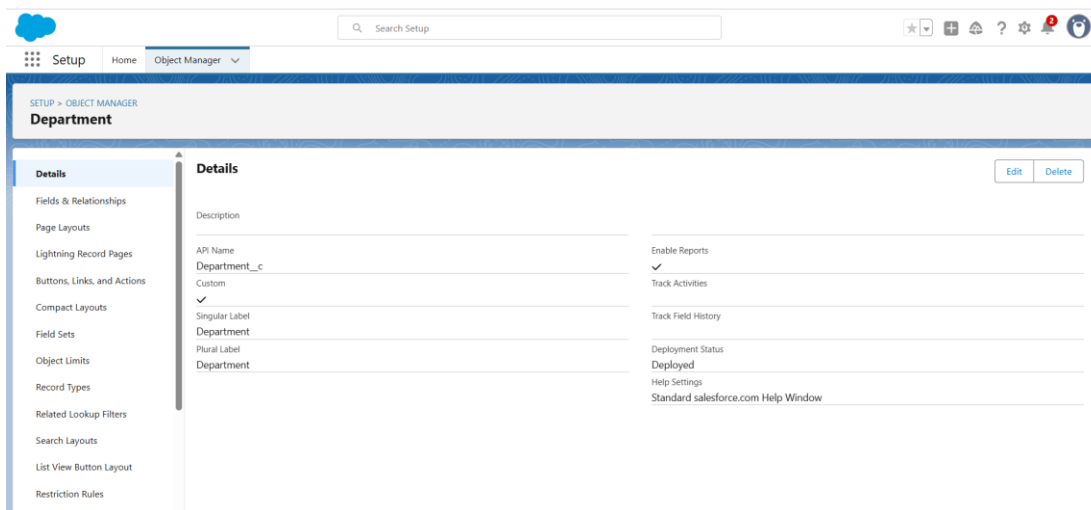


Phase 3: Data Modeling & Relationships

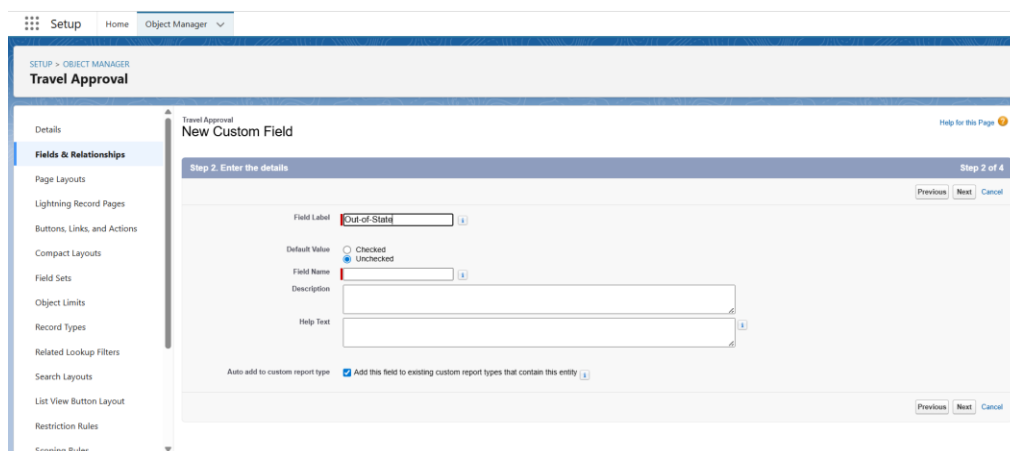
1. Standard & Custom Objects

- Used Salesforce Standard Object: User for employees, managers, and admins.
- Created Custom Objects specific to project:
 - Department: Stores department details.
 - Travel Approval: Stores employee travel requests.
 - Expense Item: Stores expenses linked to each travel request.



2. Fields

- Department → Department Name, Department Code.
- Travel Approval → Purpose of Trip, Start Date, End Date, Status (Pending/Approved/Rejected), Out of State (Yes/No), Destination State.
- Expense Item → Expense Type (Airfare, Hotel, Meals), Amount.



3. Record Types

- Travel Approval Record Types created:
- - Domestic Travel → Shows Destination State field.
- - International Travel → Shows Country and Visa Required fields.

The screenshot shows the 'Details' tab of a Travel Approval record (TA-00001). The record is owned by Ningaraj Gani. The 'Purpose of Trip' is 'Attend Dreamforce'. The 'Status' is 'Draft'. The 'Trip Start Date' is 28/07/2025 and the 'Trip End Date' is 29/07/2025. The 'Out-of-State' checkbox is checked. The 'Destination State' is 'CA'. The 'Department' is 'Technology'. The record was created by Ningaraj Gani on 28/07/2025 at 8:21 pm and last modified by the same user at the same time. The 'Activity' panel on the right shows no upcoming or overdue activities.

Field	Value
Travel Approval #	TA-00001
Owner	Ningaraj Gani
Purpose of Trip	Attend Dreamforce
Status	Draft
Trip Start Date	28/07/2025
Trip End Date	29/07/2025
Out-of-State	<input checked="" type="checkbox"/>
Destination State	CA
Department	Technology
Created By	Ningaraj Gani, 28/07/2025, 8:21 pm
Last Modified By	Ningaraj Gani, 28/07/2025, 8:21 pm

4. Page Layouts

- Employees → Page layout shows only request details.
- Managers → Page layout includes Approval Status and Manager Comments.
- Finance/Admin → Page layout displays expense details and related records.

