# Objects for Contact Management App

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

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## Objects

1. Contact Information

2. Interaction History

3. Company Details

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## Fields and Relations

### Contact Information

1. Fields:

- Name (Text)

- Email (Email)

- Phone (Phone)

- Address (Text Area)

- Date of Birth (Date)

- Company (Text)

2. Relationships:

- Contact Information to Interaction History: One-to-Many (One contact can have multiple interactions)

- Contact Information to Company Details: Many-to-One (Multiple contacts can belong to one company)

### Interaction History

1. Fields:

- Interaction Date (Date/Time)

- Interaction Type (Picklist: Call, Email, Meeting, Other)

- Notes (Long Text Area)

- Follow-up Date (Date)

2. Relationships:

- Lookup Relationship to Contact Information (Each interaction is related to a specific contact)

### Company Details

1. Fields:

- Company Name (Text)

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

2. Relationships:

- Lookup Relationship to Contact Information (A company can have multiple contacts)

Here's a **step-by-step implementation guide** for your **Contact Management App** using **Salesforce Cloud**, including how to define objects, fields, relationships, and sample data.

**✅ Contact Management App – Salesforce Setup Guide**

**🔹 STEP 1: Create the Lightning App**

1. Go to **Setup** → Search for **App Manager**
2. Click **New Lightning App**
3. App Label: Contact Management App
4. Add necessary utility items (optional)
5. Add Navigation Items: Contact Information, Interaction History, Company Details
6. Save and Finish

**🔹 STEP 2: Create Custom Objects**

**➤ Object 1: Contact Information**

* Go to **Object Manager** → **Create** → **Custom Object**
* Label: Contact Information
* Object Name: Contact\_Info
* Record Name: Name (Text)
* Enable: Track Activities, Reports, Search

**➤ Object 2: Interaction History**

* Label: Interaction History
* Object Name: Interaction\_History
* Record Name: Interaction Date (Date/Time)

**➤ Object 3: Company Details**

* Label: Company Details
* Object Name: Company\_Detail
* Record Name: Company Name (Text)

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

**✅ Contact Information Fields**

| **Field Label** | **Data Type** |
| --- | --- |
| Email | Email |
| Phone | Phone |
| Address | Text Area |
| Date of Birth | Date |
| **Company** | Lookup → Company Details |

✅ **Relationships:**

* One-to-Many with Interaction History (via lookup field in Interaction History)
* Many-to-One with Company Details (via lookup field to Company)

**✅ Interaction History Fields**

| **Field Label** | **Data Type** |
| --- | --- |
| Interaction Date | Date/Time |
| Interaction Type | Picklist (Call, Email, Meeting, Other) |
| Notes | Long Text Area |
| Follow-up Date | Date |
| **Contact** | Lookup → Contact Information |

**✅ Company Details Fields**

| **Field Label** | **Data Type** |
| --- | --- |
| Company Name | Text |
| Industry | Picklist (Technology, Finance, Healthcare, etc.) |

✅ **Relationships:**

* No child object directly linked; but has **contacts referencing it** via the Contact object's lookup field.

**🔹 STEP 4: Add Navigation Items to the App**

* Go to App Manager → Edit the Contact Management App
* Add: Contact Information, Interaction History, Company Details to Navigation Items
* Save

**🔹 STEP 5: Sample Data**

**➤ Company Details**

| **Company Name** | **Industry** |
| --- | --- |
| Globex Corp | Technology |
| FinEdge Ltd | Finance |

**➤ Contact Information**

| **Name** | **Email** | **Phone** | **Address** | **DOB** | **Company** |
| --- | --- | --- | --- | --- | --- |
| Anjali Mehta | [anjali@globex.com](mailto:anjali@globex.com) | 9876543210 | Pune, Maharashtra | 1990-06-15 | Globex Corp |
| Ravi Sharma | [ravi@finedge.com](mailto:ravi@finedge.com) | 9871234567 | Mumbai, Maharashtra | 1985-03-22 | FinEdge Ltd |

**➤ Interaction History**

| **Interaction Date** | **Type** | **Notes** | **Follow-up** | **Contact** |
| --- | --- | --- | --- | --- |
| 2025-05-03 10AM | Email | Sent product brochure | 2025-05-10 | Anjali Mehta |
| 2025-05-04 02PM | Meeting | Discussed investment options | 2025-05-12 | Ravi Sharma |

**✅ BONUS FEATURES**

* **Reports**: Track interactions by date/type/contact
* **Dashboards**: Visualize top active contacts or industries
* **Automation**: Setup reminders for follow-ups via Flows or Process Builder

Great! Below are the **viva questions with concise answers** for your **Contact Management App** in Salesforce Cloud:

**🔹 Basic Understanding**

**1. What is the purpose of your Contact Management App?**

**Ans:** The app helps manage contact information, track interactions, and link contacts with companies, making relationship management easier for businesses.

