Phase 3: Data Modeling & Relationships

Step 1: Goal of Phase 3

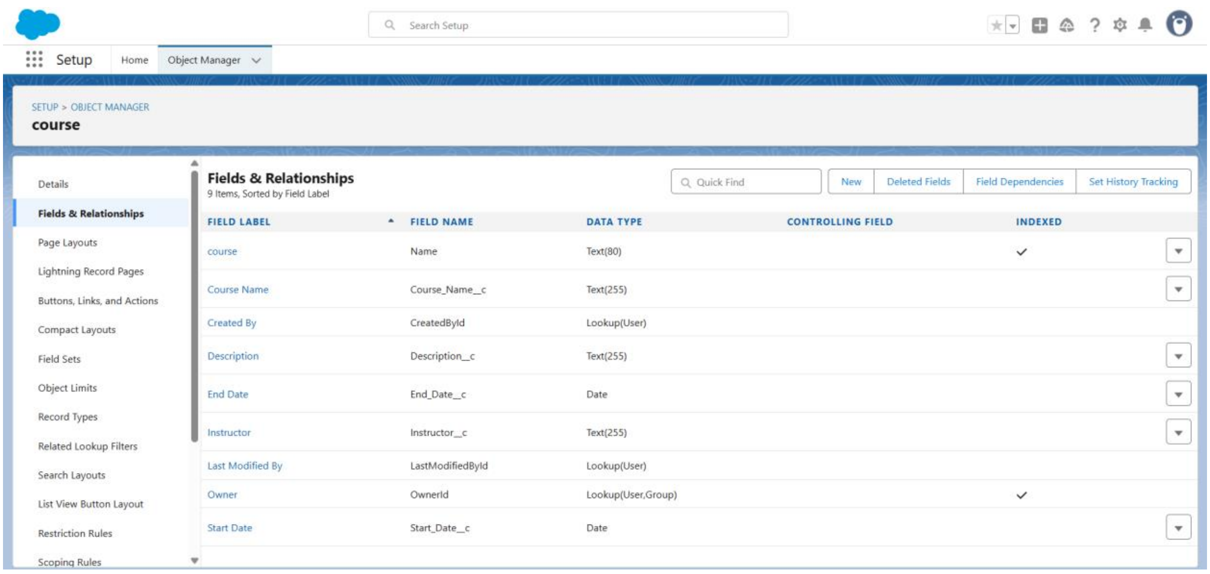
- Build a data model for the CRM to manage institutional services.
- Define standard & custom objects, fields, relationships, and layouts.
- Expected Outcome: Ready for automation, reporting, and UI configuration in Phase 4.

Step 2: Standard & Custom Objects

>>

Create Course Object

1. Go to your **object manager** and and click on **create object from spreadsheet**.
2. Click on the **link** to get the spreadsheet, **Course**.
3. After downloading, **upload the file**, **map the fields** and upload to create an object.



Custom Objects:

