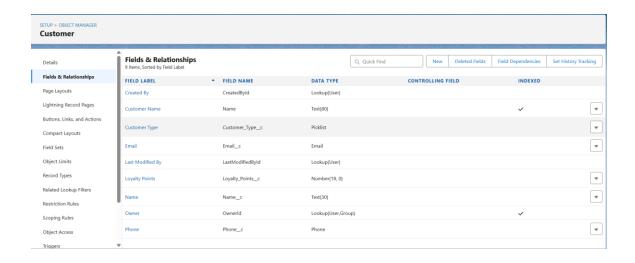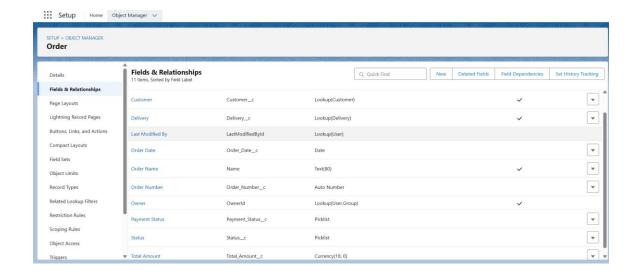# Smart E-Commerce CRM – Phase 3
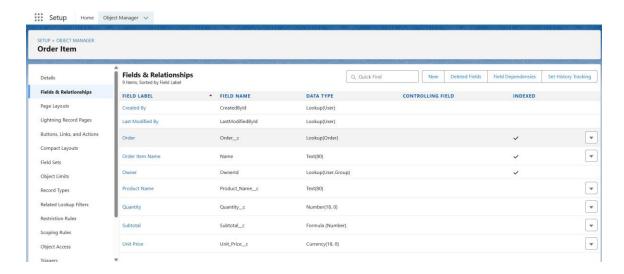
Phase 3: Data Modeling & Relationships

1. Objects and Fields

Customer__c
- Name (Auto/Formula → First + Last)
- Email__c (Email, Unique)
- Phone__c (Phone)
- Loyalty_Points__c (Number)
- Customer_Type__c (Picklist: New, Returning, VIP)

Order__c
- Order_Number__c (Auto-Number)
- Order_Date__c (Date)
- Status__c (Picklist: Placed, Packed, Shipped, Delivered, Returned, Refunded)
- Total_Amount__c (Currency)
- Payment_Status__c (Picklist: Pending, Paid, Failed, Refunded)
- Customer__c (Lookup → Customer__c)

Order_Item__c
- Product_Name__c (Text)
- Quantity__c (Number)
- Unit_Price__c (Currency)
- Subtotal__c (Formula = Quantity__c * Unit_Price__c)
- Order__c (Lookup → Order__c)

Return_Request__c
- Request_Date__c (Date)
- Reason__c (Picklist: Damaged, Wrong Item, Size Issue, Other)
- Status__c (Picklist: Pending, Approved, Rejected)
- Refund_Amount__c (Currency)
- Order__c (Lookup → Order__c)

Loyalty_Transaction__c
- Transaction_Date__c (Date)
- Points_Added__c (Number)
- Points_Used__c (Number)
- Balance__c (Formula = Points_Added__c – Points_Used__c)
- Customer__c (Lookup → Customer__c)

Customer

	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	

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	
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)			
Loyalty Points	Loyalty_Points__c	Number(18, 0)			▼
Name	Name__c	Text(30)			▼
Owner	OwnerId	Lookup(User,Group)		✓	
Phone	Phone__c	Phone			▼

Setup | Home | 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	
Restriction Rules	
Scoping Rules	
Object Access	
Triggers	

Fields & Relationships
11 Items, Sorted by Field Label

Quick Find | New | Deleted Fields | Field Dependencies | Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	INDEXED	
Customer	Customer__c	Lookup(Customer)	✓	▼
Delivery	Delivery__c	Lookup(Delivery)	✓	▼
Last Modified By	LastModifiedById	Lookup(User)		
Order Date	Order_Date__c	Date		▼
Order Name	Name	Text(80)	✓	▼
Order Number	Order_Number__c	Auto Number		▼
Owner	OwnerId	Lookup(User,Group)	✓	
Payment Status	Payment_Status__c	Picklist		▼
Status	Status__c	Picklist		▼
Total Amount	Total_Amount__c	Currency(18, 0)		▼

