

## PHASE 3: Data Modelling & Relationships

Goal: Build a robust data structure to manage plots, burials, families, visit logs, and related operations within the Digital Cemetery application.

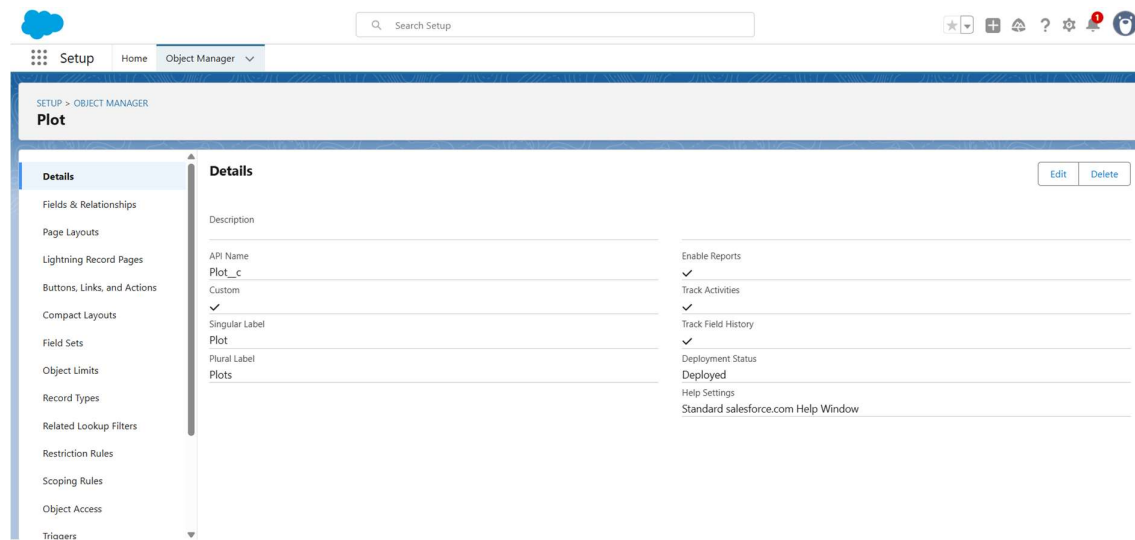
### 1. Objects AND Fields & Relationships

Standard Objects:

- Account → Represents families, institutions, or organizations associated with the cemetery (e.g., Family Accounts, Religious Institutions, Service Providers).
- Contact → Represents individual family members, visitors, or organization representatives.

Custom Objects:

- Plot → Represents individual burial plots



### Plot Object Fields and Relationships

- Plot Number → Auto Number / Text (Unique)
- Location → Text / Geolocation
- GPS Coordinates → Geolocation (Latitude & Longitude)
- Status → Picklist: Available, Reserved, Occupied, Under Maintenance
- Rows → Number / Text (if plots are organized in rows)
- Price → Currency (Cost of the plot)
- Notes → Long Text Area (Additional details or instructions)
- Capacity → Number (Number of people the plot can accommodate)
- Plot Type → Picklist: Single, Double, Family, Cremation, etc.
- Plot Area → Number / Text (Size of the plot in square meters or feet)
- Plot Section → Lookup (Section object to organize plots by blocks/sections)

Search...

Dashboards

New Plot

\* = Required Information

Information

Plot Name

Owner

Vanshika Awasthy

Plot Number

Row

--None--

Status

Available

Price

Capacity

GPS Coordinates

Latitude

Longitude

Cancel

Save & New

Save

Price

Capacity

**GPS Coordinates**

Latitude Longitude

Notes

Plot Type  
--None--

Plot Area

Section  
Search Sections...

Cancel Save & New Save

- Deceased → Represents individuals buried in the cemetery

SETUP > OBJECT MANAGER

**Deceased**

**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

API Name  
Deceased\_c

Custom  
✓

Singular Label  
Deceased

Plural Label  
Deceaseds

Enable Reports  
✓

Track Activities  
✓

Track Field History  
✓

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

Edit Delete

### Deceased Object Fields & Relationships

- Name → Text (Full name of the deceased)
- Gender → Picklist: Male, Female, Other
- Date of Birth → Date
- Date of Death → Date
- Age at Death → Formula (Calculated from DOB & DOD)

- Associated Plot → Lookup (Plot object)
- Family → Lookup (Family object)
- Burial Type → Picklist: Grave, Cremation, Mausoleum, Other
- Notes → Long Text Area (Additional details about deceased)
- Status → Picklist: Active / Archived (for record management)
- Documents → Related List / Lookup (Document object for certificates, photos, etc.)

