

Phase 3 – Data Modeling & Relationships (Ashok Motors Capstone)

Objective:

Design and implement the data model by creating standard & custom objects, fields, record types, page layouts, and relationships to support business processes and automation.

1. Standard & Custom Objects

- **Custom Objects Created:**
 - `Vehicle__c` – To track all vehicles in inventory
 - `Test_Drive__c` – To manage customer test drive requests
 - `Invoice__c` – To store finalized sale details
- **Standard Objects Used:**
 - Account, Contact, Opportunity, Lead for customer and sales management
- **Screenshot:**

SETUP > OBJECT MANAGER
Test Drive__c

Details Edit Delete

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

Description

API Name
Test_Drive__c

Custom
✓

Singular Label
Test_Drive__c

Plural Label
Test_Drive__cs

Enable Reports
✓

Track Activities
✓

Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

SETUP > OBJECT MANAGER
Vehicle

Fields & Relationships 8 Items, Sorted by Field Label Quick Find New Deleted Fields Field Dependencies Set History Tracking

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
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Object Access
Triggers

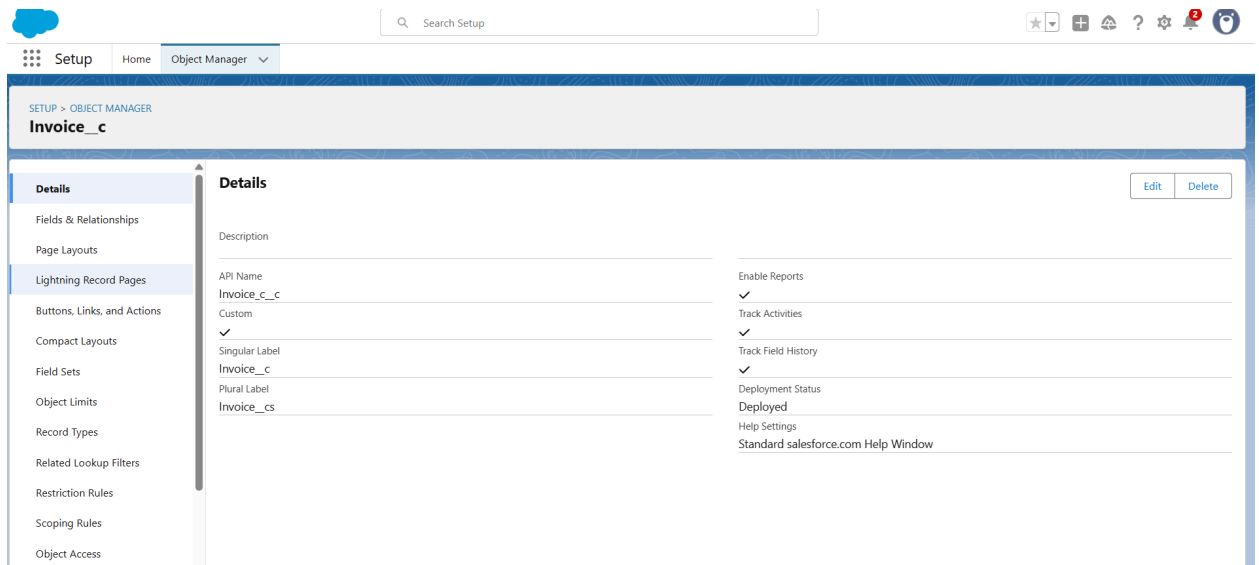
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Dealer	Dealer__c	Lookup(Dealer)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Model	Model__c	Text(10)		
Owner	OwnerId	Lookup(User,Group)		✓
Vehicle Name	Name	Text(80)		✓
VIN	VIN__c	Text(5) (Unique Case Insensitive)		✓
Year	Year__c	Number(4, 0)		

2. Fields

- Custom Fields Added:

- Vehicle__c: Model__c, Price__c, Status__c
- Test_Drive__c: Preferred_Date__c, SalesRep__c, Customer_Notes__c

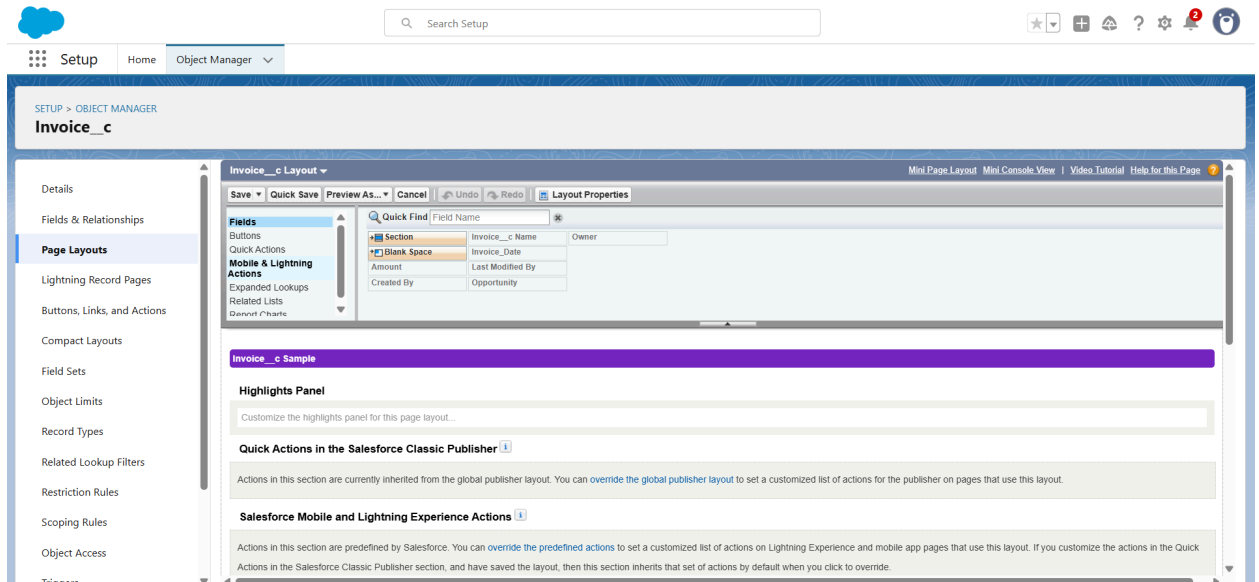
- Invoice__c: Invoice_Date__c, Amount__c, Payment_Status__c
- **Field Types:** Text, Number, Picklist, Lookup
- **Screenshot:**



3. Record Types & Page Layouts

- **Record Types:**
 - Vehicle: New, Used
 - Test Drive: Scheduled, Completed
- **Page Layouts:** Custom layouts assigned to record types for user-specific visibility
- **Compact Layouts:** Configured to display key fields on Lightning record highlights

- **Screenshot:**



4. Relationships

- **Lookup vs Master-Detail:**

- Test_Drive__c → Vehicle__c (Lookup)
- Invoice__c → Account (Master-Detail)

- **Hierarchical Relationships:** Not used in this project

- **Junction Objects:** Not required for current scenario

- **External Objects:** None used

- **Screenshot:**

