

Project Title – “Government Schemes Management System”

Phase 3: Data Modeling & Relationships

Standard & Custom Objects

- Account (Standard): Represents government offices, agencies, or organizations managing schemes.
- Contact (Standard): Stores citizens or scheme applicants.
- Scheme__c (Custom): Tracks government schemes (type, start/end dates, eligibility, budget).
- Scheme_Application__c (Custom): Stores applications submitted by citizens for schemes.
- Fund_Transaction__c (Custom): Tracks fund disbursements and receipts related to schemes.
- Grievance__c (Custom): Records complaints or feedback from citizens regarding schemes or fund transactions.

Data Flow: Account → Contact → Scheme__c -> Scheme_Application__c → Fund_Transaction__c → Grievance__c

Master-Detail & Lookup Relationships

1. Scheme_Application__c → Scheme__c
 - Relationship Type: Lookup
 - Purpose: Each application belongs to a particular scheme.
 2. Fund_Transaction__c → Scheme_Application__c
 - Relationship Type: Lookup
 - Purpose: Tracks payments/disbursements related to a specific application.
 3. Grievance__c → Scheme_Application__c
 - Relationship Type: Lookup
 - Purpose: Links complaints to the corresponding citizen application.
 4. Contact → Account
 - Relationship Type: Lookup (or optionally Master-Detail for stricter access)
 - Purpose: Each citizen belongs to a particular account/agency (for internal management).
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Fields for Custom Objects

Scheme__c

- Scheme Code (Text, 50, unique, required)
- Scheme Name (Text, 80, required)
- Description (Long Text Area)
- Start Date (Date)
- End Date (Date)
- Active (Checkbox)
- Max Amount (Currency)
- Eligibility Criteria (Long Text Area)

SETUP > OBJECT MANAGER

Scheme

Details	Fields & Relationships 12 Items, Sorted by Field Label
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	
URL Slugs	

FIELD LABEL	FIELD NAME	DATA TYPE
Active	Active__c	Checkbox
Created By	CreatedById	Lookup(User)
Description	Description__c	Long Text Area(32768)
Eligibility Criteria	Eligibility_Criteria__c	Long Text Area(32768)
End Date	End_Date__c	Date
Last Modified By	LastModifiedById	Lookup(User)
Max Amount	Max_Amount__c	Currency(16, 2)
Owner	OwnerId	Lookup(User,Group)
Record Type	RecordTypeId	Record Type
Scheme Code	Scheme_Code__c	Text(50) (Unique Case Insensitive)
Scheme Name	Name	Text(80)
Start Date	Start_Date__c	Date

Scheme_Application__c

- Application Name (Auto Number)
- Requested Amount (Currency)
- Approved Amount (Currency)
- Contact (Lookup → Contact)
- Scheme (Lookup → Scheme__c)

- Status (Picklist: Submitted, Approved, Rejected, Pending)
- Submission Date (Date)

SETUP > OBJECT MANAGER

Scheme Application

Details	Fields & Relationships 12 Items, Sorted by Field Label
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Object Access	
Triggers	
Flow Triggers	
Validation Rules	
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FIELD LABEL	FIELD NAME	DATA TYPE
Application Name	Application_Name__c	Auto Number
Approved Amount	Approved_Amount__c	Currency(16, 2)
Contact	Citizen__c	Lookup(Contact)
Created By	CreatedById	Lookup(User)
Last Modified By	LastModifiedById	Lookup(User)
Owner	OwnerId	Lookup(User,Group)
Record Type	RecordTypeId	Record Type
Requested Amount	Requested_Amount__c	Currency(16, 2)
Scheme	Scheme__c	Lookup(Scheme)
Scheme Application Name	Name	Text(80)
Status	Status__c	Picklist
Submission Date	Submission_Date__c	Date

Fund_Transaction__c

- Fund Transaction Name (Auto Number)
- Scheme Application (Lookup → Scheme_Application__c)
- Amount (Currency)
- Payment Date (Date)
- Payment Status (Picklist: Pending, Paid, Failed)