**Information**

\*Deceased Name

Owner: Vanshika Awasthy

Gender:

Date of Birth:

Date of Death:

Cause of Death:

Family:

Burial:

Plot:

[Cancel](#) [Save & New](#) [Save](#)

- Burial → Represents burial events.

SETUP > OBJECT MANAGER

**Burial**

**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

**Details**

Description

API Name: Burial\_c

Custom: ☒

Singular Label: Burial

Plural Label: Burials

Enable Reports: ☒

Track Activities: ☒

Track Field History: ☒

Deployment Status: Deployed

Help Settings

Standard salesforce.com Help Window

[Edit](#) [Delete](#)

## Burial Object Fields And Relationships

- Burial Name (Text)
- Deceased Name(Text) → Who is being buried/cremated
- Plot(Lookup → Plot\_\_c) → Which plot is used
- Burial Date & Time (Date/Time)
- Burial Type→(Picklist) Burial, Cremation, Ash Interment, Other
- Status (Picklist) → Scheduled, Completed, Cancelled
- Family Lookup(Family)
- Burial Type → Picklist
- Funeral Home → Text
- Documentation Received → Checkbox
- Family Primary Email → Email


New Burial

\* = Required Information

Information

\*Burial Name

Owner


 Vanshika Awasthy

Deceased Name


Date of Death

Burial Date

Plot

Search Plots... 

Family

Search Families... 

Burial Type

--None--

Cancel

Save & New

Save

Search...

Burial Date

Plot

Search Plots...

Family

Search Families...

Burial Type

--None--

Funeral Home

Documentation Received

Status

--None--

Family Primary Email

Cancel Save & New Save

- Family → Groups of related contacts associated with deceased individuals

SETUP > OBJECT MANAGER

**Family**

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

Details

Description

API Name: Family\_\_c

Custom

Singular Label: Family

Plural Label: Families

Enable Reports: ✓

Track Activities: ✓

Track Field History: ✓

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

Edit Delete

### Family Object Fields and Relationships

- Family Name (Text) → e.g., "Sharma Family"
- Contact Person Name → (Text) Name of the person
- Contact Number → (Phone) Contact of the family member related to deceased
- Email Address → (Email) Email of the contact or family
- Address → (Text Area / Geolocation) Residential of the Contact or Account
- National Id → (Number) Related to the Contact

- Relation to Deceased → (Picklist) → to know the relation for future records

boards

Search...

### New Family

\* = Required Information

**Information**

\* Family Name

Owner  
Vanshika Awasthy

Contact Person

Phone

Alternate Phone

Email

Address

National ID

boards

Complete this field.

Contact Person

Phone

Alternate Phone

Email

Address

National ID

Relationship to Deceased  
--None--

- Booking Request → Handles reservations of plots or burial services.

The screenshot shows the Salesforce Setup page for the 'Booking Request' object. The left sidebar contains a navigation menu with the following items: 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, and Triggers. The main content area is titled 'Details' and includes a description field, API Name (Booking\_Request\_\_c), Custom checkbox, Singular Label (Booking Request), Plural Label (Booking Requests), and a list of settings: Enable Reports (checked), Track Activities (checked), Track Field History (checked), Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). There are 'Edit' and 'Delete' buttons in the top right corner.

### Booking Request Fields and Relationship

- Booking Request Name (Text) → to store the name for the request making
- Request Date (Date) → to store the requested date mentioned by the customer
- Requested Plot (Lookup to Plot) → to select among the available plots for the further cremation process.
- Family Details (Lookup to Family) → to know from which family booking request is related to
- Desired Burial Date (Date) → to know the date for the requested burial plot booking
- Status (Picklist) → to know weather a booking request is a new , pending , approved or has been rejected
- Priority (Picklist) → to know weather the request is at high, low or medium priority therefore would be taken care of it according to the priority in future to maintain clean time scheduling
- Comment (Text Area) → a text area provided to write the comments and requests to make sure the work does not get unnoticed

The screenshot shows a 'New Booking Request' dialog box. It has a title bar with a close button (X). The main content area is titled 'New Booking Request' and contains a section 'Select a record type' with two radio button options: 'Portal Request' (selected) and 'Walk-in Request'. At the bottom right, there are 'Cancel' and 'Next' buttons.



