

Phase 3: Data Modeling & Relationships

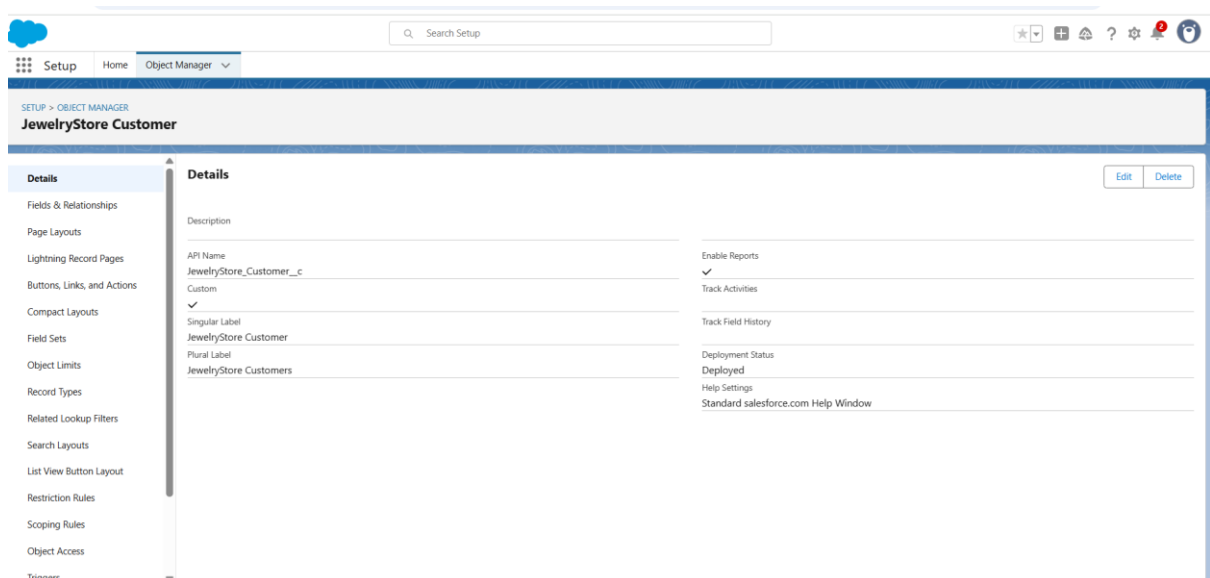
Step 1: Standard & Custom Objects

Six custom objects were created to store business-critical data:

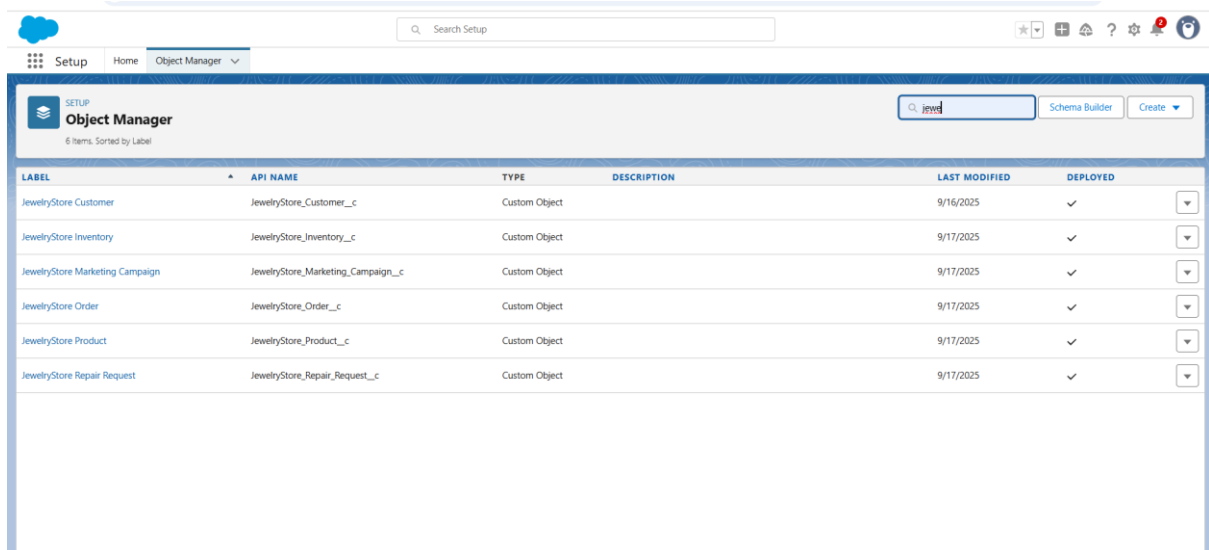
- **JewelleryStore Customer** – Stores customer details such as preferences, anniversaries, and purchase history.
- **JewelleryStore Product** – Stores product catalog details such as category, material, price, and SKU.
- **JewelleryStore Order** – Stores orders placed by customers, including order date, payment status, and delivery status.
- **JewelleryStore Inventory** – Tracks stock availability, reorder levels, and store location.
- **JewelleryStore Marketing Campaign** – Stores details of promotional campaigns such as campaign name, offers, and status.
- **JewelleryStore Repair Request** – Stores after-sales service requests such as repairs, resizing, cleaning, and their status.

