

Phase 3: Data Modelling & Relationships

GOAL: BUILD A ROBUST DATA STRUCTURE TO MANAGE PLOTS, BURIALS, FAMILIES, VISIT LOGS, AND RELATED OPERATIONS WITHIN THE DIGITAL CEMETERY APPLICATION.

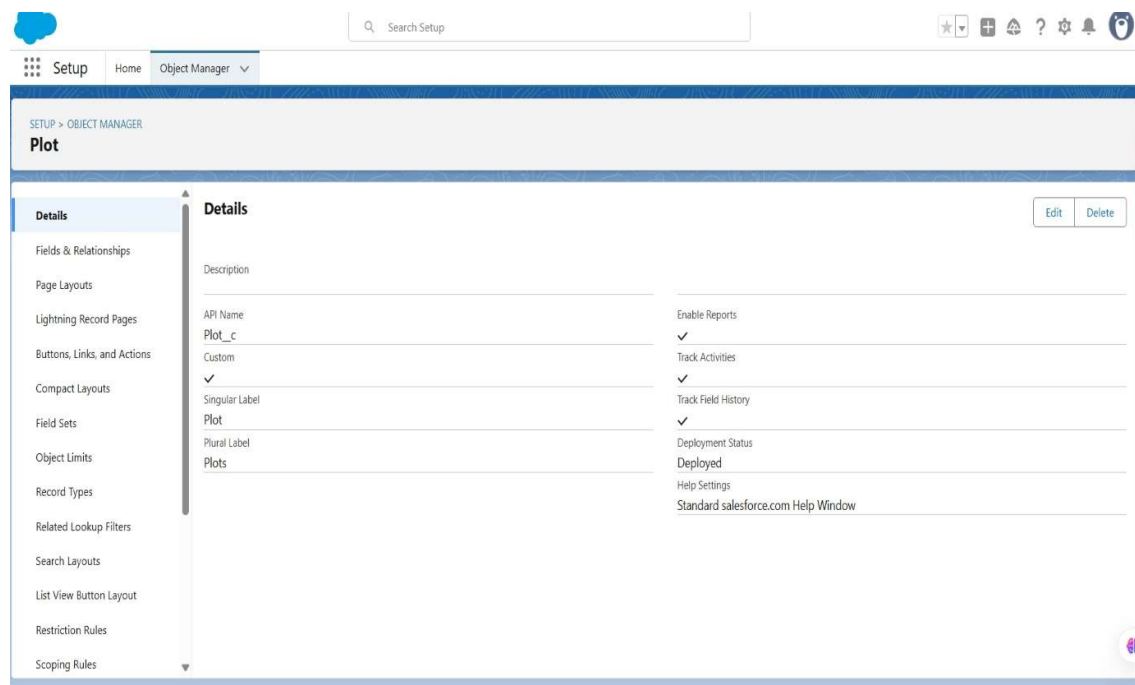
1. Objects AND Fields and Relationships

Standard Objects:

- **Account** → Represents families, institutions, or organizations associated with the cemetery (e.g., Family Accounts, Religious Institutions, Service Providers).
- **Contact** → Represents individual family members, visitors, or organization representatives.

Custom Objects:

- **Plot** → Represents individual burial plots.



Plot Object Fields and Relationships

- **Plot Number** → Auto Number / Text (Unique)

- **Location** → Text / Geolocation
- **GPS Coordinates** → Geolocation (Latitude & Longitude)
- **Status** → Picklist: Available, Reserved, Occupied, Under Maintenance
- **Rows** → Number / Text (if plots are organized in rows)
- **Price** → Currency (Cost of the plot)
- **Notes** → Long Text Area (Additional details or instructions)
- **Capacity** → Number (Number of people the plot can accommodate)
- **Plot Type** → Picklist: Single, Double, Family, Cremation, etc.
- **Plot Area** → Number / Text (Size of the plot in square meters or feet)
- **Plot Section** → Lookup (Section object to organize plots by blocks/sections)

New Plot

* = Required Information

Information

Plot Name

Owner

Plot Number

RICHAKAROTIYA

Row

--None--

Status

Available

Price

GPS Coordinates

Latitude

Longitude

Notes

Cancel

Save & New

Save

Price

GPS Coordinates

Latitude Longitude

Notes

Capacity

Plot Type

--None--

Plot Area

Section

Search Sections...