**\*Booking Request Name**

Request Date: 22/09/2025

Requested Plot: Search Plots...

Family: Search Families...

Desired Burial Date:

Status: --None--

Priority: --None--

Comments:

Owner: Vanshika Awasthy

Buttons: Cancel, Save & New, Save

- Visit Logs → Tracks visits made by family members or guests.

SETUP > OBJECT MANAGER

**Visit Log**

**Details**

Description: record visitor entries/visits/photos.

API Name: Visit\_Log\_\_c

Custom: ✓

Singular Label: Visit Log

Plural Label: Visit Logs

Enable Reports: ✓

Track Activities: ✓

Track Field History: ✓

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

Buttons: Edit, Delete

### Visit Log Object Fields And Relationships

- Visitor Name(Text) → to take the record of the visitor's name
- Visitor Type (Picklist) → to know weather a visitor is a Family member, Friend , Maintainance Staff , Official , Priest etc
- Visitor Date And Time (Date And Time) → to record the date and time of the visitor
- Visit Purpose (Picklist) → Booking Discussion , Prayers , Burial Ceremony , Cleaning/Maintenance , Inspection , Other

- Check In By (Lookup to User) → to know who allowed the entry to the visitor
- Status (Picklist) → to know whether the booking is Scheduled, Completed or Cancelled
- Related to (Lookup to Deceased) → to make sure if the visitor is there for prayer purpose, he/she/they must be related to the existing burials or deceased. To ensure this we have set the validation rule – “Deceased Mandatory for prayers” in the object – visit logs

Search...

dashboards

Task

Tasks

Im

New Visit Log

\* = Required Information

Information

\* Name

Owner

Vanshika Awasthy

Visit Date / Time

Date

Time

Visitor Type

--None--

Visitor Name

Related Family

Search Accounts...

Related Contact

Search Contacts...

Purpose

--None--

Cancel

Save & New

Save

boards

Related Contact  
Search Contacts...

Purpose  
--None--

Related Plot  
Search Plots...

Related Burial  
Search Burials...

**Check In Time**  
Date  Time

**Check Out Time**  
Date  Time

Staff Assigned  
Search People...

- Document → Stores related certificates, images, or records.

SETUP > OBJECT MANAGER

**Document**

**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  
use Files (preferred) or a light Document object if you want metadata searchable.

API Name  
Document\_c  
Custom

Singular Label  
Document

Plural Label  
Documents

Enable Reports  
✓

Track Activities  
✓

Track Field History  
✓

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

## Document Object Fields And Relationships

- Document Name (Name) → to have a record name of exactly whose document it is
- Document Type (Picklist) → Booking Receipt , Death Certificate , ID Proof , Maintenance Report , Permit , Ownership Proof
- Status (Picklist) → Active , Archieved , Expired
- Description (Text) ) → notes descriptinal area

- Related Burial (Lookup to Burial) → to record which document is related to which burial.
- Upload file (Rich Text Area(32768)) → to upload related files for the document
- Issue Date (Date)
- Related Section (Lookup (Section))
- Related Plot (Lookup (Plot))
- Related Family (Lookup (Family))
- Uploaded By (Lookup (User)) → user who has uploaded the form


Search...

## New Document

\* = Required Information

**Information**









\* Document Name







Owner  Vanshika Awasthy

\* Document Type   
 --None--

Upload File

Salesforce Sans 12

**B** **I** **U**        

\* Issue Date

Description

Search...

ards

\* Issue Date

Description

\* Related Section

Search Sections...

Related Plot

Search Plots...

Related Family

Search Accounts...

Related Burial

Search Burials...

Uploaded By

Search People...

Cancel Save & New Save

- Section → Divides section amongst the staff to make the managing process easy

SETUP > OBJECT MANAGER

Section

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  
groups plots (A, B, C). Use to assign section managers and share rules.

API Name  
Section\_\_c

Custom

Singular Label  
Section

Plural Label  
Sections

Enable Reports  
✓

Track Activities  
✓

Track Field History  
✓

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

Edit Delete

## Section Object Fields And Relationships

- Section Name (Picklist) → Four Sections available A , B , C ,D ( to make sure each of it is provided to different staff to be taken care of)

- Section Manager Name (Lookup to users) → to assign each section to a particular staff member

## PHASE 4: Process Automation (Digital Cemetery)

Goal: The goal of this phase is to **reduce manual work, minimize errors, and improve efficiency** in managing cemetery operations by using **Salesforce automation tools** (Flows, Approval Processes, Email Alerts, Validation Rules, and Notifications).

