

PHASE 3 – Data Model & Object Configuration

1. Standard & Custom Objects

- **Standard Objects:** User, Account, Contact (used for roles/faculty if needed).
- **Custom Objects:**
 - Student__c → Central profile for students.
 - Course__c → Academic courses offered.
 - Enrollment__c → Junction between Student & Course.
 - Assessment__c → Student grades (exams, quizzes, projects).
 - Attendance__c → Student attendance tracking.
 - Intervention__c → Early intervention actions for at-risk students.

SETUP > OBJECT MANAGER
Attendance

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

Details

Description
Daily/weekly attendance records for students.

API Name
Attendance__c

Custom
✓

Singular Label
Attendance

Plural Label
Attendances

Enable Reports
✓

Track Activities
✓

Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Edit Delete

SETUP > OBJECT MANAGER
Assessment

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

Details

Description
Student grades/marks for exams,assignments, projects.

API Name
Assessment__c

Custom
✓

Singular Label
Assessment

Plural Label
Assessments

Enable Reports
✓

Track Activities
✓

Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Edit Delete

SETUP > OBJECT MANAGER

Course

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

Details

Description

Academic courses offered with code, credits, and info.

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

EditDelete

SETUP > OBJECT MANAGER

Enrollment

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

Details

Description

Junction linking Students ↔ Courses (tracks enrollments).

API Name

Enrollment__c

Custom

✓

Singular Label

Enrollment

Plural Label

Enrollments

Enable Reports

✓

Track Activities

✓

Track Field History

✓

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

EditDelete

SETUP > OBJECT MANAGER

Intervention

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

Details

Description

Actions for at-risk students (counseling, mentoring, extra classes).

API Name

Intervention__c

Custom

✓

Singular Label

Intervention

Plural Label

Interventions

Enable Reports

✓

Track Activities

✓

Track Field History

✓

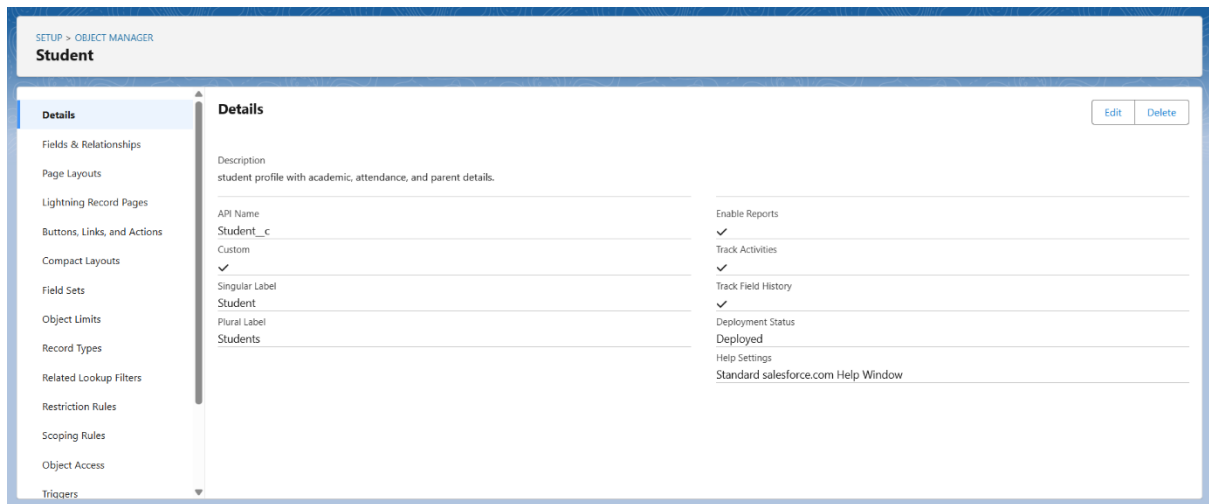
Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

EditDelete



2. Fields

- Created essential fields for each object.
- **Examples:**
 - Student → Roll No, Class, Attendance %, Average Score, Risk Level.
 - Course → Course Code, Credits.
 - Enrollment → Academic Year, Status.
 - Assessment → Score, Max Score, Type, Date.
 - Attendance → Date, Status (Present/Absent), Session.
 - Intervention → Case Status, Action Plan, Assigned To.
- Used **Formula fields** (e.g., Attendance %, Average Score).
- Used **Roll-Up Summary fields** on Student for attendance and scores.
- Added **Validation Rules** (e.g., Score cannot exceed Max Score).

