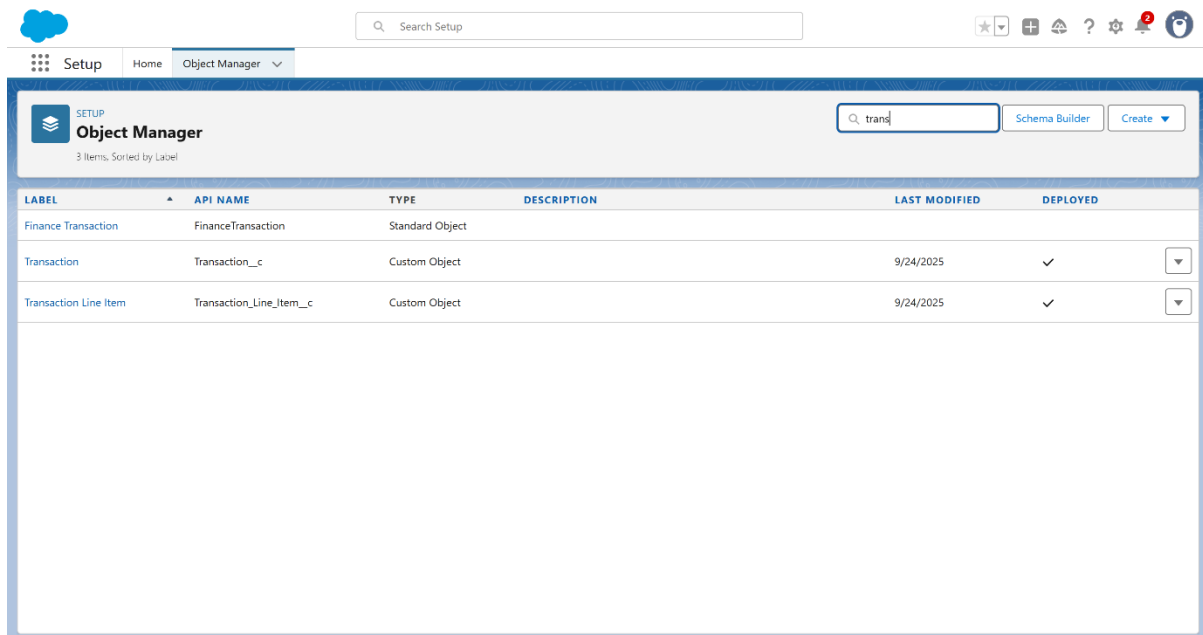


CG Sales & Service : Salesforce Implementation for Retail & Supply Chain Optimization

Phase 3: Data Modeling & Relationships

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).



The screenshot shows the Salesforce Object Manager interface. At the top, there's a search bar with "Search Setup" and a "trans" search filter. Below the search bar, there's a table with columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The table lists three objects: Finance Transaction (Standard Object), Transaction (Custom Object), and Transaction Line Item (Custom Object). The Transaction and Transaction Line Item objects are marked as deployed with a checkmark.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Finance Transaction	FinanceTransaction	Standard Object			
Transaction	Transaction__c	Custom Object		9/24/2025	✓
Transaction Line Item	Transaction_Line_Item__c	Custom Object		9/24/2025	✓

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.

