Salesforce Project Phase-2 :- Data Modeling & Relationships

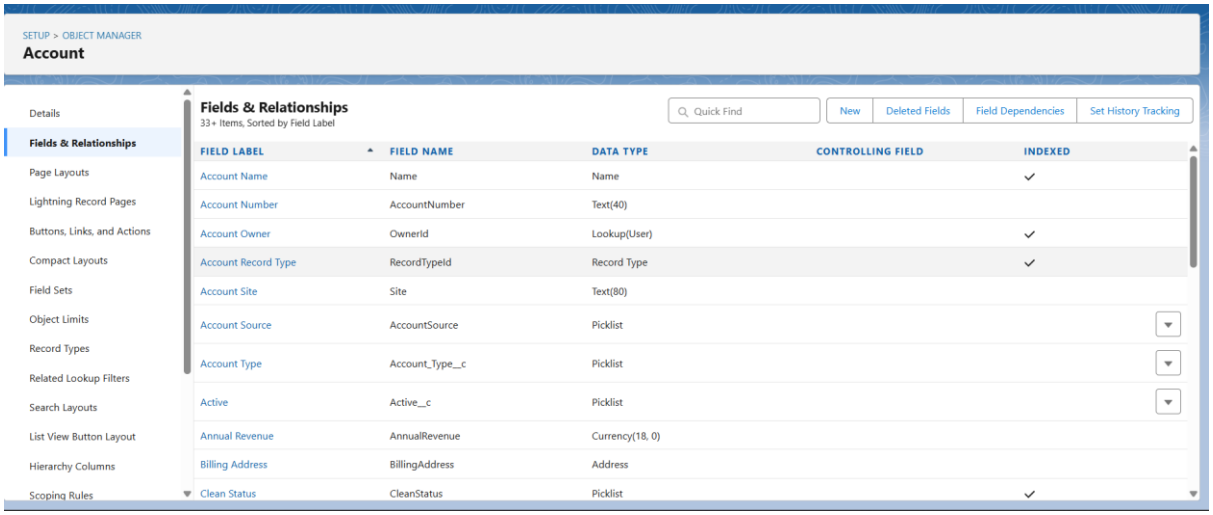
Title :- Dairy Management System Private Limited Using Salesforce CRM

1. Account Object

Purpose: Stores all stakeholders – Farmers, Distributors, and Customers. This is a standard Salesforce object.

Fields:

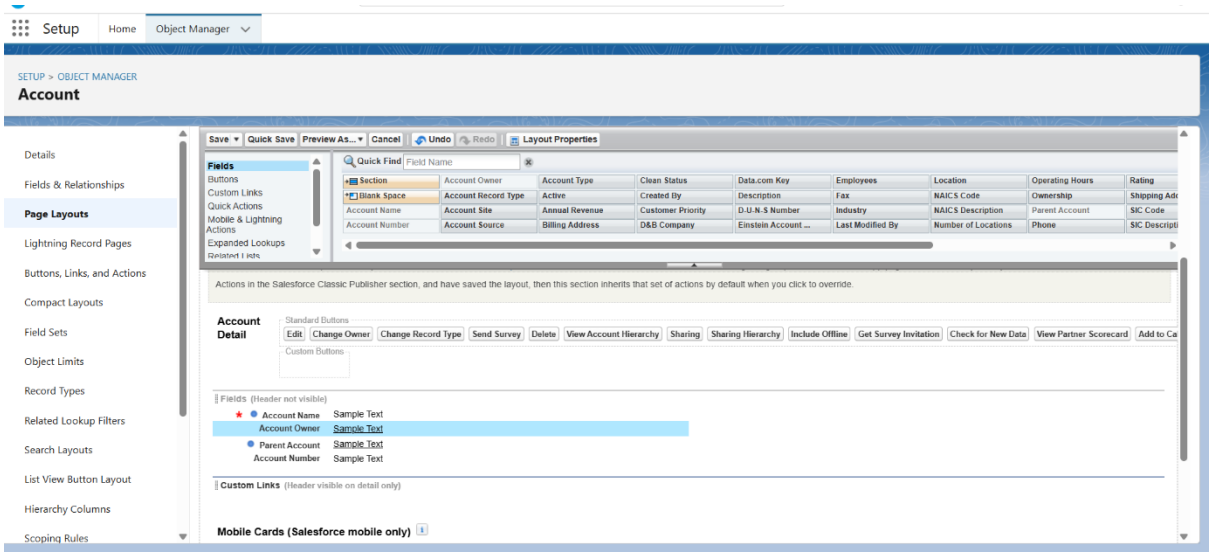
Field Name	Data Type	Description / Purpose
Name	Text	Name of the account, e.g., Farmer Name, Distributor Name, or Customer Name.
Account Type	Picklist	Values: Farmer, Distributor, Customer. Helps to differentiate stakeholders and assign appropriate record types.
Location	Text / Geolocation	The village, city, or region where the account is located. Useful for logistics and reporting.
Contact Number	Phone	Primary contact number for communication. Optional secondary contact can be added via related Contact object.

