

Phase3: Data Modeling & Relationships

◆ Standard & Custom Objects

⊕ Standard Objects Created:

- Product2 (Product Catalog)
- Pricebook2 (Price Books)
- Quote (only for your Sales Rep with Salesforce license)
- Order (downstream from Quotes)

⊕ Custom Objects created:

- Inventory__c (to track stock levels)
- Production_Order__c (for manufacturing work orders)
- Shipment__c (for shipping and delivery tracking)

The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with icons for Setup, Home, and Object Manager. A search bar contains the text 'Search Setup'. Below the navigation is a header for 'Object Manager' with tabs for 'SETUP' and 'Object Manager'. A search bar here also has the text 'inve'. To the right are buttons for 'Schema Builder' and 'Create'. The main area displays a table of objects. The table has columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. One row is visible for the object 'Inventory', which has an API name of 'Inventory__c', is a 'Custom Object', and was last modified on '19/09/2025'. The 'DEPLOYED' column shows a checked checkbox.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Inventory	Inventory__c	Custom Object		19/09/2025	✓

The screenshot shows the Salesforce Object Manager interface. At the top, there's a search bar with "Search Setup" and various navigation icons. The main title is "Object Manager" under "SETUP". A search bar at the top right contains "production". Below it are buttons for "Schema Builder" and "Create ▾". The main content area displays a table with the following data:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Production Order	Production_Order_c	Custom Object		19/09/2025	✓

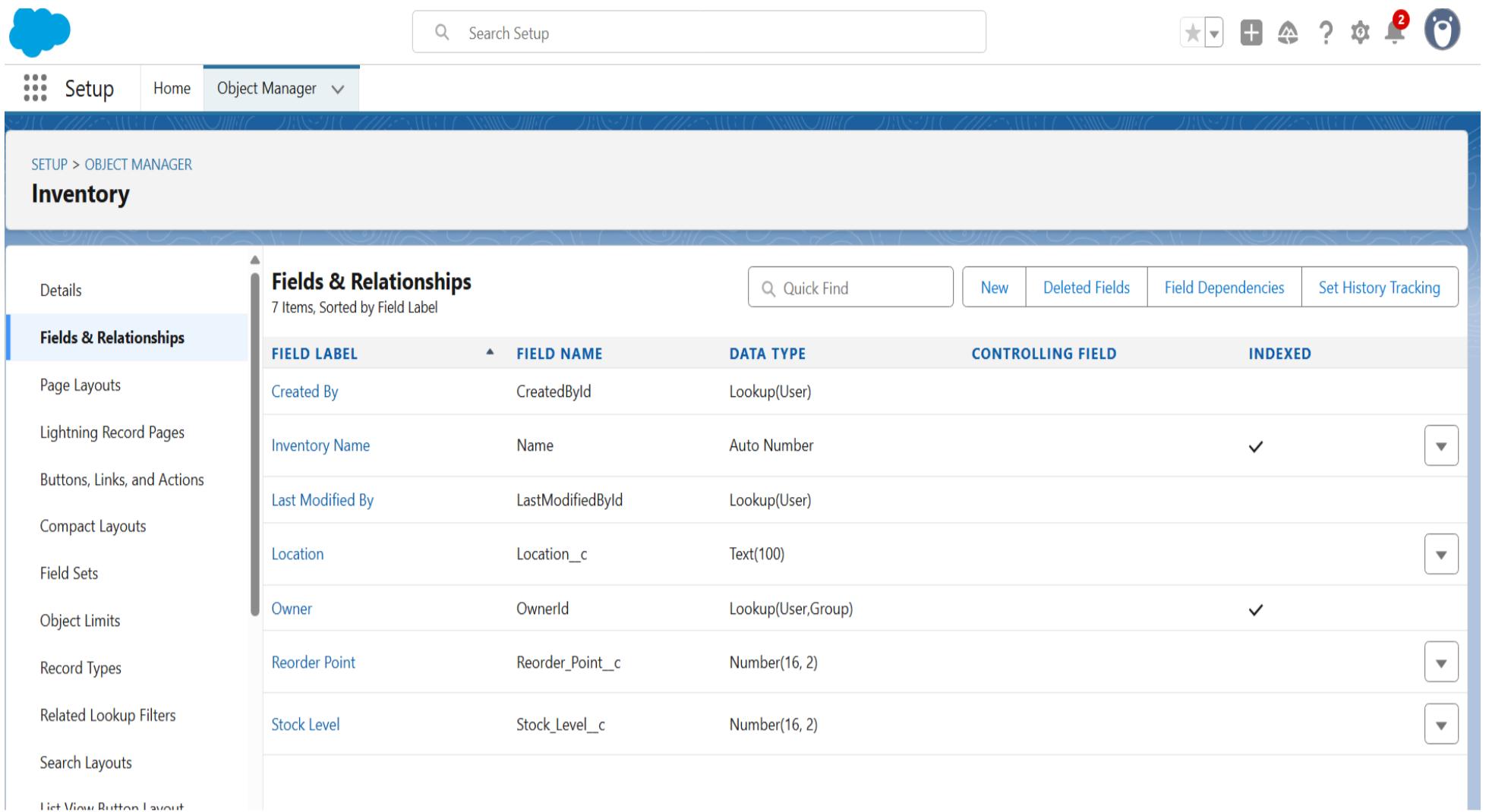
The screenshot shows the Salesforce Object Manager interface. At the top, there's a search bar with "Search Setup" and various navigation icons. The main title is "Object Manager" under "SETUP". A search bar at the top right contains "shipp". Below it are buttons for "Schema Builder" and "Create ▾". The main content area displays a table with the following data:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Shipment	Shipment_c	Custom Object		19/09/2025	✓