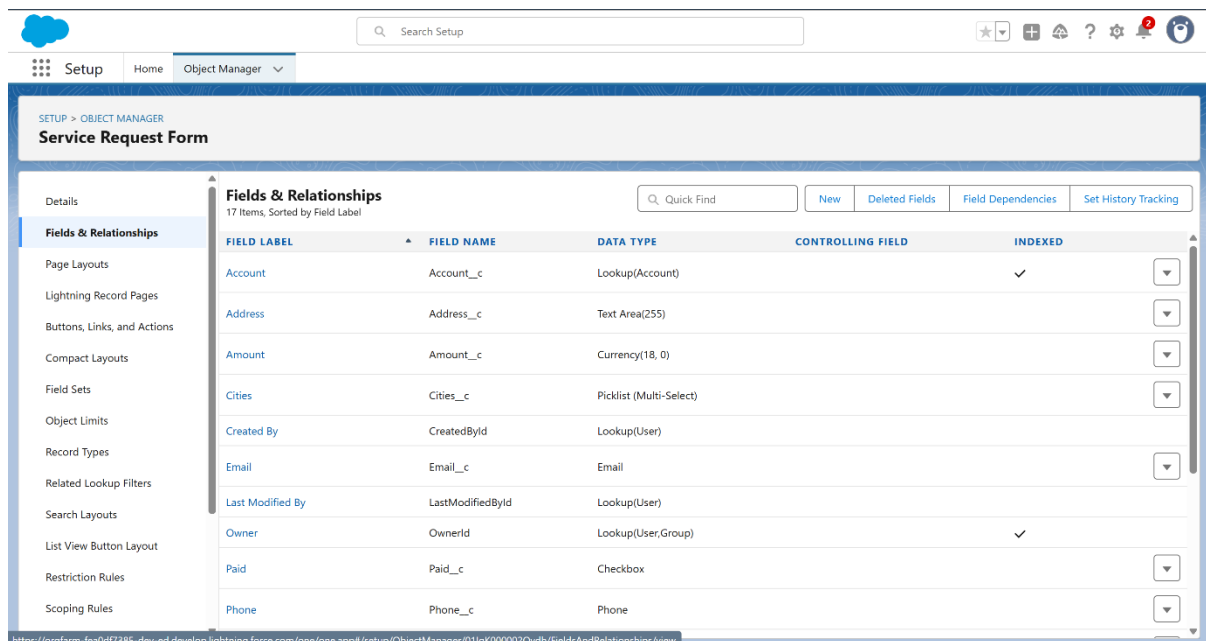
Transaction__c

- **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)



The screenshot shows the Salesforce Object Manager interface for the 'Service Request Form' object. The 'Fields & Relationships' section is active, displaying a list of 17 fields sorted by Field Label. The fields are as follows:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account	Account__c	Lookup(Account)		✓
Address	Address__c	Text Area(255)		
Amount	Amount__c	Currency(18, 0)		
Cities	Cities__c	Picklist (Multi-Select)		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Paid	Paid__c	Checkbox		
Phone	Phone__c	Phone		

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.

Setup Home Object Manager

SETUP > OBJECT MANAGER

Service Request Form

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

Restriction Rules

Scoping Rules

Record Types

2 Items, Sorted by Record Type Label

Quick Find New Page Layout Assignment

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
SRF Type 1		✓	DUPAKUNTLA SAI PRANEETHA, 9/24/2025, 3:41 AM
SRF Type 2		✓	DUPAKUNTLA SAI PRANEETHA, 9/24/2025, 3:41 AM

https://orgfarm-fea0df7385-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/01lgK000002Qydh/RecordTypes/view

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.

Setup Home Object Manager

SETUP > OBJECT MANAGER

Service Request Form

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Scoping Rules

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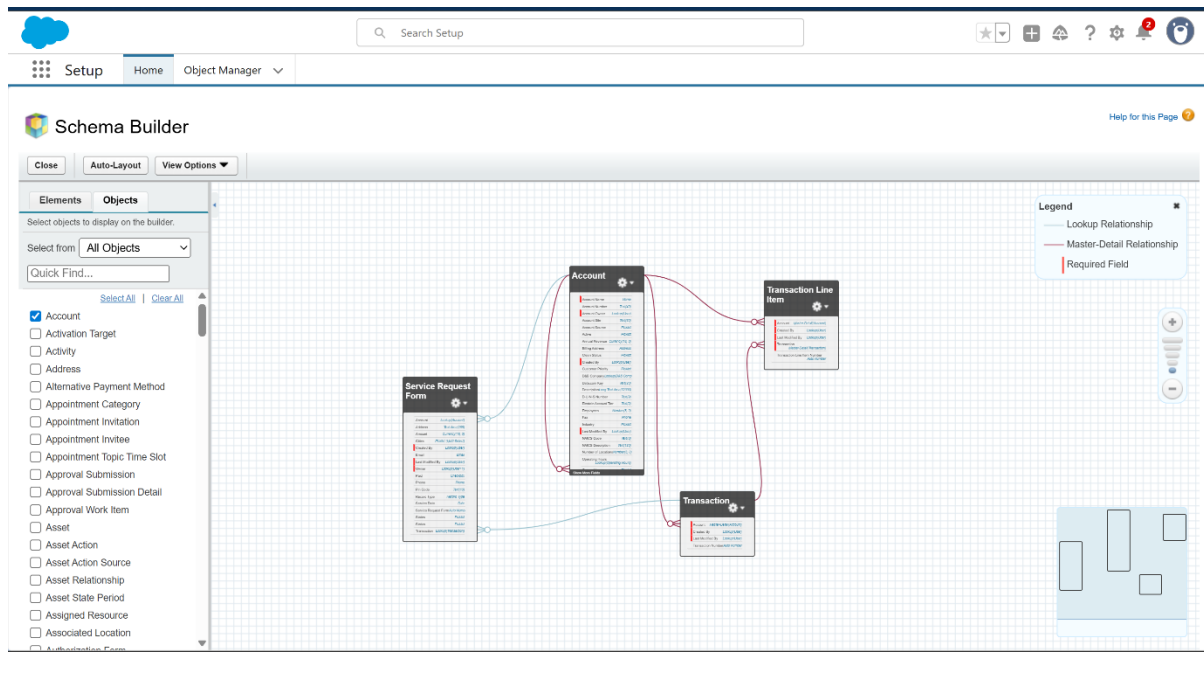
3 Items, Sorted by Page Layout Name