SETUP > OBJECT MANAGER

Student

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

Fields & Relationships

21 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

Created By	CreatedById	Lookup(User)	
DOB	DOB__c	Date	▼
First Name	First_Name__c	Text(80)	▼
Gender	Gender__c	Picklist	▼
Last Modified By	LastModifiedById	Lookup(User)	
Last Name	Last_Name__c	Text(80)	▼
Notes	Notes__c	Long Text Area(32768)	▼
Owner	OwnerId	Lookup(User,Group)	✓
Parent Phone Number	Parent_Phone_Number__c	Phone	▼
Risk Level	Risk_Level__c	Picklist	▼

SETUP > OBJECT MANAGER

Assessment

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

Fields & Relationships

10 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

Assessment Name	Name	Text(80)	✓	▼
Assessment Type	Assessment__c	Picklist		▼
Course	Course__c	Lookup(Course)	✓	▼
Created By	CreatedById	Lookup(User)		
Date	Date__c	Date		▼
Last Modified By	LastModifiedById	Lookup(User)		
Max Score	Max_Score__c	Number(5, 2)		▼
Record Type	RecordTypeId	Record Type	✓	
Score	Score__c	Number(5, 2)		▼
Student	Student__c	Master-Detail(Student)	✓	▼

SETUP > OBJECT MANAGER

Attendance

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

Fields & Relationships

6 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Attendance Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Date	Date__c	Date		▼
Last Modified By	LastModifiedById	Lookup(User)		
Status	Status__c	Picklist		▼
Student	Student__c	Master-Detail(Student)		✓

SETUP > OBJECT MANAGER				
Course				
Details	Fields & Relationships			
Fields & Relationships	7 Items, Sorted by Field Label			
Page Layouts	<input type="text" value="Quick Find"/> New Deleted Fields Field Dependencies Set History Tracking			
Lightning Record Pages	FIELD LABEL	FIELD NAME	DATA TYPE	INDEXED
Buttons, Links, and Actions	Course Code	Course_Code__c	Text(40)	
Compact Layouts	Course Name	Name	Text(80)	✓
Field Sets	Created By	CreatedById	Lookup(User)	
Object Limits	Credits	Credits__c	Number(18, 0)	
Record Types	Description	Description__c	Long Text Area(32768)	
Related Lookup Filters	Last Modified By	LastModifiedById	Lookup(User)	
Restriction Rules	Owner	OwnerId	Lookup(User,Group)	✓
Scoping Rules				
Object Access				
Triggers				

SETUP > OBJECT MANAGER				
Enrollment				
Details	Fields & Relationships			
Fields & Relationships	7 Items, Sorted by Field Label			
Page Layouts	<input type="text" value="Quick Find"/> New Deleted Fields Field Dependencies Set History Tracking			
Lightning Record Pages	FIELD LABEL	FIELD NAME	DATA TYPE	INDEXED
Buttons, Links, and Actions	Academic Year	Academic_Year__c	Picklist	
Compact Layouts	Course	Course__c	Master-Detail(Course)	✓
Field Sets	Created By	CreatedById	Lookup(User)	
Object Limits	Enrollment Name	Name	Text(80)	✓
Record Types	Last Modified By	LastModifiedById	Lookup(User)	
Related Lookup Filters	Status	Status__c	Picklist	
Restriction Rules	Student	Student__c	Master-Detail(Student)	✓
Scoping Rules				
Object Access				
Triggers				

