

Phase III: Data Modeling and Relationships

Admissions & Academic Journey CRM

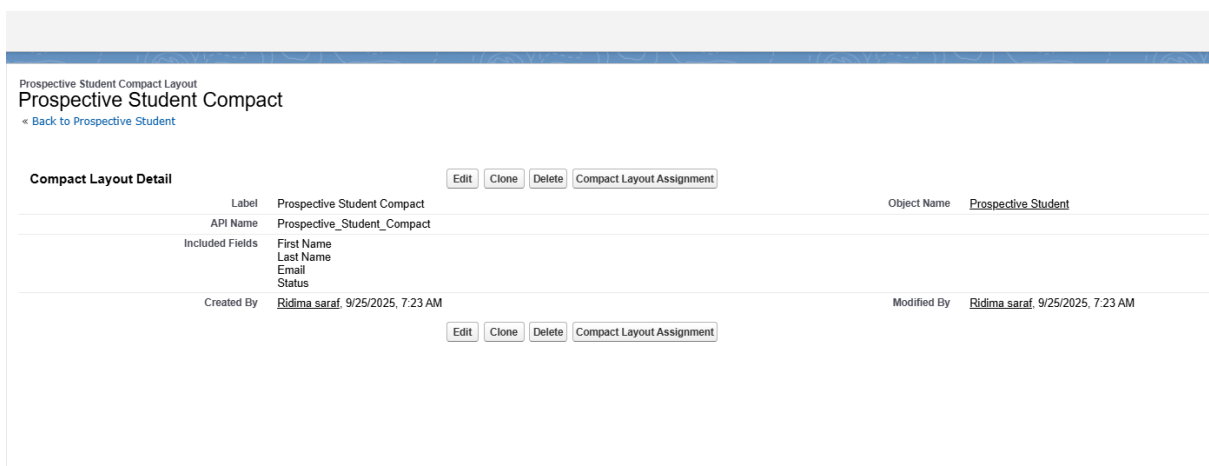
Custom Objects

Explanation: The project leverages a hybrid model, using standard Salesforce objects for basic functions and custom objects to model the unique student lifecycle from inquiry to graduation.

Salesforce Path: Setup > Object Manager > Custom object

Custom Objects Created:

- **Prospective Student:** To track individuals who have shown interest before they formally apply.



The screenshot shows the 'Prospective Student Compact Layout' configuration page in Salesforce. At the top, there's a breadcrumb trail: 'Prospective Student Compact Layout' > 'Prospective Student Compact'. Below this is a link to 'Back to Prospective Student'. The main section is titled 'Compact Layout Detail' and contains a table with the following information:

Label	Prospective Student Compact	Object Name	Prospective Student
API Name	Prospective_Student_Compact		
Included Fields	First Name Last Name Email Status		
Created By	Ridima saraf, 9/25/2025, 7:23 AM	Modified By	Ridima saraf, 9/25/2025, 7:23 AM

At the top of the table, there are buttons: 'Edit', 'Clone', 'Delete', and 'Compact Layout Assignment'. At the bottom of the table, there are buttons: 'Edit', 'Clone', 'Delete', and 'Compact Layout Assignment'.

- **Application:** To manage the entire application process from submission to the final decision.

Details	
Description Stores admission applications submitted by prospective students	
API Name	Enable Reports
Application__c	✓
Custom	Track Activities
✓	
Singular Label	Track Field History
Application	
Plural Label	Deployment Status
Applications	Deployed
	Help Settings
	Standard salesforce.com Help Window

- **Student:** To hold the official and central record of an enrolled student throughout their academic career.

Details	
Description Stores admitted student details	
API Name	Enable Reports
Student__c	✓
Custom	Track Activities
✓	
Singular Label	Track Field History
Student	
Plural Label	Deployment Status
Students	Deployed
	Help Settings
	Standard salesforce.com Help Window

- **Academic Record:** To track the grades, credits, and academic performance of a student for each course or term.

Details

Description

Tracks student grades, attendance, and course performance

API Name

Academic_Record__c

Custom

✓

Singular Label

Academic Record

Plural Label

Academic Records

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

- **Course:** To store a catalog of all individual courses the university offers.

