Project Title: Smart Pharmacy Inventory Tracker
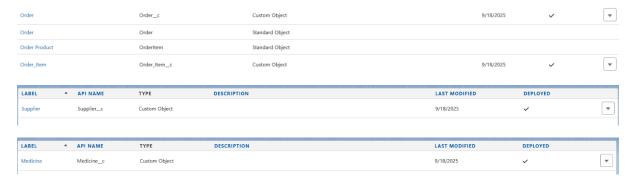
Phase 3: Data Modeling & Relationships

Standard & Custom Objects:
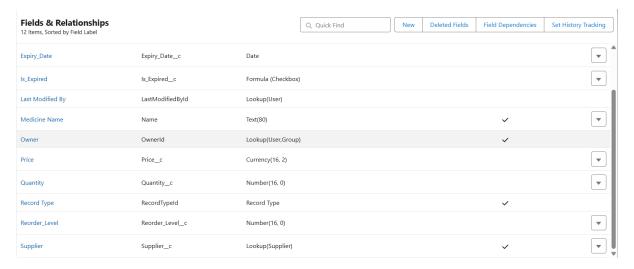
1.Go to Setup → Object Manager.

2.Review standard objects (like Accounts, Contacts).

- Contacts can represent pharmacy customers/patients.

- Users will represent pharmacists, managers, suppliers.

3.Create custom objects for the pharmacy system:

- **Medicine__c** (tracks medicines in stock).

- **Supplier__c** (stores supplier details).

- **Order__c** (represents purchase/sales orders).

- **Order_Item__c** (junction object to link Orders and Medicines).

Order	Order__c	Custom Object		9/18/2025	✓	▼
Order	Order	Standard Object				
Order Product	OrderItem	Standard Object				
Order_Item	Order_Item__c	Custom Object		9/18/2025	✓	▼

LABEL ▲	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED	
Supplier	Supplier__c	Custom Object		9/18/2025	✓	▼

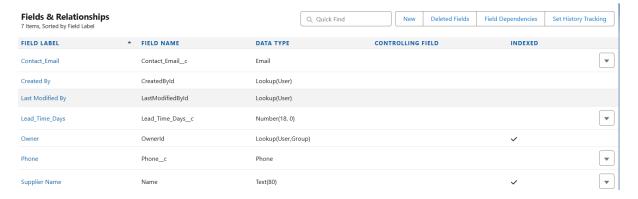| LABEL ▲	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED	
Medicine	Medicine__c	Custom Object		9/18/2025	✓	▼

Fields:

1.**Medicine__c:**

- Quantity__c (Number)

- Reorder_Level__c (Number)

- Expiry_Date__c (Date)

- Price__c (Currency)

- Category__c (Picklist: OTC, Prescription, Supplement, Other)

- Supplier__c (Lookup → Supplier)
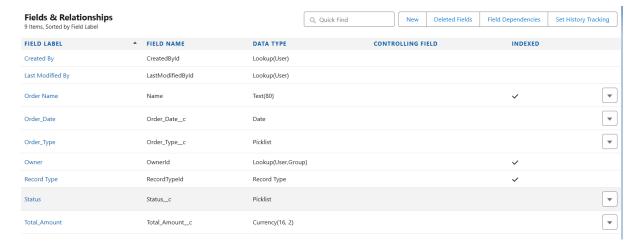
- Is_Expired__c (Formula: Expiry_Date__c < TODAY())

Fields & Relationships
12 Items, Sorted by Field Label

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

Expiry_Date	Expiry_Date__c	Date		▼
Is_Expired	Is_Expired__c	Formula (Checkbox)		▼
Last Modified By	LastModifiedById	Lookup(User)		
Medicine Name	Name	Text(80)	✓	▼
Owner	OwnerId	Lookup(User,Group)	✓	
Price	Price__c	Currency(16, 2)		▼
Quantity	Quantity__c	Number(16, 0)		▼
Record Type	RecordTypeId	Record Type	✓	
Reorder_Level	Reorder_Level__c	Number(16, 0)		▼
Supplier	Supplier__c	Lookup(Supplier)	✓	▼

2.Supplier__c:

- Contact_Email__c (Email)

- Phone__c (Phone)

- Lead_Time_Days__c (Number)

Fields & Relationships
7 Items, Sorted by Field Label

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

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Contact_Email	Contact_Email__c	Email			▼
Created By	CreatedById	Lookup(User)			
Last Modified By	LastModifiedById	Lookup(User)			
Lead_Time_Days	Lead_Time_Days__c	Number(18, 0)			▼
Owner	OwnerId	Lookup(User,Group)		✓	
Phone	Phone__c	Phone			▼
Supplier Name	Name	Text(80)		✓	▼

3.Order__c:

- Order_Date__c (Date)

- Order_Type__c (Picklist: Purchase, Sale)

- Status__c (Picklist: Draft, Placed, Received, Cancelled)

- Total_Amount__c (Currency)

