

# PROJECT MANAGEMENT APP

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## Phase 3: Data Modeling & Relationships

Goal: Build strong data structure with required objects and relationships.

- Identify standard objects (Contacts, Users).
- Create custom objects like Project, Task, Resource Allocation.
- Define key fields: Project Start Date, End Date, Priority, Status.
- Add task-specific fields like Assigned Resource, Deadline, Progress %.
- Create record types for different project types (Agile, Waterfall).
- Design page layouts showing related tasks, resources, and updates.
- Build compact layouts for mobile accessibility.
- Use schema builder to visualize data model and relationships.

**Create Master-Detail Field (Object: Timesheet)**

Field Label

Project Name

Field Name

Project\_Name

Description

Help Text

Related To

Project

Child Relationship Name

Timesheets

Sharing Setting

Select the minimum access level required on the Master record to create, edit, or delete related Detail records:  
☐ Read Only. Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.  
☒ Read/Write. Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

Related List Label

Timesheets

Reparentable Master Detail

☐ Child records can be reparented to other parent records after they are created

Save

Cancel

Create New Object

Label

Timesheet

Plural Label

Timesheets

Starts With

Consonant

Object Name

Timesheet

Description

Context-Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window
 ☐ Open a window using a Visualforce page

Record Name

Timesheet Name

Data Type

Auto Number

Display Format

{YYYY}-{0}

Examples: A (0000) [What Is This?](#)

Starting Number

1

Allow Reports

☒

Allow Activities

☒

Track Field History

☐

In Development

☐ In Development
 ☒ Deployed

Add Google Docs, Notes, and Attachments related list to default page layout

☐

Save

Cancel

Project

Details

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Recent Items

Related Lists, Filters

Search Layouts

List View Buttons Layouts

Branding Tools

Working Notes

Object Access

Triggers

Fields

Quick Find

Field Name

Field Type

Field Value

Field Label

Field Format

Field Help

Field Status

Field Type

Field Value

Field Label

Field Format

Field Help

Field Status

Project Detail

Project Name

Sample Text

Project Description

Sample Text

Created By

Sample Text

Last Modified By

Sample Text

Mobile Cards (Salesforce mobile only)

Project Name

Sample Text

Project Description

Sample Text

Related Lists

Project Name

Sample Text

Project Description

Sample Text

Problem Edit Page: Refresh Preview Close

Project Name

Sample Text

Project Description

Sample Text

Project Type

Field Price

Start Date

9/25/2020

End Date

9/26/2020

Total Hours

805.01

Hours Worked To Date

804.07

Remaining Hours

0.94

Last Month's Timesheet

Last Month's Timesheet web

Created By

Sample Text

Last Modified By

Sample Text

Timesheets

Timesheet Name

09/26/2020-23

Open Activities

Subject

Sample Text

Name

Sample Text

Task

Sample Text

Due Date

9/25/2020

Status

Not Started

Priority

Normal

Assigned To

Sample Text

Activity History

Log a Call

Make a Meeting

Send an Email

View All