CG Sales & Service : Salesforce Implementation for Retail & Supply Chain Optimization

Phase 3: Data Modeling & Relationships

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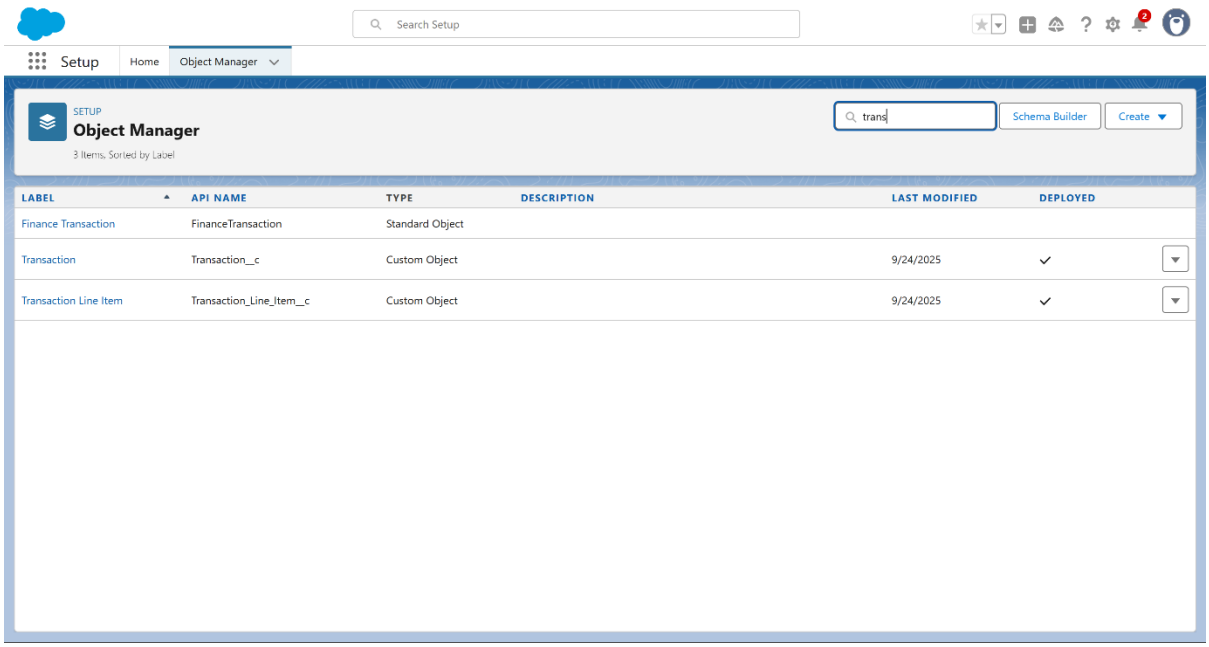
1. Standard & Custom Objects

- **Standard Objects:** Used default Salesforce objects such as **Account**, **Contact**, and **Product** to store customer and product details.
- **Custom Objects:**
    - **Service_Request__c** – Captures customer service requests (e.g., maintenance, repair).
    - **Transaction__c** – Represents a customer's purchase or service billing record.
    - **Transaction_Line_Item__c** – Stores line-level details for each transaction (e.g., product/service, quantity, amount).



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2. Fields

In my project, I created different fields across the custom objects to capture essential details.

For the Service_Request__c object, I created fields like Service_Request_ID (Auto Number), Amount, Transaction Date, Phone, Address, and Account (Lookup) to record customer details, service costs, and link the request with the related account.

Service_Request__c

- **Service_Request_ID__c** (Auto Number)
- **Amount__c** (Currency)
- **Transaction_Date__c** (Date)

- **Phone__c** (Phone)
- **Address__c** (Text Area)
- **Account__c** (Lookup → Account)

For the Transaction__c object, I created Transaction_ID (Auto Number) and Account (Lookup) to uniquely identify each transaction and connect it with the customer.