Quick Find New Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Service Request Form Layout	DUPAKUNTLA SAI PRANEETHA, 9/24/2025, 2:59 AM	DUPAKUNTLA SAI PRANEETHA, 9/24/2025, 3:41 AM
Service Request Form Type 1	DUPAKUNTLA SAI PRANEETHA, 9/24/2025, 3:08 AM	DUPAKUNTLA SAI PRANEETHA, 9/24/2025, 3:41 AM
Service Request Form Type 2	DUPAKUNTLA SAI PRANEETHA, 9/24/2025, 3:14 AM	DUPAKUNTLA SAI PRANEETHA, 9/24/2025, 3:41 AM

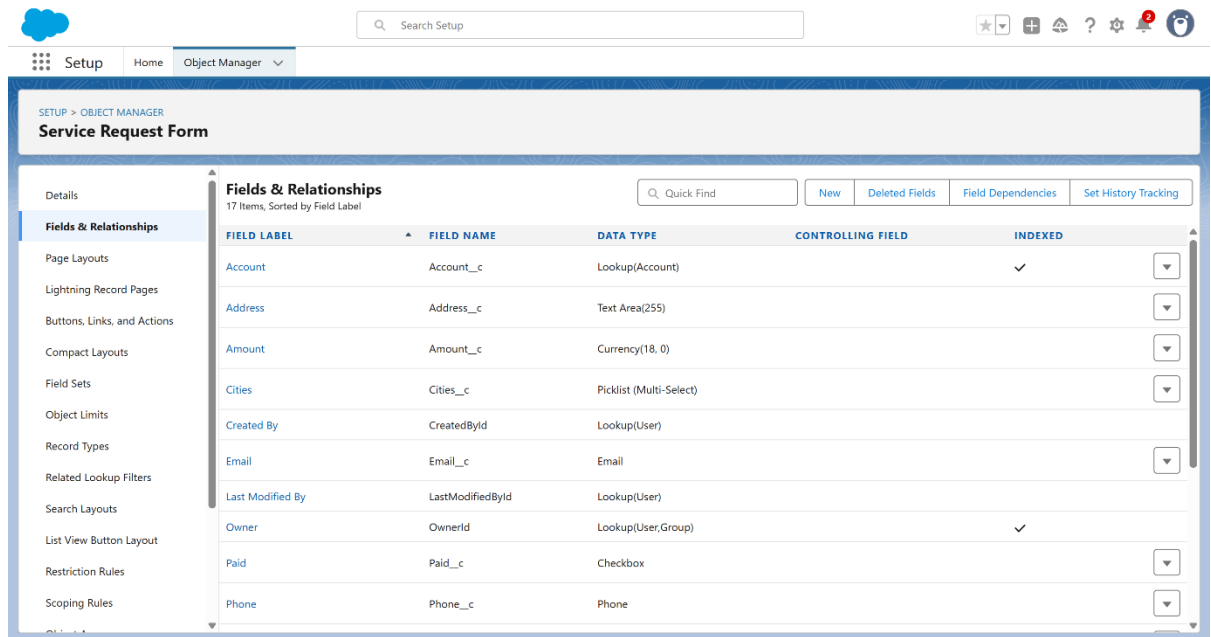
5. Schema Builder

- 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.



