

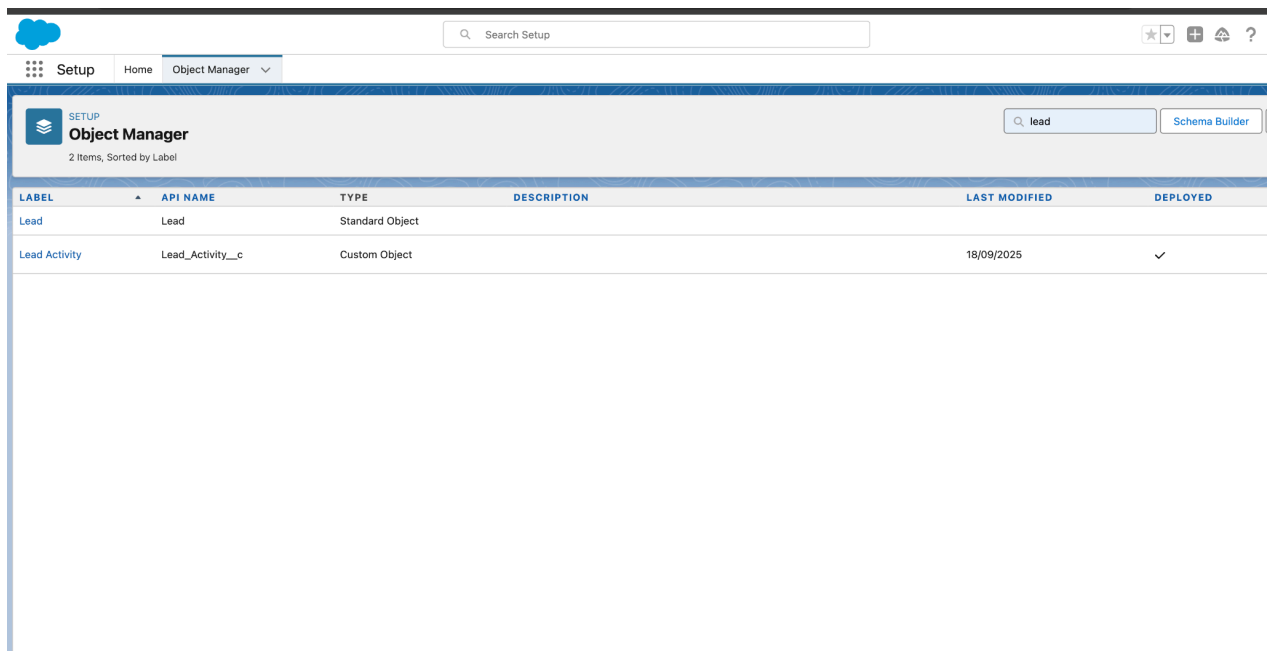
Phase 3: Data Modeling & Relationships

Overview

Phase 3 focuses on designing and implementing the data model for the Lead Management system using Salesforce standard and custom objects. It encompasses creating fields, record types, page layouts, compact layouts, and defining relationships to support sales processes effectively.

Standard & Custom Objects

- Standard Objects leveraged: Lead, Account, Contact, Opportunity.
- Custom Object created: **Lead Activity** to capture lead interaction details such as calls, meetings, and emails.
- These provide a balanced foundation for CRM and customized data capture.
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The screenshot displays the Salesforce Object Manager interface. At the top, there is a navigation bar with 'Setup', 'Home', and 'Object Manager' tabs. A search bar labeled 'Search Setup' is also present. Below the navigation bar, the 'Object Manager' section is active, showing a list of objects. The list has columns for 'LABEL', 'API NAME', 'TYPE', 'DESCRIPTION', 'LAST MODIFIED', and 'DEPLOYED'. Two objects are listed: 'Lead' (Standard Object) and 'Lead Activity' (Custom Object). The 'Lead Activity' object was last modified on 18/09/2025 and is deployed.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Lead	Lead	Standard Object			
Lead Activity	Lead_Activity__c	Custom Object		18/09/2025	✓

Fields

- Lead object customized with key fields:
 - Product_Interest__c (Picklist: Retail, Services, Wholesale, Other)
 - Priority__c (Picklist: High, Medium, Low)
 - Lead_Score__c (Number, default 0)
 - Assigned_Agent__c (Lookup User)
 - Region__c (Picklist: North, South, East, West)
 - Source_Detail__c (Text)
 - First_Response_Date__c (DateTime)
 - Follow_Up_By__c (Date)