Cancel Save & New Save

- **Deceased** → Represents individuals buried in the cemetery.

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Deceased

Edit Delete

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

Restriction Rules

Scoping Rules

Description

API Name

Deceased_c

Custom

✓

Singular Label

Deceased

Plural Label

Deceaseds

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Deceased Object Fields & Relationships

- **Name** → Text (Full name of the deceased)
- **Gender** → Picklist: Male, Female, Other
- **Date of Birth** → Date
- **Date of Death** → Date
- **Age at Death** → Formula (Calculated from DOB & DOD)
- **Associated Plot** → Lookup (Plot object)
- **Family** → Lookup (Family object)
- **Memorial Notes** → Long Text Area (Additional details about deceased)
- **Status** → Picklist: Active / Archived (for record management)
- **Documents** → Related List / Lookup (Document object for certificates, photos, etc.)

Information

*Deceased Name

Complete this field.

Gender

--None--

*Date of Birth

*Date of Death

Cause of Death

--None--

*Death Certificate Number

Memorial Note

Owner

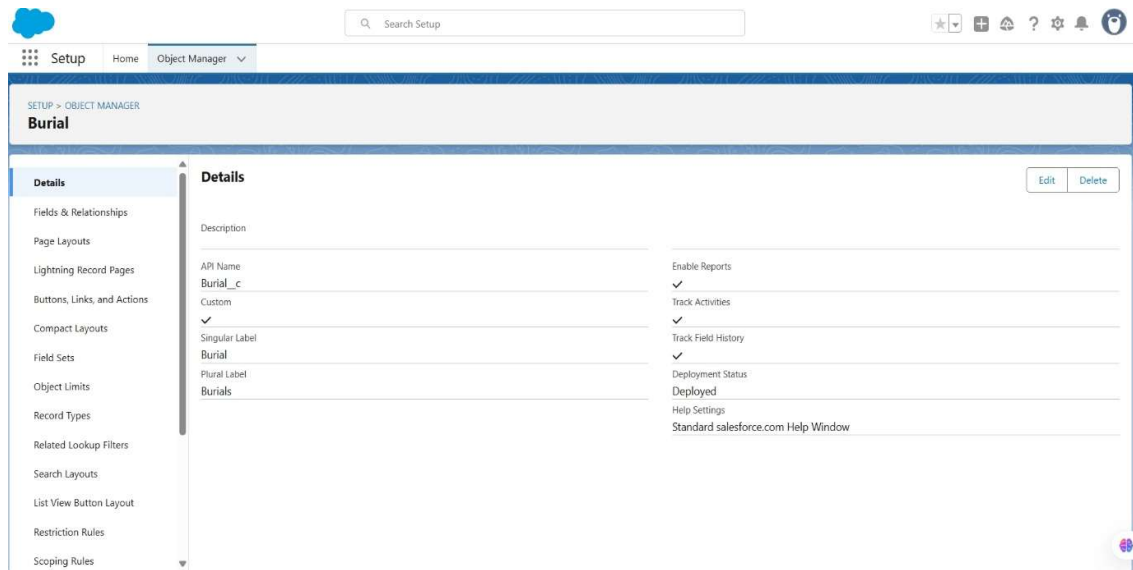
RICHA KAROTIYA

Cancel

Save & New

Save

- **Burial** → Represents burial events.