SETUP > OBJECT MANAGER				
Intervention				
Details	Fields & Relationships			
Fields & Relationships	10 Items, Sorted by Field Label			
Page Layouts	<input type="text" value="Quick Find"/> New Deleted Fields Field Dependencies Set History Tracking			
Lightning Record Pages	FIELD LABEL	FIELD NAME	DATA TYPE	INDEXED
Buttons, Links, and Actions	Action	Action__c	Long Text Area(32768)	
Compact Layouts	Assigned to	Assigned_to__c	Lookup(User)	✓
Field Sets	Case Status	Case_Status__c	Picklist	
Object Limits	Created By	CreatedById	Lookup(User)	
Record Types	End Date	End_Date__c	Date	
Related Lookup Filters	Intervention Name	Name	Auto Number	✓
Restriction Rules	Last Modified By	LastModifiedById	Lookup(User)	
Scoping Rules	Record Type	RecordTypeId	Record Type	✓
Object Access	Start Date	Start_Date__c	Date	
Triggers	Student	Student__c	Master-Detail(Student)	✓

3. Record Types

- **Assessment__c**: Exam, Midterm, Assignment, Project.

- **Intervention__c:** Counseling, Extra Class, Mentoring, Parent Meeting.
- Each Record Type mapped to **separate Page Layouts** for relevant fields.

SETUP > OBJECT MANAGER
Intervention

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

Record Types
4 Items, Sorted by Record Type Label

Q Quick Find

New Page Layout Assignment

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Counseling		✓	Shivangi Tiwari, 16/09/2025, 8:27 pm
Extra Class		✓	Shivangi Tiwari, 16/09/2025, 8:28 pm
Mentoring		✓	Shivangi Tiwari, 16/09/2025, 8:29 pm
Parent Meeting		✓	Shivangi Tiwari, 16/09/2025, 8:29 pm

SETUP > OBJECT MANAGER
Assessment

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

Record Types
4 Items, Sorted by Record Type Label

Q Quick Find

New Page Layout Assignment

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Assignment Test		✓	Shivangi Tiwari, 16/09/2025, 7:09 pm
Final Exam		✓	Shivangi Tiwari, 16/09/2025, 7:11 pm
Midterm		✓	Shivangi Tiwari, 16/09/2025, 7:10 pm
Project		✓	Shivangi Tiwari, 16/09/2025, 7:11 pm

4. Page Layouts

- **Student Layout:** Demographics + related lists (Assessments, Attendance, Enrollments, Interventions).
- **Assessment Layouts:** Customized per record type (Exam, Midterm, Assignment, Project).
- **Intervention Layouts:** Customized per record type (Counseling, Extra Class, etc.).

SETUP > OBJECT MANAGER

Assessment

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

Page Layouts
5 Items, Sorted by Page Layout Name

Q Quick Find
New
Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY	
Assessment - Assignment Test Layout	Shivangi Tiwari, 16/09/2025, 7:14 pm	Shivangi Tiwari, 16/09/2025, 7:26 pm	▼
Assessment - Final Exam Layout	Shivangi Tiwari, 16/09/2025, 7:27 pm	Shivangi Tiwari, 16/09/2025, 7:28 pm	▼
Assessment - Midterm Layout	Shivangi Tiwari, 16/09/2025, 7:26 pm	Shivangi Tiwari, 16/09/2025, 7:27 pm	▼
Assessment - Project Layout	Shivangi Tiwari, 16/09/2025, 7:27 pm	Shivangi Tiwari, 16/09/2025, 7:27 pm	▼
Assessment Layout	Shivangi Tiwari, 16/09/2025, 11:19 am	Shivangi Tiwari, 16/09/2025, 11:27 am	▼