Steps followed:

- Navigated to Setup → Object Manager → Create → Custom Object
- Provided label, name, and enabled reports/search
- Saved and created Tabs for each object



Same steps followed for all six custom object creation



The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager' tabs. Below the tabs, the 'Object Manager' section is active, displaying a list of 6 items sorted by label. The list includes objects like 'JewelryStore Customer', 'JewelryStore Inventory', 'JewelryStore Marketing Campaign', 'JewelryStore Order', 'JewelryStore Product', and 'JewelryStore Repair Request'. Each row shows the label, API name, type (Custom Object), last modified date, and deployment status.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
JewelryStore Customer	JewelryStore_Customer__c	Custom Object		9/16/2025	✓
JewelryStore Inventory	JewelryStore_Inventory__c	Custom Object		9/17/2025	✓
JewelryStore Marketing Campaign	JewelryStore_Marketing_Campaign__c	Custom Object		9/17/2025	✓
JewelryStore Order	JewelryStore_Order__c	Custom Object		9/17/2025	✓
JewelryStore Product	JewelryStore_Product__c	Custom Object		9/17/2025	✓
JewelryStore Repair Request	JewelryStore_Repair_Request__c	Custom Object		9/17/2025	✓

Step 2: Fields

JewelleryStore Customer

- **JewelleryStore Customer Name** (Text, 80) – Standard Name field
- **FirstName** (Text, 60)
- **LastName** (Text, 60)
- **FullName** (Formula, Text → FirstName + LastName)
- **Email** (Email)
- **Phone** (Phone)
- **Loyalty Status** (Picklist: Gold, Silver, Bronze, Platinum)
- **Total Purchases** (Number, 18,0)
- **Owner** (Lookup → User/Group)
- **Created By** (Lookup → User)
- **Last Modified By** (Lookup → User)

JewelleryStore Order

- **Customer** (Lookup JewelleryStore Customer)
- **Product** (Lookup → JewelleryStore Product)
- **Order Date** (Date)
- **Payment Status** (Picklist: Pending, Paid, Refunded)
- **Delivery Status** (Picklist: Pending, Shipped, Delivered)

JewelleryStore Inventory

- **Product** (Lookup → JewelleryStore Product)
- **Available Quantity** (Number)
- **Reorder Level** (Number)
- **Store Location** (Text)
- **Stock Status** (Formula → IF(Available_Quantity__c > Reorder_Level__c, "Available", "Low Stock"))

JewelleryStore Marketing Campaign

- **Campaign Name** (Text)
- **Start Date** (Date)
- **End Date** (Date)
- **Offer Type** (Picklist: Discount %, Free Gift, Exclusive Access)
- **Campaign Status** (Picklist: Planned, Active, Completed)

JewelleryStore Repair Request

- **Customer** (Lookup → JewelleryStore Customer)
- **Product** (Lookup → JewelleryStore Product)
- **Request Type** (Picklist: Repair, Cleaning, Resizing, Engraving)
- **Request Status** (Picklist: New, In Progress, Completed)
- **Service Date** (Date)