Burial Object - Fields And Relationships

- **Burial Name** (Auto Number)
- **Deceased Name**(Lookup → Deceased__c) → Who is being buried/cremated
- **Plot**(Lookup → Plot__c) → Which plot is used
- **Burial Date & Time** (Date/Time)
- **Burial Type**→ Burial, Cremation, Ash Interment, Other
- **Status** (Picklist) → Scheduled, Completed, Cancelled
- **Family** → Lookup(Family)
- **Burial Type** → Picklist
- **Funeral Home** → Text
- **Documentation Received** → Checkbox
- **Family Primary Email** → Email

New Burial


* = Required Information

Information

* Burial Name

TestBurial

Owner

 RICH A KAROTIYA

Deceased Name

Date of Death



Burial Date



Plot

Search Plots... 

Family

Search Families... 

Burial Type

--None--

Cancel

Save & New

Save

Funeral Home

Family

Search Families... 

Burial Type

--None-- 

Funeral Home

Documentation Received

☐

Status

--None-- 

Family Primary Email

Cancel

Save & New

Save

- **Family** → Groups of related contacts associated with deceased individuals.

The screenshot shows the Salesforce Setup - Object Manager page for the 'Family' object. The left sidebar contains a navigation menu with the following items: Details (selected), Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Object Access, and Triggers. The main content area is titled 'Details' and includes a description field, an API Name field (Family__c), a Custom checkbox (checked), a Singular Label field (Family), a Plural Label field (Families), an Enable Reports checkbox (checked), a Track Activities checkbox (checked), a Track Field History checkbox (checked), a Deployment Status field (Deployed), and a Help Settings field (Standard salesforce.com Help Window). There are 'Edit' and 'Delete' buttons in the top right corner.

Family Object - Fields and Relationships

- **Family Name** (Text) → e.g., "Sharma Family"
- **Contact Number** → (Phone) Contact of the family member related to deceased
- **Email Address** → (Email) Email of the contact or family
- **Address** → (Text Area / Geolocation) Residential of the Contact or Account
- **National Id** → (Number) Related to the Contact
- **Relation to Deceased** → (Picklist) → to know the relation for future records

Search...

X

Pl

* Family Name

⊘

Complete this field.

Contact Person

Phone

Alternate Phone

Email

Address

National Id

Relationship to Deceased

--None--

Owner

RICHA KAROTIYA

Cancel

Save & New

Save

- **Booking Request** → Handles reservations of plots or burial services.

Setup

Home

Object Manager

Search Setup

★

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⚙

🔔

👤

SETUP > OBJECT MANAGER

Booking Request

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

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Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Details

Description

API Name

Booking_Request__c

Custom

✓

Singular Label

Booking Request

Plural Label

Booking Requests

Enable Reports

✓

Track Activities

✓

Track Field History

✓

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Edit

Delete

Search this list...

