# Objects for Accounts Management App

Problem Statement: Design and develop custom Application (Accounts Management) using Salesforce Cloud.

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## Objects

1. Account Details

2. Contact Details

3. Activity Information

4. Case Information

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## Fields and Relations

### Account Details

1. Fields:

- Account Name (Text)

- Account Type (Picklist: Customer, Partner, Vendor, etc.)

- Industry (Picklist: Technology, Finance, Healthcare, etc.)

- Phone (Phone)

- Address (Address)

2. Relationships:

Account Details to Contact Details: One-to-Many (One Account can have multiple Contacts)

Account Details to Activity Information: One-to-Many (One Account can have multiple Activities)

Account Details to Case Information: One-to-Many (One Account can have multiple Cases)

### Contact Details

1. Fields:

- Name (Text)

- Email (Email)

- Phone (Phone)

- Job Title (Text)

- Account (Lookup to Account)

2. Relationships:

- Contact Details to Activity Information: One-to-Many (One Contact can have multiple Activities)

- Contact Details to Case Information: One-to-Many (One Contact can have multiple Cases)

### Activity Information

1. Fields:

- Subject (Text)

- Account (Lookup to Account)

- Contact (Lookup to Contact)

- Activity Type (Picklist: Call, Meeting, Email, Task)

- Due Date (Date)

- Status (Picklist: Not Started, In Progress, Completed)

- Notes (Long Text Area)

### Case Information

1. Fields:

- Case Number (Auto Number)

- Account (Lookup to Account)

- Contact (Lookup to Contact)

- Status (Picklist: New, In Progress, Escalated, Closed)

- Priority (Picklist: Low, Medium, High)

- Description (Long Text Area)

- Created Date (Date/Time)

- Last Modified Date (Date/Time)

Great! Let's walk through a **step-by-step Salesforce guide** to create your **Accounts Management App**, including **custom objects**, **fields**, **relationships**, and **sample data**.

**✅ Step-by-Step Guide: Create "Accounts Management App" in Salesforce**

**🔹 STEP 1: Create the App**

1. Go to **Setup** > Search for **App Manager**
2. Click **New Lightning App**
3. Fill:
   * **App Name**: Accounts Management App
   * **Developer Name**: (auto-filled)
4. Add **Utility Bar** and **Navigation Items** if needed
5. Choose **Navigation Items**:
   * Add: Account Details, Contact Details, Activity Information, Case Information
6. Finish

**🔹 STEP 2: Create Custom Objects**

**➤ Object 1: Account Details**

1. Go to **Object Manager** > **Create** > **Custom Object**
2. Label: Account Details
3. Object Name: Account\_Detail
4. Record Name: Account Name (Text)
5. Optional: Allow Reports, Activities, Track Field History
6. Save

**➤ Object 2: Contact Details**

Repeat similar steps:

* Label: Contact Details
* Object Name: Contact\_Detail
* Record Name: Name (Text)
* Add Lookup field to Account Details (will be added in Step 3)

**➤ Object 3: Activity Information**

* Label: Activity Information
* Object Name: Activity\_Info
* Record Name: Subject (Text)

**➤ Object 4: Case Information**

* Label: Case Information
* Object Name: Case\_Info
* Record Name: Case Number (Auto-Number format like CASE-{0000})

**🔹 STEP 3: Add Custom Fields and Relationships**

**✅ Account Details Fields**

| **Field Label** | **Data Type** |
| --- | --- |
| Account Type | Picklist (Customer, Partner, Vendor) |
| Industry | Picklist (Technology, Finance, Healthcare) |
| Phone | Phone |
| Address | Address |

✅ **Relationships:**

* You don’t need extra setup here—child objects will reference Account via Lookup.

**✅ Contact Details Fields**

| **Field Label** | **Data Type** |
| --- | --- |
| Email | Email |
| Phone | Phone |
| Job Title | Text |
| **Account** (Lookup) | Lookup → Account Details |

**✅ Activity Information Fields**

| **Field Label** | **Data Type** |
| --- | --- |
| Subject | Text |
| **Account** | Lookup → Account Details |
| **Contact** | Lookup → Contact Details |
| Activity Type | Picklist: Call, Meeting, Email, Task |
| Due Date | Date |
| Status | Picklist: Not Started, In Progress, Completed |
| Notes | Long Text Area |

**✅ Case Information Fields**

| **Field Label** | **Data Type** |
| --- | --- |
| **Account** | Lookup → Account Details |
| **Contact** | Lookup → Contact Details |
| Status | Picklist: New, In Progress, Escalated, Closed |
| Priority | Picklist: Low, Medium, High |
| Description | Long Text Area |
| Created Date | Date/Time |
| Last Modified Date | Date/Time |

**🔹 STEP 4: Add to App Navigation**

1. Go to **App Manager** → Open your App
2. Click **Edit**
3. Under **Navigation Items**, add:
   * Account Details
   * Contact Details
   * Activity Information
   * Case Information
4. Save and Done

**🔹 STEP 5: Add Sample Data**

**➤ Account Details**

| **Account Name** | **Account Type** | **Industry** | **Phone** | **Address** |
| --- | --- | --- | --- | --- |
| ABC Corp | Customer | Technology | 9876543210 | Pune, Maharashtra |
| XYZ Ltd | Partner | Finance | 9871234567 | Mumbai, Maharashtra |

**➤ Contact Details**

| **Name** | **Email** | **Phone** | **Job Title** | **Account** |
| --- | --- | --- | --- | --- |
| Priya Shah | [priya@abc.com](mailto:priya@abc.com) | 9876543222 | Manager | ABC Corp |
| Rohan Mehta | [rohan@xyz.com](mailto:rohan@xyz.com) | 9876543111 | Consultant | XYZ Ltd |

**➤ Activity Information**

| **Subject** | **Account** | **Contact** | **Type** | **Due Date** | **Status** | **Notes** |
| --- | --- | --- | --- | --- | --- | --- |
| Meeting A | ABC Corp | Priya Shah | Meeting | 2025-05-10 | In Progress | Budget discussion |
| Call Follow | XYZ Ltd | Rohan Mehta | Call | 2025-05-12 | Not Started | Initial engagement |

**➤ Case Information**

| **Case Number** | **Account** | **Contact** | **Status** | **Priority** | **Description** | **Created Date** |
| --- | --- | --- | --- | --- | --- | --- |
| CASE-0001 | ABC Corp | Priya Shah | New | High | Issue with billing | 2025-05-05 10:00AM |
| CASE-0002 | XYZ Ltd | Rohan Mehta | In Progress | Medium | Need product onboarding | 2025-05-06 03:30PM |

**✅ BONUS TIPS**

* **Create List Views**: To see filtered data by status or type
* **Reports & Dashboards**: Use Reports to show activities per account or case trends
* **Automation** (Optional): Add flows to alert on high-priority cases

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