◆ Fields

i. Inventory

Setup → Object Manager → Inventory → Fields & Relationships

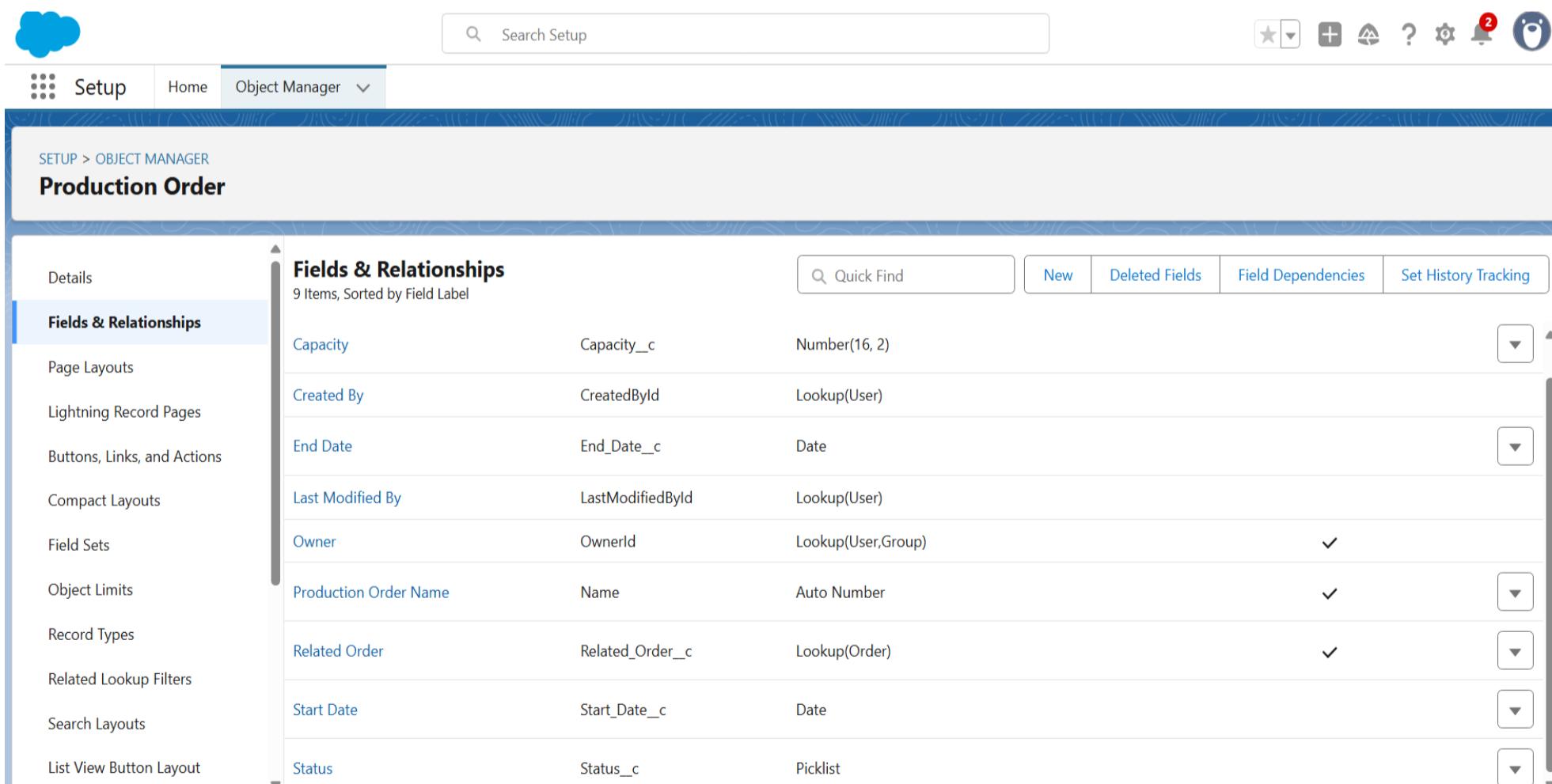


The screenshot shows the Salesforce Setup interface under the Object Manager for the 'Inventory' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main content area displays the 'Fields & Relationships' section for the Inventory object, showing 7 items sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status. Key fields shown include Created By, Inventory Name, Last Modified By, Location, Owner, Reorder Point, and Stock Level.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Inventory Name	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Location	Location_c	Text(100)		▼
Owner	OwnerId	Lookup(User,Group)		✓
Reorder Point	Reorder_Point_c	Number(16, 2)		▼
Stock Level	Stock_Level_c	Number(16, 2)		▼

ii. Production Order

Setup → Object Manager → Production Order → Fields & Relationships



The screenshot shows the Salesforce Setup interface under the Object Manager for the 'Production Order' object. The left sidebar lists various setup options. The main content area displays the 'Fields & Relationships' section for the Production Order object, showing 9 items sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status. Key fields shown include Capacity, Created By, End Date, Last Modified By, Owner, Production Order Name, Related Order, Start Date, and Status.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Capacity	Capacity_c	Number(16, 2)		▼