**2. Why did you choose these three objects (Contact, Interaction, Company)?**

**Ans:** These represent the core components of a CRM: contacts (people), interactions (communication), and companies (organizations).

**3. What is Salesforce Cloud and why did you use it?**

**Ans:** Salesforce Cloud is a platform for building cloud-based applications. I used it for its scalability, built-in CRM features, and rapid development tools.

**4. What is the difference between a standard and custom object?**

**Ans:** Standard objects are provided by Salesforce (like Account, Contact). Custom objects are created by users to meet specific needs, like "Interaction History".

**🔹 Object & Relationship Design**

**5. What is the relationship between Contact and Company?**

**Ans:** Many-to-One. Multiple contacts can belong to one company using a lookup relationship.

**6. What is the relationship between Contact and Interaction History?**

**Ans:** One-to-Many. One contact can have multiple interactions linked via a lookup field.

**7. How is a One-to-Many relationship implemented?**

**Ans:** By adding a **lookup field** on the child object (e.g., on Interaction History pointing to Contact).

**8. Why did you use a Lookup relationship instead of Master-Detail?**

**Ans:** To allow independent management of records. For example, deleting a contact doesn’t automatically delete its interactions.

**9. Can a contact exist without a company?**

**Ans:** Yes, since we used a lookup relationship, company linkage is optional.

**🔹 Fields and Data Types**

**10. Which data type did you use for the Address field and why?**

**Ans:** Long Text Area, because addresses may include multiple lines and special characters.

**11. Why Picklist for Industry and Interaction Type?**

**Ans:** To standardize entries and prevent user input errors.

**12. Why use Date for Follow-up Date?**

**Ans:** To schedule future actions like follow-ups and allow calendar-based reports/reminders.

**13. Difference between Text and Long Text Area?**

**Ans:** Text stores a short, single-line string; Long Text Area can store longer multi-line data (up to 32,000+ characters).

**🔹 Functionality & Use Cases**

**14. How to view all interactions for a contact?**

**Ans:** Through the related list on the Contact record page or by creating a report with a contact-interaction filter.

**15. Can two contacts have the same email?**

**Ans:** Technically yes, but we can add validation rules to prevent duplicate emails if needed.

**16. What automation or workflow can be added?**

**Ans:** A reminder for follow-up dates, email alerts after interactions, or tasks for overdue follow-ups.

**17. Can you report upcoming interactions?**

**Ans:** Yes, using a custom report type and filters on "Follow-up Date" to show future-dated records.

**🔹 User Interface and Navigation**

**18. How did you configure navigation?**

**Ans:** I used the App Manager to add object tabs like Contacts, Interactions, and Companies in the navigation bar.

**19. Did you customize page layouts?**

**Ans:** Yes, to show important fields like Email and Interaction Notes on top and arrange related lists clearly.

**20. What is the use of Lightning App Builder?**

**Ans:** To design and customize record pages with drag-and-drop components like charts, lists, or quick actions.

**🔹 Advanced/Scenario-Based**

**21. How to prevent future DOB entries?**

**Ans:** Using a validation rule like Date\_of\_Birth\_\_c > TODAY() with an error message.

**22. If a company is deleted, what happens to contacts?**

**Ans:** The contacts remain, but the lookup field becomes blank unless restricted with a trigger or validation rule.

**23. How to handle contacts with roles in a company?**

**Ans:** Add a "Role" field on the Contact object to specify their role within the company.

**24. Can you show which companies have the most interactions?**

**Ans:** Yes, by creating a joined report combining Companies and their Contacts' Interactions.

**🔹 Security & Access Control**

**25. How to restrict access to Interactions?**

**Ans:** Use **object-level permissions**, **record-level sharing rules**, and **profiles** or **permission sets**.

**26. What are profiles and permission sets?**

**Ans:** Profiles define user access at a base level. Permission sets give extra access without changing the profile.

Would you like a **printable PDF** of these Q&A or a **PowerPoint for viva presentation**?