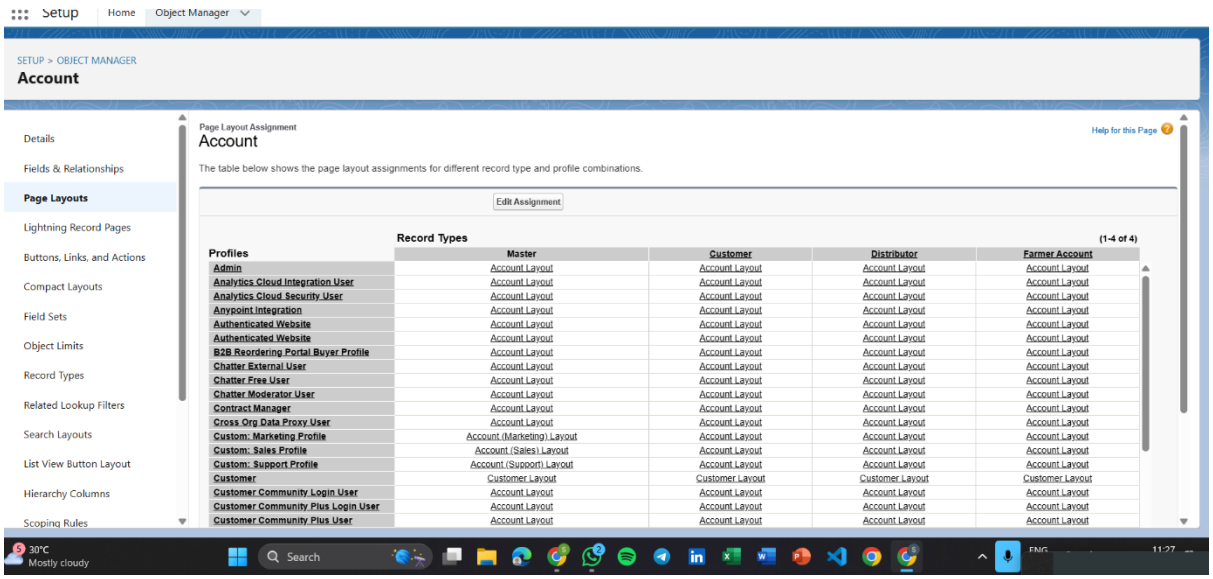


Additional Notes:

- **Record Types:** Separate page layouts and business processes for Farmers, Distributors, and Customers.
- **Relationships:** Can have **child contacts**, **orders**, and **cattle** (for farmers).

Page Layouts :-





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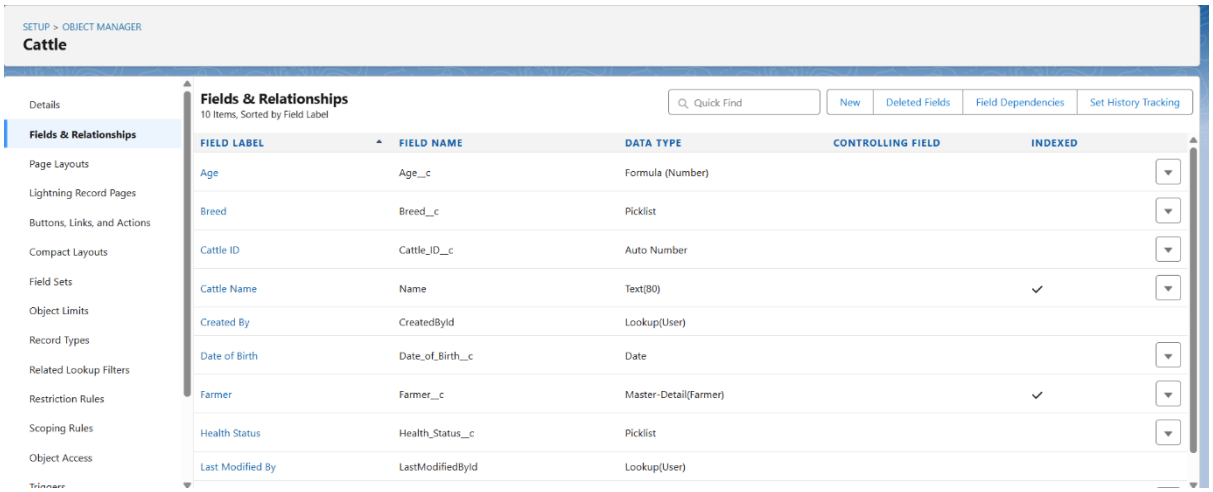
2. Cattle Object

Purpose: Tracks individual cattle owned by farmers. Custom object.

Fields:

Field Name	Data Type	Description / Purpose
Cattle ID	Auto Number / Text	Unique identifier for each cattle. Helps in tracking milk production individually.
Breed	Picklist	Types like Holstein, Jersey, Gir, etc. Useful for production and quality analysis.
DOB (Date of Birth)	Date	Birthdate of the cattle. Helps in calculating age and predicting lactation cycles.
Health Status	Picklist	Values like Healthy, Sick, Recovering. Used to monitor livestock health and alert veterinary actions.



Relationships:

- **Master-Detail:** Linked to Account (Farmer) – one farmer can own multiple cattle.
- **Child Object:** Milk Production is linked to Cattle.