Created By	CreatedById	Lookup(User)		
End Date	End_Date_c	Date		▼
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Production Order Name	Name	Auto Number		✓
Related Order	Related_Order_c	Lookup(Order)		✓
Start Date	Start_Date_c	Date		▼
Status	Status_c	Picklist		▼

iii. Shipment

Setup → Object Manager → Shipment → Fields & Relationships

Setup | Home | Object Manager

SETUP > OBJECT MANAGER

Shipment

Details

Fields & Relationships

9 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Carrier	Carrier_c	Text(50)		
Created By	CreatedById	Lookup(User)		
Estimated Delivery	Estimated_Delivery_c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Order	Related_Order_c	Lookup(Order)	✓	
Owner	OwnerId	Lookup(User,Group)	✓	
Shipment Name	Name	Auto Number	✓	
Status	Status_c	Picklist		
Tracking Number	Tracking_Number_c	Text(100)		

◆ Page Layouts

Define what fields appear where on the record detail page.

- Inventory Layout → show Stock Level + Reorder Point at top.
- Production Order Layout → show Status + Scheduled Date + Related Order.
- Shipment Layout → show Tracking Number + Carrier + Status.

I. Inventory Layout →

Setup Home Object Manager

SETUP > OBJECT MANAGER
Inventory

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

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

Section	Last Modified By	Stock Level
+ Section		
+ Blank Space	Location	
Created By	Owner	
Inventory Name	Reorder Point	

