

Phase 3: Data modeling and Relationship

1. Standard and Custom field

Standard Objects Used:

- **Account:** Stores information about companies or clients.
- **Contact:** Stores details of individuals related to Accounts.
- **Opportunity:** Tracks potential sales or deals.
- **Case:** Manages customer service requests.

Custom Objects Created:

- **Custom Objects Created:**
- **Service Request:** To manage service requests from customers.
- **Payment:** To track payment details.
- **Service Provider:** To store details of local service providers.
- **Appointment:** To schedule appointments between customers and service providers.
- **Feedback:** To collect customer feedback on services provided.
- **Customer Address:** To store addresses of customers for service delivery.

The screenshot displays the Salesforce Object Manager interface for a custom object named 'Service Request'. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main header shows the breadcrumb 'Setup > OBJECT MANAGER' and the object name 'Service Request'. On the left, a sidebar lists various configuration options: 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, Flow Triggers, Validation Rules, and Conditional Field Formatting. The main content area is titled 'Details' and contains several configuration fields: 'Description' (empty), 'API Name' (Service_Request__c), 'Custom' (checked), 'Singular Label' (Service Request), 'Plural Label' (Service_Requests), and 'Service_Requests' (checked). On the right side, there are checkboxes for 'Enable Reports' and 'Track Activities', and a section for 'Track Field History' with a checkbox for 'Track Field History'. At the bottom right, there is a section for 'Deployment Status' showing 'Deployed' and a link to 'Help Settings'.

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Service Provider c

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Details

Description

Stores information about service providers.

API Name

Service Provider c_c

Custom

✓

Singular Label

Service Provider c

Plural Label

Service_provider__c

Enable Reports

✓

Track Activities

✓

Track Field History

✓

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

EditDelete

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Description

Tracks customer payments related to service requests.

API Name

Payment_c__c

Custom

✓

Singular Label

Payment c

Plural Label

Payment__c

Enable Reports

✓

Track Activities

✓

Track Field History

✓

Deployment Status

Deployed

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Description

API Name

Appointment__c

Custom

✓

Singular Label

Appointment

Plural Label

Appointment__c

Enable Reports

✓

Track Activities

✓

Track Field History

✓

Deployment Status

Deployed

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Standard salesforce.com Help Window

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SETUP > OBJECT MANAGER

Feedback c

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- Validation Rules
- Conditional Field Formatting

Details Edit Delete

Description
Collects customer feedback on completed service requests.

API Name
Feedback_c__c

Custom
✓

Singular Label
Feedback c

Plural Label
Feedback_c

Enable Reports
✓

Track Activities
✓

Track Field History
✓

Deployment Status
Deployed

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Standard salesforce.com Help Window

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Customer Address

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Details Edit Delete

Description

API Name
Customer_Address__c

Custom
✓

Singular Label
Customer Address

Plural Label
Customer_Address__c

Enable Reports
✓

Track Activities
✓

Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

2. Fields

- **Service Request** → Request ID, Customer Name, Service Type, Description, Status, Request Date
- **Payment** → Payment ID, Service Request ID, Amount, Payment Method, Payment Date, Status
- **Service Provider** → Provider ID, Name, Service Type, Contact Number, Email, Rating
- **Appointment** → Appointment ID, Customer Name, Service Provider Name, Date & Time, Status
- **Feedback** → Feedback ID, Customer Name, Service Provider Name, Rating, Comments, Feedback Date
- **Customer Address** → Address ID, Customer Name, Street, City, State, Pincode

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Fields & Relationships

8 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
Amount	Amount__c	Currency(16, 2)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Payment Date	Payment_Date__c	Date		
Payment Method	Payment_Method__c	Picklist		
Payment Name	Name	Auto Number		✓
Service Request	Service_Request__c	Lookup(Service Request)		✓

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Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer	Customer__c	Lookup(Customer)		✓
Description	Description__c	Text Area(255)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Priority	Priority__c	Picklist		
Request Date	Request_Date__c	Date		
Service Provider	Service_Provider__c	Lookup(Service Provider)		✓
Service Request Name	Name	Auto Number		✓
Status	Status__c	Picklist		

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9 items, Sorted by Field Label

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Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
Customer Name	Name	Text(80)		✓
Customer Type	Customer_Type__c	Picklist		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓
Phone	Phone__c	Phone		
Registration Date	Registration_Date__c	Date		