X

New Booking Request

Select a record type

☒

Portal Request

☐

Walk-in Reques

Cancel

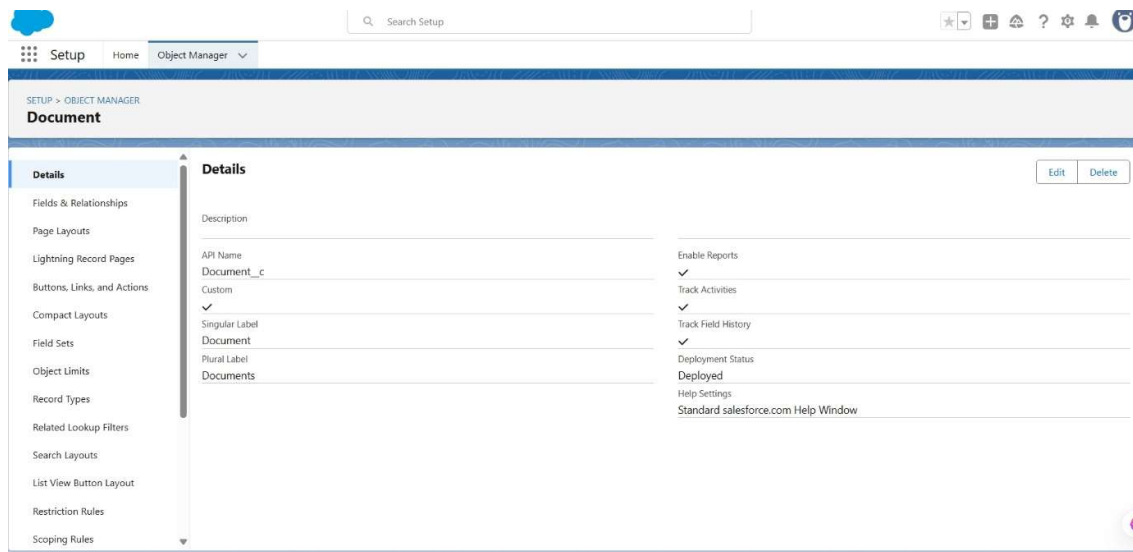
Next

Booking Request Object – Fields And Relationships

- **Booking Request Name** (Text) → to store the name for the request making
- **Request Date** (Date) → to store the requested date mentioned by the customer
- **Requested Plot** (Lookup to Plot) → to select among the available plots for the further cremation process.
- **Family Details** (Lookup to Family)→ to know from which family booking request is related to
- **Desired Burial Date** (Date) → to know the date for the requested burial plot booking
- **Status** (Picklist) → to know weather a booking request is a new , pending , approved or has been rejected
- **Priority** (Picklist) → to know weather the request is at high, low or medium priority therefore would be taken care of it according to the priority in future to maintain clean time scheduling
- **Comment** (Text Area) → a text area provided to write the comments and requests to make sure the work does not get unnoticed

Visit Log Object – Fields And Relationships

- **Visitor Name**(Text) → to take the record of the visitor's name
- **Visitor Type** (Picklist) → to know weather a visitor is a Family member, Friend , Maintainance Staff , Official , Priest etc
- **Visitor Date And Time** (Date And Time) → to record the date and time of the visitor
- **Visit Purpose** (Picklist) → Booking Discussion , Prayers , Burial Ceremony , Cleaning/Maintenance , Inspection , Other
- **Check In By** (Lookup to User) → to know who allowed the entry to the visitor
- **Status** (Picklist) →to know weather the booking is Scheduled,Completed or Cancelled
- **Related to** (Lookup to Deceased) → to make sure if the visitor is there for prayer purpose, he/she/they must be related to the existing burials or deceased. To ensure this we have set the validation rule –“ Deceased Mandatory for prayers “ in the object – visit logs
- **Document** → Stores related certificates, images, or records.



Document Object Fields And Relationships

- **Document Owner Name** (Text) → to have a record name of exactly whose document it is
- **Document Type** (Picklist) → Booking Receipt , Death Certificate , ID Proof , Maintenance Report , Permit , Ownership Proof
- **Status** (Picklist) → Active , Archieved , Expired
- **Description** (Text)) → notes descriptonal area
- **Burial** (Lookup to Burial) → to record which document is related to which burial.

Digital Cemetery Families Plots

Search...

New Document

* = Required Information

Information

* Document Name Owner: RICHAKAROTIYA

Complete this field.

Document Type: --None--

Status: --None--

Description:

*Burial: Search Burials...

Cancel Save & New Save

- **Section** → Divides section amongst the staff to make the managing process easy

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER

Section

Details

Description: groups plots (A, B, C). Use to assign section managers and share rules.

API Name: Section_c

Custom: ☒

Singular Label: Section

Plural Label: Sections

Enable Reports: ☒

Track Activities: ☒

Track Field History: ☒

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

Edit Delete

Section Object - Fields Ans Relationships

- **Section Name** (Picklist) → Four Sections available A , B , C ,D (to make sure each of it is provided to different staff to be taken care of)
- **Section Manager Name** (Lookup to users) → to assign each section to a particular staff member

Sections

Recently Viewed ▾

Items • Updated a few seconds ago

	<input type="checkbox"/> Section Number
1	<input type="checkbox"/> SEC-0005
2	<input type="checkbox"/> SEC-0004
3	<input type="checkbox"/> SEC-0003
4	<input type="checkbox"/> SEC-0002
5	<input type="checkbox"/> SEC-0001

New Section

* = Required Information

Information

Section Number

Owner

RICHA KAROTIYA

Name

--None-- ▾

Section code

Manager

Search People... 🔍

Cancel

Save & New

Save


PHASE 4: Process Automation (Digital Cemetery)

GOAL: THE GOAL OF THIS PHASE IS TO REDUCE MANUAL WORK, MINIMIZE ERRORS, AND IMPROVE EFFICIENCY IN MANAGING CEMETERY OPERATIONS BY USING SALESFORCE AUTOMATION TOOLS (FLOWS, APPROVAL PROCESSES, EMAIL ALERTS, VALIDATION RULES, AND NOTIFICATIONS).