SETUP > OBJECT MANAGER

Intervention

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
Triiggers

Page Layouts
5 Items, Sorted by Page Layout Name

Q Quick Find
New
Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY	
Intervention - Counseling Layout	Shivangi Tiwari, 16/09/2025, 8:22 pm	Shivangi Tiwari, 16/09/2025, 8:22 pm	▼
Intervention - Extra Class Layout	Shivangi Tiwari, 16/09/2025, 8:23 pm	Shivangi Tiwari, 16/09/2025, 8:23 pm	▼
Intervention - Mentoring Layout	Shivangi Tiwari, 16/09/2025, 8:24 pm	Shivangi Tiwari, 16/09/2025, 8:24 pm	▼
Intervention - Parent Meeting Layout	Shivangi Tiwari, 16/09/2025, 8:23 pm	Shivangi Tiwari, 16/09/2025, 8:23 pm	▼
Intervention Layout	Shivangi Tiwari, 16/09/2025, 11:48 am	Shivangi Tiwari, 16/09/2025, 11:56 am	▼

5. Compact Layouts

- **Student Compact Layout:** Name, Roll No, Class, Risk Level, Attendance %, Average Score.
- **Assessment Compact Layout:** Name, Score, Max Score, Date, Type.
- **Intervention Compact Layout:** Status, Assigned To, Start Date.
- Assigned layouts to **Highlights Panel** for better visibility.

SETUP > OBJECT MANAGER

Student

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

Student Compact Layout

Student Compact Layout

[Back to Student](#)

Compact Layout Detail

Label: Student Compact Layout

API Name: Student_Compact_Layout

Included Fields: Student Name, Roll No, Class, Risk Level, Attendance Percent, Average Score

Object Name: Student

Created By: Shivangi Tiwari, 17/09/2025, 10:47 am

Modified By: Shivangi Tiwari, 17/09/2025, 10:47 am

Buttons: Edit, Clone, Delete, Compact Layout Assignment

SETUP > OBJECT MANAGER

Assessment

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

Assessment Compact Layout

Assessment Compact Layout

[Back to Assessment](#)

Compact Layout Detail

Label: Assessment Compact Layout

API Name: Assessment_Compact_Layout

Included Fields: Assessment Name, Score, Max Score, Date, Assessment Type

Object Name: Assessment

Created By: Shivangi Tiwari, 16/09/2025, 8:32 pm

Modified By: Shivangi Tiwari, 16/09/2025, 8:32 pm

Buttons: Edit, Clone, Delete, Compact Layout Assignment

SETUP > OBJECT MANAGER

Intervention

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

Intervention Compact Layout

Intervention Compact Layout

[Back to Intervention](#)

Compact Layout Detail

Label: Intervention Compact Layout

API Name: Intervention_Compact_Layout

Included Fields: Case Status, Assigned to, Start Date

Object Name: Intervention

Created By: Shivangi Tiwari, 16/09/2025, 8:31 pm

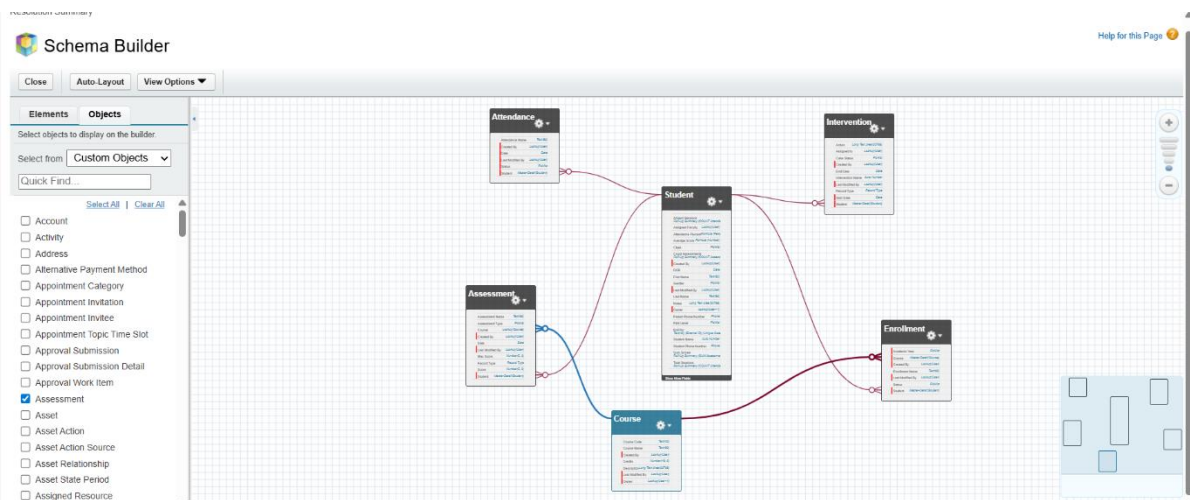
Modified By: Shivangi Tiwari, 16/09/2025, 8:31 pm