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Setup

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Service Provider

Details

Fields & Relationships

9 items, Sorted by Field Label

Quick Find

New

Deleted Fields

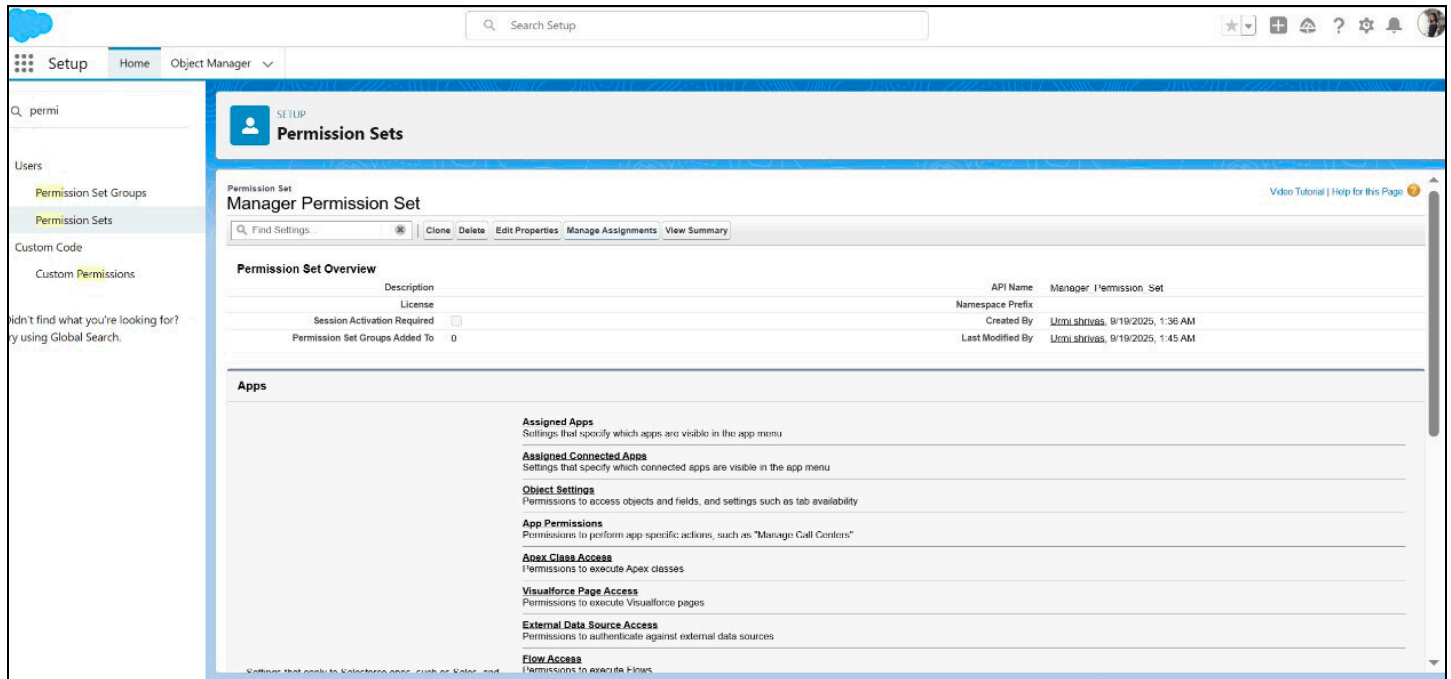
Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Availability	Availability__c	Checkbox		
Contact	Contact__c	Phone		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Location	Location__c	Text(100)		
Owner	OwnerId	Lookup(User/Group)		✓
Rating	Rating__c	Number(2, 1)		
Service Provider Name	Name	Text(80)		✓
Service Type	Service_Type__c	Picklist		

8. Permission Sets

- **Extra Access** → For additional object/field access
- **Report Access** → To create & view reports
- **Dashboard Access** → To view dashboards
- Assigned to users as per need, beyond their profiles



3. Record Types

3. Service Request Object Layouts (Multiple – Record Type)

a) Normal Request Layout

- Request ID, Customer, Service Provider, Request Date, Status, Description, Priority

b) Emergency Request Layout

- Request ID, Customer, Service Provider, Request Date, Status (customized)
- Extra Fields: Response Time, Extra Charges, Priority (High)

c) Cleaning Service Layout

- Request ID, Customer, Service Provider, Request Date, Status (customized)
- Extra Fields: Cleaning Type, Estimated Hours, Description

d) Plumbing / Electrical Layouts

4. Payment Object Layouts

a) Cash Payment Layout

- Payment ID, Amount, Payment Date, Collected By

b) UPI Payment Layout

- Payment ID, Amount, Payment Date, Transaction ID, UPI Reference

c) Card Payment Layout

- Payment ID, Amount, Payment Date, Card Type, Last 4 Digits

d) Wallet/Online Layout

- Payment ID, Amount, Payment Date, Wallet Name / Bank Reference

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SETUP > OBJECT MANAGER
Service Request