The screenshot shows the Salesforce Setup interface for the 'JewelleryStore Repair Request' object. The left sidebar contains navigation links: Details, Fields & Relationships (selected), 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, and Object Access. The main content area is titled 'Fields & Relationships' and shows a table of 8 fields. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Created By (CreatedById, Lookup(User), CONTROLLING FIELD, INDEXED), JewelleryStore Customer (JewelleryStore_Customer__c, Lookup(JewelleryStore Customer), INDEXED), JewelleryStore Product (JewelleryStore_Product__c, Lookup(JewelleryStore Product), INDEXED), Last Modified By (LastModifiedById, Lookup(User)), Owner (OwnerId, Lookup(User,Group), INDEXED), Reason (Reason__c, Text(100)), Repair Request Number (Name, Text(80), INDEXED), and Service Type (Service_Type__c, Picklist). At the top of the main area, there is a search bar and tabs for New, Deleted Fields, Field Dependencies, and Set History Tracking.

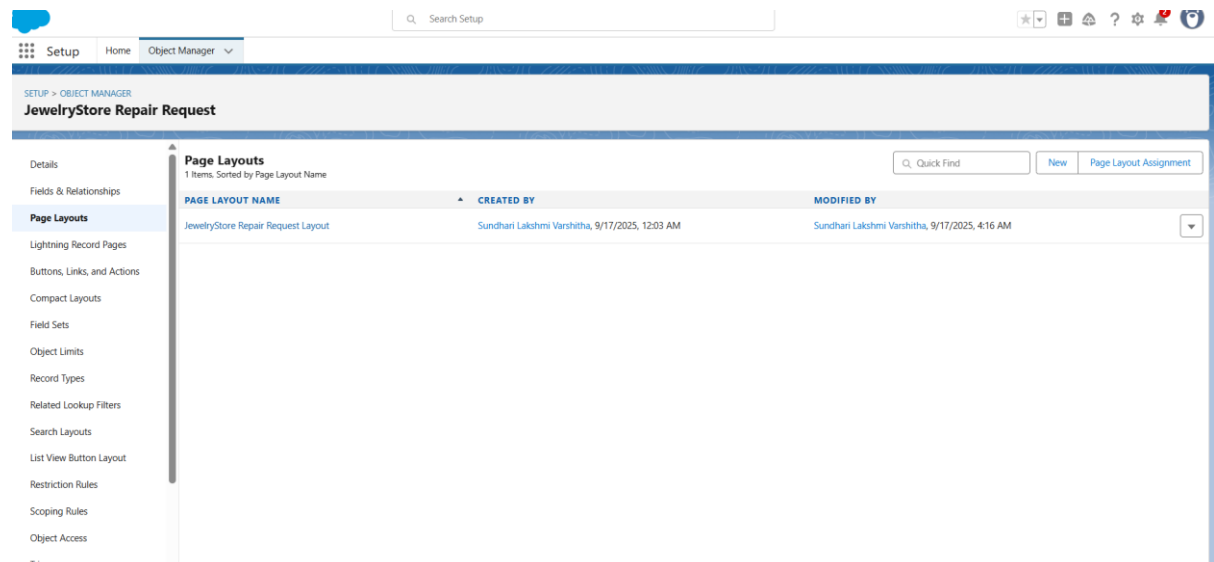
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
JewelleryStore Customer	JewelleryStore_Customer__c	Lookup(JewelleryStore Customer)		✓
JewelleryStore Product	JewelleryStore_Product__c	Lookup(JewelleryStore Product)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Reason	Reason__c	Text(100)		
Repair Request Number	Name	Text(80)		✓
Service Type	Service_Type__c	Picklist		

3. Record Types

- Used to **differentiate business processes** if needed.
- Example:
 - **JewelleryStore Repair Request** → Record Types: *Repair Request, Cleaning Request, Resizing Request*
 - **JewelleryStore Order** → Record Types: *Online Order, In-Store Order*