- Lead Activity fields:
 - Activity Type (Picklist: Call, Email, Meeting, Demo)
 - Activity Date (DateTime)
 - Outcome (Picklist)
 - Next Steps (Long Text)



Setup
Home
Object Manager

SETUP > OBJECT MANAGER
Lead Activity

Details

Fields & Relationships
 8 Items, Sorted by Field Label

New
Deleted Fields
Field Dependencies
Set Hi

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Activity Date	Activity_Date__c	Date		
Activity Type	Activity_Type__c	Picklist		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Lead Activity Name	Name	Text(80)		✓
Outcome	Outcome__c	Picklist		
Owner	OwnerId	Lookup(User,Group)		✓
Relationship	Relationship__c	Lookup(Lead)		✓

Page Layouts
 Lightning Record Pages
 Buttons, Links, and Actions
 Compact Layouts
 Field Sets
 Object Limits
 Record Types
 Related Lookup Filters
 Search Layouts
 List View Button Layout
 Restriction Rules
 Scoping Rules
 Object Access
 Triggers
 Flow Triggers
 Validation Rules
 Conditional Field Formatting

Record Types

- Created 4 record types to segment leads:
 - Web Lead
 - Campaign Lead
 - Referral Lead
 - Cold Lead
- Each record type supports specific lead processes with custom picklists and layouts.

Setup

Home

Object Manager

Search Setup

Star

Share

Help

SETUP > OBJECT MANAGER

Lead

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

Record Types

4 Items, Sorted by Record Type Label

Q Quick Find

New

Page Layo

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Campaign Lead		✓	Sales Manager, 19/09/2025, 7:36 pm
Cold Lead		✓	Sales Manager, 19/09/2025, 7:37 pm
Referral Lead		✓	Sales Manager, 19/09/2025, 7:36 pm
Web Lead	Leads captured from website forms	✓	Sales Manager, 19/09/2025, 7:34 pm

Page Layouts

- Unique page layouts per record type enhance user experience.
- Layouts streamline data entry and visibility for different lead types.

Setup

Home

Object Manager

Search Setup

Lead

SETUP > OBJECT MANAGER

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

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Search Layouts

List View Button Layout

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Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

Page Layouts

8 Items, Sorted by Page Layout Name

Quick Find

New

Page Lays

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Campaign Lead Layout	Sales Manager, 19/09/2025, 7:50 pm	Sales Manager, 19/09/2025, 7:50 pm
Cold Lead Layout	Sales Manager, 19/09/2025, 7:51 pm	Sales Manager, 19/09/2025, 7:51 pm
Lead (Marketing) Layout	Sales Manager, 13/08/2025, 6:11 pm	Sales Manager, 18/09/2025, 11:13 am
Lead (Sales) Layout	Sales Manager, 13/08/2025, 6:11 pm	Sales Manager, 18/09/2025, 11:13 am
Lead (Support) Layout	Sales Manager, 13/08/2025, 6:11 pm	Sales Manager, 18/09/2025, 11:13 am
Lead Layout	Sales Manager, 13/08/2025, 6:11 pm	Sales Manager, 18/09/2025, 11:13 am
Referral Lead Layout:	Sales Manager, 19/09/2025, 7:50 pm	Sales Manager, 19/09/2025, 7:50 pm
Web Lead Layout	Sales Manager, 19/09/2025, 7:49 pm	Sales Manager, 19/09/2025, 7:49 pm