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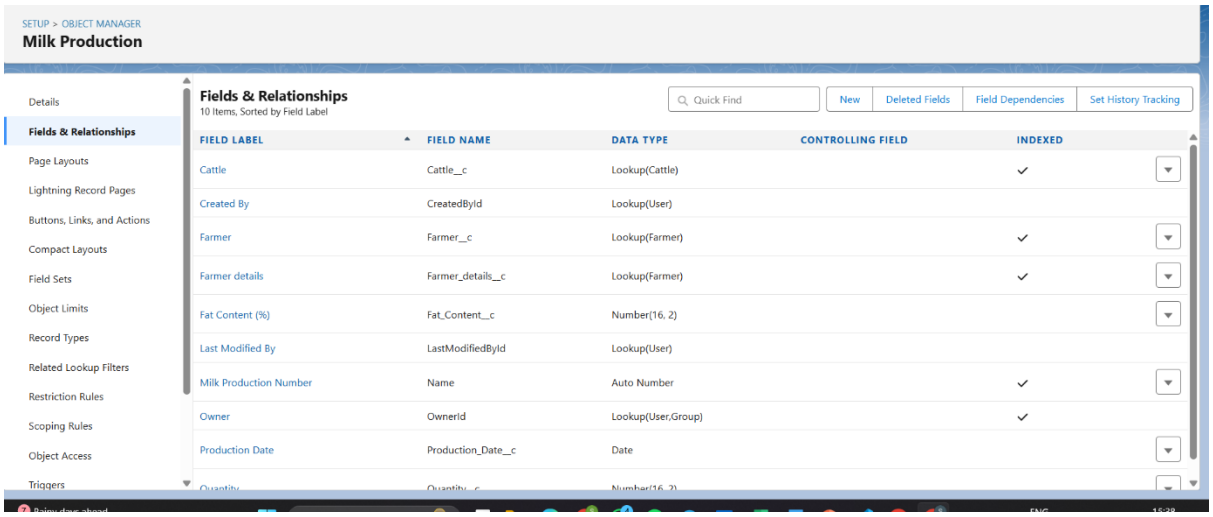
3. Milk Production Object

Purpose: Records daily/periodic milk collection from cattle. Custom object.

Fields:

Field Name	Data Type	Description / Purpose
Quantity	Number (Decimal)	Liters of milk produced. Key metric for inventory and farmer payouts.

Field Name	Data Type	Description / Purpose
Collection Date	Date	Date when the milk was collected. Important for production tracking and trend analysis.
Fat %	Number (Decimal)	Fat percentage of milk. Useful for quality assessment and pricing.
Quality Grade	Picklist	Grade like A, B, C based on fat %, protein content, or contaminant tests. Helps in pricing and distribution decisions.



Relationships:

- **Lookup / Master-Detail:** Linked to Cattle (which links to Farmer Account).

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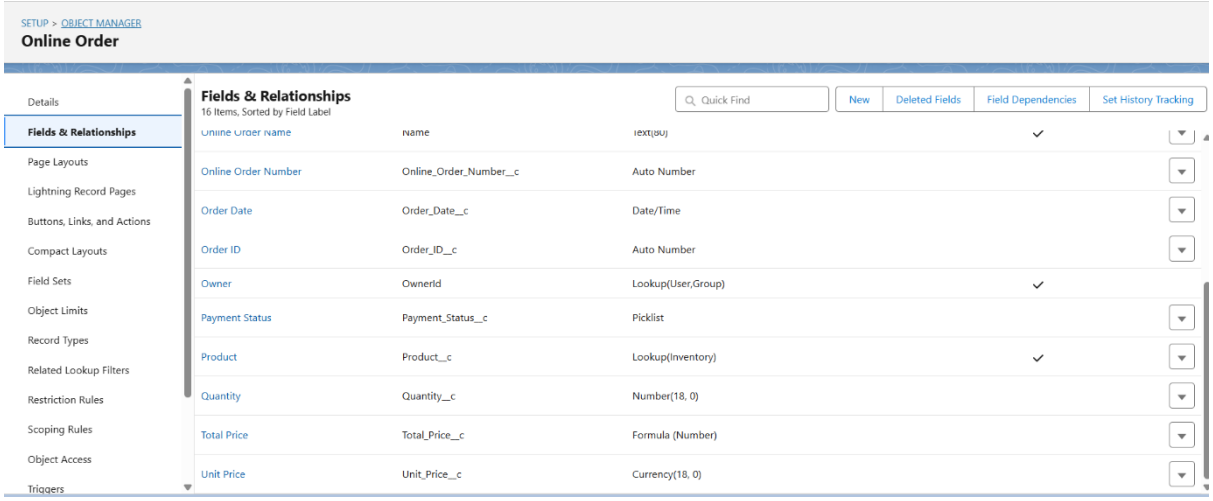
4. Online Order Object

Purpose: Tracks milk/product orders by distributors or customers. Standard object with custom fields and record types.