Buttons: Edit, Clone, Delete, Compact Layout Assignment

6. Schema Builder

- Used to **visualize and verify** relationships between objects.

- Confirmed:
 - Student ↔ Assessment (Master-Detail).
 - Student ↔ Attendance (Master-Detail).
 - Student ↔ Intervention (Master-Detail).
 - Student ↔ Enrollment ↔ Course (Junction).

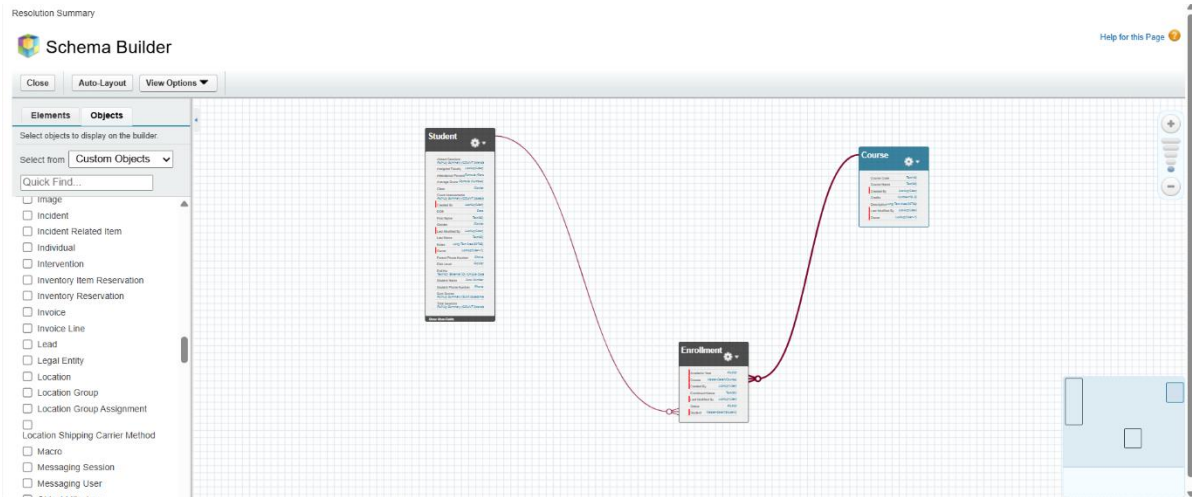


7. Relationships (Lookup vs Master-Detail vs Hierarchical)

- Student ↔ Assessment → Master-Detail (for rollups)
- Student ↔ Attendance → Master-Detail (for rollups)
- Student ↔ Intervention → Master-Detail (for rollups)
- Course ↔ Enrollment ↔ Student → Enrollment is Junction (two master-details).

8. Junction Objects

- Enrollment__c → connect Student & Course (many-to-many).
- Related lists enabled so both Student and Course records display enrolled records.



9. External Objects

- External Objects were reviewed but **not required for this project scope**.
- Hence, no External Object was created or used.