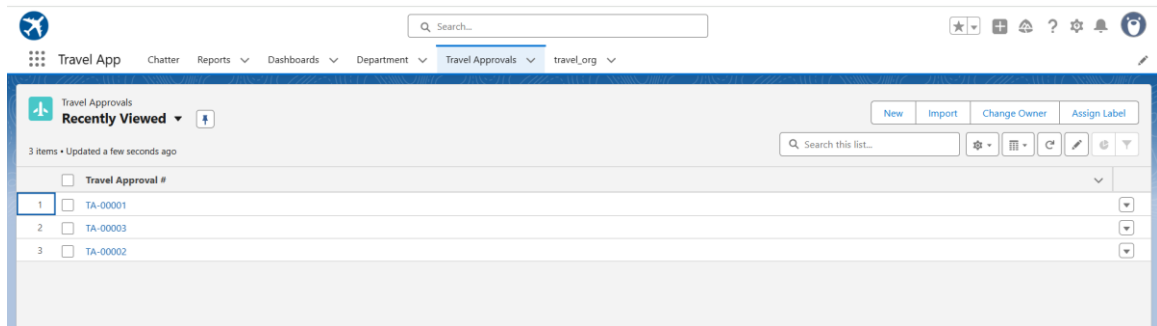
1. Page Layout of Department:

The screenshot shows the 'Department' page layout in the Travel App. It displays a list of 'Recently Viewed' items. The list includes 5 items, updated a few seconds ago. The items are: Emp_trip, school_trip, college_trip, Technology, and Contract Management. Each item has a checkbox and a dropdown menu for actions.

Item	Department Name	Actions
1	<input type="checkbox"/> Emp_trip	[Edit] [Dropdown]
2	<input type="checkbox"/> school_trip	[Dropdown]
3	<input type="checkbox"/> college_trip	[Dropdown]
4	<input type="checkbox"/> Technology	[Dropdown]
5	<input type="checkbox"/> Contract Management	[Dropdown]

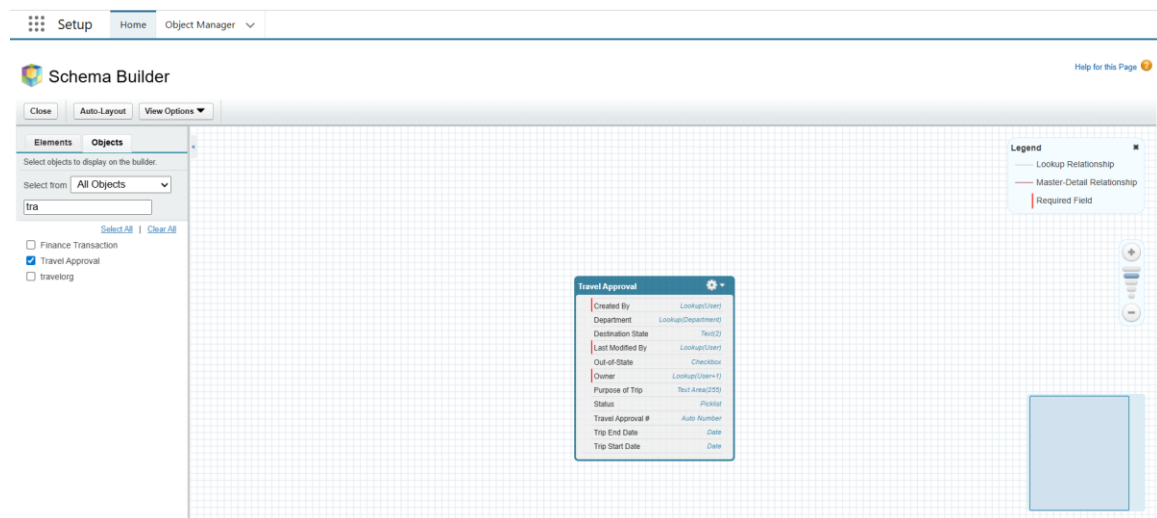
5. Compact Layouts

- Travel Approval → Displays Purpose of Trip, Status, Start Date, End Date in highlights panel.
- Expense Item → Displays Expense Type and Amount in highlights panel.
- **Compact Layout of Travel Approval:**



6. Schema Builder

- Used Schema Builder to visualize relationships between objects.
- Department ↔ Travel Approval (Lookup).
- Travel Approval ↔ Expense Item (Master-Detail).



7. Lookup vs Master-Detail vs Hierarchical Relationships

- Lookup Relationship → Child record can exist independently (e.g., Travel Approval → Department).
- Master-Detail Relationship → Child depends on parent (e.g., Expense Item → Travel Approval).
- Hierarchical Relationship → Available only for User object (e.g., Manager assigned to Employee).

SETUP > OBJECT MANAGER
Travel Approval

Details

Fields & Relationships
11 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Department	Department__c	Lookup(Department)		✓
Destination State	Destination_State__c	Text(2)		
Last Modified By	LastModifiedById	Lookup(User)		
Out-of-State	Out_of_State__c	Checkbox		
Owner	OwnerId	Lookup(User,Group)		✓
Purpose of Trip	Purpose_of_Trip__c	Text Area(255)		
Status	Status__c	Picklist		
Travel Approval #	Name	Auto Number		✓
Trip End Date	Trip_End_Date__c	Date		

8. Junction Objects

- Introduced Travel Participant as a junction object (future use case).
- Links multiple employees to one Travel Approval for group/team trips.

9. External Objects

- Used External Object (optional use case) for integrating data from outside Salesforce.
- Example: External Booking Object fetches flight/hotel booking details from third-party system.
- Linked external booking details to Travel Approval records.