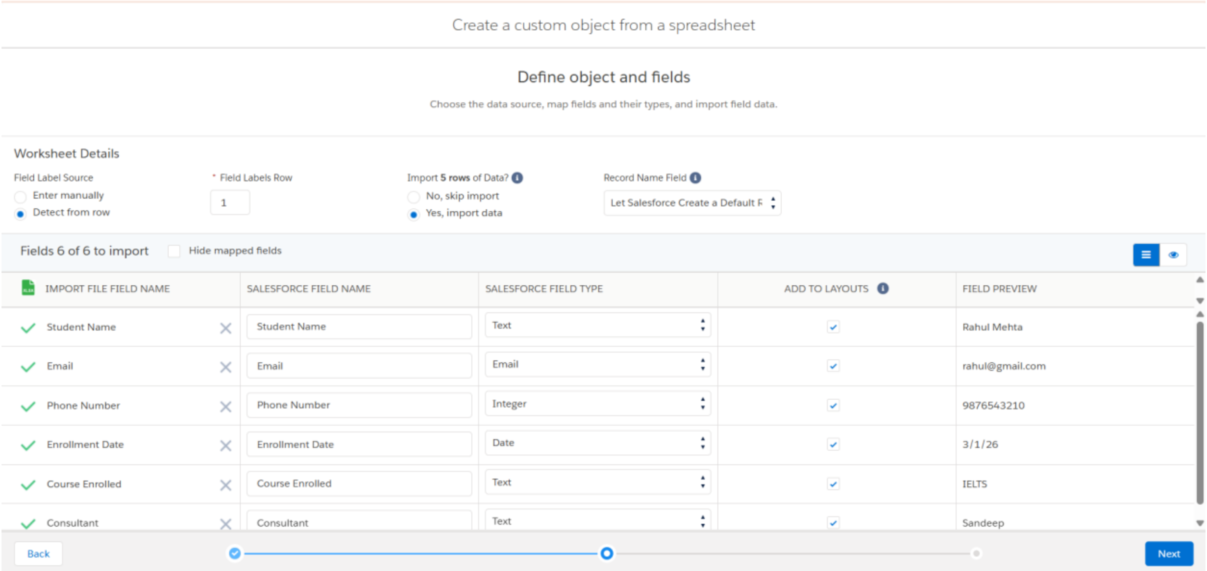
Create Remaining Objects

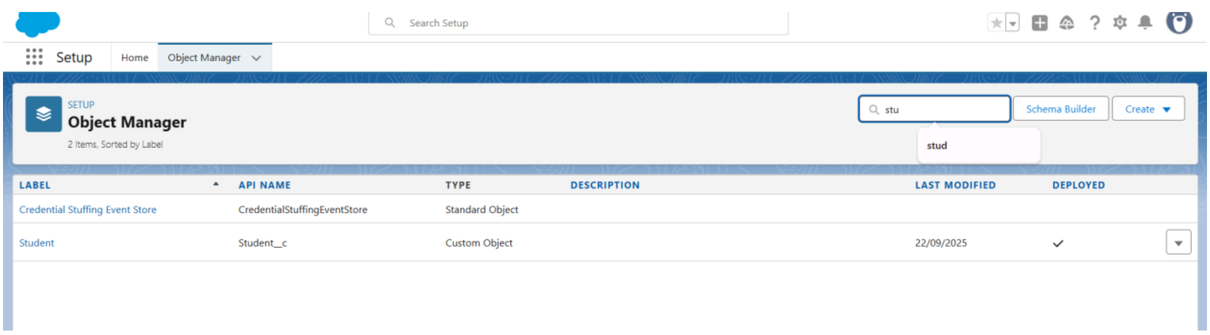
1. Follow the steps which we have followed for course object creation.
2. Use the following sheets for remaining objects.

