

# 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			<input type="text" value="Quick Find"/> <a href="#">New</a> <a href="#">Deleted Fields</a> <a href="#">Field Dependencies</a> <a href="#">Set History Tracking</a>			
12 Items, Sorted by Field Label						
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			<input type="text" value="Quick Find"/> <a href="#">New</a> <a href="#">Deleted Fields</a> <a href="#">Field Dependencies</a> <a href="#">Set History Tracking</a>			
7 Items, Sorted by Field Label						
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

Q 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 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

Q Quick Find

New

Page Layout Assignment

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

Q Quick Find

New

Page Layout Assignment

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.

Medicine Detail

Standard Buttons

EditDeleteCloneChange OwnerChange Record TypePrintable ViewSharingSharing HierarchyEdit Labels

Custom Buttons

Information (Header visible on edit only)

★● Medicine Name

Sample Text

★● Quantity

32,426

★● Reorder\_Level

36,029

★● Expiry\_Date

9/21/2025

★● Price

₹123.45

★● Category

Sample Text

★● Supplier

Sample Text

🔒 Is Expired

✓

Owner

Sample Text

Medicine Detail

Standard Buttons

EditDeleteCloneChange OwnerChange Record TypePrintable ViewSharingSharing HierarchyEdit Labels

Custom Buttons

Fields (Header not visible)

★● Medicine Name

Sample Text

★● Quantity

57,687

★● Expiry\_Date

9/21/2025

★● Price

₹123.45

★● Supplier

Sample Text

★● Category

Sample Text

Custom Links (Header visible on detail only)

Compact Layouts:

1.Go to Medicine → Compact Layouts → New.

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

3.Set as primary.

Medicine Compact Layout

Medicine Compact Layout

Help for this Page

← Back to Medicine

Compact Layout Detail

EditCloneDeleteCompact Layout Assignment

Label

Medicine Compact Layout

API Name

Medicine\_Compact\_Layout

Included Fields

Medicine Name  
Quantity  
Expiry\_Date  
Reorder\_Level  
Is\_Expired

Object Name

Medicine

Created By

Shreyash Babhulkar 9/18/2025, 11:03 PM

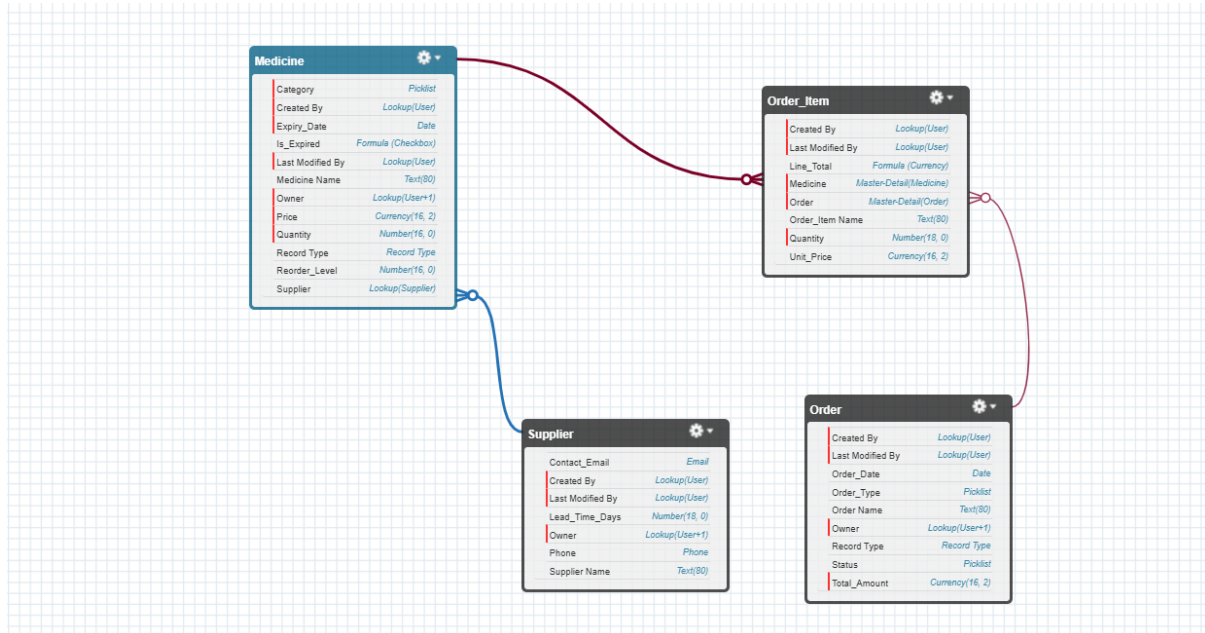
Modified By

Shreyash Babhulkar 9/18/2025, 11:03 PM

EditCloneDeleteCompact Layout Assignment

## 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").