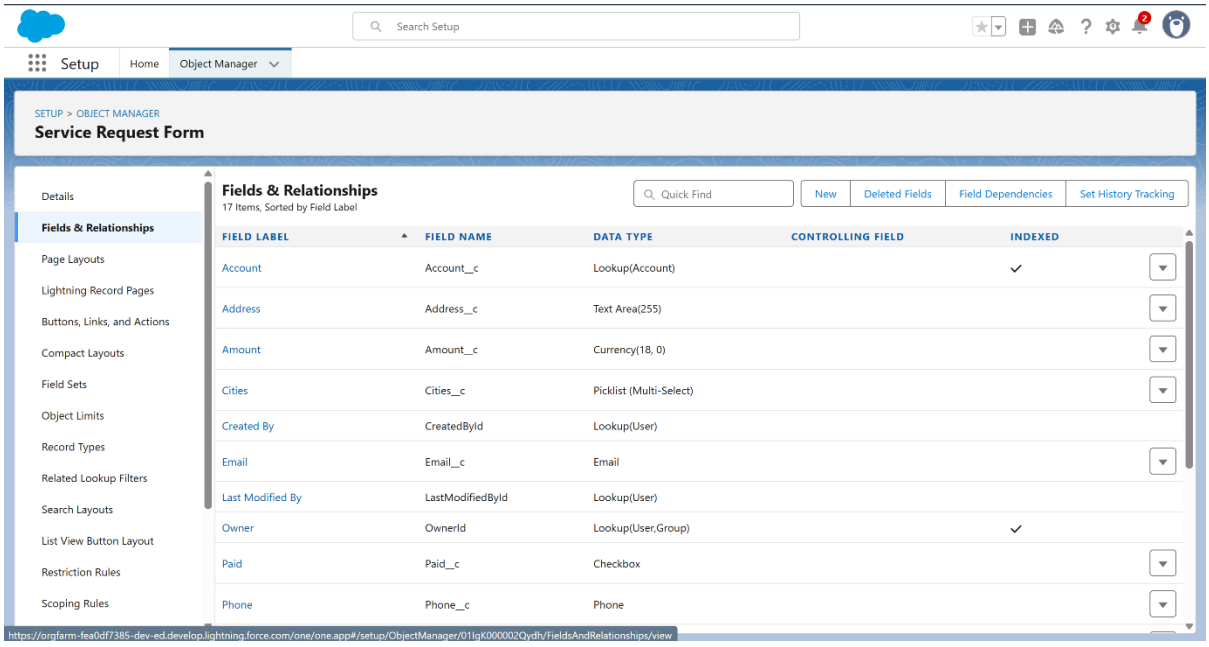
Transaction__c

- **Transaction_ID__c** (Auto Number)
- **Account__c** (Lookup → Account)

For the Transaction_Line_Item__c object, I created Line Item Number and Account (Lookup) fields to manage individual line items and associate them with the customer's account.

Transaction_Line_Item__c

- **Line_Item_Number__c** (Auto Number or Text)
- **Account__c** (Lookup → Account)