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Cleaning Request		✓	Urmil shrivastava, 8/20/2025, 10:05 AM
electrical request		✓	Urmil shrivastava, 9/20/2025, 10:05 AM
Emergency Request		✓	Urmil shrivastava, 8/20/2025, 10:07 AM
Plumbing Request		✓	Urmil shrivastava, 9/20/2025, 10:09 AM
Regular Service Request		✓	Urmil shrivastava, 8/20/2025, 9:56 AM

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4 Items, Sorted by Record Type Label

Q Quick Find

New

Page Layout Assignment

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Card Payment		✓	Urmil shrivastava, 5/20/2025, 10:34 AM
Cash Payment		✓	Urmil shrivastava, 5/20/2025, 10:35 AM
Online Transfer		✓	Urmil shrivastava, 5/20/2025, 10:34 AM
UPI Payment		✓	Urmil shrivastava, 5/20/2025, 10:35 AM

Sharing rules

- **Customer Records** → Shared with Customer Manager (read/write)
- **Service Requests** → Shared with Provider Manager (read/write)
- **Reports** → Shared with Admin team (read-only)

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Security

Guest User Sharing Rule Access Report

Sharing Settings

Didn't find what you're looking for? Try using Global Search.

Setup

Sharing Settings

Organization-Wide Sharing Defaults Edit

Help for this Page

Edit your organization-wide sharing defaults below. Changing these defaults will cause all sharing rules to be recalculated. This could require significant system resources and time depending on the amount of data in your organization. Setting an object to Private makes records visible to record owners and those above them in the role hierarchy, and access can be controlled using sharing rules.

Save

Cancel

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	<input checked="" type="checkbox"/>
Account and Contract	Public Read/Write	Private	<input checked="" type="checkbox"/>
Order	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Contact	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Asset	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Opportunity	Public Read/Write	Private	<input checked="" type="checkbox"/>
Case	Public Read/Write/Transfer	Private	<input checked="" type="checkbox"/>
Campaign	Public Full Access	Private	<input checked="" type="checkbox"/>
Campaign Member	Controlled by Campaign	Controlled by Campaign	<input checked="" type="checkbox"/>
User	Public Read Only	Private	<input checked="" type="checkbox"/>
Individual	Public Read/Write	Private	<input checked="" type="checkbox"/>
Voice Call	Private	Private	<input checked="" type="checkbox"/>
Activity	Private	Private	<input checked="" type="checkbox"/>
Calendar	Hide Details and Add Events	Hide Details and Add Events	<input checked="" type="checkbox"/>
Price Book	Use	Use	<input checked="" type="checkbox"/>
Product	Public Read/Write	Public Read/Write	<input checked="" type="checkbox"/>
Agent Work	Public Read Only	Private	<input checked="" type="checkbox"/>
Alternative Payment Method	Private	Private	<input checked="" type="checkbox"/>
Analytics User Attribute Function Token	Public Read Only	Private	<input checked="" type="checkbox"/>
Appointment Invitation	Private	Private	<input checked="" type="checkbox"/>
Approval Submission	Private	Private	<input checked="" type="checkbox"/>
Authorization Form	Private	Private	<input checked="" type="checkbox"/>

4. Page Layout

- **Customer** → Customer Info : Name, Email, Phone, Address, Customer Type, Registration Date | Related Records (1-column): Service Requests
- **Service Provider** → Provider Info : Name, Service Type, Rating, Availability, Contact, Location | Related Records (1-column): Service Requests

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4 Items. Sorted by Page Layout Name

Q

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Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Description	Umi shivas, 9/20/2025, 11:04 AM	Umi shivas, 9/20/2025, 11:04 AM
Emergency Service Request	Umi shivas, 9/20/2025, 11:03 AM	Umi shivas, 9/20/2025, 11:03 AM
Request Info	Umi shivas, 9/20/2025, 11:04 AM	Umi shivas, 9/20/2025, 11:04 AM
Service Request Layout	Umi shivas, 9/20/2025, 3:40 AM	Umi shivas, 9/20/2025, 4:05 AM