Fields:

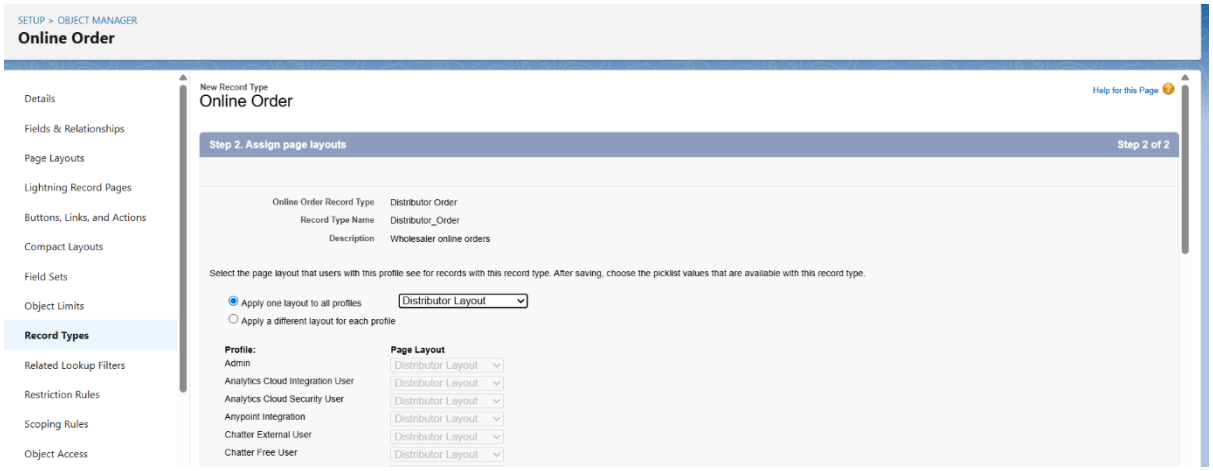
Field Name	Data Type	Description / Purpose
Order Type	Picklist	Distributor Order, Customer Order. Determines fulfillment process and pricing.
Payment Mode	Picklist	Cash, Online, UPI, Credit. Helps in accounting and payment tracking.
Discount %	Number	Discounts applied to orders. Can be standard, seasonal, or festival-based.

Field Name	Data Type	Description / Purpose
Validity Period	Date Range / Date	The duration the order or offer is valid. Helps manage deliveries and promotions.



Relationships:

- Linked to Account (Customer/Distributor) and Inventory (products ordered).
- Can be linked to **Order Items** (junction object) if multiple products per order.



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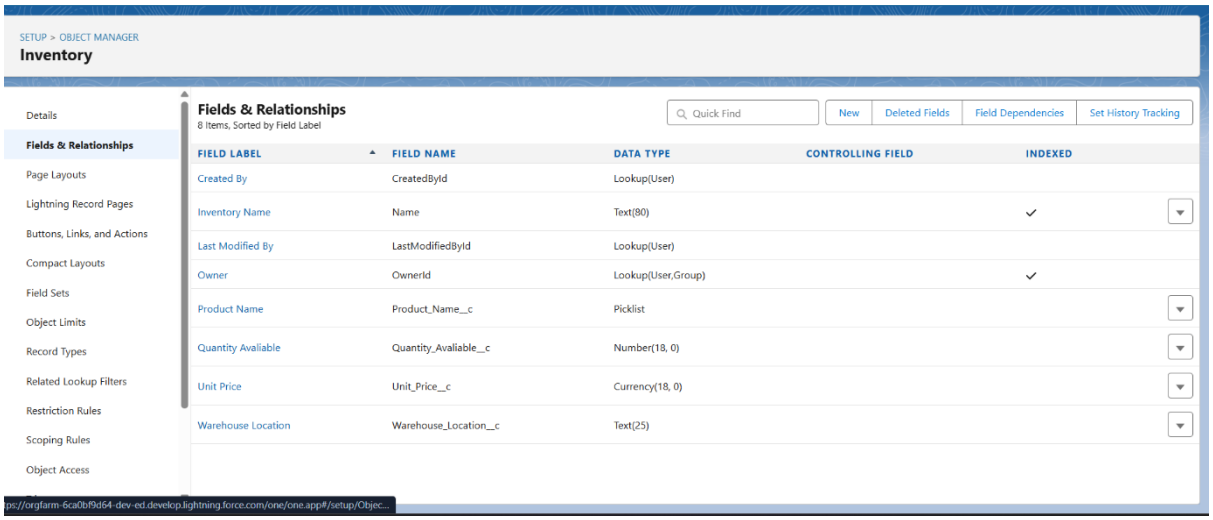
5. Inventory Object

Purpose: Maintains stock of milk and processed products. Custom object.

Fields:

Field Name	Data Type	Description / Purpose
Product Name	Text	Name of the product – e.g., Cow Milk, Paneer, Ghee.
Stock Quantity	Number	Current quantity available in liters/kg. Helps manage supply chain.
Expiry Date	Date	Expiration for perishable products. Alerts for clearance or disposal.



Relationships:

- **Lookup:** Can link to Orders to track which products were sold.