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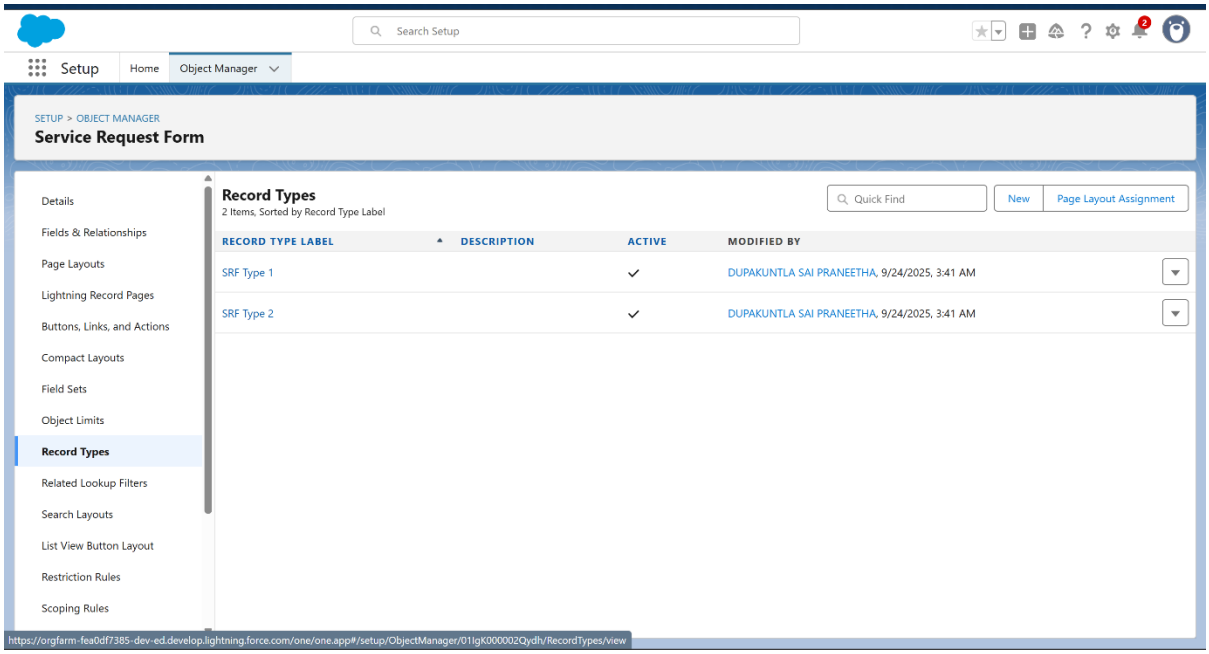
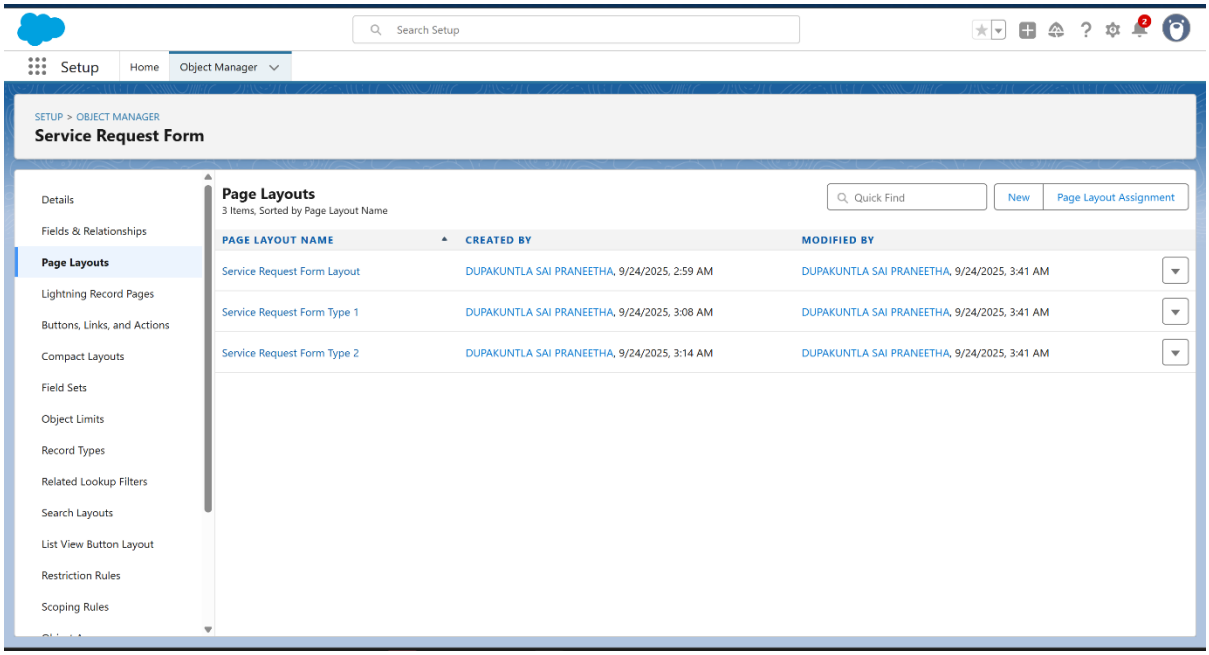
3. Record Types

- Created **record types** for the **Service_Request_Form__c** object to handle different types of service requests.
- Created **SRF Type 1** and **SRF Type 2** to manage separate categories of service requests.
- Each record type has its own **page layout**, displaying only the relevant fields and sections.



