

Salesforce Setup Guide: Phase 3 – Data Modeling & Relationships (ShipmentTrack)

This document outlines the data architecture setup for the **ShipmentTrack Project** (Shipment & Inventory Management System) in Salesforce.

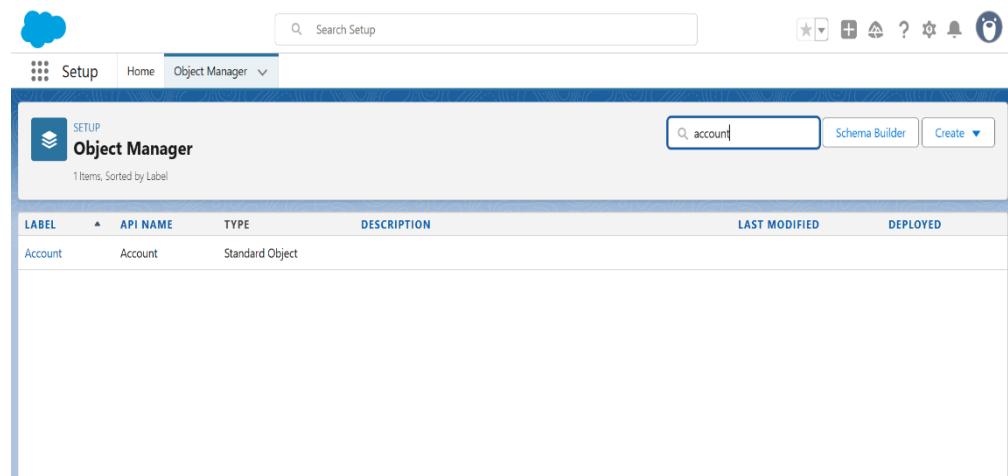
Step 1: Standard & Custom Objects

Purpose: To define the core data structure for shipment, inventory, warehouse, and customer information.

Action:

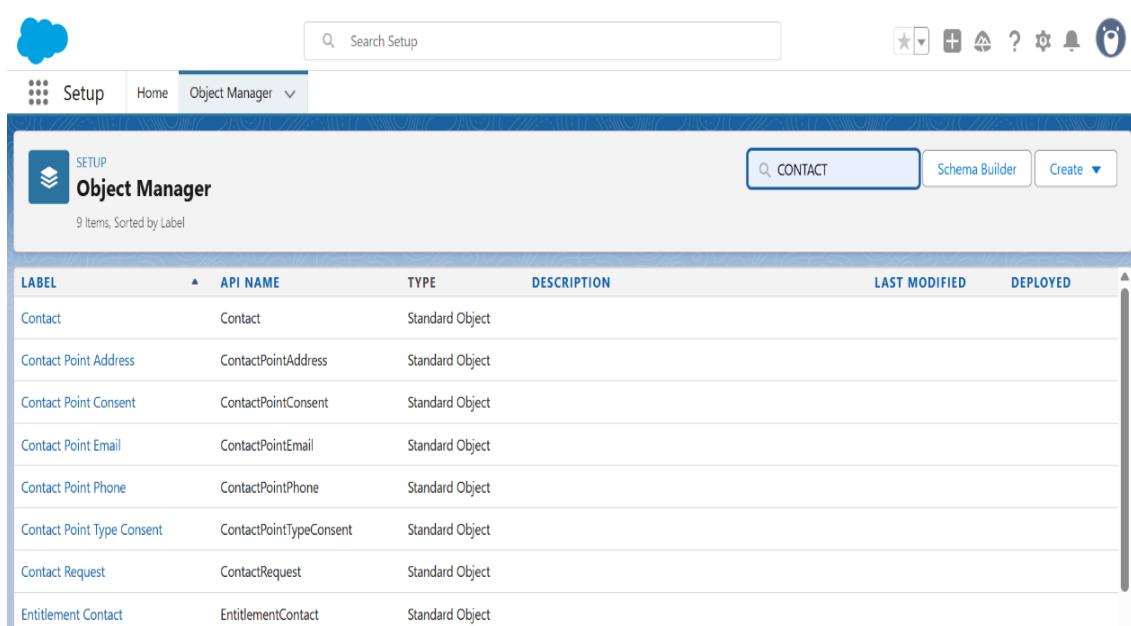
1. Use Standard Objects:

- **Account** → represents logistics partners/vendors.
- **Contact** → represents customer contacts.
- **User** → internal team members (e.g., Amit, Neha).



The screenshot shows the Salesforce Object Manager interface. The search bar at the top contains "account". The main table displays one item: Account, with API Name "Account" and Type "Standard Object".

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			



The screenshot shows the Salesforce Object Manager interface. The search bar at the top contains "CONTACT". The main table displays nine items related to the Contact object.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Contact	Contact	Standard Object			
Contact Point Address	ContactPointAddress	Standard Object			
Contact Point Consent	ContactPointConsent	Standard Object			
Contact Point Email	ContactPointEmail	Standard Object			
Contact Point Phone	ContactPointPhone	Standard Object			
Contact Point Type Consent	ContactPointTypeConsent	Standard Object			
Contact Request	ContactRequest	Standard Object			
Entitlement Contact	EntitlementContact	Standard Object			

Label	API Name	Type	Description	Last Modified	Deployed
Guest User Anomaly Event Store	GuestUserAnomalyEventStore	Standard Object			
Messaging User	MessagingEndUser	Standard Object			
User	User	Standard Object			
User Presence	UserServicePresence	Standard Object			
User Provisioning Request	UserProvisioningRequest	Standard Object			

2. Create Custom Objects:

- **Shipment__c** → Stores shipment details.
- **Inventory__c** → Tracks product stock levels.
- **Warehouse__c** → Stores warehouse information.
- **Customer__c** → Captures customer profiles.

