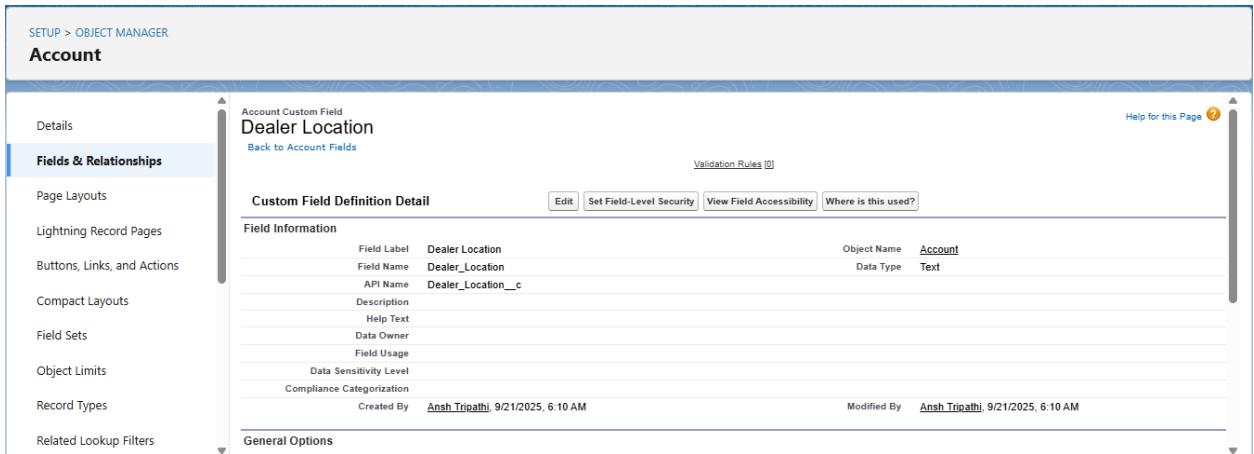


## ❖ Phase 3: Data Modeling & Relationships

### 1.1 Dealer Location (Account)

1. Setup → Object Manager → Account → Fields & Relationships → New.
2. Data Type: **Text**
3. Field Label: Dealer Location
4. Field Name: Dealer\_Location
5. Add to **Dealer Page Layout**.



SETUP > OBJECT MANAGER  
**Account**

Details  
**Fields & Relationships**  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters

Account Custom Field  
**Dealer Location**  
Back to Account Fields

Custom Field Definition Detail

Field Information		Object Name	Account
Field Label	Dealer Location	Data Type	Text
Field Name	Dealer_Location		
API Name	Dealer_Location_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Ansh Tripathi	Created By	Ansh Tripathi
	9/21/2025, 6:10 AM		9/21/2025, 6:10 AM

Validation Rules (0)  
Edit Set Field-Level Security View Field Accessibility Where is this used?

Help for this Page ?

### 1.2 Vehicle Availability Status (Vehicle)

1. Setup → Object Manager → Vehicle → Fields & Relationships → New.
2. Data Type: **Picklist**
3. Values: Available, Reserved, Sold, Out of Stock
4. Field Label: Vehicle Availability Status

## 5. Add to Vehicle Layout.

Vehicle Custom Field  
**Availability Status**

Custom Field Definition Detail

Field Information	Object Name	Vehicle	
Field Label	Availability Status	Object Name	
Field Name	Availability_Status	Data Type	Picklist
API Name	Availability_Status__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Ansh Tripathi, 9/21/2025, 5:14 AM		
Modified By	Ansh Tripathi, 9/21/2025, 5:14 AM		

General Options

### 1.3 Order Status (Order)

1. Setup → Object Manager → Order → Fields & Relationships → New.
2. Data Type: **Picklist**
3. Values: New, In Progress, Fulfilled, Cancelled
4. Field Label: Order Status
5. Add to Order Layout.