Details

Description

Stores information about courses/programs offered

API Name

Course__c

Custom

✓

Singular Label

Course

Plural Label

Courses

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

- **Department:** To organize the university's different academic areas.

Details

Description

Stores academic department information

API Name

Department__c

Custom

✓

Singular Label

Department

Plural Label

Departments

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

- **Counseling Note:** To log all interactions and meeting notes between academic advisors and students.

Details

Description

Tracks counseling sessions between students and counselors

API Name

Counseling_Note__c

Custom

✓

Singular Label

Counseling Note

Plural Label

Counseling Notes

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Fields & Relationships

Explanation: Custom fields were created for each object to capture specific data points for admissions and academic tracking, and relationships were built to connect these objects into a logical data model.

Salesforce Path: Setup > Object Manager > Select Object > Fields & Relationships

Procedure & Configuration:

- Prospective Student: Field present in it .

SETUP > OBJECT MANAGER

Prospective Student

Details

Fields & Relationships
12 Items. Sorted by Field Label

Q Quick Find

New Deleted Fields Field Dependencies

Address	Address__c	Text Area(255)	
Created By	CreatedById	Lookup(User)	
Date of Birth	Date_of_Birth__c	Date	
Email	Email__c	Email	
First Name	First_Name__c	Text(10)	
Inquiry Source	Inquiry_Source__c	Picklist	
Intended Department	Intended_Department__c	Lookup(Department)	✓
Last Modified By	LastModifiedById	Lookup(User)	
Last Name	Last_Name__c	Text(10)	
Owner	OwnerId	Lookup(User,Group)	✓
Prospective Student Name	Name	Text(80)	✓
Status	Status__c	Picklist	

- Application: Field present in it .

SETUP > OBJECT MANAGER

Application

Details

Fields & Relationships
12 Items. Sorted by Field Label

Q Quick Find

New Deleted Fields Field Dependencies

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Application Date	Application_Date__c	Date		
Application Name	Name	Auto Number		✓
Application Number	Application_Number__c	Auto Number		
Created By	CreatedById	Lookup(User)		
Documents Uploaded	Documents_Uploaded__c	Checkbox		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Program/Department	Program_Department__c	Lookup(Department)		✓
Record Type	RecordTypeId	Record Type		✓
Reviewer	Reviewer__c	Lookup(User)		✓
Status	Status__c	Picklist		

- Student: Field present in it.

SETUP > OBJECT MANAGER

Application

Details

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

Triggers

Flow Triggers

Validation Rules

Fields & Relationships

12 Items. Sorted by Field Label

Q Quick Find

New

Deleted Fiel

Application Date	Application_Date__c	Date
Application Name	Name	Auto Number
Application Number	Application_Number__c	Auto Number
Created By	CreatedById	Lookup(User)
Documents Uploaded	Documents_Uploaded__c	Checkbox
Last Modified By	LastModifiedById	Lookup(User)
Owner	OwnerId	Lookup(User,Group)
Program/Department	Program_Department__c	Lookup(Department)
Record Type	RecordTypeId	Record Type
Reviewer	Reviewer__c	Lookup(User)
Status	Status__c	Picklist
Student	Student__c	Lookup(Prospective Student)

- Course: Field present in it.

SETUP > OBJECT MANAGER

Course

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

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Triggers

Flow Triggers

Fields & Relationships

9 Items. Sorted by Field Label

Q Quick Find

New

Del

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
Course	Course__c	Text(10)	
Course Code	Course_Code__c	Text(10)	
Course Name	Course_Name__c	Text(10)	
Course Name	Name	Text(80)	
Created By	CreatedById	Lookup(User)	
credit hours	credit_hours__c	Number(18, 0)	
Department	Department__c	Lookup(Department)	
Last Modified By	LastModifiedById	Lookup(User)	
Owner	OwnerId	Lookup(User,Group)	

- Academic Record: Field present in it.

SETUP > OBJECT MANAGER

Academic Record

Details

Fields & Relationships
10 Items. Sorted by Field Label

Q, Quick Find New Deleted Fields Field Dependencies

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Academic Record Name	Name	Auto Number		✓
Academic term	Academic_term__c	Picklist		
Attendance	Attendance__c	Number(18, 0)		
Course	Course__c	Lookup(Course)		✓
Created By	CreatedById	Lookup(User)		
Faculty	Faculty__c	Lookup(User)		✓
Grade	Grade__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Record ID	Record_ID__c	Auto Number		
Student	Student__c	Master-Detail(Student)		✓

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
Triggers
Flow Triggers

- Department: Field present in it.