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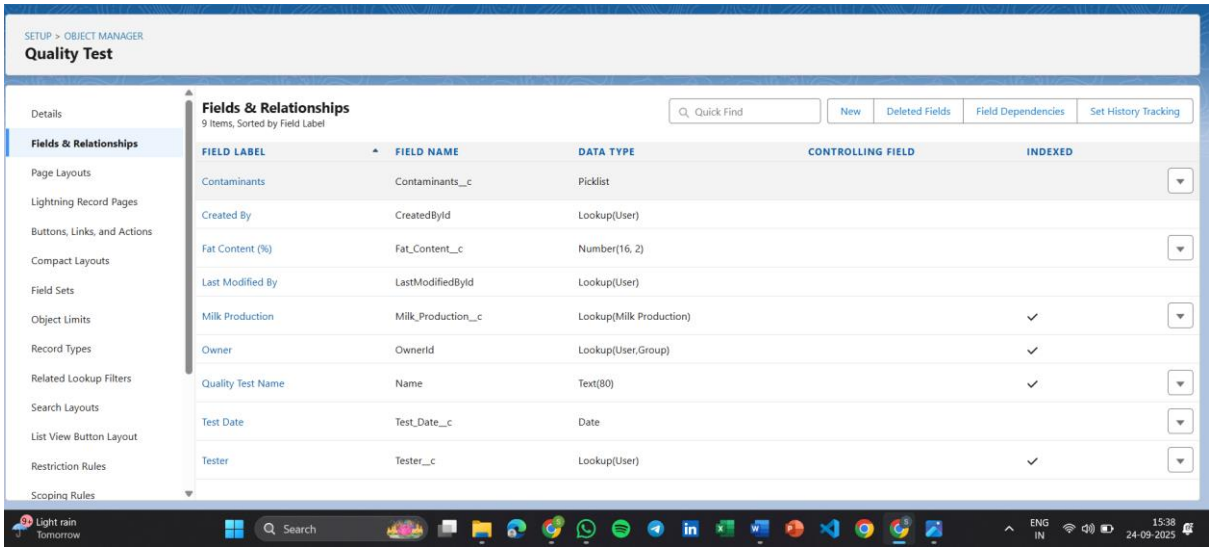
6. Quality Test Object

Purpose: Records tests for milk quality and contamination. Custom object.

Fields:

Field Name	Data Type	Description / Purpose
Test Date	Date	Date of testing milk or dairy product.
Fat %	Number	Fat content measured during testing.
Contaminants	Text / Picklist	Any contaminants found – e.g., Antibiotics, Bacteria.
Tester	Lookup (User/Employee)	Person who performed the quality test.



Relationships:

- Linked to **Milk Production** or **Inventory** to ensure quality compliance.

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7. Festival Offer Object

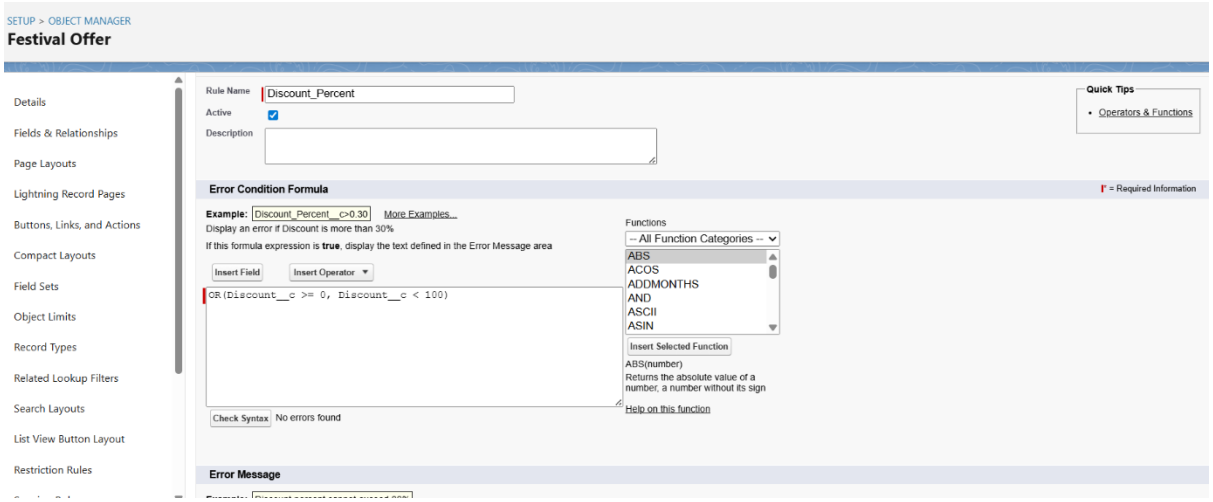
Purpose: Tracks promotional offers during festivals or seasonal campaigns. Custom object.

Fields:

Field Name	Data Type	Description / Purpose
Offer Name	Text	Name of the promotion – e.g., Diwali Discount, Holi Special.
Discount %	Number	Discount applied to product or order.
Validity	Date Range / Date	Start and end date of the offer. Helps manage marketing campaigns.

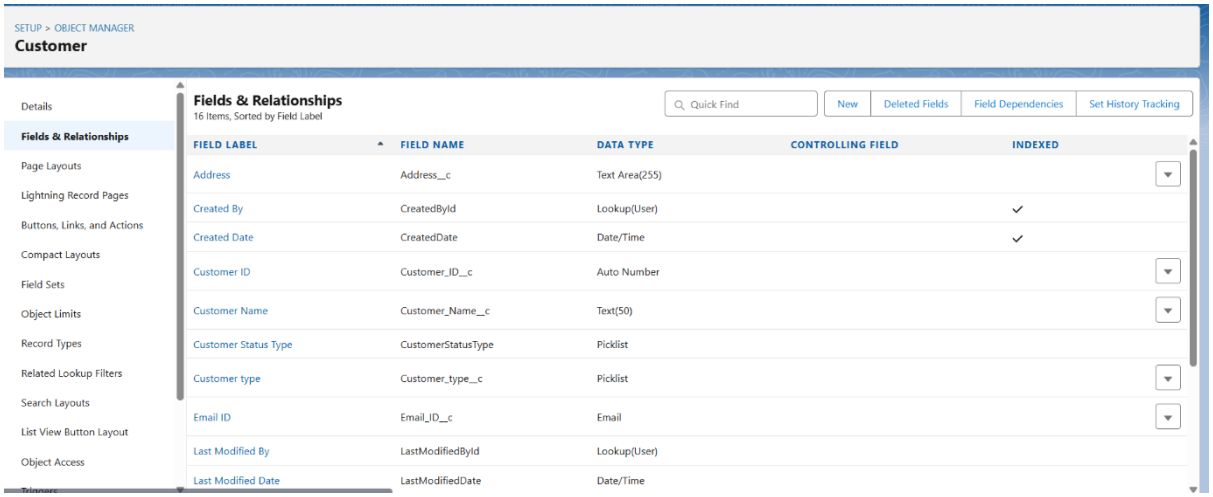
Relationships:

- Can link to **Orders** or **Inventory** to apply promotions automatically.



8. Customer Object

Field Name	Data Type	Description
Name	Text	Customer’s full name
Account Type	Picklist	Customer (Record Type: Customer)
Location	Text	Customer’s address (city/village/region)
Contact Number	Phone	Mobile number of the customer
Email	Email	Email ID of the customer
Preferred Product	Picklist	Type of product usually purchased (Milk, Ghee, Curd, etc.)
Order History	Lookup (Order)	Past orders placed by the customer
Festival Offers Availed	Lookup (Festival Offer)	Offers applied to customer orders
Loyalty Points	Number	Optional field for rewards/points
Active Status	Checkbox	Whether customer is active or not



Relationships:

- Customer → Orders (1-to-Many)
- Customer → Festival Offers (via Orders)
- Customer → Payment (via Orders)

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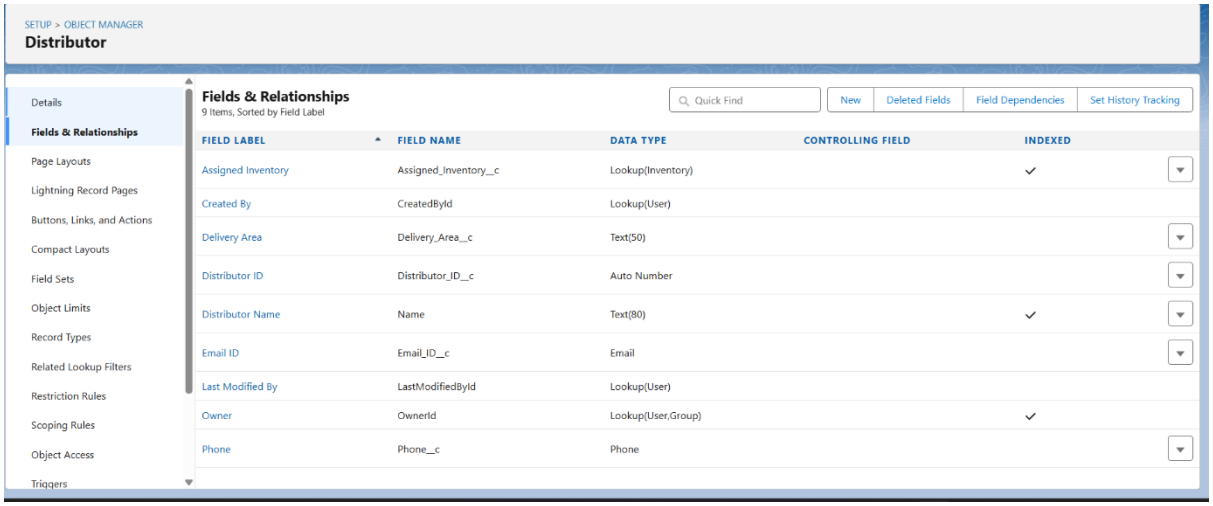
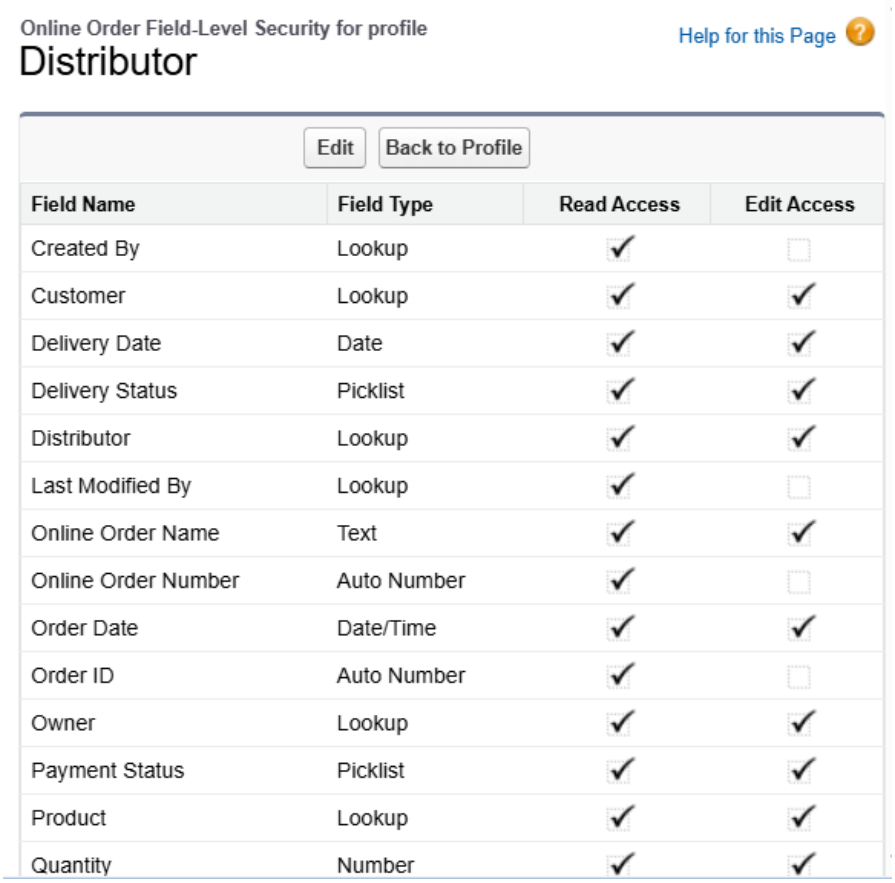
9. Distributor Object