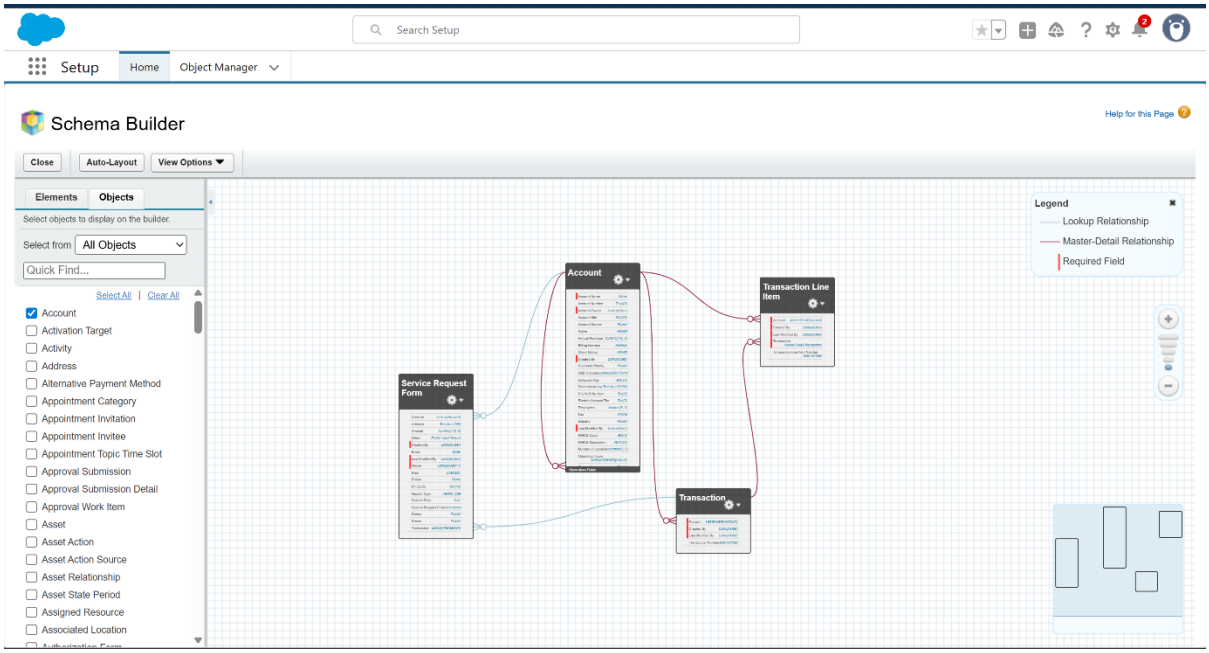
4. Page Layouts

- Created **page layouts** for each custom object to organize fields and sections clearly.
- For **Service_Request__c**, the layout shows customer details, transaction info, and service specifics.
- **Transaction__c** layout displays the transaction ID and associated account.
- **Transaction_Line_Item__c** layout displays line item number and linked account.
- Ensures users see only relevant fields and improves data entry efficiency.



5. Schema Builder

- **Used Schema Builder to visually create and manage object relationships.**
- **Mapped connections between Account → Service_Request → Transaction → Transaction_Line_Item.**
- **Helps in understanding data flow and ensures relationships are correctly implemented.**



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6. Lookup vs Master-Detail vs Hierarchical Relationships

- **Lookup:** Links Service_Request__c and Transaction_Line_Item__c to Account for optional associations.
- **Master-Detail:** Can be used between Transaction__c and Transaction_Line_Item__c for parent-child relationship and roll-up summaries.