Fields & Relationships
9 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 Name	Name	Text(80)		✓	▼
Order_Date	Order_Date__c	Date			▼
Order_Type	Order_Type__c	Picklist			▼
Owner	OwnerId	Lookup(User,Group)		✓	
Record Type	RecordTypeId	Record Type		✓	
Status	Status__c	Picklist			▼
Total_Amount	Total_Amount__c	Currency(16, 2)			▼

4. **Order_Item__c (junction):**

- Order__c (Master-Detail → Order)
- Medicine__c (Master-Detail → Medicine)
- Quantity__c (Number)
- Unit_Price__c (Currency)
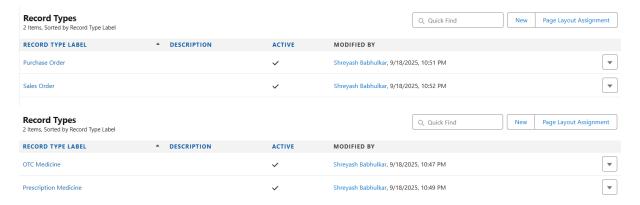- Line_Total__c (Formula: Quantity * Unit_Price)

Record Types:

1. Go to Setup → Object Manager → Medicine → Record Types → New.

2. Create:

- OTC Medicine.
- Prescription Medicine.

3. For Orders:

- Purchase Order.
- Sales Order.

Record Types
2 Items, Sorted by Record Type Label

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY	
Purchase Order		✓	Shreyash Babhulkar, 9/18/2025, 10:51 PM	▼
Sales Order		✓	Shreyash Babhulkar, 9/18/2025, 10:52 PM	▼

Record Types
2 Items, Sorted by Record Type Label

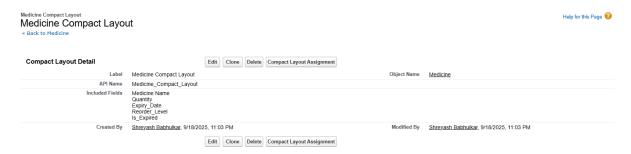| RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY	
OTC Medicine		✓	Shreyash Babhulkar, 9/18/2025, 10:47 PM	▼
Prescription Medicine		✓	Shreyash Babhulkar, 9/18/2025, 10:49 PM	▼

Page Layouts:

1.Go to Medicine → Page Layouts → New.

- Create Medicine_Pharmacist_Layout (basic info: name, expiry, quantity).

- Create Medicine_Manager_Layout (includes supplier, category, price).2. Assign layouts by profile.
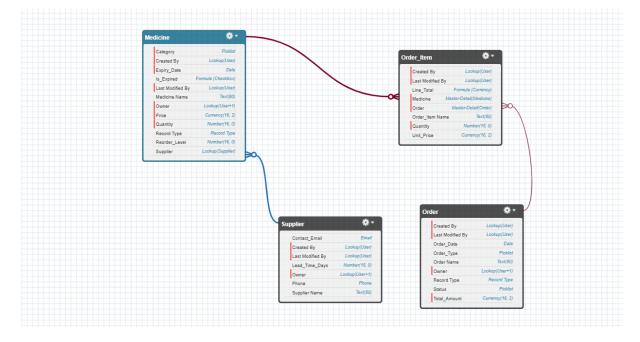

Compact Layouts:

1.Go to Medicine → Compact Layouts → New.

2.Add: Name, Expiry Date, Quantity, Reorder Level, Is Expired.

3.Set as primary.

Schema Builder:

1.Go to Setup → Schema Builder.

2.Select: Medicine, Supplier, Order, Order Item.

3.Arrange and view relationships.

Lookup vs Master-Detail Relationships:

- Medicine → Supplier = Lookup (medicine can exist without supplier).
- Order Item → Order = Master-Detail.
- Order Item → Medicine = Master-Detail.
- Hierarchical: Not used (only for Users).

Validation & Formula Fields:

1.Medicine → New → Formula(Boolean).

- Field: Is_Expired__c = Expiry_Date__c < TODAY().

2.Formula(Text).

- Field: Stock_Status__c = IF(Quantity__c <= Reorder_Level__c, "Low", "OK").

Stock_Status
Back to Medicine

Custom Field Definition Detail   Edit   Set Field-Level Security   View Field Accessibility   Where is this used?

Field Information

Field Label	Stock_Status	Object Name	Medicine
Field Name	Stock_Status		
API Name	Stock_Status__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Shreyash Babhulkar, 9/21/2025, 6:39 AM	Modified By	Shreyash Babhulkar, 9/21/2025, 6:39 AM

Formula Options

Data Type	Formula

IF(Quantity__c <= Reorder_Level__c, "Low", "OK")

Is_Expired
Back to Medicine

Custom Field Definition Detail   Edit   Set Field-Level Security   View Field Accessibility   Where is this used?

Field Information

Field Label	Is_Expired	Object Name	Medicine
Field Name	Is_Expired		
API Name	Is_Expired__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Shreyash Babhulkar, 9/18/2025, 9:39 PM	Modified By	Shreyash Babhulkar, 9/18/2025, 9:39 PM

Formula Options

Data Type	Formula

Expiry_Date__c < TODAY()