Field Name	Data Type	Description
Name	Text	Distributor's name / business name
Account Type	Picklist	Distributor (Record Type: Distributor)
Location	Text	Distributor's office/warehouse location
Contact Number	Phone	Distributor's mobile/landline number
Email	Email	Distributor's email address
License/ID Number	Text	Registration or license ID of distributor
Stock Supplied	Lookup (Inventory)	Stock provided by farmer to distributor
Orders Managed	Lookup (Order)	Orders handled by distributor
Customer Accounts	Lookup (Account)	Customers linked to this distributor
Active Status	Checkbox	Whether distributor is active



Relationships:

- Distributor → Inventory (1-to-Many)
- Distributor → Orders (1-to-Many, mostly bulk orders)
- Distributor → Customers (1-to-Many, via Account hierarchy or related field)



Online Order Field-Level Security for profile

Distributor

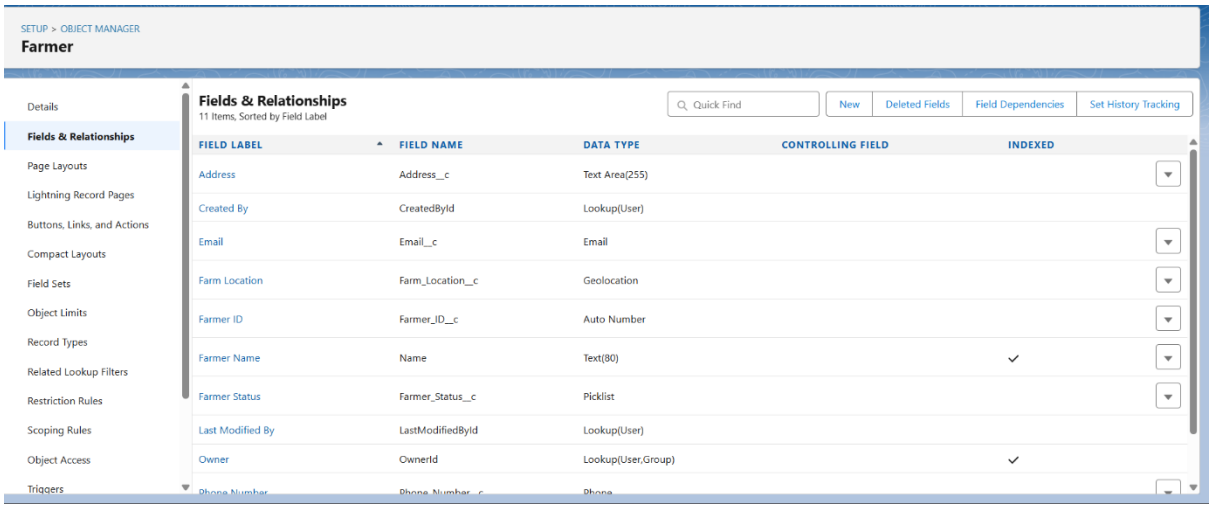
Help for this Page

Edit | Back to Profile

Field Name	Field Type	Read Access	Edit Access
Created By	Lookup	✓	
Customer	Lookup	✓	✓
Delivery Date	Date	✓	✓
Delivery Status	Picklist	✓	✓
Distributor	Lookup	✓	✓
Last Modified By	Lookup	✓	
Online Order Name	Text	✓	✓
Online Order Number	Auto Number	✓	
Order Date	Date/Time	✓	✓
Order ID	Auto Number	✓	
Owner	Lookup	✓	✓
Payment Status	Picklist	✓	✓
Product	Lookup	✓	✓
Quantity	Number	✓	✓

10. **Farmer Object**

Field Name	Data Type	Description
Name	Text	Farmer's full name / farm name
Account Type	Picklist	Farmer (Record Type: Farmer)
Location	Text	Farmer's village, city, or region
Contact Number	Phone	Mobile number of the farmer
Email	Email	Farmer's email (optional)
Farm Size	Number	Size of farmland (acres/hectares)
No. of Cattle	Number	Total cattle owned by farmer
Cattle IDs	Lookup (Cattle)	Links to individual cattle records
Milk Production	Lookup (Milk Production)	Links to farmer's milk production records
Inventory Supplied	Lookup (Inventory)	Products supplied to distributor/customer