   a. Consultant

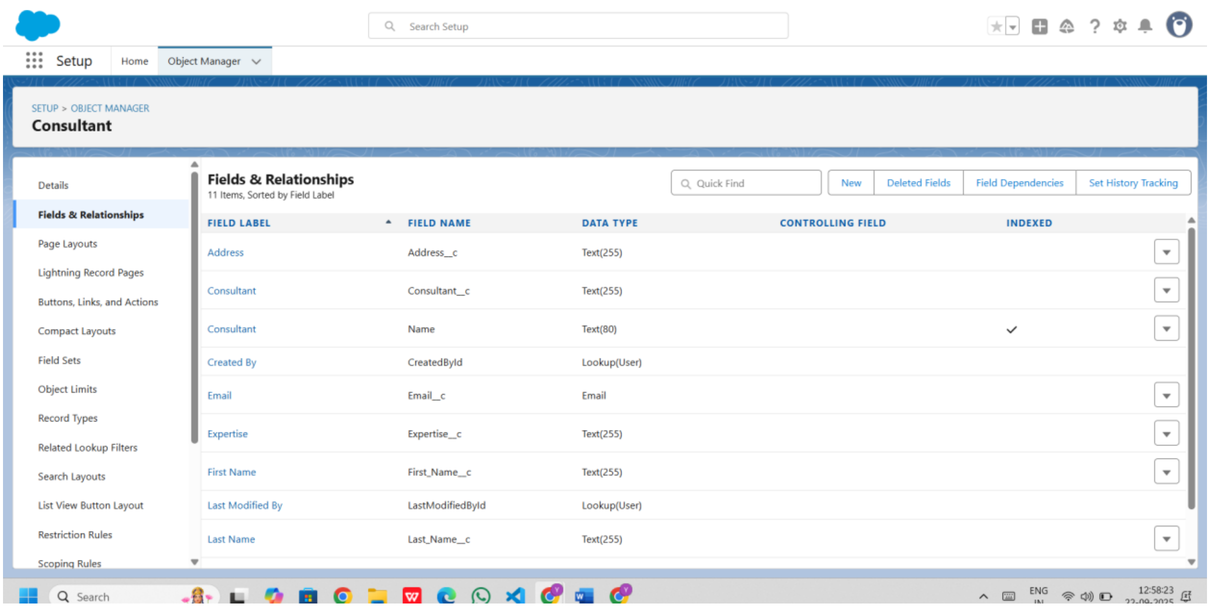
b. Student

c. Appointment

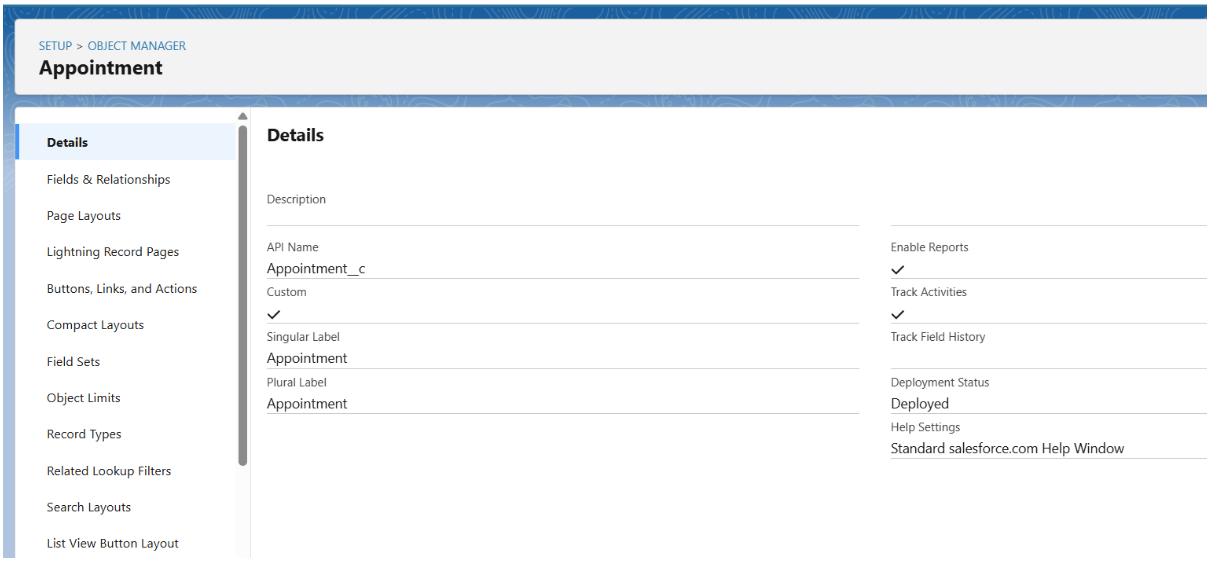




Consultant:



Appointment

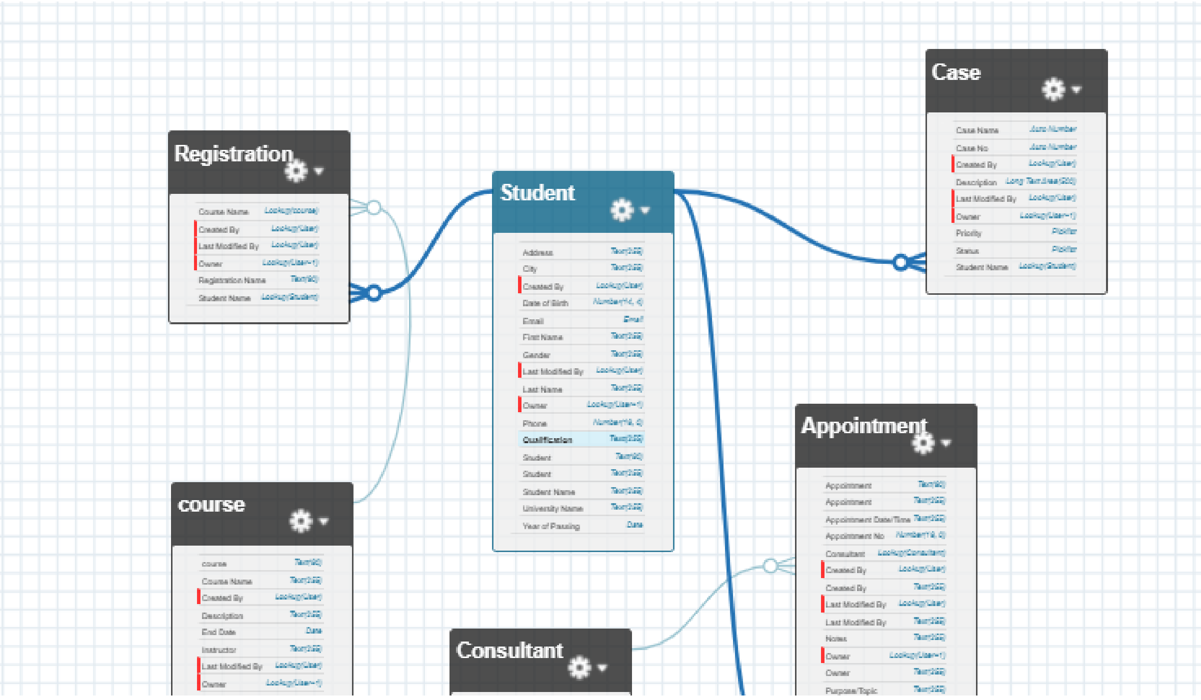


Steps to create custom object:

- **Setup → Object Manager → Create → Custom Object from Spreadsheet**
- **Upload Spreadsheet:** Browse and select your prepared file.
- **Map Fields:** Verify Salesforce mapped columns correctly.
- **Verify & Edit:**
- Go to **Fields & Relationships**.
- Check all fields, adjust data types or picklists if needed.
- **Configure Layouts & Relationships:**
- **Page Layouts:** Arrange fields into sections.
- **Lightning Record Pages:** Configure UI.
- **Relationships:** Add Lookup or Master-Detail links (e.g., Student → Course).