### 1. Validation Rules

Ensures that a Deceased record is selected whenever the Visit Purpose is set to "Prayer". This rule prevents saving a Visit Log without linking it to a Deceased record when the purpose is prayer.

Validation Rule Detail		Active	
Rule Name	Deceased_Mandatory_For_Prayer	Active	✓
Error Condition Formula	AND( ISPICKVAL( Purpose__c, "Prayer"), ISBLANK( Related_Contact__c ) )		
Error Message	*You must select a Deceased record when the Visit Purpose is Prayer.*	Error Location	Top of Page
Description			
Created By	Vanshika Awasthy, 22/09/2025, 12:19 pm	Modified By	Vanshika Awasthy, 22/09/2025, 12:19 pm

## 2. Approval Processes

This process ensures that any booking request with Pending Approval status goes through a manager approval step. The record is locked during review to prevent edits.

- If approved, status is updated to Approved and record remains locked.
- If rejected, status is updated to Rejected and record is unlocked.
- Recall action allows unlocking if submitter recalls the request.

The process automates booking approvals by routing requests to the manager, controlling record access, and updating booking status automatically.

The screenshot displays the 'Approval Processes' setup page in Salesforce. The top section, 'Process Definition Detail', shows the process name 'Booking Request Approval', which is active. It specifies that the next automated approver is determined by the 'Manager of Record Submitter'. The entry criteria are 'Booking Request: Status EQUALS Pending Approval', and record editability is restricted to 'Administrator ONLY'. The process was created by Vanshika Awasthy on 16/09/2025. Below this, the 'Initial Submission Actions' table lists two actions: 'Record Lock' (to lock the record from being edited) and 'Field Update' (to set the status to 'Pending Approval'). The 'Approval Steps' table shows a single step, 'Manager Approval Step', with the criteria 'Booking Request: Priority NOT EQUAL TO null, else Approve', assigned to the approver 'User:Mayank Burman'. The 'Final Approval Actions' table lists 'Record Lock' and 'Field Update' (to set status to 'Approved'). The 'Final Rejection Actions' table lists 'Record Lock' (to unlock the record for editing) and 'Field Update' (to set status to 'Rejected'). Finally, the 'Recall Actions' table lists a 'Record Lock' action to unlock the record for editing. The page includes navigation links like 'Back To Top' and 'more records per related list'.

**Approval Processes**

Booking Request Approval

Process Definition Detail

Process Name: Booking Request Approval

Unique Name: Booking\_Request\_Approval

Description: Booking Request: Status EQUALS Pending Approval

Entry Criteria: Booking Request: Status EQUALS Pending Approval

Record Editability: Administrator ONLY

Approval Assignment Email Template: Booking Request Owner

Initial Submitters: Booking Request Owner

Created By: Vanshika Awasthy, 16/09/2025, 12:47 pm

Modified By: Vanshika Awasthy, 16/09/2025, 1:17 pm

Initial Submission Actions

Action	Type	Description
Record Lock		Lock the record from being edited
Field Update		Set Status to Pending Approval

Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Manager Approval Step	1			Booking Request: Priority NOT EQUAL TO null, else Approve	User:Mayank Burman	Final Rejection

Final Approval Actions

Action	Type	Description
Record Lock		Lock the record from being edited
Field Update		Set Status to Approved

Final Rejection Actions

Action	Type	Description
Record Lock		Unlock the record for editing
Field Update		Set Status to Rejected

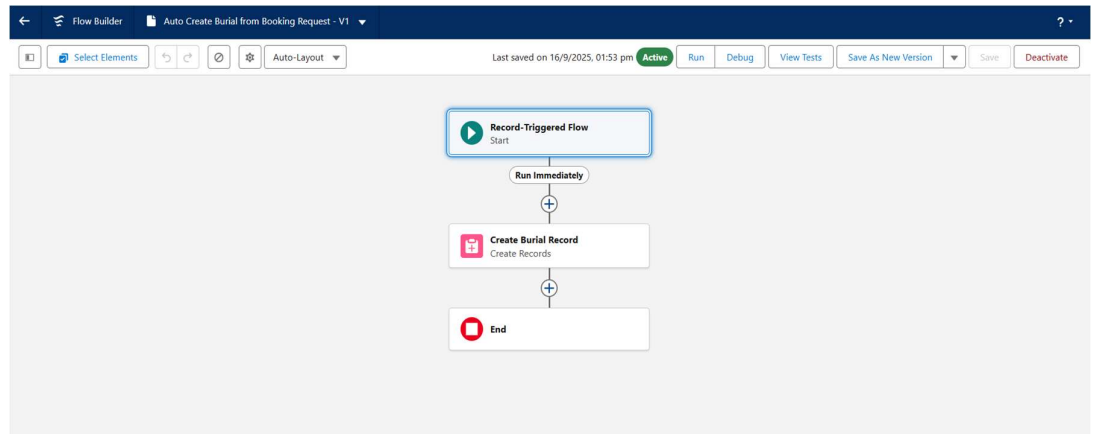
Recall Actions

Action	Type	Description
Record Lock		Unlock the record for editing

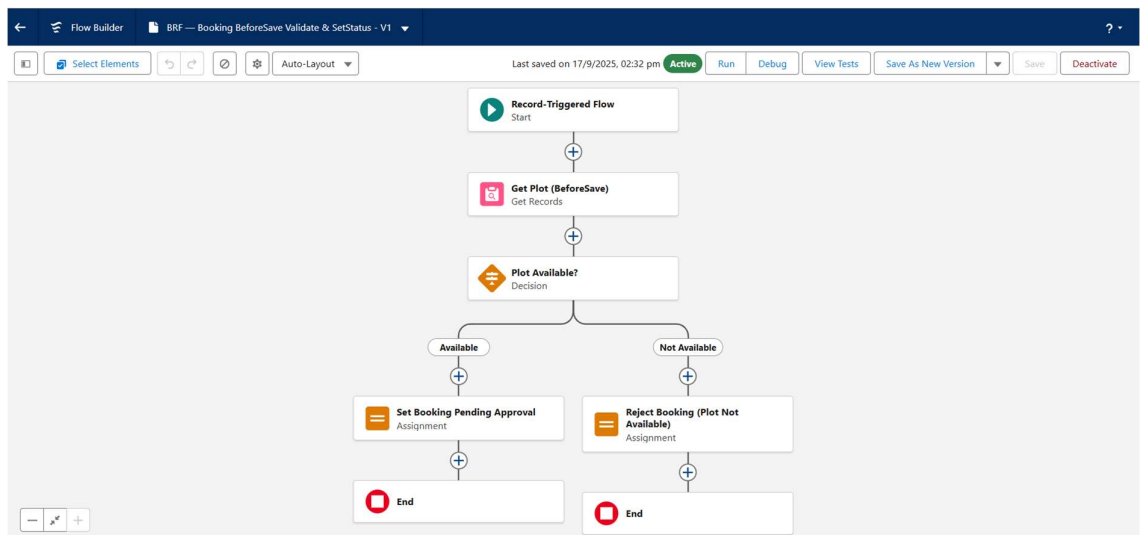
## 3. Flow Builder

Flows are powerful automation tools in Salesforce that allow admins to create declarative business logic without code. They can run on record triggers, screens, or scheduled events to perform actions such as creating records, updating fields, sending emails, or guiding users through processes.

- **Auto Create Burial from Booking Request (Record-Triggered Flow)**  
This flow automatically creates a Burial record when a new Booking Request is approved. It ensures that every approved booking directly leads to a linked burial record, reducing manual work and errors.