SETUP > OBJECT MANAGER

Department

Details

Fields & Relationships
5 Items. Sorted by Field Label

Q, Quick Find New Delete

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
Created By	CreatedById	Lookup(User)	
Department name	Department_name__c	Text(10)	
Department Name	Name	Text(80)	
Last Modified By	LastModifiedById	Lookup(User)	
Owner	OwnerId	Lookup(User,Group)	

Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
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Field Sets
Object Limits
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Scoping Rules
Object Access
Triggers

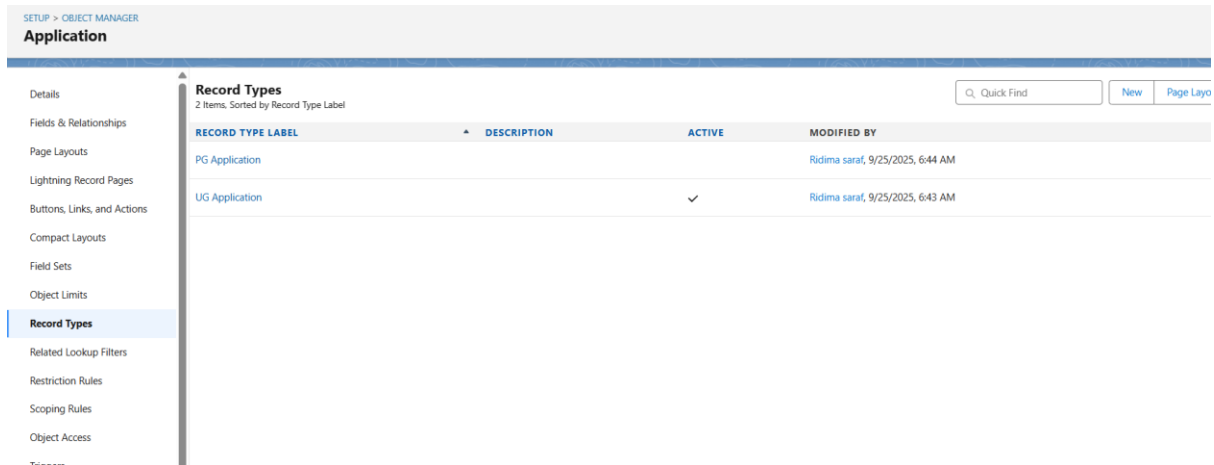
Record Types & Page Layouts

Explanation: Record types and page layouts were configured to provide a tailored user experience based on the academic level (Undergraduate vs. Postgraduate). Compact layouts were set up to provide a quick summary of key information on each record.

Salesforce Path: Setup > Object Manager > Select Object > Record Types and Page Layouts

Procedure & Configuration:

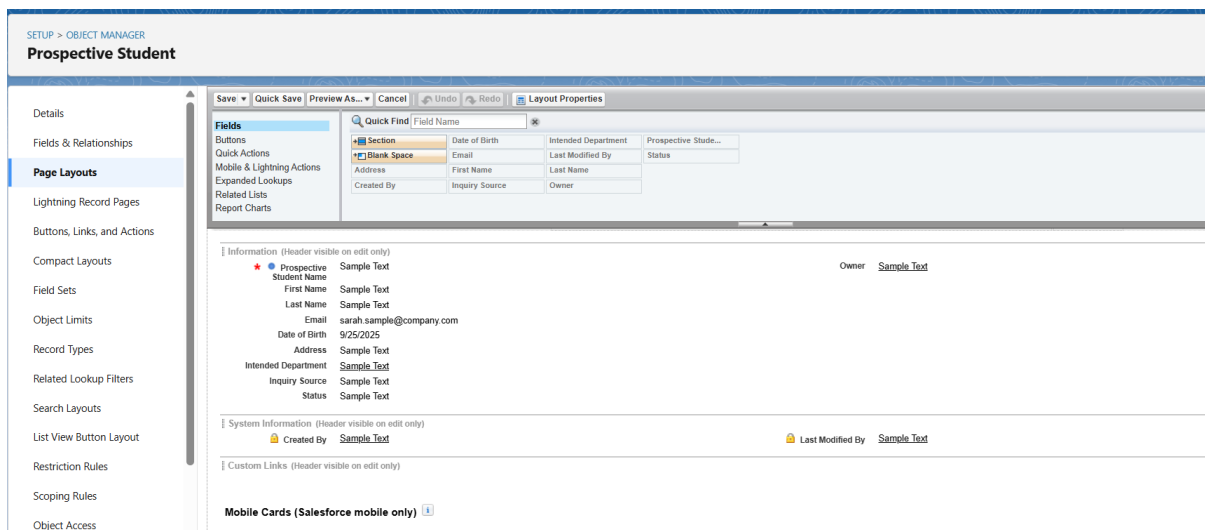
- **Record Types:** Two record types were created for the **Application** object: **UG** and **PG**.