Validation Rules

Ensures that a Deceased record is selected whenever the Visit Purpose is set to "Prayer". This rule prevents saving a Visit Log without linking it to a Deceased record when the purpose is prayer.

In this case this Validation rule comes under the Visit Log Object to make sure the purpose is served



Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Visit Log

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Validation Rules

URL Slugs

Conditional Field Formatting

Visit Log Validation Rule

[Back to Visit Log](#)

Validation Rule Detail

Rule Name

Deceased_Mandatory_For_Prayer

Active

Error Condition Formula

AND(
ISPICKVAL(Visit_Purpose__c, "Prayer"),
ISBLANK(Related_to__r.Name)
)

Error Message

"You must select a Deceased record when the Visit Purpose is Prayer."

Error Location

Description

to make sure if the visitor is visiting for prayers then the deceased name needs to be mentioned for sure

Created By

[RICHIA KAROTIYA](#), 19/09/2025, 12:33 pm

Modified By

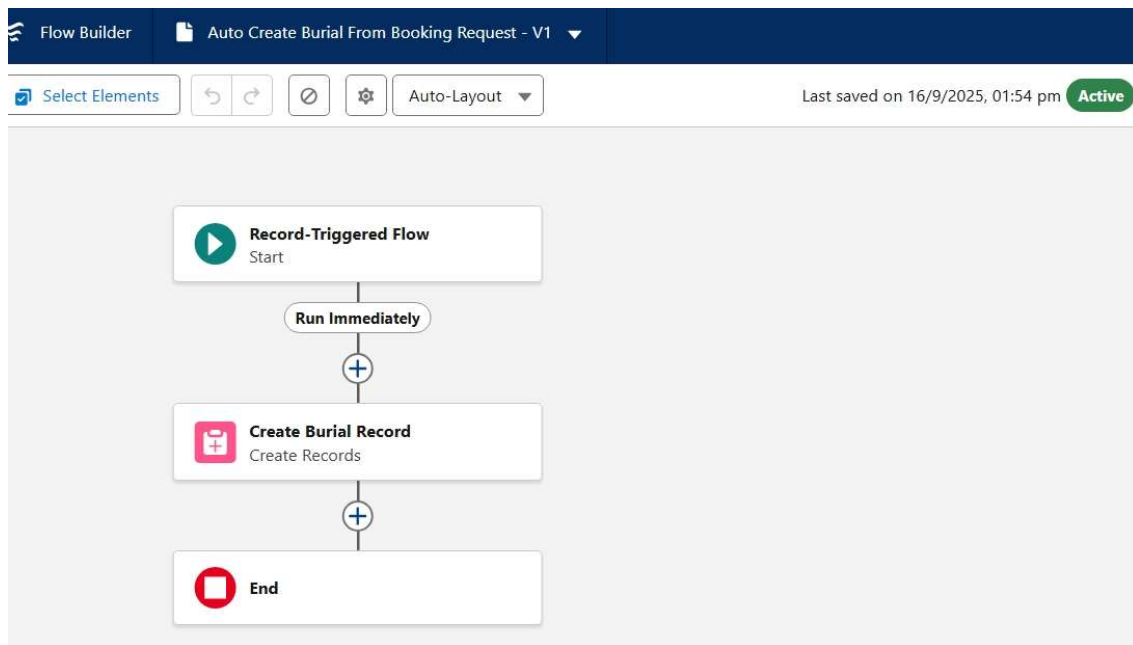
2. Approval Processes

This process ensures that any booking request with Pending Approval status goes through a manager approval step. The record is locked during review to prevent edits.