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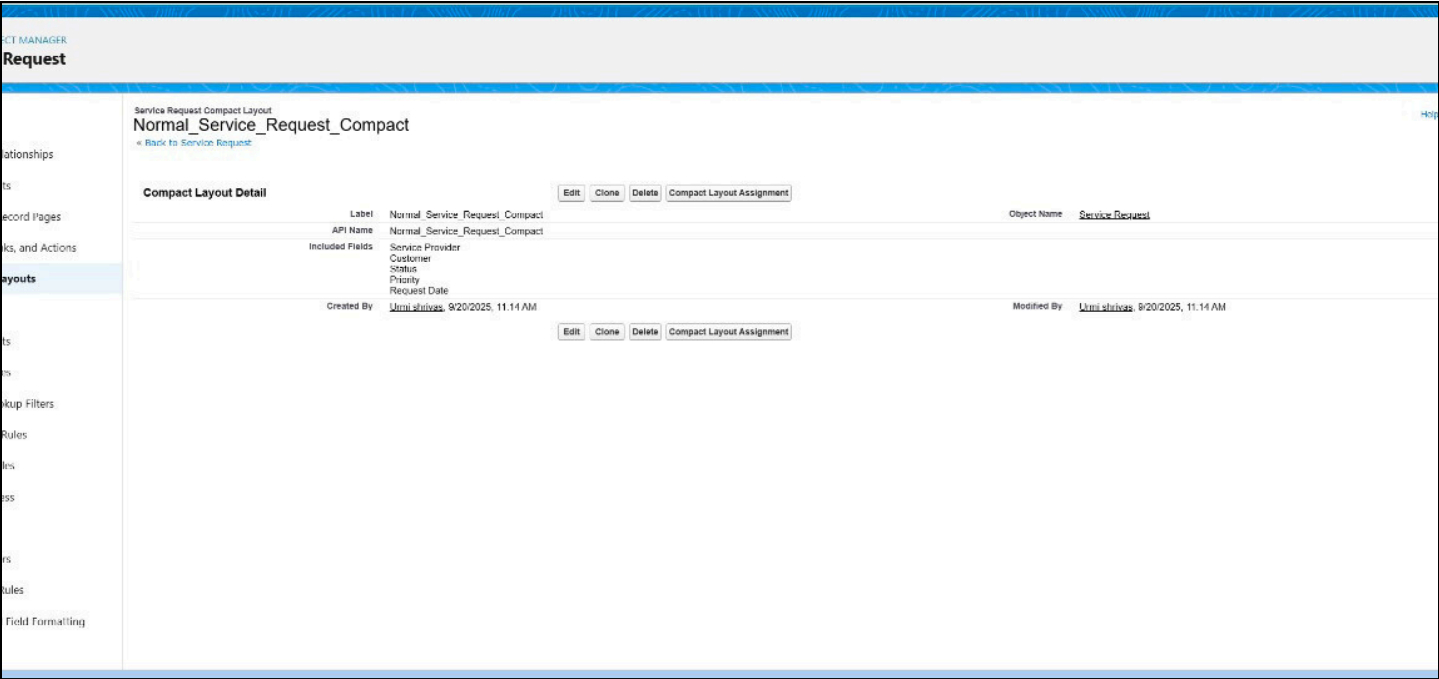
PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Customer Object	Umi shivas, 9/20/2025, 10:59 AM	Umi shivas, 9/20/2025, 10:59 AM
Payment Object	Umi shivas, 9/20/2025, 10:56 AM	Umi shivas, 9/20/2025, 10:57 AM
Service Provider Layout	Umi shivas, 9/20/2025, 3:19 AM	Umi shivas, 9/20/2025, 3:53 AM
Service Request Object	Umi shivas, 9/20/2025, 10:58 AM	Umi shivas, 9/20/2025, 10:58 AM

5- Compact Layouts

Customer → Key Fields: Name, Email, Phone, Customer Type | Layout Name: Customer_Compact_Layout | Set as Primary

Service Provider → Key Fields: Name, Service Type, Rating, Availability | Layout Name: Service_Provider_Compact_Layout | Set as Primary

Service Request → Key Fields: Request ID, Customer, Service Provider, Status, Priority | Layout Name: Service_Request_Compact_Layout | Set as Primary



MANAGER

quest

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Service Request Compact Layout

Cleaning_Service_Request_Compact

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Compact Layout Detail

EditCloneDeleteCompact Layout Assignment

Label	Cleaning_Service_Request_Compact	Object Name	Service Request
API Name	Cleaning_Service_Request_Compact		
Included Fields	Request Date Customer Record Type Service Provider Service Request Name Status Priority		
Created By	Umi.shrivastava, 9/20/2025, 11:16 AM	Modified By	Umi.shrivastava, 9/20/2025, 11:16 AM

EditCloneDeleteCompact Layout Assignment

MANAGER

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Service Request Compact Layout