Fund Transaction

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

Fields & Relationships

9 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
Amount	Amount__c	Currency(16, 2)
Created By	CreatedById	Lookup(User)
Fund Transaction Name	Name	Auto Number
Last Modified By	LastModifiedById	Lookup(User)
Owner	OwnerId	Lookup(User,Group)
Payment Date	Payment_Date__c	Date
Payment Status	Payment_Status__c	Picklist
Record Type	RecordTypeId	Record Type
Scheme Application	Application__c	Lookup(Scheme Application)

Grievance__c

- Grievance Name (Auto Number)
- Contact (Lookup → Contact)
- Scheme Application (Lookup → Scheme_Application__c)
- Category (Picklist: Scheme Complaint, Payment Complaint, General Feedback)
- Status (Picklist: Open, In Progress, Resolved)
- Resolution Notes (Long Text Area)

Grievance

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

Fields & Relationships

10 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
Category	Category__c	Picklist
Contact	Citizen__c	Lookup(Contact)
Created By	CreatedById	Lookup(User)
Grievance Name	Name	Auto Number
Last Modified By	LastModifiedById	Lookup(User)
Owner	OwnerId	Lookup(User,Group)
Record Type	RecordTypeId	Record Type
Resolution Notes	Resolution_Notes__c	Long Text Area(32768)
Scheme Application	Application__c	Lookup(Scheme Application)
Status	Status__c	Picklist

Page Layouts

Scheme__c Layout

- Sections: Header (Scheme Code, Scheme Name), Details (Start/End Date, Description, Eligibility Criteria, Max Amount, Active)
- Related Lists: Applications, Fund Transactions, Grievances

SETUP > OBJECT MANAGER

Scheme

Details	Page Layouts	Q Quick Find
Fields & Relationships	5 Items, Sorted by Page Layout Name	
Page Layouts		
Lightning Record Pages		
Buttons, Links, and Actions		
Compact Layouts		
Field Sets		
Object Limits		
Record Types		

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Education Scheme Layout	KAPPA ACHCHITHA, 21/09/2025, 4:40 pm	KAPPA ACHCHITHA, 21/09/2025, 4:40 pm
Health Scheme Layout	KAPPA ACHCHITHA, 21/09/2025, 4:38 pm	KAPPA ACHCHITHA, 21/09/2025, 4:39 pm
Infrastructure Scheme Layout	KAPPA ACHCHITHA, 21/09/2025, 4:41 pm	KAPPA ACHCHITHA, 21/09/2025, 4:41 pm
Scheme Layout	KAPPA ACHCHITHA, 15/09/2025, 12:05 pm	KAPPA ACHCHITHA, 15/09/2025, 9:46 pm
Welfare Scheme Layout	KAPPA ACHCHITHA, 21/09/2025, 4:41 pm	KAPPA ACHCHITHA, 21/09/2025, 4:41 pm

Scheme_Application__c Layout

- Sections: Header (Application Name, Contact), Application Details (Requested/Approved Amount, Status, Submission Date)
- Related Lists: Fund Transactions, Grievances

SETUP > OBJECT MANAGER

Scheme Application

Details	Page Layouts
Fields & Relationships	5 Items, Sorted by Page Layout Name
Page Layouts	
Lightning Record Pages	
Buttons, Links, and Actions	
Compact Layouts	
Field Sets	
Object Limits	

PAGE LAYOUT NAME	CREATED BY
Education Application Layout	KAPPA ACHCHITHA, 21/09/2025, 4:25 pm
Health Application Layout	KAPPA ACHCHITHA, 21/09/2025, 4:16 pm
Infrastructure Application Layout	KAPPA ACHCHITHA, 21/09/2025, 4:26 pm
Scheme Application Layout	KAPPA ACHCHITHA, 15/09/2025, 12:50 pm