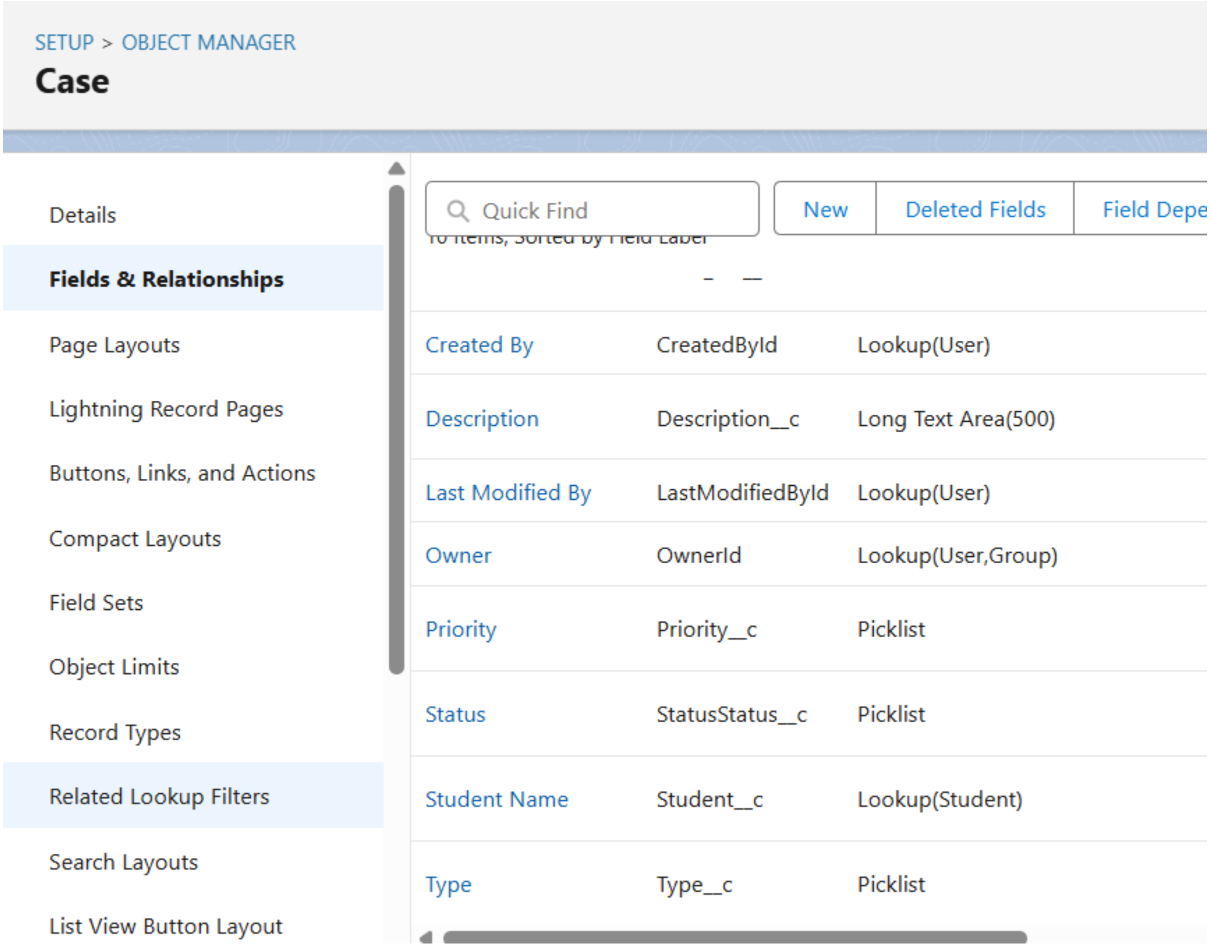
Create Relationship Among the Objects

1. Create lookup between appointment and student, appointment and consultant.
2. Create an object to store the information student and course details with the name Registration.
3. Also create a lookup between student and case to store the student queries for immigration or visa application.
4. The data model should be similar to the below Data Model with fields & relationships:



Configure The Case Object

1. Go to object manager, edit case object.
2. Select the **"Type"** field and add the values in it.
   - Immigration
   - Visa Application
3. Now Select the **"Status"** field and add the values in it.
   - Open
   - In-progress



Create A Lightning App

1. Go to **Setup**, search for the **App Manager** in quick find.
2. Click on **New Lightning App**.
3. Give app name as **"EduConsultPro"**, click Next, Next, Next.
4. Add **Home, Students, Courses, Consultants, Appointments, Registrations, and Cases** from the Available Items to Selected Items.
5. Add **"System Administrator"** profile from Available Profiles to Selected Profiles, click **Save & Finish**.

Steps to Create Record Types for Cases

Step 1: Go to Object Manager

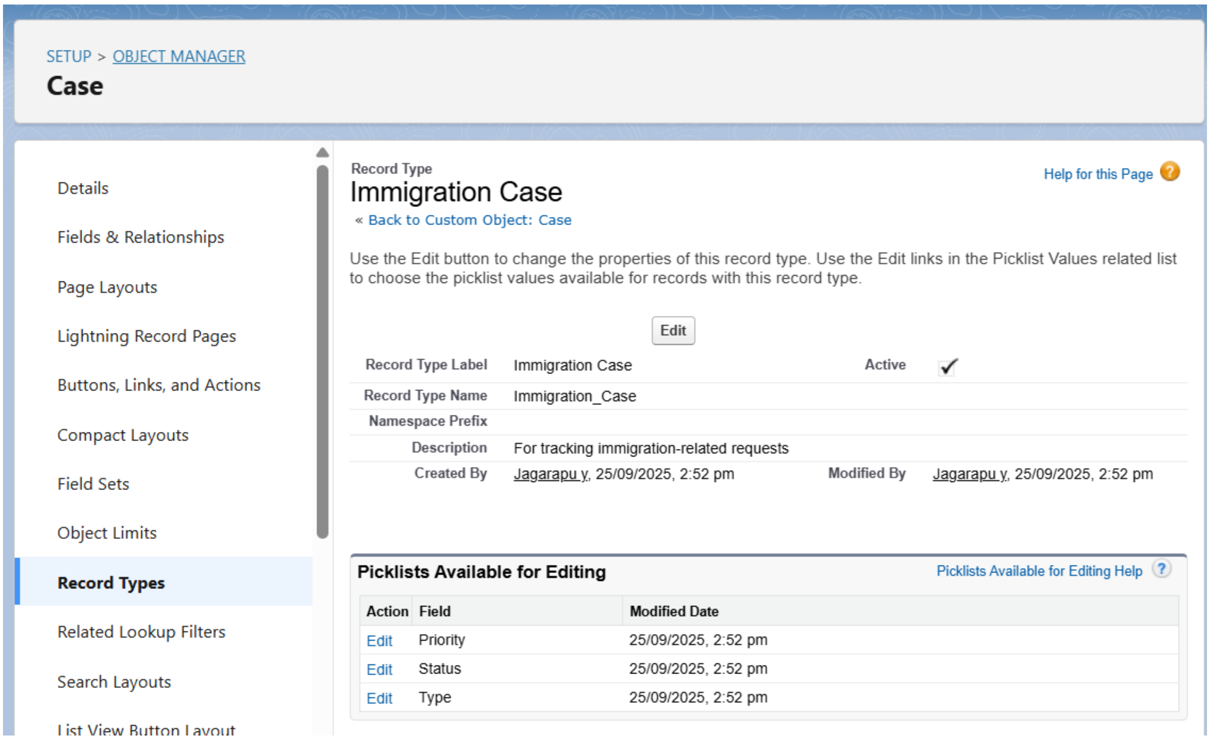
1. Go to **Setup** → **Object Manager** → **Case**.

