Phase 3 — Data Modeling & Relationships
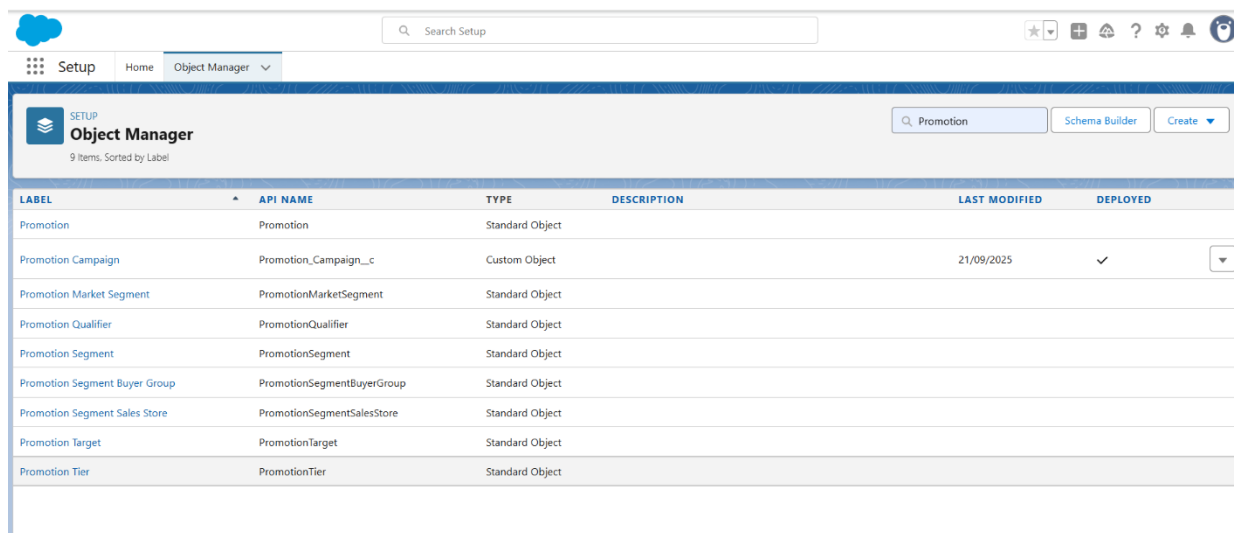
1. Create Custom Objects

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}

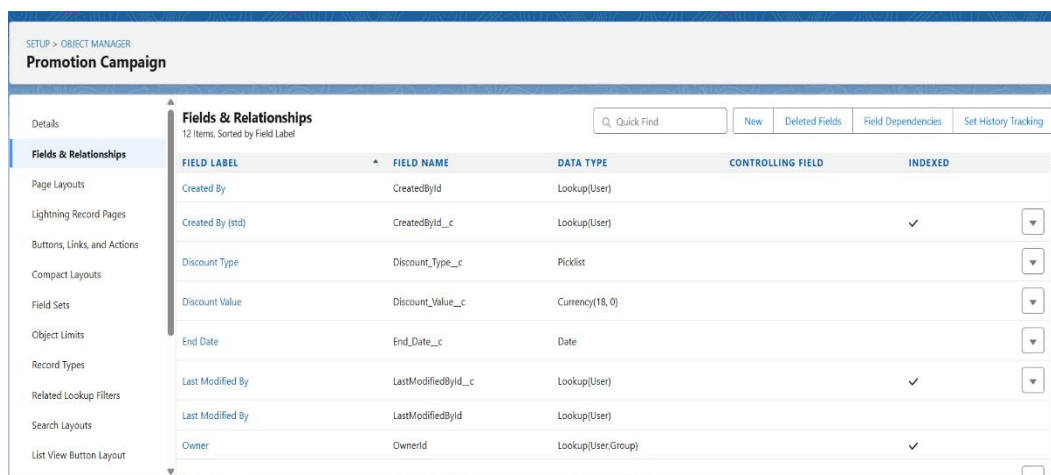o Customer Feedback→ Customer_Feedback__c → Auto Number: FDBK-{0000}

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

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

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

> **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
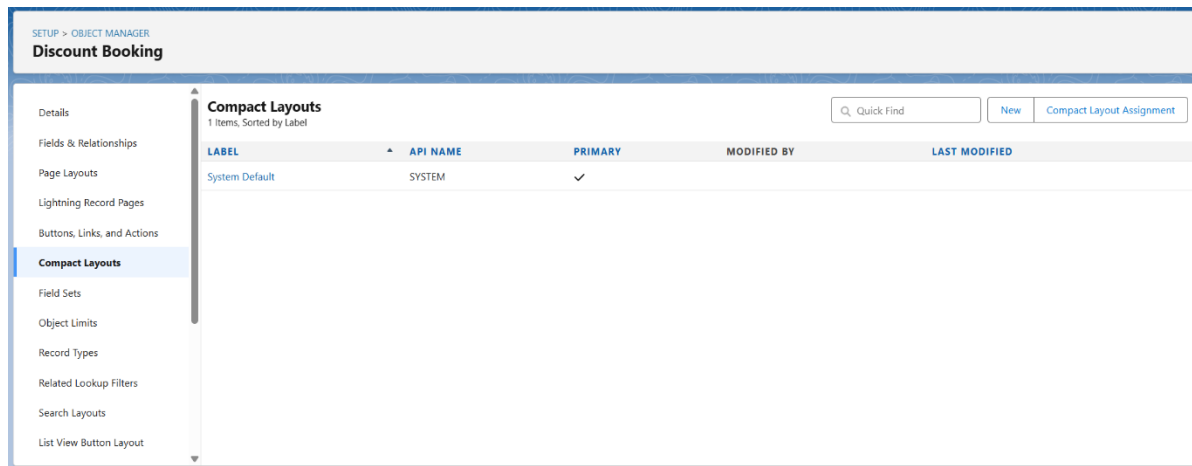
> **DiscountBooking_Store_Layout:**