Fund_Transaction__c Layout

- Fields: Fund Transaction Name, Scheme Application, Amount, Payment Date, Payment Status

SETUP > OBJECT MANAGER

Fund Transaction

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Page Layouts

4 Items, Sorted by Page Layout Name

PAGE LAYOUT NAME	CREATED BY
Disbursement Layout	KAPPA ACHCHITHA, 21/09/2025, 4:42 pm
Fund Transaction Layout	KAPPA ACHCHITHA, 15/09/2025, 10:01 pm
Receipt Layout	KAPPA ACHCHITHA, 21/09/2025, 4:42 pm
Refund Layout	KAPPA ACHCHITHA, 21/09/2025, 4:43 pm

Grievance__c Layout

- Fields: Grievance Name, Contact, Scheme Application, Category, Status, Resolution Notes

SETUP > OBJECT MANAGER

Grievance

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Page Layouts

4 Items, Sorted by Page Layout Name

PAGE LAYOUT NAME	CREATED BY
General Feedback Layout	KAPPA ACHCHITHA, 21/09/2025, 4:44 pm
Grievance Layout	KAPPA ACHCHITHA, 15/09/2025, 11:19 pm
Payment Complaint Layout	KAPPA ACHCHITHA, 21/09/2025, 4:44 pm
Scheme Complaint Layout	KAPPA ACHCHITHA, 21/09/2025, 4:43 pm

Compact Layouts

Scheme__c

Fund Transaction

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Compact Layouts

5 Items, Sorted by Label

LABEL	API NAME
Disbursement Compact Layout	Disbursement_Compact_Layout
Fund Custom Layout	Fund_Custom_Layout
Receipt Compact Layout	Receipt_Compact_Layout
Refund Compact Layout	Refund_Compact_Layout
System Default	SYSTEM

Grievance__c

- Display Fields: Grievance Name, Category, Status

Grievance

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Compact Layouts

5 Items, Sorted by Label

LABEL	API NAME
General Feedback Compact Layout	General_Feedback_Compact_Layout
Grievance Custom Layout	Grievance_Custom_Layout
Payment Complaint Compact Layout	Payment_Complaint_Compact_Layout
Scheme Complaint Compact Layout	Scheme_Complaint_Compact_Layout
System Default	SYSTEM

Record Types

Scheme__c

- Health Scheme, Education Scheme, Welfare Scheme, Infrastructure Scheme

SETUP > OBJECT MANAGER

Scheme

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

Record Types
6 Items, Sorted by Record Type Label

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Education Scheme	Schemes related to education & scholarships	✓	KAPPA ACHCHITHA, 21/09/2025, 5:00 pm
Education Scheme1		✓	KAPPA ACHCHITHA, 21/09/2025, 7:15 pm
Health Scheme	Schemes related to health & medical services	✓	KAPPA ACHCHITHA, 21/09/2025, 5:00 pm
Health Scheme1		✓	KAPPA ACHCHITHA, 21/09/2025, 7:51 pm
Infrastructure Scheme	Infrastructure/development schemes	✓	KAPPA ACHCHITHA, 21/09/2025, 7:18 pm
Welfare Scheme	Social welfare schemes (subsidies, pensions)	✓	KAPPA ACHCHITHA, 21/09/2025, 7:16 pm

Scheme_Application__c

- Health Application, Education Application, Welfare Application, Infrastructure Application

SETUP > OBJECT MANAGER

Scheme Application

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Record Types
4 Items, Sorted by Record Type Label

RECORD TYPE LABEL	DESCRIPTION
Education Application	Application for Education schemes
Health Application	Application for Health schemes
Infrastructure Application	Application for Infrastructure schemes
Welfare Application	Application for Welfare schemes

Fund_Transaction__c

- Disbursement, Receipt, Refund

Fund Transaction

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

3 Items, Sorted by Record Type Label

RECORD TYPE LABEL	DESCRIPTION
Disbursement	Funds released to beneficiaries
Receipt	Funds received from government/donors
Refund	Refunds or returned payments

Grievance__c

- Scheme Complaint, Payment/Transaction Complaint, General Feedback

Note: Different record types allow for different page layouts, picklist values, and visibility for officers, auditors, and citizens.