Step 2: Create a New Record Type

1. Click **Record Types → New Record Type**.
2. Enter:
    - **Record Type Label:** Immigration Case
    - **Record Type Name (API Name):** Immigration_Case
    - **Description:** For tracking immigration-related requests
    - **Enable for Profiles:** Select **System Administrator** (you can select other profiles later)
3. Click **Next**.

Step 3: Repeat for Visa Application

1. Click **New Record Type** again.
2. Enter:
    - **Label:** Visa Application
    - **API Name:** Visa_Application
    - **Description:** For tracking student visa applications
3. Assign a page layout with fields like **Case Details, Student Lookup, Status, Visa Type (if any)**
4. Click **Save**.



Step 5: Page Layouts

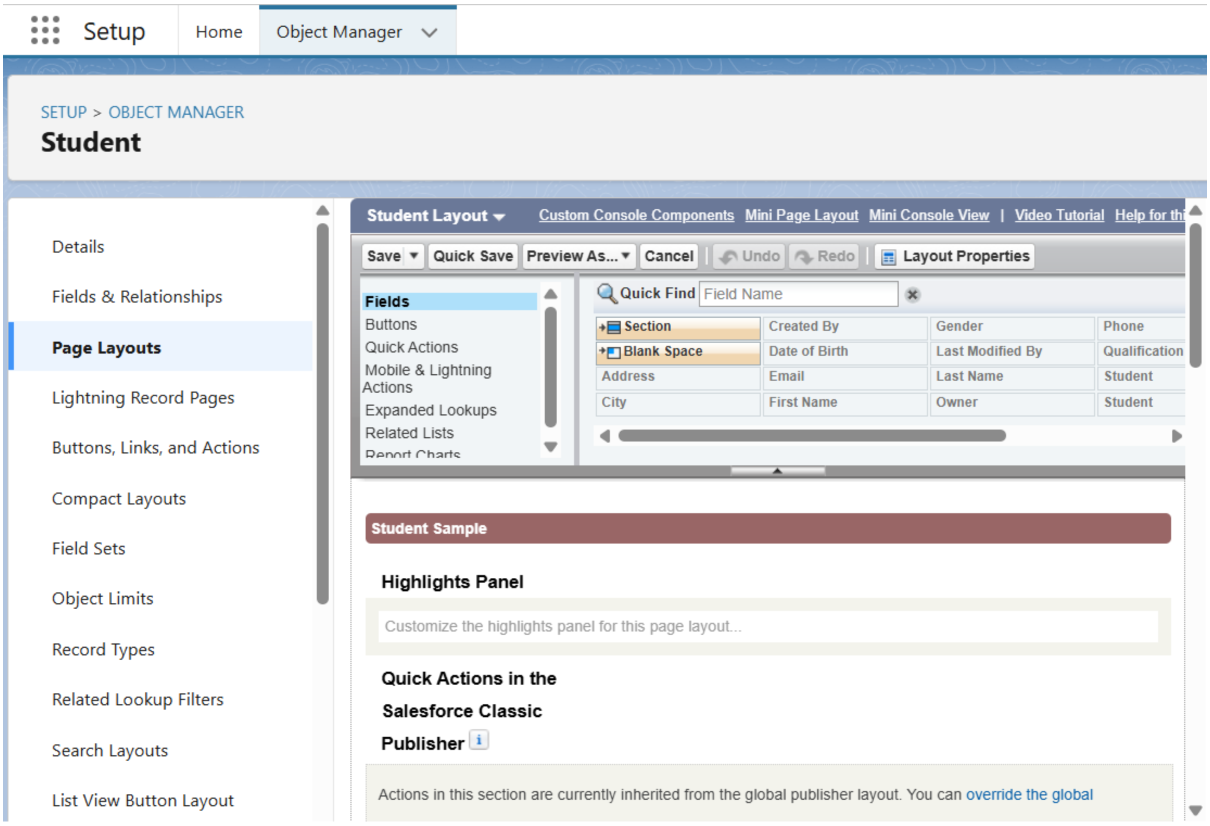
Steps to Create/Edit Page Layouts

Step 1: Go to Object Manager

1. **Setup → Object Manager → Select Object** (e.g., Student, Course, Appointment, Case).