Order Custom Field  
**Order Status**

Custom Field Definition Detail

Field Information	Object Name	Order	
Field Label	Order Status	Object Name	
Field Name	Order_Status	Data Type	Picklist
API Name	Order_Status__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Ansh Tripathi, 9/21/2025, 6:18 AM		
Modified By	Ansh Tripathi, 9/21/2025, 6:18 AM		

General Options

## Step 2: Create Record Types

### 2.1 Retail Order

1. Setup → Object Manager → Order → Record Types → New.
2. Record Type Label: Retail Order

3. Apply page layout: **Customer Service Layout**.
4. Select picklist defaults for retail sales if needed.

## 2.2 Bulk Order

1. Setup → Object Manager → Order → Record Types → New.
2. Record Type Label: Bulk Order
3. Apply page layout: **Dealer Layout**.
4. Select picklist defaults for bulk orders.

## Step 3: Create Page Layouts

### 3.1 Customer Service Layout

1. Setup → Object Manager → Order → Page Layouts → New.
2. Layout Name: Customer Service Layout

3. Include sections: Customer Info, Vehicle Status, Order History
4. Assign to **Retail Order record type**.

### 3.2 Dealer Layout

1. Setup → Object Manager → Order → Page Layouts → New.
2. Layout Name: Dealer Layout
3. Include sections: Dealer Location, Bulk Orders, Stock Records
4. Assign to **Bulk Order record type**.

## Step 4: Create Compact Layouts

### 4.1 Object Manager → Vehicle → Compact Layouts → New.

1. Fields: Vehicle Model, Availability Status, Dealer
2. Set as **Primary Compact Layout**

Vehicle Compact Layout  
Primary Compact Layout  
< Back to Vehicle

Compact Layout Detail

Label	Primary Compact Layout	Object Name	Vehicle
API Name	Primary_Compact_Layout	Created By	Ansh Tripathi
Included Fields	Model, Availability Status, Dealer	Modified By	Ansh Tripathi
Created By	Ansh Tripathi, 9/23/2025, 6:30 AM	Modified	9/23/2025, 6:30 AM

### 4.2 Order Compact Layout

1. Object Manager → Order → Compact Layouts → New.
2. Fields: Order #, Order Status, Vehicle, Customer
3. Set as **Primary Compact Layout**

SETUP > OBJECT MANAGER

**Order**

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

**Compact Layouts**

Field Sets

Object Limits

Record Types

Related Lookup Filters

Order Compact Layout  
Primary Compact Layout  
« Back to Order Compact Layouts

Help for this Page

**Compact Layout Detail**

Label: Primary Compact Layout  
API Name: Primary\_Compact\_Layout

Object Name: Order

Included Fields: Order Type, Order Status, Vehicle, Customer

Created By: Ansh Tripathi, 9/23/2025, 6:33 AM

Modified By: Ansh Tripathi, 9/23/2025, 6:33 AM

Edit | Clone | Delete | Compact Layout Assignment

## Step 5: Create Relationships

### 5.1 Master-Detail Relationships

- Orders → Vehicles

- Object Manager → Order → Fields & Relationships → New
- Data Type: **Lookup (Vehicle)**

SETUP > OBJECT MANAGER

**Order**

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Vehicle

Back to Order Fields

Validation Rules (0)

**Custom Field Definition Detail**

Field Information

Field Label: Vehicle  
Field Name: Vehicle  
API Name: Vehicle\_\_c  
Object Name: Order  
Data Type: Lookup

Description  
Help Text  
Data Owner  
Field Usage  
Data Sensitivity Level  
Compliance Categorization

Created By: Ansh Tripathi, 9/23/2025, 8:26 AM

Modified By: Ansh Tripathi, 9/23/2025, 8:26 AM

Lookup Options

Type: **Lookup (Vehicle)**

- Child: Orders; Parent: Vehicle

- Stock Records → Vehicles

- Object Manager → Stock Records → Fields & Relationships → New

## 2. Data Type: Lookup (Vehicle)

The screenshot shows the Salesforce Object Manager interface for the 'Order' object. The left sidebar is titled 'Fields & Relationships' and lists various options: Details, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Order Custom Field Order' and shows the 'Custom Field Definition Detail' for the field 'Order'. The field information includes: Field Label: Order, Field Name: Order, API Name: Order\_c, Description: (empty), Help Text: (empty), Data Owner: (empty), Field Usage: (empty), Data Sensitivity Level: (empty), and Compliance Categorization: (empty). The object name is Order and the data type is Lookup. The field was created by Ansh Tripathi on 9/21/2025, 7:01 AM and modified by Ansh Tripathi on 9/23/2025, 8:23 AM. There are buttons for Edit, Set Field-Level Security, View Field Accessibility, and Where is this used?