Grievance

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Record Types

3 Items, Sorted by Record Type Label

RECORD TYPE LABEL	DESCRIPTION
General Feedback	Suggestions or general feedback
Payment/Transaction Complaint	Complaints about Fund Transactions
Scheme Complaint	Complaints regarding a scheme

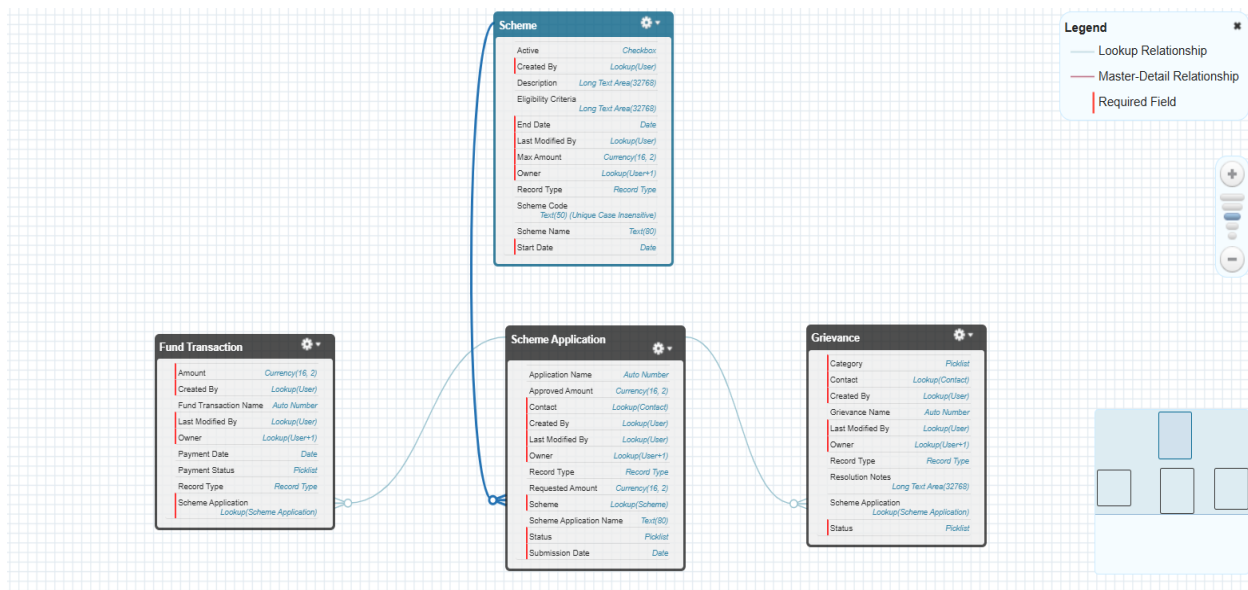
Schema Builder

- Used to visually confirm relationships: Lookup and Master-Detail between objects.
- Steps:
 1. Setup → Object Manager → Schema Builder
 2. Select Objects: Scheme, Scheme Application, Fund Transaction, Grievance, Contact, Account

3. Arrange objects to visualize data flow and relationships
4. Verify that Master-Detail and Lookup relationships are correctly displayed

Lookup vs Master-Detail vs Hierarchical Relationships

- Lookup: Optional relationship; used for linking Scheme Application → Scheme, Grievance → Scheme Application.
- Master-Detail: Enforces ownership inheritance; can be used if Scheme Application must strictly belong to Scheme.
- Hierarchical: Only available for User object; not used in this project.



Junction Objects

- Not used; no many-to-many relationships needed. Each application, transaction, or grievance links to a single scheme/application.

External Objects

- Not used; no external data sources are integrated. All data is stored within Salesforce standard/custom objects.