Step 2: Open Page Layouts

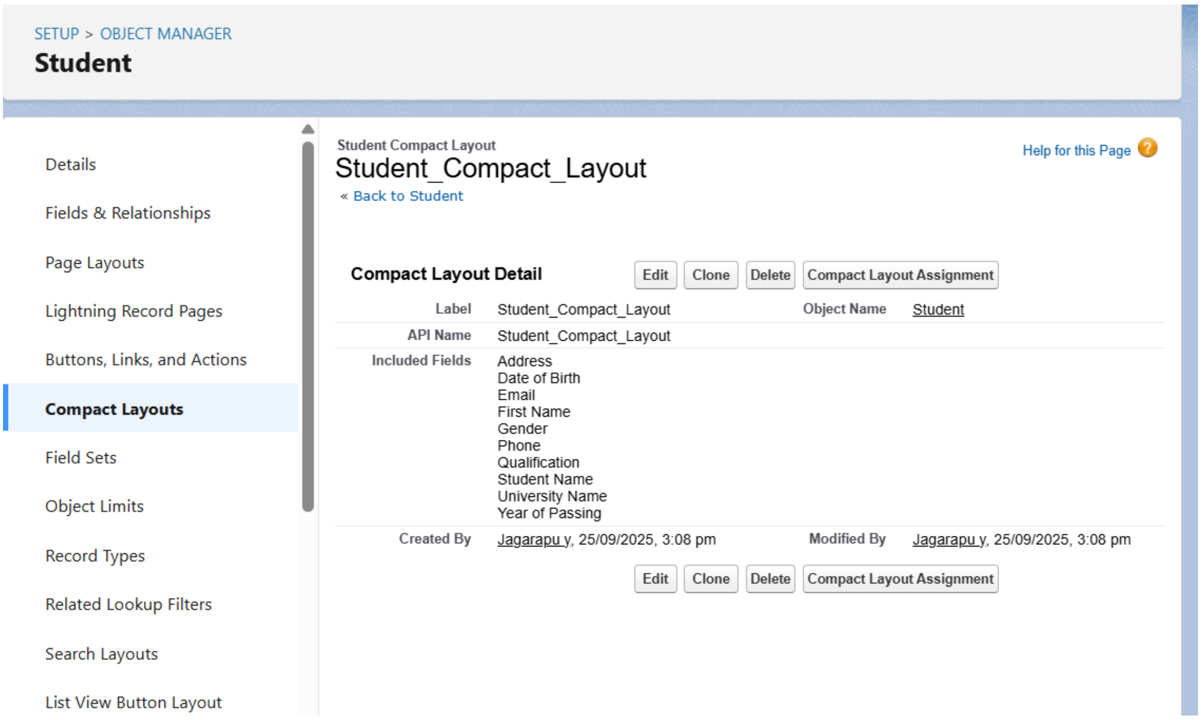
1. In the object, click **Page Layouts** in the sidebar.
2. Click **New** or select an existing layout to edit.



Step 6: Compact Layouts

Steps to Create a Compact Layout:

1. Go to **Setup** → **Object Manager** → **Student (or any object)** → **Compact Layouts**
2. Click **New**
3. Enter **Layout Name**, e.g., Student_Compact_Layout
4. Drag **key fields** to the layout:
    1. Example for Student: Name, Email, Phone, Qualification
5. Click **Save**
6. Set as **Primary** to make it the default compact layout for the object

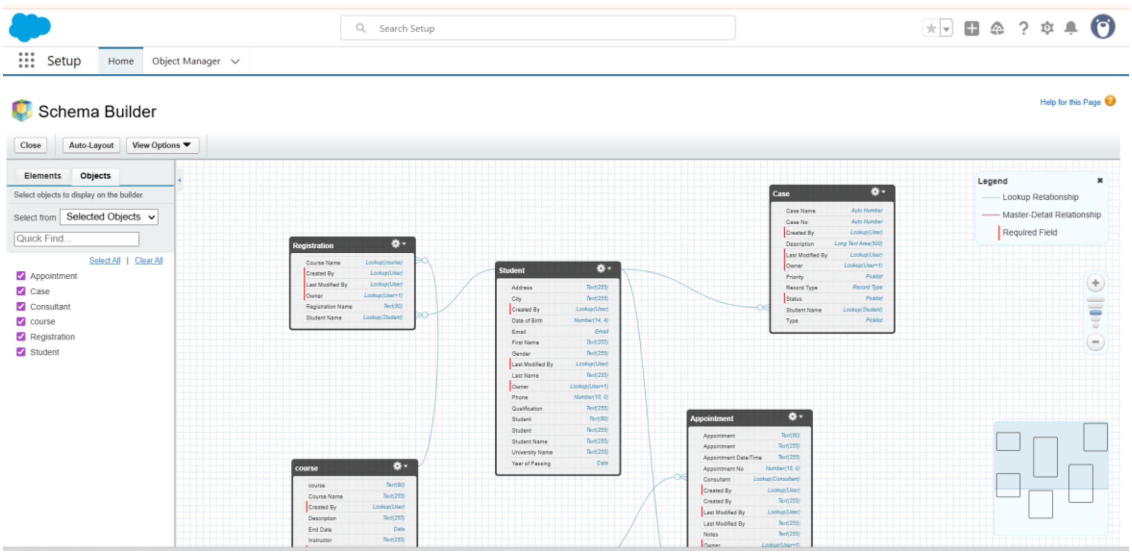
7. 