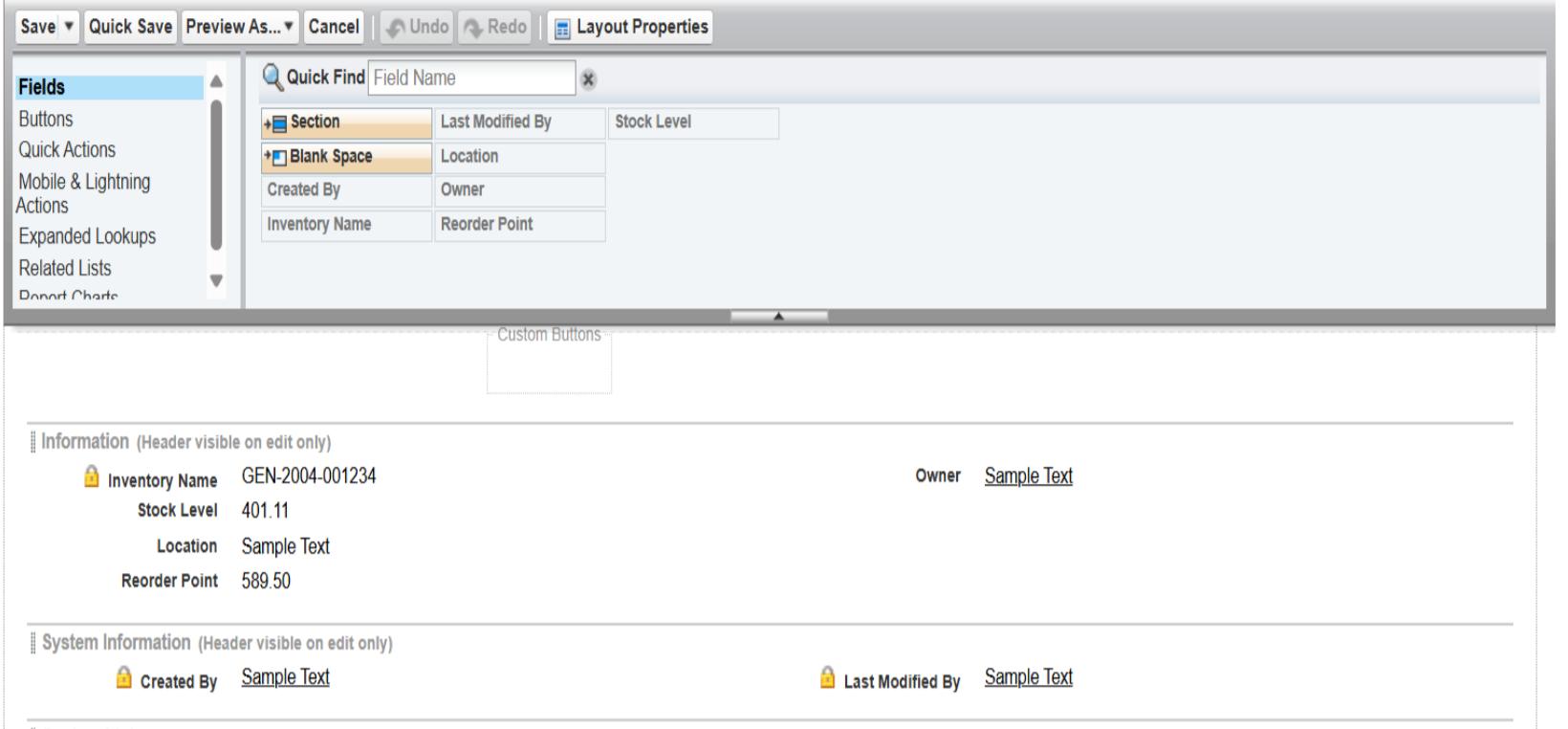
Quick Find Field Name

Information (Header visible on edit only)

Inventory Name	GEN-2004-001234	Owner	Sample Text
Stock Level	401.11		
Location	Sample Text		
Reorder Point	589.50		

System Information (Header visible on edit only)

Created By	Sample Text	Last Modified By	Sample Text
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II. Production Order Layout→

Setup Home Object Manager

SETUP > OBJECT MANAGER
Production Order

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

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

Section	End Date	Related Order
+ Section		
+ Blank Space	Last Modified By	Start Date
Capacity	Owner	Status
Created By	Production Order ...	