- 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

6. Field-Level Security

Setup → Object Manager → Discount Booking → Fields & Realtionship → [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.
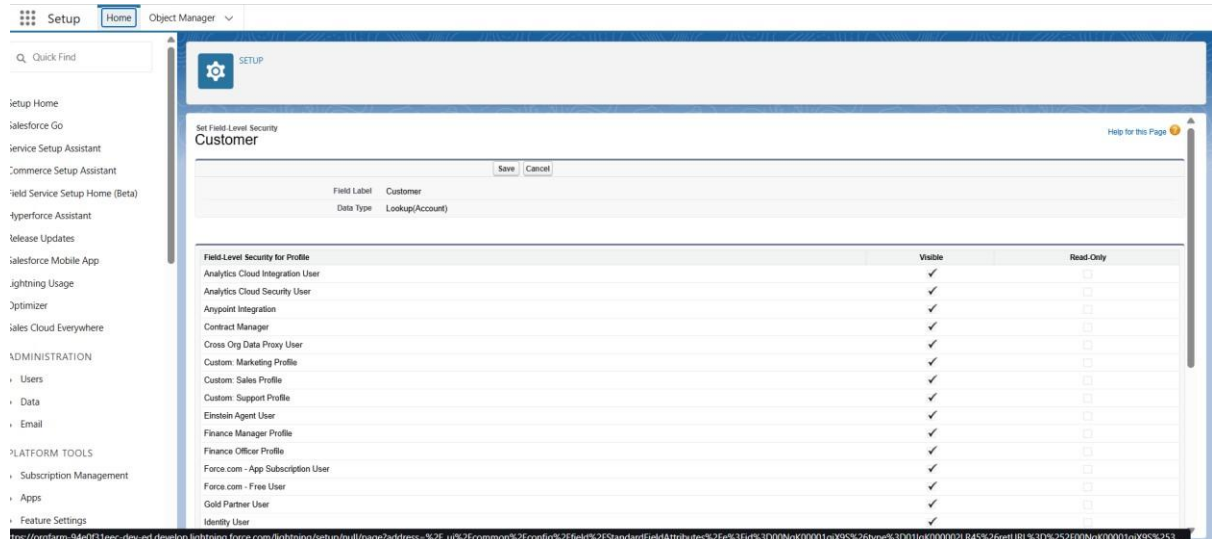
7. Related Lists & Buttons

Setup → Object Manager → Discount Booking → Page Layouts → Edit Layout
- Promotion Campaign → Name, Discount_Type_c , Start_Date_c, End_Date_c, Status_c
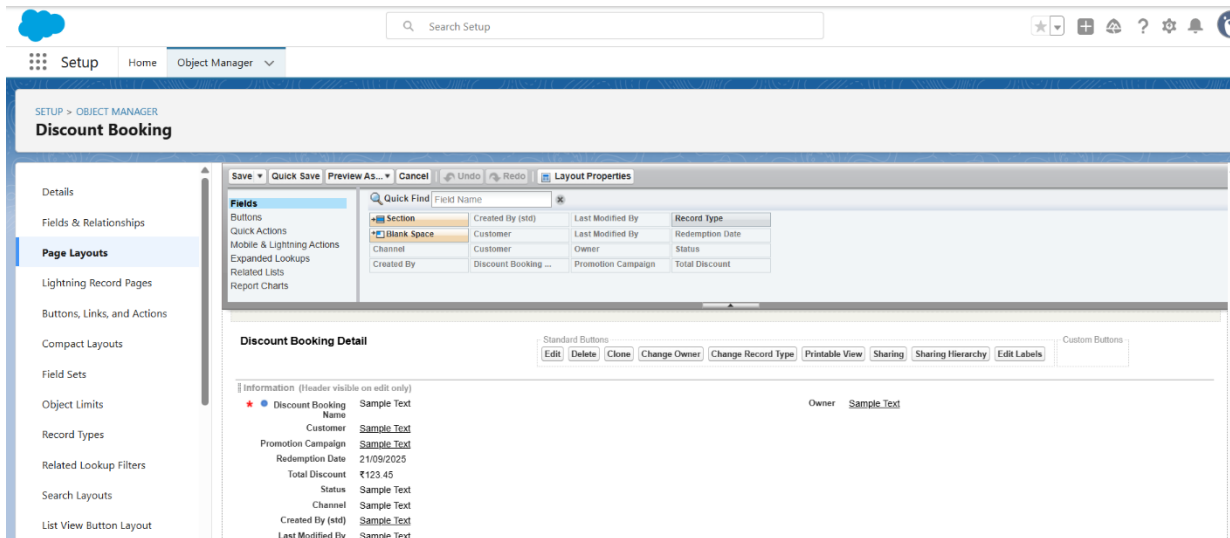- Customer Feedback → Feedback_Date_c, Rating_c, Feedback_Text_c, Status_c
- Activity History → Subject, Status, Due Date
- Quick Actions → New Feedback / New Follow-up Task

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.