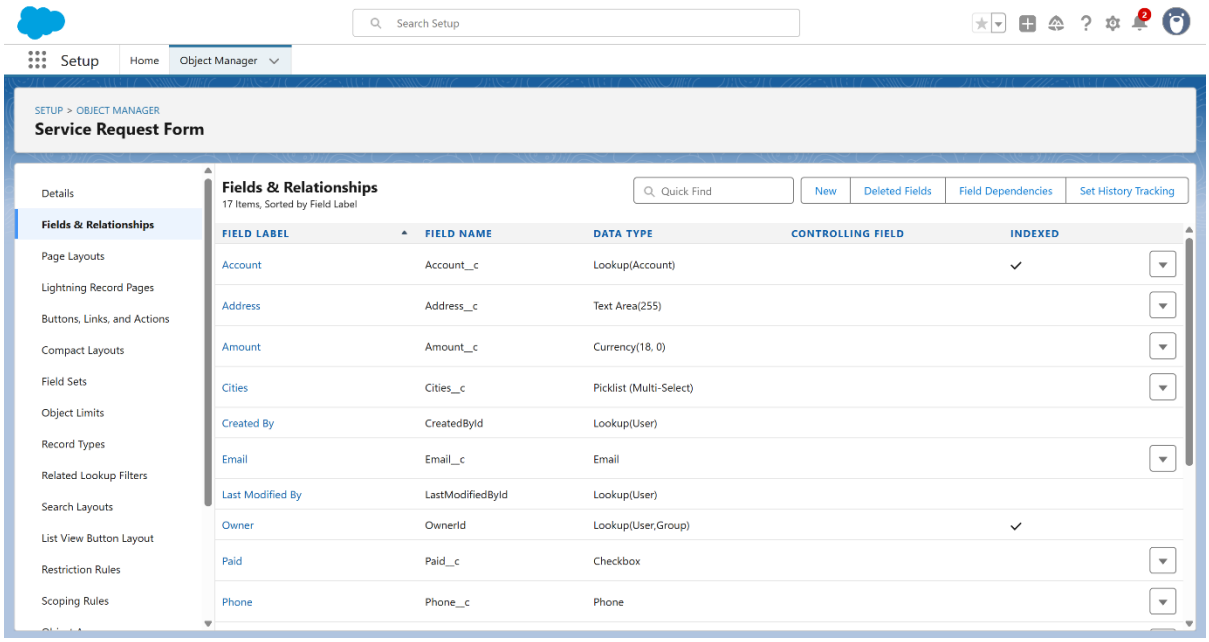
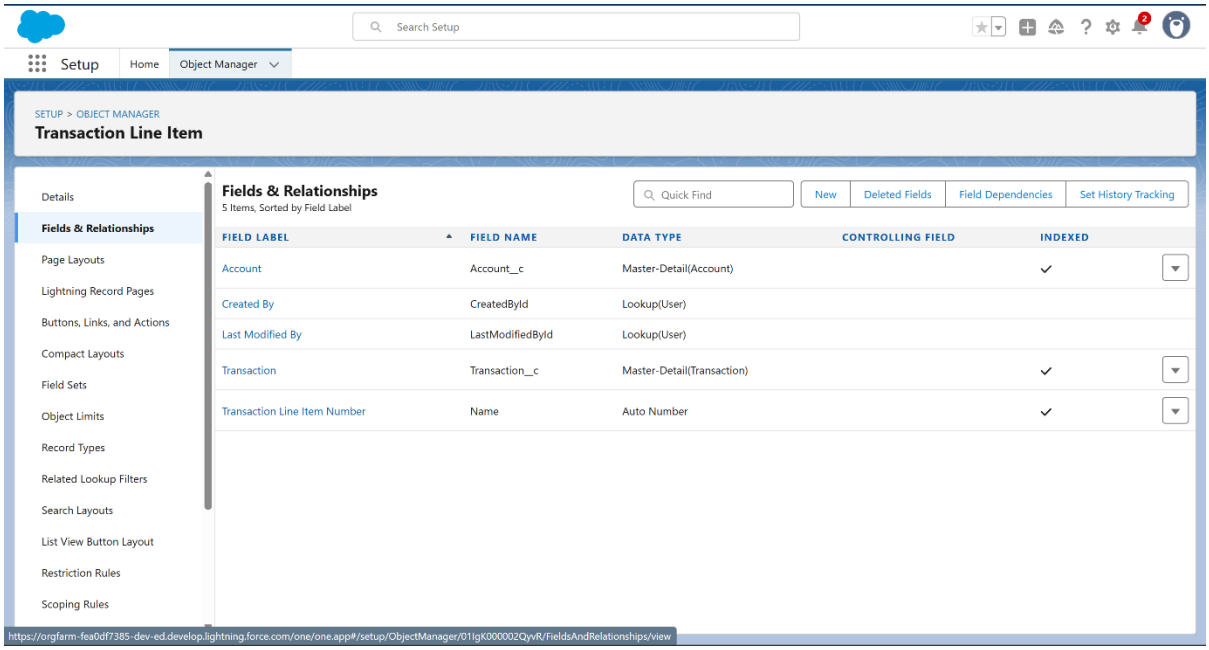