Production Order Detail

Standard Buttons: Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Sharing, Sharing Hierarchy, Edit Labels

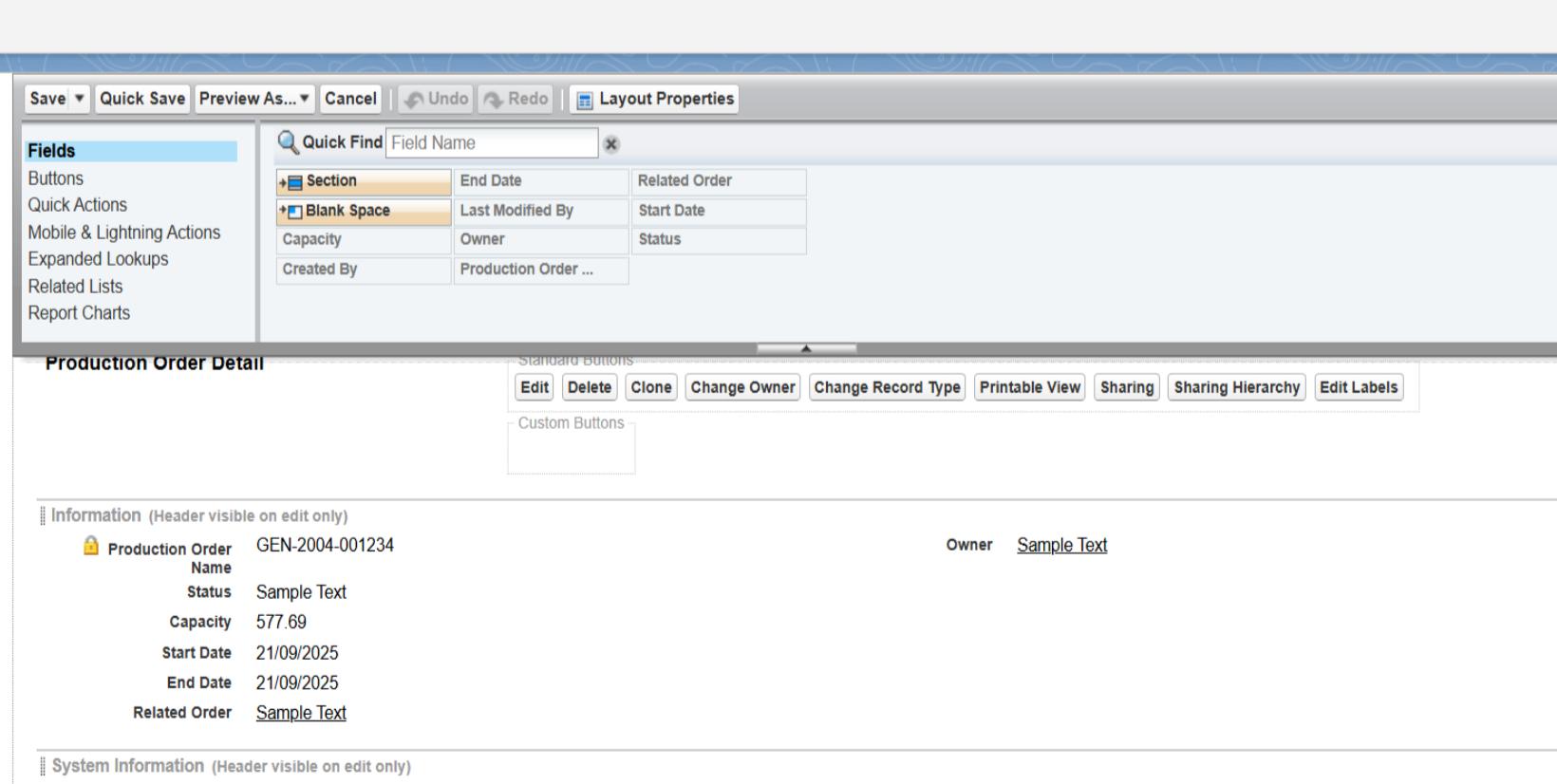
Custom Buttons

Information (Header visible on edit only)

Production Order Name	GEN-2004-001234	Owner	Sample Text
Status	Sample Text		
Capacity	577.69		
Start Date	21/09/2025		
End Date	21/09/2025		
Related Order	Sample Text		

System Information (Header visible on edit only)

Created By	Sample Text	Last Modified By	Sample Text
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III. Shipment Layout →