Setup | Home | Object Manager ▼

Order Item

	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	

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	
Created By	CreatedById	Lookup(User)			
Last Modified By	LastModifiedById	Lookup(User)			
Order	Order__c	Lookup(Order)		✓	▼
Order Item Name	Name	Text(80)		✓	▼
Owner	OwnerId	Lookup(User,Group)		✓	
Product Name	Product_Name__c	Text(80)			▼
Quantity	Quantity__c	Number(18, 0)			▼
Subtotal	Subtotal__c	Formula (Number)			▼
Unit Price	Unit_Price__c	Currency(18, 0)			▼

	Fields & Relationships				
Details	9 Items, Sorted by Field Label				
Fields & Relationships					
Page Layouts	FIELD LABEL ▲	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Lightning Record Pages	Created By	CreatedById	Lookup(User)		
Buttons, Links, and Actions	Last Modified By	LastModifiedById	Lookup(User)		
Compact Layouts	Order	Order__c	Lookup(Order)		✓
Field Sets	Owner	OwnerId	Lookup(User,Group)		✓
Object Limits	Reason	Reason__c	Picklist		
Record Types	Refund Amount	Refund_Amount__c	Currency(18, 0)		
Related Lookup Filters	Request Date	Request_Date__c	Date		
Restriction Rules	Return Request Name	Name	Auto Number		✓
Scoping Rules	Status	Status__c	Picklist		
Object Access					
Triggers					

Quick Find · New · Deleted Fields · Field Dependencies · Set History Tracking

	Fields & Relationships				
Details	9 Items, Sorted by Field Label				
Fields & Relationships					
Page Layouts	FIELD LABEL ▲	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Lightning Record Pages	Balance	Balance__c	Formula (Number)		
Buttons, Links, and Actions	Created By	CreatedById	Lookup(User)		
Compact Layouts	Customer	Customer__c	Lookup(Customer)		✓
Field Sets	Last Modified By	LastModifiedById	Lookup(User)		
Object Limits	Loyalty Point Name	Name	Text(80)		✓
Record Types	Owner	OwnerId	Lookup(User,Group)		✓
Related Lookup Filters	Points Added	Points_Added__c	Number(18, 0)		
Restriction Rules	Points Redeemed	Points_Redeemed__c	Number(18, 0)		
Scoping Rules	Transaction Date	Transaction_Date__c	Date		
Object Access					

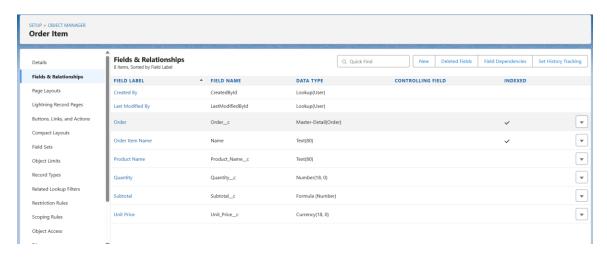Quick Find · New · Deleted Fields · Field Dependencies · Set History Tracking

2. Relationships

- Customer__c → Order__c (Lookup)
- Order__c → Order_Item__c (Master-Detail)
- Order__c → Return_Request__c (Lookup)
- Customer__c → Loyalty_Transaction__c (Lookup)

Fields & Relationships		Q Quick Find	New	Deleted Fields	Field Dependencies	Set History Tracking

Fields & Relationships
8 Items, Sorted by Field Label

FIELD LABEL ▲	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Created By	CreatedById	Lookup(User)			
Last Modified By	LastModifiedById	Lookup(User)			
Order	Order__c	Master-Detail(Order)		✓	▼
Order Item Name	Name	Text(80)		✓	▼
Product Name	Product_Name__c	Text(80)			▼
Quantity	Quantity__c	Number(18, 0)			▼
Subtotal	Subtotal__c	Formula (Number)			▼
Unit Price	Unit_Price__c	Currency(18, 0)			▼

3. Schema Visualization

Schema Example:

Customer__c → Order__c → Order_Item__c

Customer__c → Loyalty_Transaction__c

Order__c → Return_Request__c