Fig:-7.1 Lookup Relationship



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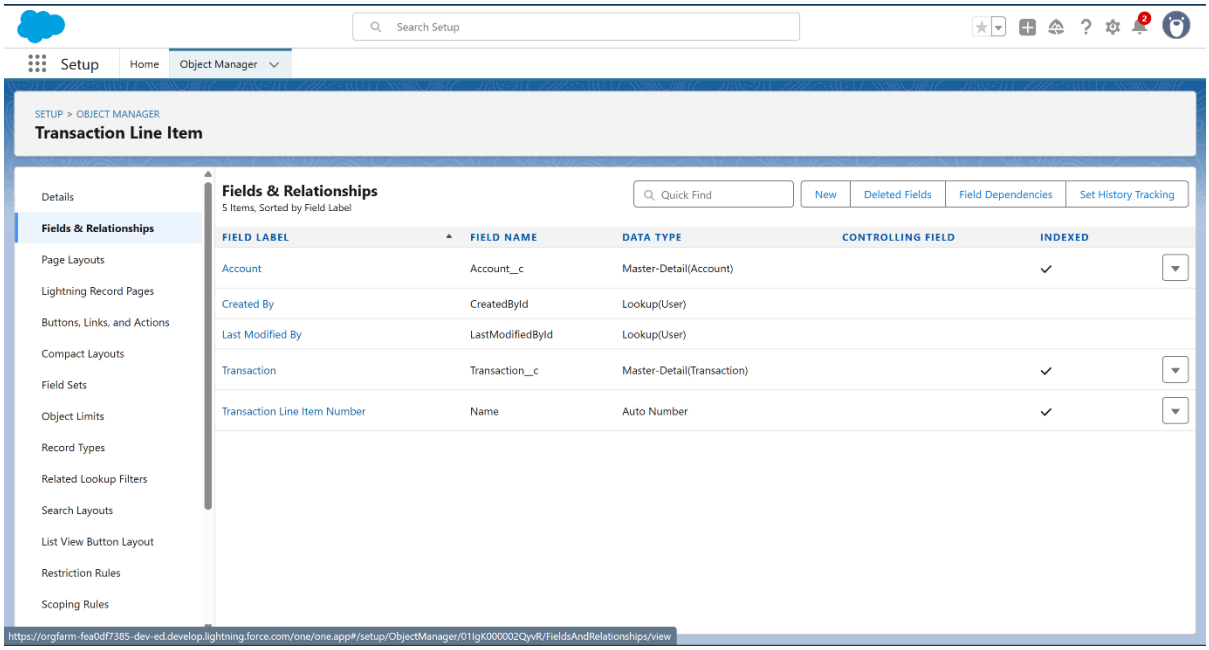
7. Junction Objects

- **Transaction_Line_Item__c** acts like a junction object connecting **Transaction__c** and products/customers.
- Allows many-to-many relationships between transactions and items.
- Supports detailed tracking of multiple items under a single transaction.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