## 5.2 Lookup Relationships

- Orders → Dealers (Accounts)

- Object Manager → Order → Fields & Relationships → New
- Data Type: **Lookup (Account)**

The screenshot shows the Salesforce Object Manager interface for the 'Order' object. The left sidebar is titled 'Fields & Relationships' and lists various options: Details, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Order Custom Field Dealer' and shows the 'Custom Field Definition Detail' for the field 'Dealer'. The field information includes: Field Label: Dealer, Field Name: Dealer, API Name: Dealer\_c, Description: (empty), Help Text: (empty), Data Owner: (empty), Field Usage: (empty), Data Sensitivity Level: (empty), and Compliance Categorization: (empty). The object name is Order and the data type is Lookup. The field was created by Ansh Tripathi on 9/21/2025, 6:20 AM and modified by Ansh Tripathi on 9/21/2025, 6:20 AM. There are buttons for Edit, Set Field-Level Security, View Field Accessibility, and Where is this used?

- Orders → Customers (Contacts)

- Object Manager → Order → Fields & Relationships → New
- Data Type: **Lookup (Contact)**

SETUP > OBJECT MANAGER

**Order**

**Customer**

Field Label: Customer  
Field Name: Customer  
API Name: Customer\_\_c

Description: Customer  
Help Text: Customer  
Data Owner: Customer  
Field Usage: Customer  
Data Sensitivity Level: Standard  
Compliance Categorization: Standard

Created By: Ansh Tripathi, 9/21/2025, 6:21 AM  
Modified By: Ansh Tripathi, 9/21/2025, 6:21 AM

### 5.3 Junction Object

- **Dealer-Vehicle Mapping**

Create Custom Object: Dealer-Vehicle Mapping

Two Master-Detail Relationships: Dealer (Account) & Vehicle

Allows many-to-many mapping between Dealers and Vehicles

SETUP > OBJECT MANAGER

**Dealer Vehicle Mapping**

**Details**

Description: Dealer Vehicle Mapping  
API Name: Dealer\_Vehicle\_Mapping\_\_c  
Custom: ✓  
Singular Label: Dealer Vehicle Mapping  
Plural Label: Dealer Vehicle Mappings

**Details**

Enable Reports: ✓  
Track Activities: ✓  
Track Field History: ✓  
Deployment Status: Deployed  
Help Settings: Standard salesforce.com Help Window

**Edit** **Delete**

SETUP > OBJECT MANAGER

## Dealer Vehicle Mapping

Details	Fields & Relationships		
Page Layouts	Currency	CurrencyIsoCode	Picklist
Lightning Record Pages	Dealer	Dealer__c	Master-Detail(Account)
Buttons, Links, and Actions	Dealer Vehicle Mapping Name	Name	Auto Number
Compact Layouts	Default Price	Default_Price__c	Currency(18, 0)
Field Sets	Is Primary	Is_Primary__c	Checkbox
Object Limits	Last Modified By	LastModifiedById	Lookup(User)
Record Types	Vehicle	Vehicle__c	Lookup(Account)
Related Lookup Filters			

## Step 6: External Object (ERP Integration)

Not included since the project does not integrate with external systems or data sources. All required data is stored within Salesforce standard/custom objects.

## Step 7: Use Schema Builder

1. Setup → Schema Builder
2. Drag objects: Orders, Vehicles, Dealers, Customers, Stock Records
3. Verify relationships:
  - Orders ↔ Vehicles (Master-Detail)
  - Orders ↔ Dealers (Lookup)
  - Orders ↔ Customers (Lookup)
  - Stock Records ↔ Vehicles (Master-Detail)