Compact Layouts

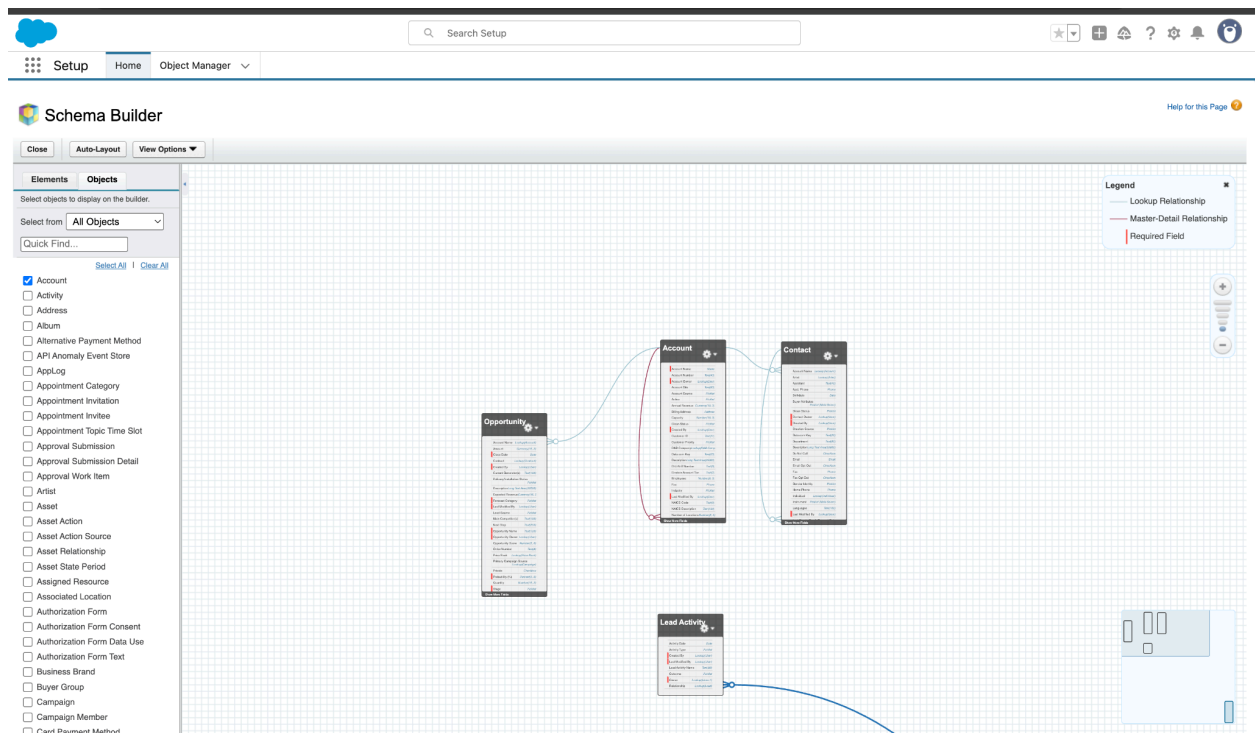
- Compact layout setup shows essential lead details in highlights panel:
 - Lead Score, Priority, Status, Assigned Agent, Region, Product Interest, First Response Date, Follow-Up Date.
- Enhances quick access to critical information for sales agents.

The screenshot shows the Salesforce Setup interface for configuring Compact Layouts for the Lead object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, and Compact Layouts (which is currently selected). The main content area displays a table of Compact Layouts. The table has columns for LABEL, API NAME, PRIMARY, MODIFIED BY, and LAST MODIFIED. Two layouts are listed: 'Lead Quick Info' and 'System Default'. The 'Lead Quick Info' layout is marked as the primary layout. A 'Quick Find' search bar and 'New' and 'Compact Layout' buttons are located at the top right of the table.

LABEL	API NAME	PRIMARY	MODIFIED BY	LAST MODIFIED
Lead Quick Info	Lead_Quick_Info	✓	Sales Manager	19/09/2025, 7:57 pm
System Default	SYSTEM			

Schema Builder

- Schema Builder was used to visualize and validate the data model.
- Objects and relationships (Lookup, Master-Detail) are clearly mapped.
- Relationship lines indicate correct dependency and data flow.



Lookup vs Master-Detail vs Hierarchical Relationships

- **Lookup:** Loose, independent relationships. Used for Lead Activity to Lead.
- **Master-Detail:** Strong ownership, security inheritance, cascade delete. Used in Account-Opportunity.
- **Hierarchical:** For user management, not applicable here.

Junction Objects

- Junction objects create many-to-many relationships via two master-detail links.
- Currently, not implemented as your project scope doesn't require many-to-many links.

External Objects

- Enable integration of external data into Salesforce.
- No current implementation; kept as future integration consideration.

Conclusion

Phase 3 establishes a robust, scalable Salesforce data model supporting multiple lead types, flexible activity tracking, and reliable business process enforcement. This foundation enables effective data capture, process segmentation, and prepares for future automation and integrations.