4. Page Layouts

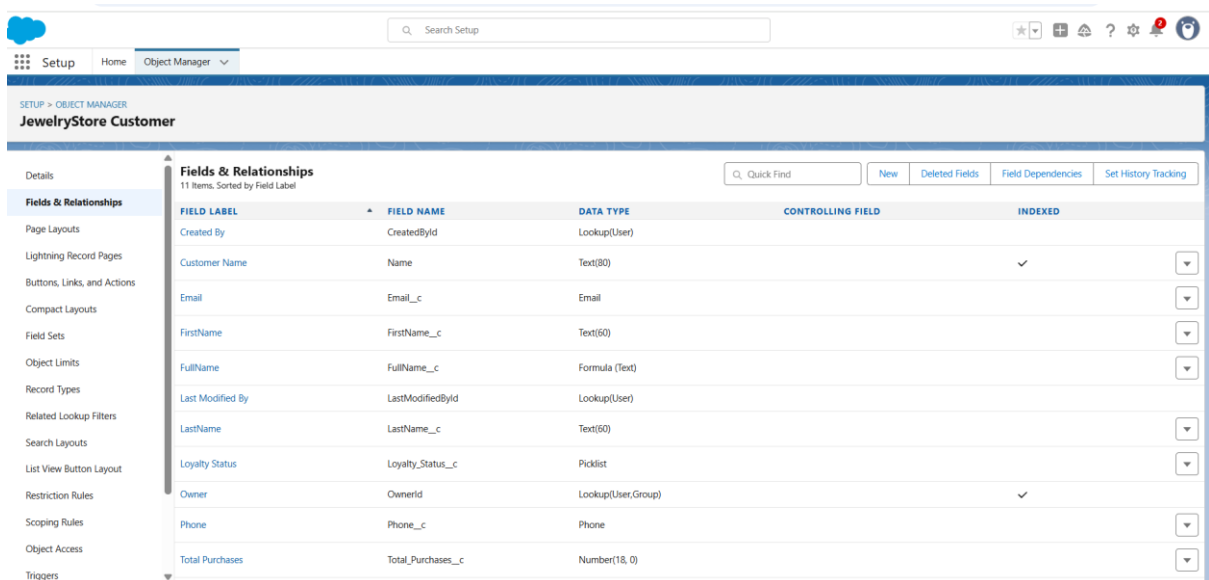
- Each object has **custom page layouts** to show only relevant fields to different users.
- Example:
 - **Sales team** sees Customer Name, Email, Phone, Orders, Total Purchases.
 - **Service team** sees Service Requests, Product details, Request Status.



5. Compact Layouts

- Provides **summary info on record highlights** (used in mobile view or hover cards).
- Example:
 - **JewelleryStore Customer Compact Layout:** Full Name, Email, Phone, Loyalty Status, Total Purchases.
 - **JewelleryStore Product Compact Layout:** Product Name, Price, Stock Quantity.

But I used Compact Layout as System Default.