Step 7: Schema Builder

- Visual representation of objects & relationships.
- Useful to validate relationships and dependencies before development.

Steps:

1. Setup → Schema Builder
2. Drag standard/custom objects → Connect relationships
3. Save changes



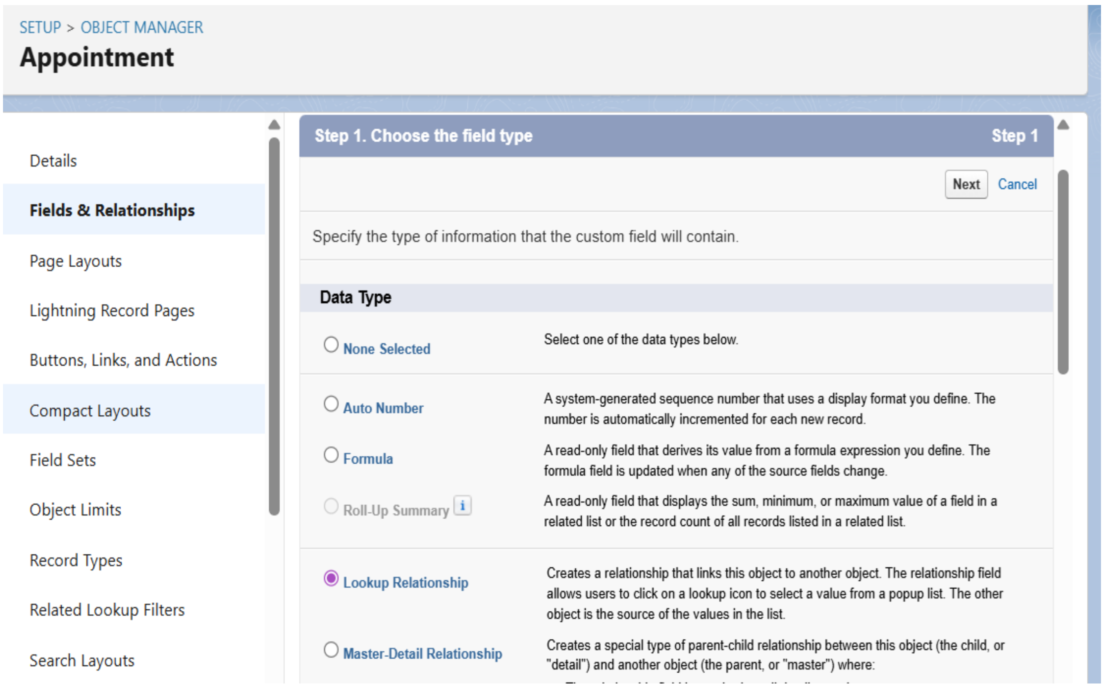
Step 8: Relationships

. Lookup Relationship

1. **Click on “Relationship” → Lookup Relationship in the left panel.**
2. **Drag from the child object to the parent object.**
   - **Example: Appointment → Student**
3. **Define the relationship name and field properties.**
4. **Save.**

B. Master-Detail Relationship

1. **Click on “Relationship” → Master-Detail Relationship.**
2. **Drag from child object to parent object.**
   - **Example: Registration → Student and Registration → Course**
3. **Define the relationship (e.g., roll-up summary fields if needed).**
4. **Save.**