The screenshot shows the Salesforce Setup interface for managing object layouts. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'Shipment'. On the left, a sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts (which is selected and highlighted in blue), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area displays the 'Shipment Detail' page layout. It features a 'Fields' section with a 'Quick Find' search bar and a table showing field mappings. The table includes columns for 'Section' (e.g., Section, Blank Space), 'Field Name' (e.g., Estimated Delivery, Shipment Name, Last Modified By, Status, Carrier, Order, Created By, Owner), and 'Tracking Number'. Below this is a 'Standard Buttons' section with buttons for Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Sharing, Sharing Hierarchy, and Edit Labels. A 'Custom Buttons' section is also present. The layout is divided into sections: 'Information' (Header visible on edit only) and 'System Information' (Header visible on edit only). The 'Information' section contains fields for Shipment Name (GEN-2004-001234), Carrier (Sample Text), Tracking Number (Sample Text), Status (Sample Text), Estimated Delivery (21/09/2025), and Order (Sample Text). The 'System Information' section contains fields for Created By (Sample Text), Last Modified By (Sample Text), and Owner (Sample Text).

◆ Compact Layouts

- Inventory: Name, Stock Level, Location
- Shipment: Tracking Number, Carrier, Tracking Status, Related Order
- Production Order: Name, Status, Scheduled Date, Related Order

SETUP > OBJECT MANAGER

Inventory

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

Inventory Compact Layout
Inventory Highlights[« Back to Inventory](#)[Edit](#) [Clone](#) [Delete](#) [Compact Layout Assignment](#)Object Name [Inventory](#)Label **Inventory Highlights**API Name **Inventory_Highlights**

Included Fields
 Inventory Name
 Owner
 Stock Level
 Location
 Reorder Point
 Created By
 Last Modified By

Created By [Gauri Shirke](#), 21/09/2025, 12:47 pmModified By [Gauri Shirke](#), 21/09/2025, 12:47 pm[Edit](#) [Clone](#) [Delete](#) [Compact Layout Assignment](#)[Help for this Page](#)

SETUP > OBJECT MANAGER

Shipment

- 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

Shipment Compact Layout
Shipment Highlights[« Back to Shipment](#)[Edit](#) [Clone](#) [Delete](#) [Compact Layout Assignment](#)Object Name [Shipment](#)Label **Shipment Highlights**API Name **Shipment_Highlights**

Included Fields
 Shipment Name
 Owner
 Order
 Tracking Number
 Status
 Carrier
 Estimated Delivery
 Created By
 Last Modified By

Created By [Gauri Shirke](#), 21/09/2025, 12:53 pmModified By [Gauri Shirke](#), 21/09/2025, 12:53 pm[Edit](#) [Clone](#) [Delete](#) [Compact Layout Assignment](#)[Help for this Page](#)

SETUP > OBJECT MANAGER

Production Order

Production Order Compact Layout
Production Order Highlights
« Back to Production Order

Compact Layout Detail

	Label	Production Order Highlights	Object Name	Production Order
	API Name	Production_Order_Highlights		
	Included Fields	Production Order Name Owner Status Related Order Capacity Start Date End Date Created By Last Modified By		
Created By	Gauri Shirke, 21/09/2025, 12:55 pm		Modified By	Gauri Shirke, 21/09/2025, 12:55 pm