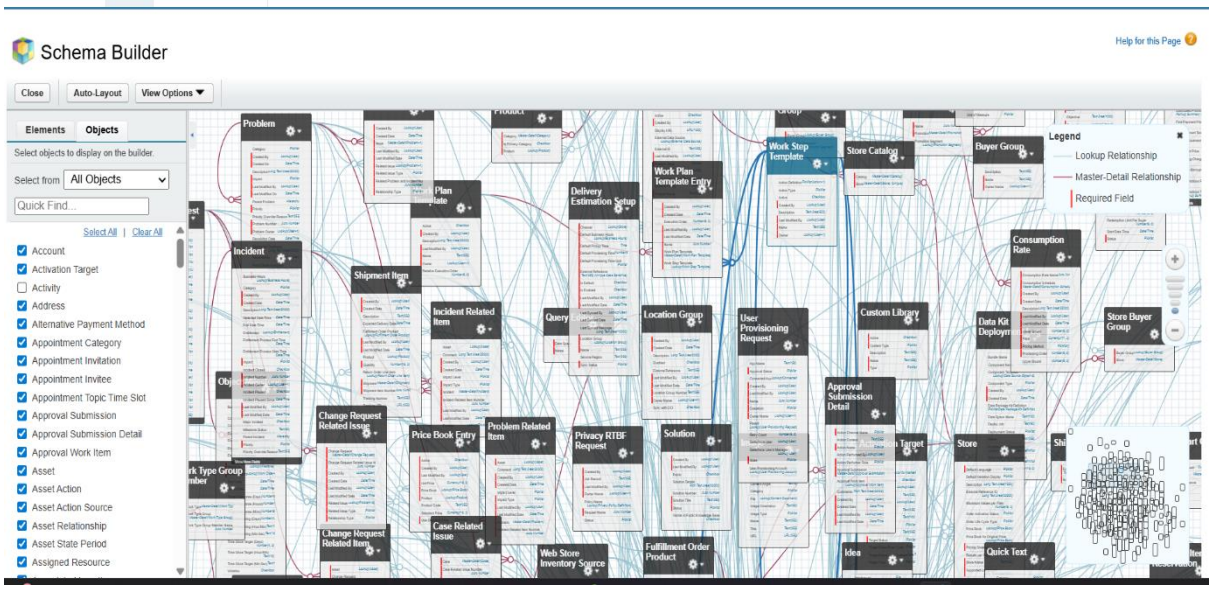
Schema Builder

Steps:

1. Setup → enter Schema Builder in Quick Find → Schema Builder.

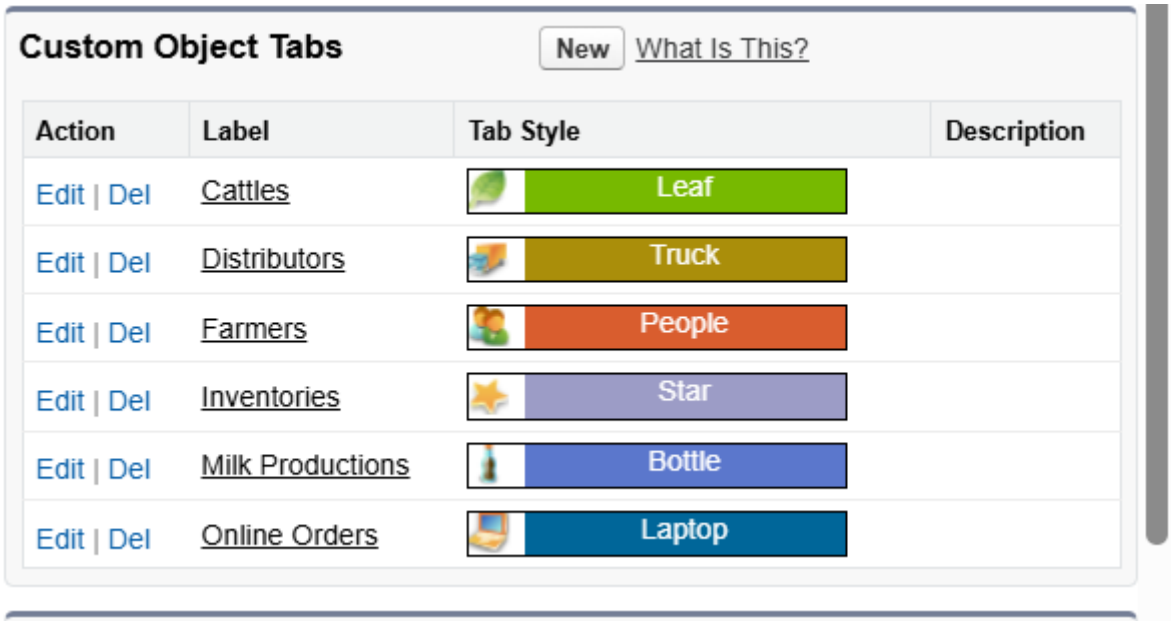
2. From the left pane, check the objects you created.

3. Drag objects onto canvas to view relationships



Create Tabs & Add to App

Steps: 1. Setup → Quick Find → Tabs → New (Custom Object Tabs).

2. Select Farmer→ Choose tab style → Next → Add to desired Apps → Save.

3. Repeat for all the objects