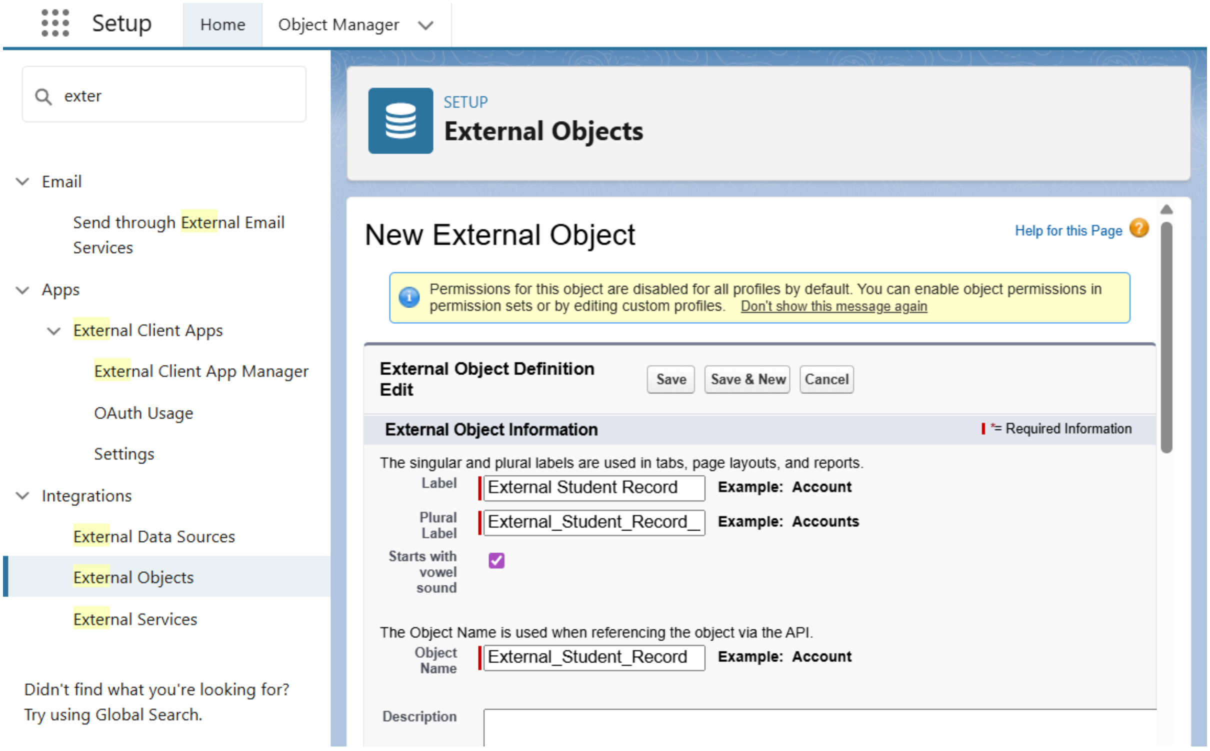
Step 9: External Objects

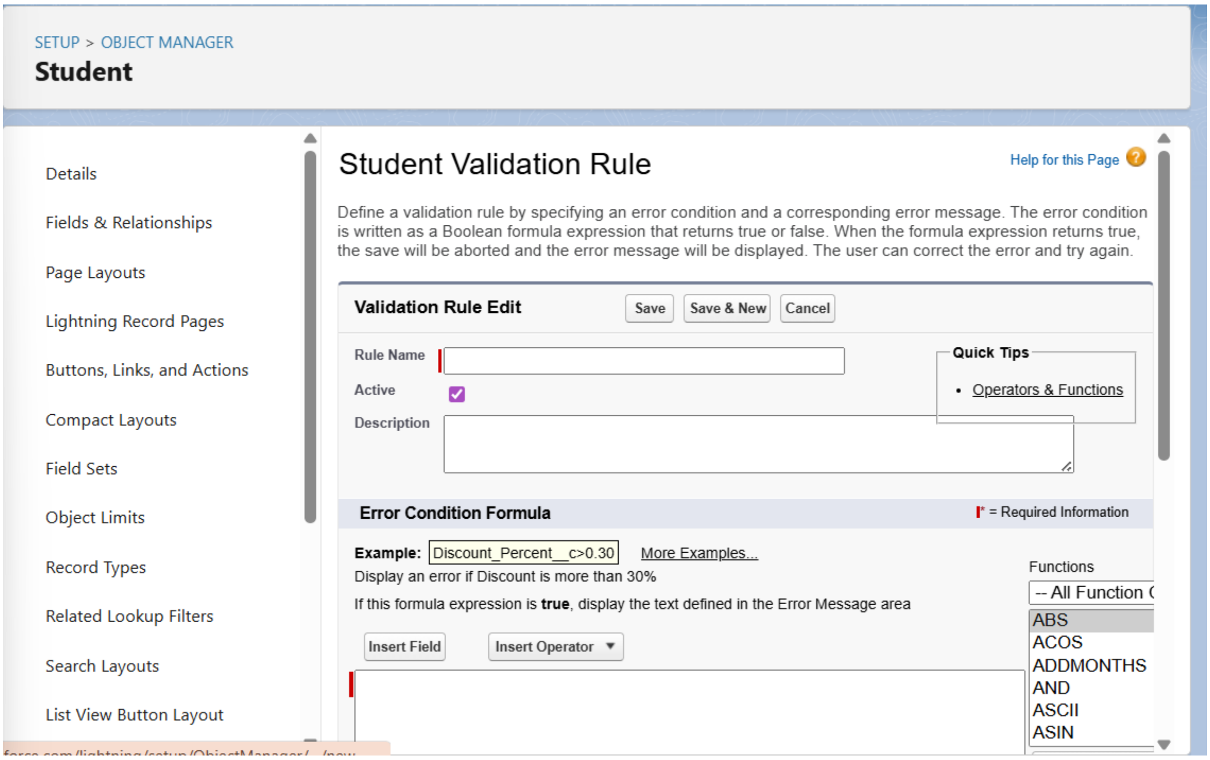
- Represent data stored outside Salesforce.

- Example: ERP student records, library database.
- Access via Salesforce Connect (OData, REST/SOAP)

Steps:

1. Setup → External Data Sources → New
2. Configure connection → Validate → Sync objects
3. Map external objects and fields




SETUP > OBJECT MANAGER
Student
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
Student Validation Rule
Help for this Page
Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.
Validation Rule Edit
Save
Save & New
Cancel
Rule Name
Active
Description
Quick Tips
Operators & Functions
Error Condition Formula
= Required Information
Example: Discount_Percent__c>0.30
More Examples...
Display an error if Discount is more than 30%
If this formula expression is true, display the text defined in the Error Message area
Insert Field
Insert Operator
Functions
-- All Function
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN