

Phase 3 — Data Modeling & Relationships

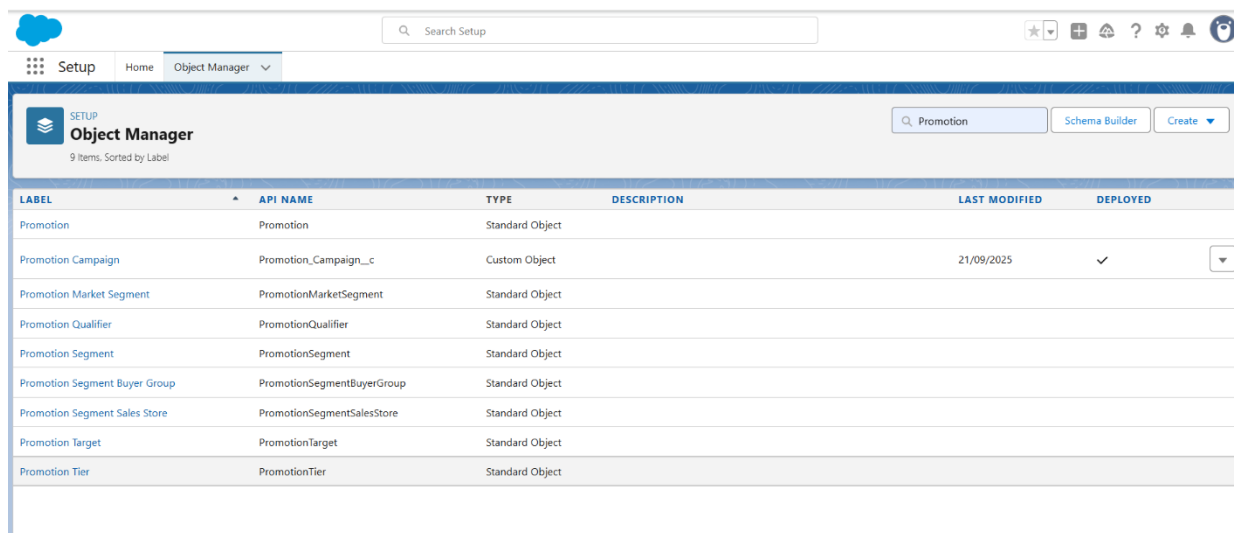
1. Create Custom Objects

Setup → Object Manager → Create → Custom Object

o Promotion Campaign → Promotion_Campaign__c → Text INV {0000}

o Discount Booking / Redemption → Discount_Booking__c → Auto Number: BOOK-{0000}

o Customer Feedback → Customer_Feedback__c → Auto Number: FDBK-{0000}



The screenshot shows the Salesforce Object Manager interface. At the top, there's a search bar with "Search Setup" and a navigation bar with "Setup", "Home", and "Object Manager". Below this, the "Object Manager" section is displayed with a search bar containing "Promotion" and buttons for "Schema Builder" and "Create". A table lists 9 items, sorted by label. The table has columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The "Promotion Campaign" object is highlighted, showing it is a Custom Object created on 21/09/2025 and is deployed.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Promotion	Promotion	Standard Object			
Promotion Campaign	Promotion_Campaign__c	Custom Object		21/09/2025	✓
Promotion Market Segment	PromotionMarketSegment	Standard Object			
Promotion Qualifier	PromotionQualifier	Standard Object			
Promotion Segment	PromotionSegment	Standard Object			
Promotion Segment Buyer Group	PromotionSegmentBuyerGroup	Standard Object			
Promotion Segment Sales Store	PromotionSegmentSalesStore	Standard Object			
Promotion Target	PromotionTarget	Standard Object			
Promotion Tier	PromotionTier	Standard Object			

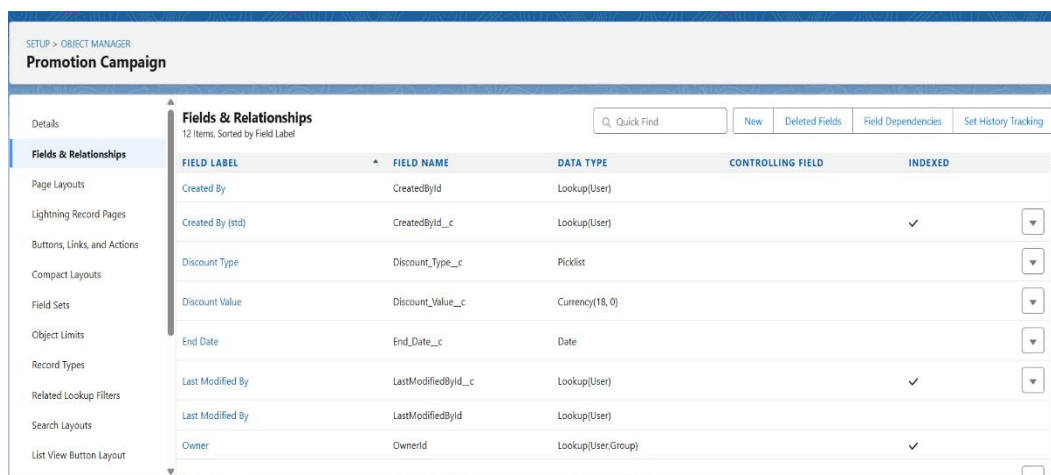
2. Add Fields to Objects

Setup → Object Manager → Discount Booking → Fields & Relationships → New

o Promotion_Campaign__c

o Discount_Booking__c

o Customer_Feedback__c



The screenshot shows the "Fields & Relationships" section for the "Promotion Campaign" object. The left sidebar contains a navigation menu with options like "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", and "List View Button Layout". The main area displays a table of fields with columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. There are 12 items listed, sorted by field label. The fields include "Created By", "Created By (ntd)", "Discount Type", "Discount Value", "End Date", "Last Modified By", "Last Modified By", and "Owner".

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Created By (ntd)	CreatedBy__c	Lookup(User)		✓
Discount Type	Discount_Type__c	Picklist		
Discount Value	Discount_Value__c	Currency(18, 0)		
End Date	End_Date__c	Date		
Last Modified By	LastModifiedById__c	Lookup(User)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓

SETUP > OBJECT MANAGER
Discount Booking

Details

Fields & Relationships
14 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
Channel	Channel_c	Picklist		
Created By	CreatedById	Lookup(User)		
Created By (std)	Created_By_std_c	Lookup(User)		✓
Customer	Customer_c	Lookup(Contact)		✓
Customer	Customer_c_c	Lookup(Contact)		✓
Discount Booking Name	Name	Text(80)		✓
Last Modified By	Last_Modified_By_c	Lookup(User)		✓
Last Modified By	LastModifiedById	Lookup(User)		

3. Relationships

- **Discount Booking → Lookup → Promotion Campaign →** Bookings are linked to a campaign
- **Discount Booking → Lookup → Contact →** Bookings are linked to a customer
- **Customer Feedback → Lookup → Discount Booking →** Feedback is linked to specific booking
- **Customer Feedback → Lookup → Contact →** Feedback record linked to the customer

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER
Discount Booking

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

Discount booking Custom Field
Customer
Back to Discount Booking

Validation Rules (0)

Custom Field Definition Detail

Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Customer	Object Name	Discount Booking
Field Name	Customer_c	Data Type	Lookup
API Name	Customer_c_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Tanvi Markad, 21/09/2025, 3:02 pm	Modified By	Tanvi Markad, 21/09/2025, 3:02 pm

Lookup Options

Related To	Contact	Child Relationship Name	Discount_Bookings1
Related List Label	Discount Bookings (Customer)		
Required	<input type="checkbox"/>		
What to do if the lookup record is deleted?	Clear the value of this field.		

4. Record Types (Invoice)

Setup → Object Manager → Discount Booking → Record Types → New

- Online Redemption → Default for Sales Agent Profile
- In-Store Redemption → Sales Agent, Store Manager profiles

The screenshot shows the 'Discount Booking' section in the Salesforce Object Manager. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types (selected), Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled 'Record Types' and shows '2 Items, Sorted by Record Type Label'. It contains a table with the following data:

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
In-Store Redemption	For redemptions done physically in retail store	✓	Tanvi Markad, 21/09/2025, 2:57 pm
Online Redemption	Used for discounts redeemed online (website/app)	✓	Tanvi Markad, 21/09/2025, 2:54 pm

➤ DiscountBooking_Online_Layout:

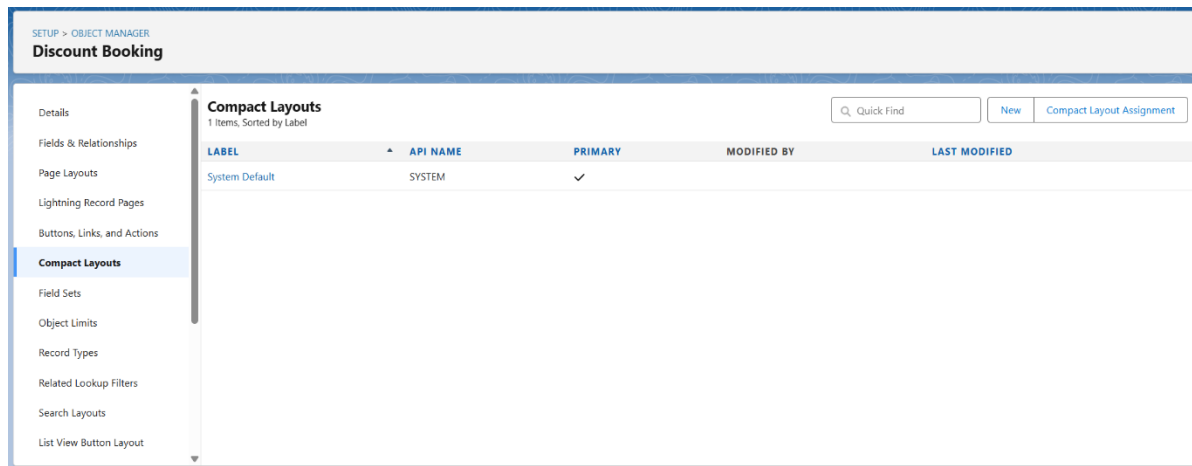
- Highlight Panel → Booking Number, Status__c, Total_Discount__c, Redemption_Date_c
- Sections → Booking Details & Customer Info
- Related Lists → Promotion Campaign , Activity History, Customer Feedback
- Compact Layout → DiscountBooking_Compact_Online
- Assign → Sales Agent Profile, Online Redemption record type

➤ DiscountBooking_Store_Layout:

- Highlight Panel → Booking Number, Status__c, Total_Discount__c, Channel_c
- Sections → Booking Details, Store Notes/Approvals
- Related Lists → Promotion Campaign , Activity History, Customer Feedback
- Compact Layout → DiscountBooking_Compact_Store
- Assign → Sales Agent Profile, In-Store Redemption record type

The screenshot shows the 'Discount Booking' section in the Salesforce Object Manager, specifically the 'Page Layouts' tab. The left sidebar is the same as the previous screenshot, but 'Page Layouts' is selected. The main content area is titled 'Page Layouts' and shows '1 Items, Sorted by Page Layout Name'. It contains a table with the following data:

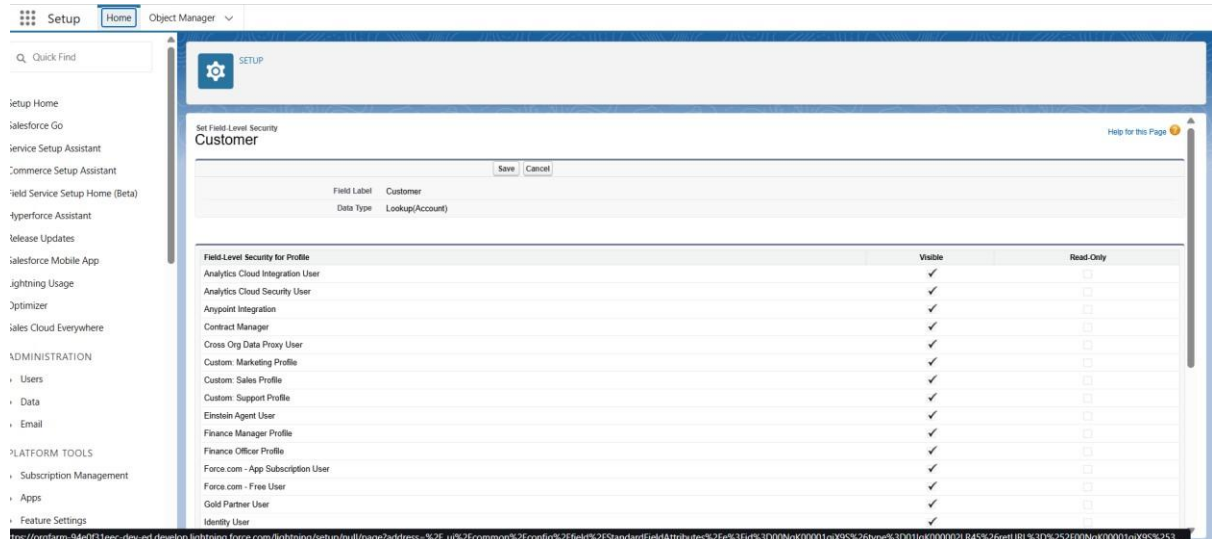
PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Discount Booking Layout	Tanvi Markad, 21/09/2025, 2:43 pm	Tanvi Markad, 21/09/2025, 3:02 pm



6. Field-Level Security

Setup → Object Manager → Discount Booking → Fields & Relationship → [Select Field] → Set Field-Level

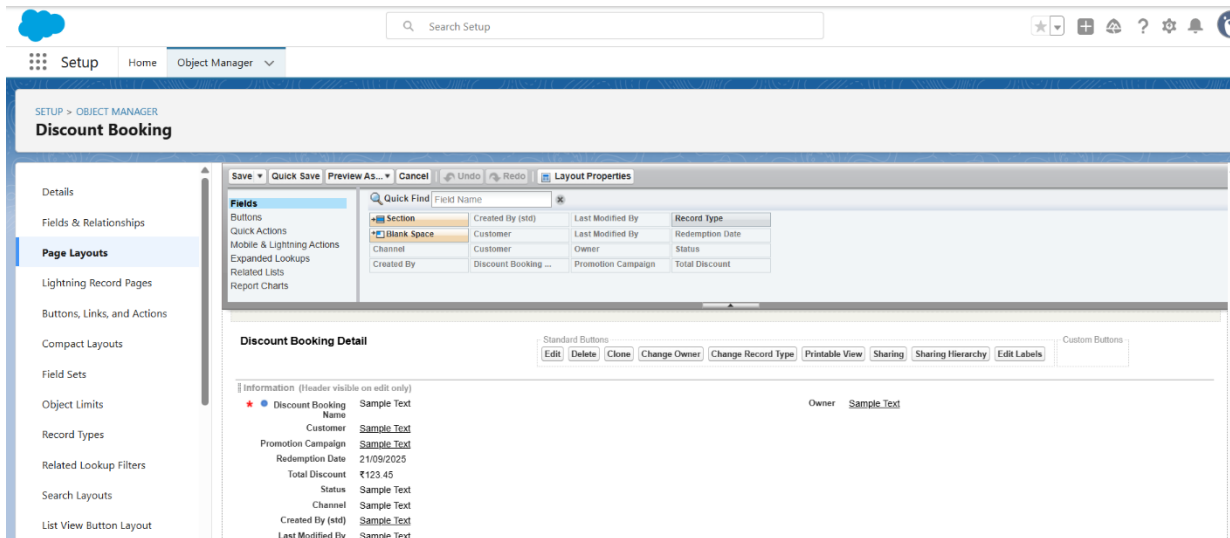
- Sales Agent → Status_c, Total_Discount_c visible(Read-only), other fields hidden
- Store Manager → All fields visible.
- Marketing Manager → All fields visible.
- Customer Service Rep → Status_c, Channel_c, Redemption_Date_c visible, Total_Discount_c read-only.



7. Related Lists & Buttons

Setup → Object Manager → Discount Booking → Page Layouts → Edit Layout

- Promotion Campaign → Name, Discount_Type_c, Start_Date_c, End_Date_c, Status_c
- Customer Feedback → Feedback_Date_c, Rating_c, Feedback_Text_c, Status_c
- Activity History → Subject, Status, Due Date
- Quick Actions → New Feedback / New Follow-up Task



8. Schema Builder Verification

Setup → Schema Builder → Add Promotion Campaign, Discount Booking, Customer Feedback, Contact.

- Discount Booking → Lookup → Promotion Campaign.
- Discount Booking → Lookup → Contact.
- Customer Feedback → Lookup → Discount Booking.
- Customer Feedback → Lookup → Contact.