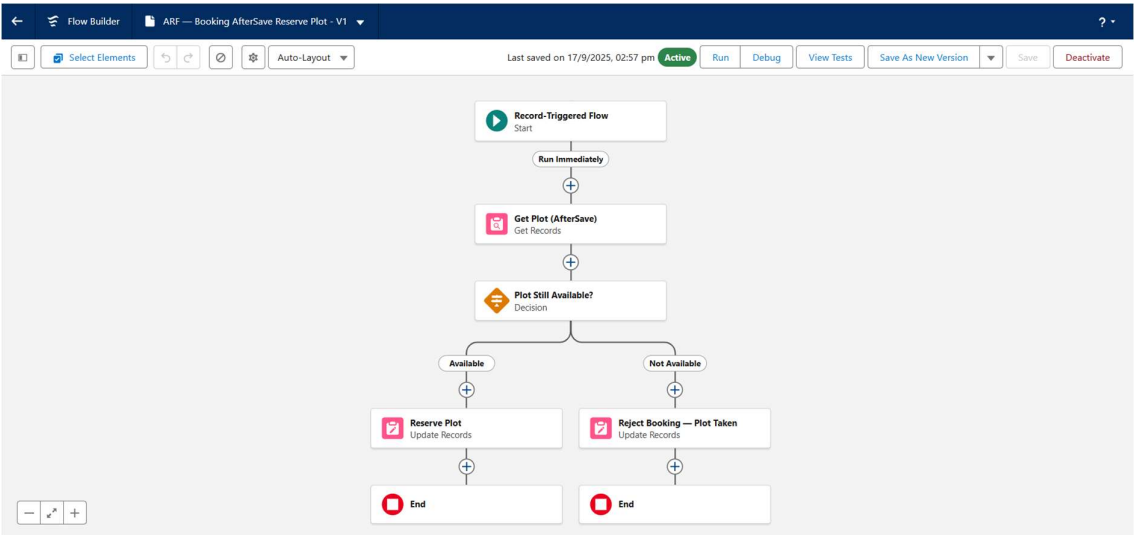
- **BRF — Booking BeforeSave Validate & SetStatus (Before-Save Flow)**  
This flow runs before a Booking record is saved. It validates booking data (like required fields, dates, or conditions) and automatically sets the initial Status = “Pending Approval” to maintain consistency in the approval process.



- **ARF — Booking AfterSave Reserve Plot (After-Save Flow)**



This flow runs after a Booking record is saved. Once approved, it automatically reserves the selected cemetery plot, updates the booking details, and ensures the plot is not double-booked.



4. Email Alerts

This email alert automatically sends a reminder email to the family or concerned person 7 days before the scheduled burial date. It helps ensure timely communication and preparation for the ceremony.


The screenshot shows the 'Email Alerts' setup interface. At the top, there's a 'SETUP' button and the title 'Email Alerts'. Below this, the specific alert is identified as 'EA\_Burial\_Reminder\_7days'. A header bar indicates the number of rules, approval processes, and entitlement processes using this alert, all currently at zero.

The 'Email Alert Detail' section includes fields for Description, Unique Name, From Email Address, Recipients, and Additional Emails. The 'Email Template' is set to 'Burial Reminder - 7 Days' and the 'Object' is 'Burial'. The alert was created by 'Yanshika Awasthy' on 17/09/2025 at 4:02 pm and was modified by the same user at the same time.

Below the details, there are three sections: 'Rules Using This Email Alert', 'Approval Processes Using This Email Alert', and 'Entitlement Processes Using This Email Alert'. Each section shows that the alert is currently not used by any rules, approval processes, or entitlement processes.

## 5. Field Updates

- Set Status to Approved → Updates Booking Request status to Approved after manager approval.
- Set Status to Pending Approval → Marks the request as Pending Approval when submitted.
- Set Status to Rejected → Changes the status to Rejected if the request is declined.

 **Field Updates**

### All Workflow Field Updates

Field updates allow you to automatically change a field value to one that you specify. Field updates are actions associated with workflow rules and approval processes.

View: **All Workflow Field Updates** | [Edit](#) | [Create New View](#)

[A](#)[B](#)[C](#)[D](#)[E](#)[F](#)[G](#)[H](#)[I](#)[J](#)[K](#)[L](#)[M](#)[N](#)[O](#)[P](#)[Q](#)[R](#)[S](#)[T](#)[U](#)[V](#)[W](#)[X](#)[Y](#)[Z](#)[Other](#) **All**

Action	Name ↑	Field to Update	Operation	Value	Last Modified Date
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Changes the case priority to high.</a>	Case: Priority	Value	High	12/09/2025
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Set Status to Approved</a>	Booking Request: Status	Value	Approved	16/09/2025
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Set Status to Pending Approval</a>	Booking Request: Status	Value	Pending Approval	16/09/2025
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Set Status to Rejected</a>	Booking Request: Status	Value	Rejected	16/09/2025

[A](#)[B](#)[C](#)[D](#)[E](#)[F](#)[G](#)[H](#)[I](#)[J](#)[K](#)[L](#)[M](#)[N](#)[O](#)[P](#)[Q](#)[R](#)[S](#)[T](#)[U](#)[V](#)[W](#)[X](#)[Y](#)[Z](#)[Other](#) **All**