Emergency_Service_Request_Compact

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Compact Layout Detail

EditCloneDeleteCompact Layout Assignment

Label	Emergency_Service_Request_Compact	Object Name	Service Request
API Name	Emergency_Service_Request_Compact		
Included Fields	Request Date Customer Service Provider Status Priority		
Created By	Umi.shrivastava, 9/20/2025, 11:16 AM	Modified By	Umi.shrivastava, 9/20/2025, 11:16 AM

EditCloneDeleteCompact Layout Assignment

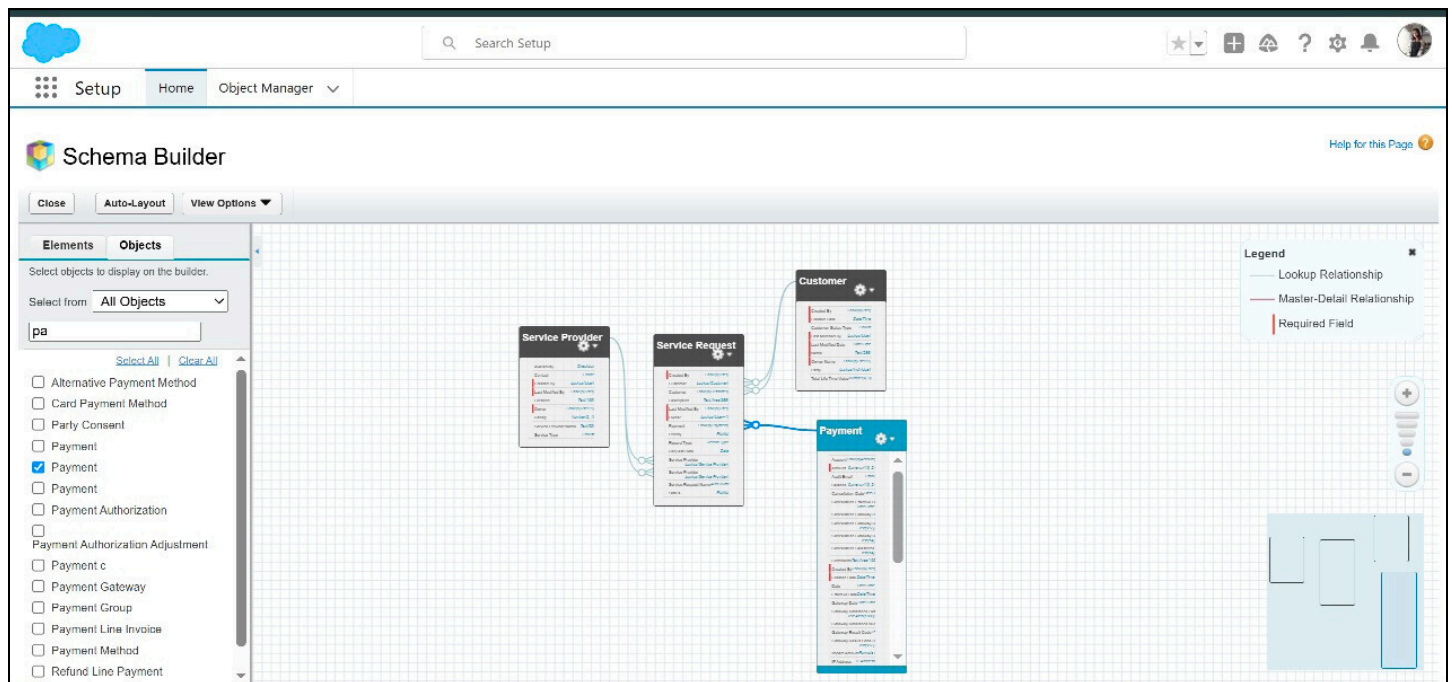
6- Schema Builder

Schema Builder → Visual representation of all objects and relationships.

Objects Displayed: Customer, Service Provider, Service Request, Payment, Appointment, Feedback, Customer Address

Relationships:

- **Customer** → **Service Request**: Lookup / Master-Detail
- **Service Provider** → **Service Request**: Lookup / Master-Detail
- **Service Request** → **Payment**: Lookup / Master-Detail
- **Service Request** → **Appointment**: Lookup
- **Service Request** → **Feedback**: Lookup
- **Customer** → **Customer Address**: Lookup



Lookup Relationship → Linked Customer → Customer Address and Service Request → Appointment so child records can exist independently.

Master-Detail Relationship → Connected **Service Request** → **Payment** and **Service Provider** → **Service Request** to inherit sharing, ownership, and cascade deletion.

Hierarchical Relationship → Not used (optional for User object hierarchy).

Junction Object → Created a junction object (if any) to connect two objects in a many-to-many relationship (e.g., Service Provider ↔ Services Offered).

External Object → Not implemented (no external data connected)