- If approved, status is updated to Approved and record remains locked.
- If rejected, status is updated to Rejected and record is unlocked.
- Recall action allows unlocking if submitter recalls the request.

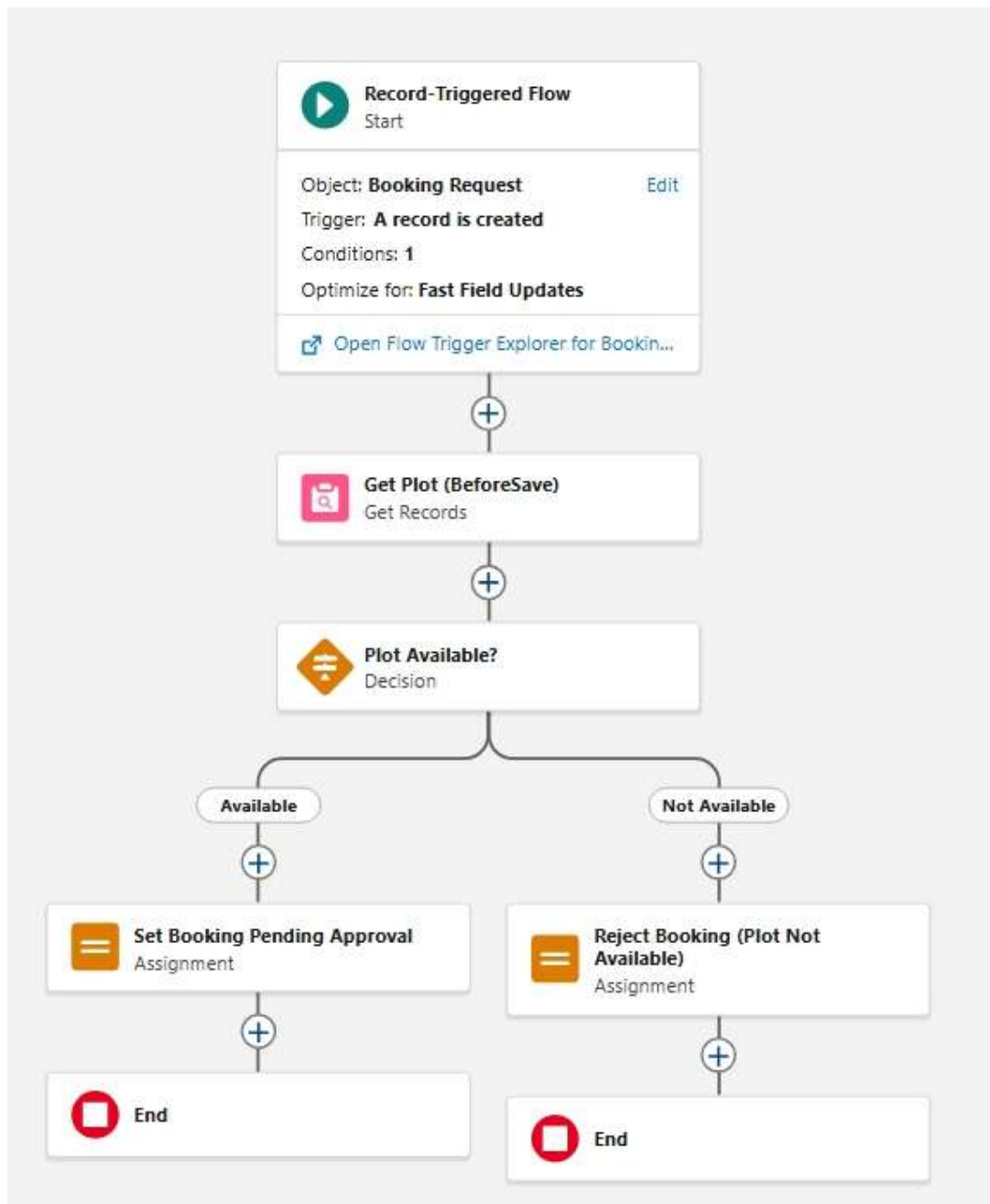
The process automates booking approvals by routing requests to the manager, controlling record access, and updating booking status automatically.