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.



SETUP > OBJECT MANAGER

Service Request Form

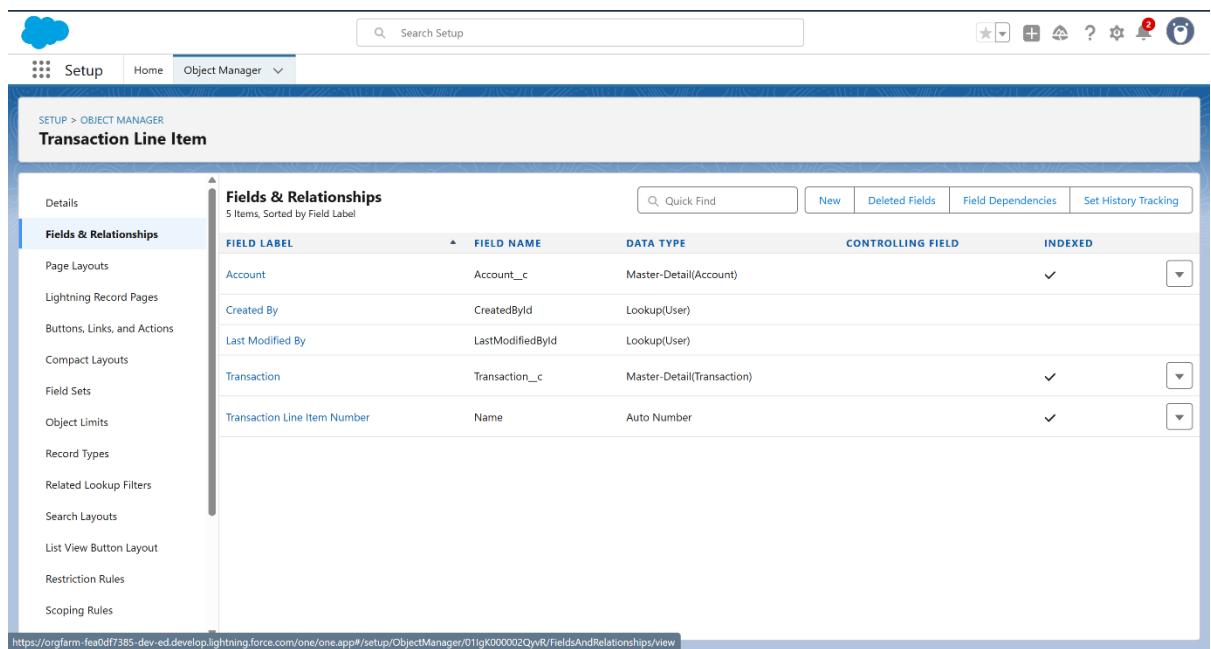
Details

Fields & Relationships
17 Items, Sorted by Field Label

Quick Find: [] New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account	Account__c	Lookup(Account)		✓
Address	Address__c	Text Area(255)		
Amount	Amount__c	Currency(18, 0)		
Cities	Cities__c	Picklist (Multi-Select)		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Paid	Paid__c	Checkbox		
Phone	Phone__c	Phone		

Fig:-7.1 Lookup Relationship



SETUP > OBJECT MANAGER

Transaction Line Item

Details

Fields & Relationships
5 Items, Sorted by Field Label


Quick Find: [] New Deleted Fields Field Dependencies Set History Tracking








FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account	Account__c	Master-Detail(Account)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Transaction	Transaction__c	Master-Detail(Transaction)		✓
Transaction Line Item Number	Name	Auto Number		✓

<https://orgfarm-fea0df7385-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/01gK000002QyYR/FieldsAndRelationships/view>

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.





Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Transaction Line Item

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List View Button Layout

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Scoping Rules

Fields & Relationships




5 Items, Sorted by Field Label

[New](#)

[Deleted Fields](#)

[Field Dependencies](#)

[Set History Tracking](#)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Account	Account__c	Master-Detail(Account)		✓	
Created By	CreatedById	Lookup(User)			
Last Modified By	LastModifiedById	Lookup(User)			
Transaction	Transaction__c	Master-Detail(Transaction)		✓	
Transaction Line Item Number	Name	Auto Number		✓	

<https://orgfarm-fea0df7385-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/01lgK000002QyyR/FieldsAndRelationships/view>