The screenshot shows the Salesforce Setup interface for the 'Application' object. The left sidebar lists various configuration options, with 'Record Types' selected. The main area displays a table of record types for the 'Application' object. The table has columns for 'RECORD TYPE LABEL', 'DESCRIPTION', 'ACTIVE', and 'MODIFIED BY'. Two record types are listed: 'PG Application' and 'UG Application'. The 'UG Application' record type is marked as 'ACTIVE' with a checkmark.

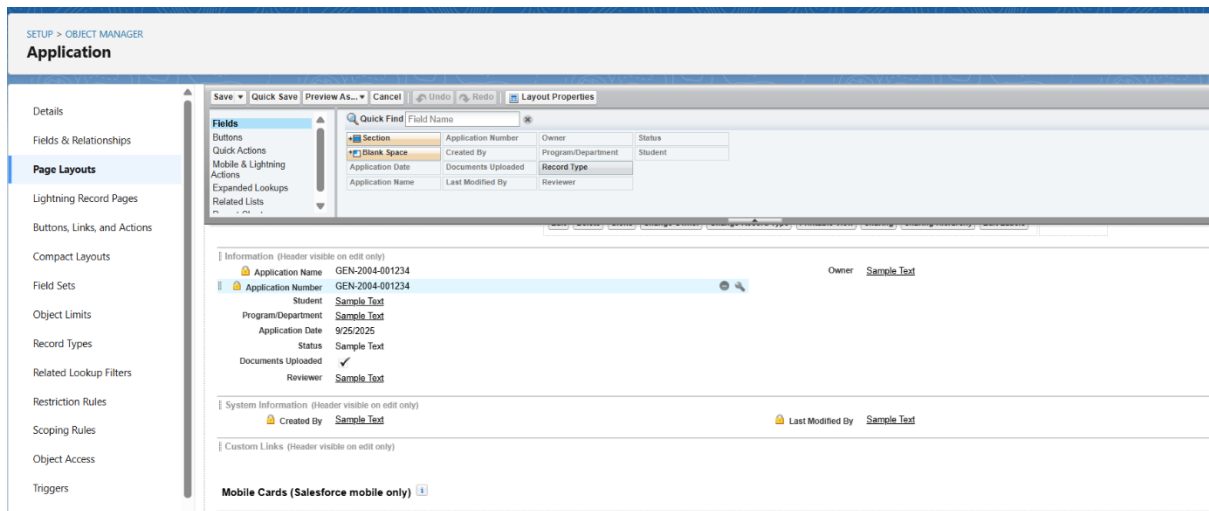
RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
PG Application			Ridima saraf, 9/25/2025, 6:44 AM
UG Application		✓	Ridima saraf, 9/25/2025, 6:43 AM