This flow automatically creates a Burial record when a new Booking Request is approved. It ensures that every approved booking directly leads to a linked burial record, reducing manual work and errors.



· BRF — Booking BeforeSave Validate & SetStatus (Before-Save Flow)

This flow runs before a Booking record is saved. It validates booking data (like required fields, dates, or conditions) and automatically sets the initial Status = "Pending Approval" to maintain consistency in the approval process.



· ARF — Booking AfterSave Reserve Plot (After-Save Flow)

This flow runs after a Booking record is saved. Once approved, it automatically reserves the selected cemetery plot, updates the booking details, and ensures the plot is not double-booked.

Digital Cemetery

Accounts

Families

Plots

Burials

Booking Requests

Maintenance Tasks

Documents

Se

Flow

ARF — Booking AfterSave Reserve Plot

Type

Record—Run After Save

Associated Record

Progress Status

Activated

Last Modified Date

17/09/2025, 2:58 pm

Flow Owner

RICHAKAROTIYA

Related

Details

Information

Flow Label

ARF — Booking AfterSave Reserve Plot

Description

Associated Record

Created By

[RICHAKAROTIYA](#), 17/09/2025, 2:57 pm

Last Modified

[RICHAKAROTIYA](#), 17/09/2025, 2:58 pm

Category

API Name

ARF_Booking_AfterSave_Reserve_Plot

Flow Type

Record-Triggered After Save Flow

Created Date

17/09/2025, 2:57 pm

Last Modified Date

17/09/2025, 2:58 pm

Subcategory

4. Email Alerts

This email alert automatically sends a reminder email to the family or concerned person 7 days before the scheduled burial date. It helps ensure timely communication and preparation for the ceremony.

Search Setup

☆

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Setup

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email al

Process Automation

Workflow Actions

Email Alerts

Didn't find what you're looking for?

Try using Global Search.

SETUP

Email Alerts

Email Alert

EA_Burial_Reminder_7days

Rules Using This Email Alert (0)

Approval Processes Using This Email Alert (0)

Entitlement Processes Using This Email Alert (0)

Email Alert Detail

Description

EA_Burial_Reminder_7days

Unique Name

EA_Burial_Reminder_7days

From Email Address

Current User's email address

Recipients

Email Field: Family Primary Email

Additional Emails

Created By

RICHAKAROTIYA, 17/09/2025, 4:02 pm

Modified By

RICHAKAROTIYA, 17/09/2025, 4:02 pm

Email Template

Burial Reminder - 7 days

Object

Burial

Rules Using This Email Alert

This alert is currently not used by any rules

Approval Processes Using This Email Alert

This alert is currently not used by any approval processes

Entitlement Processes Using This Email Alert

This alert is currently not used by any entitlement processes

5. Field Updates

- Set Status to Approved → Updates Booking Request status to Approved after manager approval.
- Set Status to Pending Approval → Marks the request as Pending Approval when submitted.

- **Set Status to Rejected** → Changes the status to Rejected if the request is declined.

Field Updates

All Workflow Field Updates

[Help for this Page](#)

Field updates allow you to automatically change a field value to one that you specify. Field updates are actions associated with workflow rules and approval processes.

View: All Workflow Field Updates | [Edit](#) | [Create New View](#)

New Field Update					
Action	Name +	Field to Update	Operation	Value	Last Modified Date
Edit Del	Changes the case priority to high.	Case: Priority	Value	High	12/09/2025
Edit Del	Set Status To Approved	Booking Request: Status	Value	Approved	16/09/2025
Edit Del	Set Status To Pending Approval	Booking Request: Status	Value	Pending Approval	16/09/2025
Edit Del	Set Status To Rejected	Booking Request: Status	Value	Rejected	16/09/2025