Setup > OBJECT MANAGER

JewelryStore Customer

Details

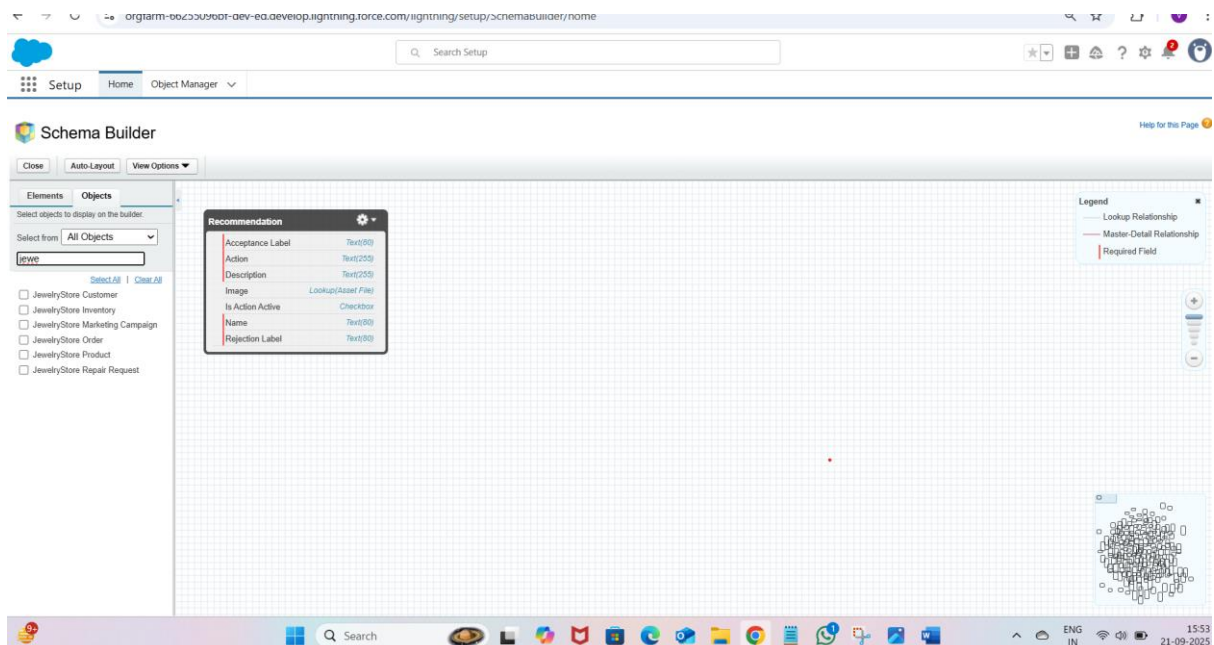
Fields & Relationships
11 Items. Sorted by Field Label

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)		
Customer Name	Name	Text(80)		✓
Email	Email_c	Email		
FirstName	FirstName_c	Text(60)		
FullName	FullName_c	Formula (Text)		
Last Modified By	LastModifiedById	Lookup(User)		
LastName	LastName_c	Text(60)		
Loyalty Status	Loyalty_Status_c	Picklist		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone_c	Phone		
Total Purchases	Total_Purchases_c	Number(18, 0)		

6. Schema Builder

- Used to **visualize all objects and their relationships**.
- Shows **custom and standard objects**, field types, and lookup/master-detail links.
- Helps stakeholders understand **data flow and connections**.



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Setup > Schema Builder

Close Auto-Layout View Options

Elements Objects

Select objects to display on the builder

Select from: All Objects

Search: [jewe]

Select All Clear All

- ☐ JewelryStore Customer
- ☐ JewelryStore Inventory
- ☐ JewelryStore Marketing Campaign
- ☐ JewelryStore Order
- ☐ JewelryStore Product
- ☐ JewelryStore Repair Request

Recommendation

- Acceptance Label Text(90)
- Action Text(255)
- Description Text(255)
- Image Lookup(Asset File)
- Is Action Active Checkbox
- Name Text(80)
- Rejection Label Text(90)

Legend

- Lookup Relationship
- Master-Detail Relationship
- Required Field

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7. Lookup vs Master-Detail vs Hierarchical Relationships

- **Lookup Relationship:**
 - Simple connection between two objects.
 - Example: → JewelleryStore Customer
- **Master-Detail Relationship:**
 - Strong dependency, parent controls child record behavior.
 - Example: JewelleryStore Inventory → Product (Product is parent, Inventory is child)
- **Hierarchical Relationship:**
 - Special relationship for **User object** only.
 - Example: Manager → Employee (not used heavily in this project)

The screenshot shows the Salesforce Setup interface for the 'GoldenEra Order' object. The 'Fields & Relationships' section is active, displaying a list of 10 fields. The table below represents the data shown in the screenshot.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer Email	Customer_Email__c	Email		
GoldenEra Customer	GoldenEra_Customer__c	Lookup(GoldenEra Customer)		✓
GoldenEra Product	GoldenEra_Product__c	Lookup(GoldenEra Product)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Order Number	Name	Auto Number		✓
Owner	OwnerId	Lookup(User,Group)		✓
Quantity	Quantity__c	Number(18, 0)		
Status	Status__c	Picklist		
Total Amount	Total_Amount__c	Number(18, 0)		

8. Junction Objects

- Used for **many-to-many relationships**.
- Example (optional for future enhancement):
 - **JewelleryStore Customer ↔ JewelleryStore Marketing Campaign**
 - A single customer can belong to multiple campaigns, and a campaign can target multiple customers.