- **Page Layouts:**



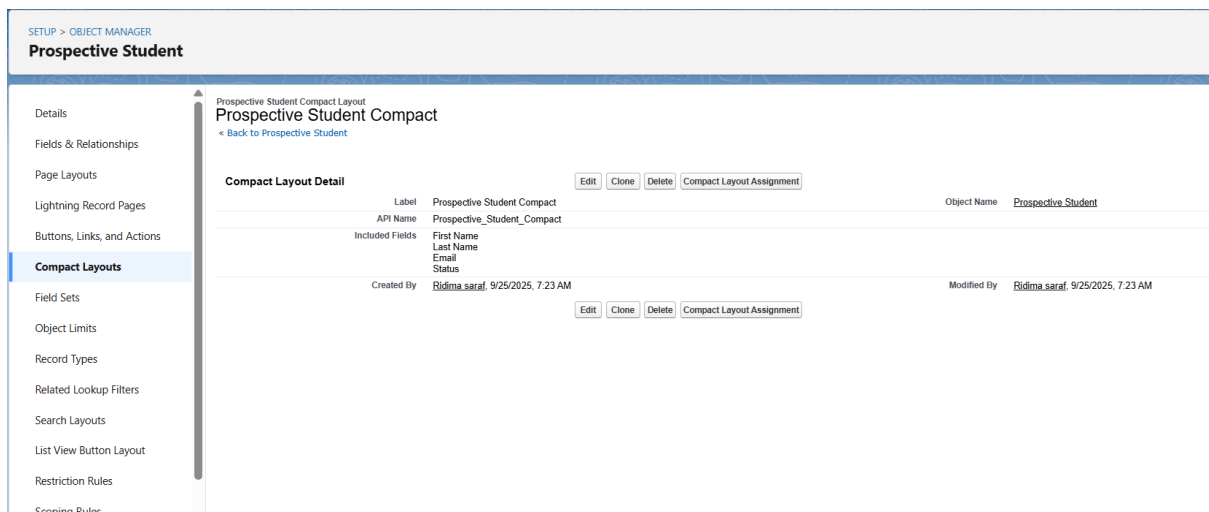
The screenshot shows the Salesforce Setup interface for the 'Prospective Student' object. The left sidebar lists various configuration options, with 'Page Layouts' selected. The main area displays the 'Page Layout Properties' dialog box. The dialog box has tabs for 'Fields', 'Buttons', 'Quick Actions', 'Mobile & Lightning Actions', 'Expanded Lookups', 'Related Lists', and 'Report Charts'. The 'Fields' tab is active, showing a list of fields for the 'Prospective Student' object. The fields are organized into sections: 'Section', 'Blank Space', 'Address', 'Created By', 'Inquiry Source', and 'Owner'. The 'Owner' field is highlighted, showing the user 'Sample Text'.

Field Name	Field Type
Section	Text
Blank Space	Text
Address	Text
Created By	Text
Inquiry Source	Text
Owner	Text



Compact Layouts

The primary compact layout was configured for key objects like **Student** and **Application** to ensure important fields are visible in the highlights panel.



SETUP > OBJECT MANAGER

Academic Record

- Details
- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts**
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters

Academic Record Compact Layout
Academic Record Compact
[Back to Academic Record](#)

Compact Layout Detail [Edit](#) [Clone](#) [Delete](#) [Compact Layout Assignment](#)

Label	Academic Record Compact	Object Name	Academic Record
API Name	Academic_Record_Compact		
Included Fields	Record ID Student Course Grade		
Created By	Ridima.saraf: 9/25/2025, 7:28 AM	Modified By	Ridima.saraf: 9/25/2025, 7:28 AM

[Edit](#) [Clone](#) [Delete](#) [Compact Layout Assignment](#)

SETUP > OBJECT MANAGER

Application

- Details
- 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

Application Compact Layout
Application Compact
[Back to Application](#)

Compact Layout Detail [Edit](#) [Clone](#) [Delete](#) [Compact Layout Assignment](#)

Label	Application Compact	Object Name	Application
API Name	Application_Compact		
Included Fields	Application Number Student Program/Department Status		
Created By	Ridima.saraf: 9/25/2025, 7:24 AM	Modified By	Ridima.saraf: 9/25/2025, 7:24 AM

[Edit](#) [Clone](#) [Delete](#) [Compact Layout Assignment](#)

Lookup vs Master-Detail Relationship

Lookup Relationship

A **loose link** between two objects. The child record can exist without the parent. Deletion of the parent does **not** delete the child.

Master-Detail Relationship

A **tight link** where the child record is controlled by the parent. The child **cannot exist without the parent**, and deleting the parent deletes the child. Also supports **roll-up summary fields**.