

Phase 3: Data Modeling

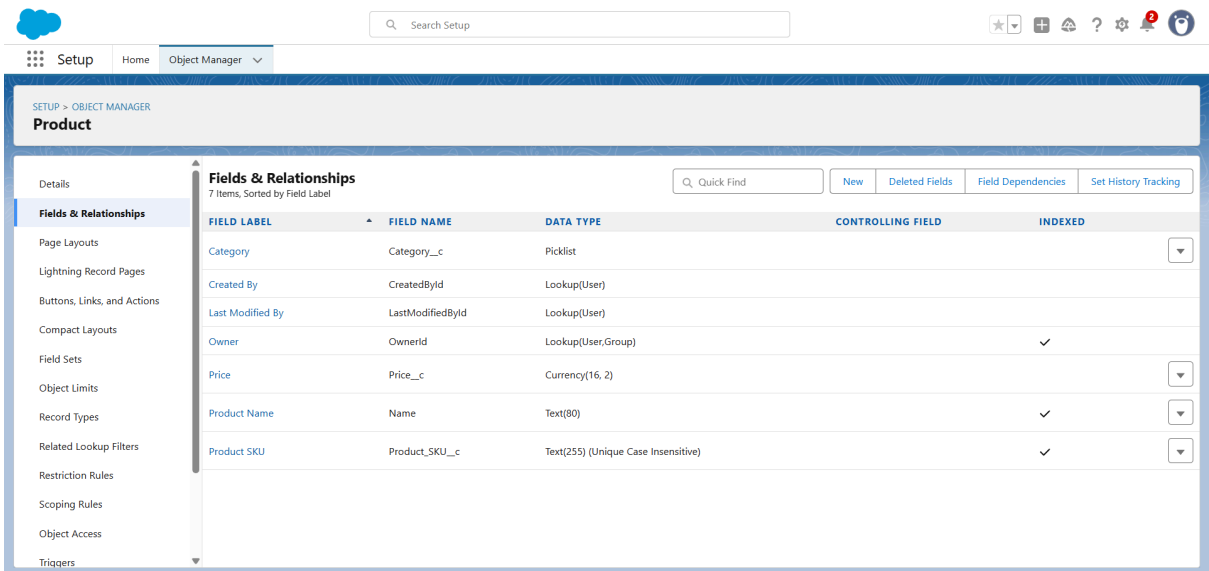
This phase focused on building the foundational data structure of the Retail CRM application. This involved creating custom objects to store key business information (Products and Order Line Items) and establishing the critical relationships between them and the standard Account and Order objects. This data model is the essential backbone that will support all future application functionality, from automation to reporting.

1. Custom Product Object

The **Product** custom object was created to store all sellable items. It includes key fields such as:

- **Product SKU** (a unique identifier)
- **Price** (Currency)
- **Category** (Picklist)

This provides a structured way to manage the company’s product catalog.



2. Custom Order Line Item Object

The **Order Line Item** object serves as the crucial junction between Orders and Products. It uses:

- A **Master-Detail** relationship to the Order object
- A **Lookup** relationship to the Product object

Key fields include:

- **Quantity**
- **Line Item Total** (a formula field that automatically calculates the total price by multiplying quantity and product price)

Setup

Home

Object Manager

Search Setup

SETUP > OBJECT MANAGER

Order Line Item

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Fields & Relationships

7 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)		
Line Item Number	Name	Auto Number		✓
Line Item Total	Line_Item_Total__c	Formula (Currency)		
Order	Order__c	Master-Detail(Order)		✓
Product	Product__c	Lookup(Product)		✓
Quantity	Quantity__c	Number(18, 0)		

3. Schema Builder Visualization

Description:

The **Schema Builder** diagram provides a complete visual representation of the final data model. It clearly shows the connections between the **Account**, **Order**, **Order Line Item**, and **Product** objects, illustrating the flow of data and the structure of the relationships (Master-Detail and Lookup) that were built in this phase.



Search Setup



Setup Home Object Manager

Schema Builder

[Help for this Page](#)

Close Auto-Layout View Options

Elements Objects

Select objects to display on the builder.

Select from All Objects

Quick Find

Select All Clear All

- ☒ Account
- ☐ Activation Target
- ☐ Activity
- ☐ Address
- ☐ Alternative Payment Method
- ☐ Appointment Category
- ☐ Appointment Invitation
- ☐ Appointment Invitee
- ☐ Appointment Topic Time Slot
- ☐ Approval Submission
- ☐ Approval Submission Detail
- ☐ Approval Work Item
- ☐ Asset
- ☐ Asset Action
- ☐ Asset Action Source
- ☐ Asset Relationship
- ☐ Asset State Period
- ☐ Assigned Resource