Compact Layout Assignment

SETUP > OBJECT MANAGER

Quote

Quote Compact Layout
Quote Compact Layout
« Back to Quote

Compact Layout Detail

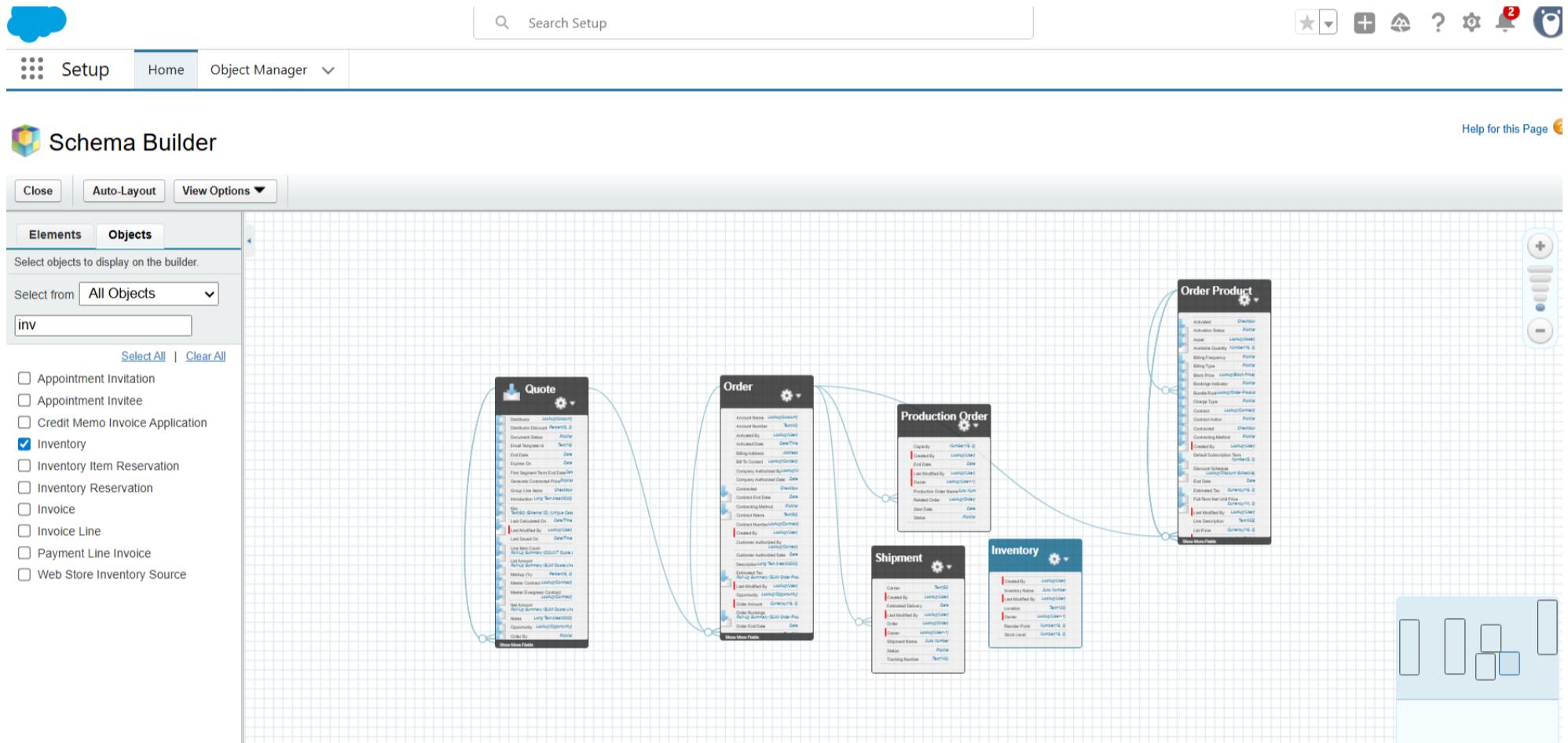
	Label	Quote Compact Layout	Object Name	Quote
	API Name	Quote_Compact_Layout		
	Included Fields	Quote Number Account Status Total Customer Disc. Amount Expires On		
Created By	Gauri Shirke, 21/09/2025, 2:50 pm		Modified By	Gauri Shirke, 21/09/2025, 2:50 pm

Compact Layout Assignment

◆ Schema Builders

- Quote → Order (Standard Lookup/Master Detail)
Quotes are converted to Orders.
- Order → Production_Order_c (Custom Lookup)
We built Related_Order_c on Production Order to link it.

- Production_Order_c → Shipment_c (Custom Master-Detail or Lookup)
Shipments linked to Production Orders.
- Order → Order Products (OrderItem)
Standard child object that lists all products in an order.
- OrderItem → Inventory_c (Custom Lookup)
created a lookup from QuoteLine



◆ Lookup vs Master-Detail vs Hierarchical Relationships

- Lookup: Flexible relationship (e.g., Quote Line → Inventory).
- Master-Detail: Tight relationship, child record depends on parent (e.g., Shipment → Order).
- Hierarchical: Special type for User object only (not used here).

◆ Junction Objects

- 1 Product can require multiple Components (Inventory).
- 1 Inventory item (Component) can be used in multiple Products.

- Create a junction object: Product_Component__c.
- Now → Product ↔ Product Component ↔ Inventory forms a many-to-many link.

◆ External Objects