Label	API Name	Type	Description	Last Modified	Deployed
Inventory	Inventory__c	Custom Object		9/26/2025	✓
Inventory Item	InventoryItem__c	Custom Object	Tracks inventory items, stock levels, and locations	9/22/2025	✓
Inventory Item Reservation	InventoryItemReservation	Standard Object			
Inventory Reservation	InventoryReservation	Standard Object			
Web Store Inventory Source	WebStoreInventorySource	Standard Object			

Label	API Name	Type	Description	Last Modified	Deployed
Shipment	Shipment__c	Custom Object		9/26/2025	✓
Shipment	Shipment	Standard Object			
Shipment Item	ShipmentItem	Standard Object			
Shipment Update Log	ShipmentUpdateLog__c	Custom Object		9/22/2025	✓
ShipmentTrack	ShipmentTrack__c	Custom Object	Tracks shipments and related logistics data	9/22/2025	✓

The image displays two screenshots of the Salesforce Object Manager interface. Both screenshots show a search bar at the top with the word 'warehouse' in the first one and 'Customer' in the second. Below the search bar is a table with columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED.

Screenshot 1 (Warehouse Object):

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Warehouse	Warehouse__c	Custom Object		9/22/2025	✓

Screenshot 2 (Customer Object):

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Customer	Customer	Standard Object			

Step 2: Fields

Purpose: To capture key information for shipments and inventory.

Action:

1. Shipment__c Fields:

- Tracking Number (Text)
- Current Location (Text)
- Status (Picklist: Pending, In-Transit, Delivered, Returned)
- Estimated Delivery Date (Date)

SETUP > OBJECT MANAGER
Shipment

Fields & Relationships
8 Items, Sorted by Field Label

Estimated Delivery Date	Estimated_Delivery_Date__c	Date	
Last Modified By	LastModifiedByld	Lookup(User)	
Owner	OwnerId	Lookup(User,Group)	✓
Shipment Name	Name	Text(80)	✓
Status	Status__c	Picklist	
Tracking Number	Tracking_Number__c	Text(50)	

2. Inventory__c Fields:

- Quantity (Number)
- Reorder Level (Number)

SETUP > OBJECT MANAGER
Inventory

Fields & Relationships
6 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedByld	Lookup(User)		
Inventory Name	Name	Text(80)	✓	
Last Modified By	LastModifiedByld	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)	✓	
Quantity	Quantity__c	Number(10, 0)		
Reorder Level	Reorder_Level__c	Number(10, 0)		

Step 3: Record Types

Purpose: To handle different shipment workflows (Domestic vs International).

Action:

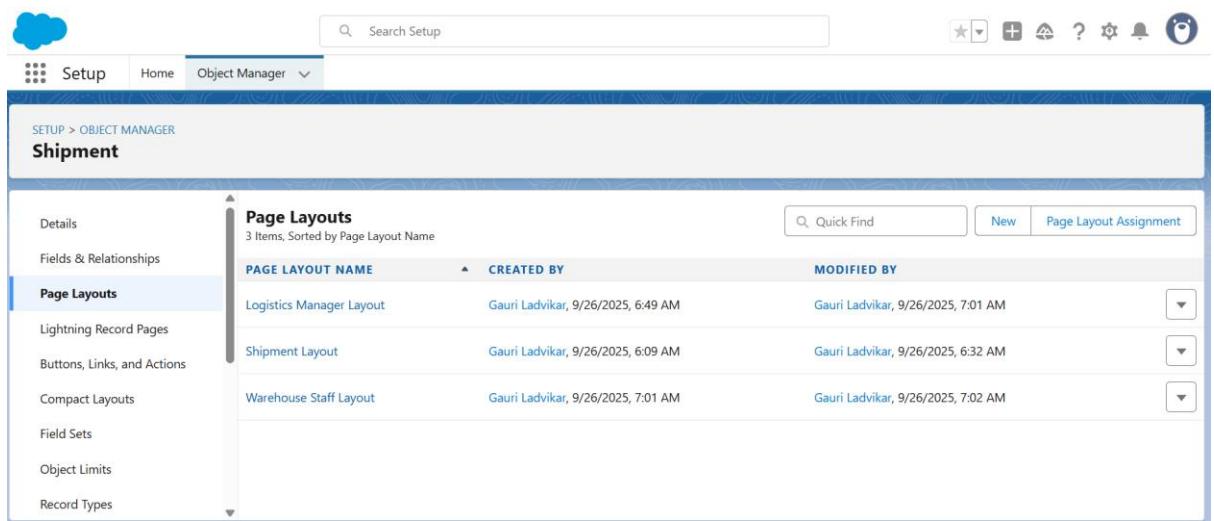
1. Create **Record Types** in **Shipment__c**:
 - Domestic Shipment
 - International Shipment
2. Assign different **Status picklist values** for each record type.

Step 4: Page Layouts

Purpose: To control which fields are visible to different roles.

Action:

1. **Logistics Manager Layout** → Includes all shipment details, history, and customer info.
2. **Warehouse Staff Layout** → Simplified layout showing only essential shipment fields.



The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Search Setup, Setup, Home, Object Manager.
- Breadcrumbs:** SETUP > OBJECT MANAGER.
- Page Title:** Shipment.
- Left Sidebar:** Details, Fields & Relationships, **Page Layouts** (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types.
- Table:** Page Layouts (3 Items, Sorted by Page Layout Name)

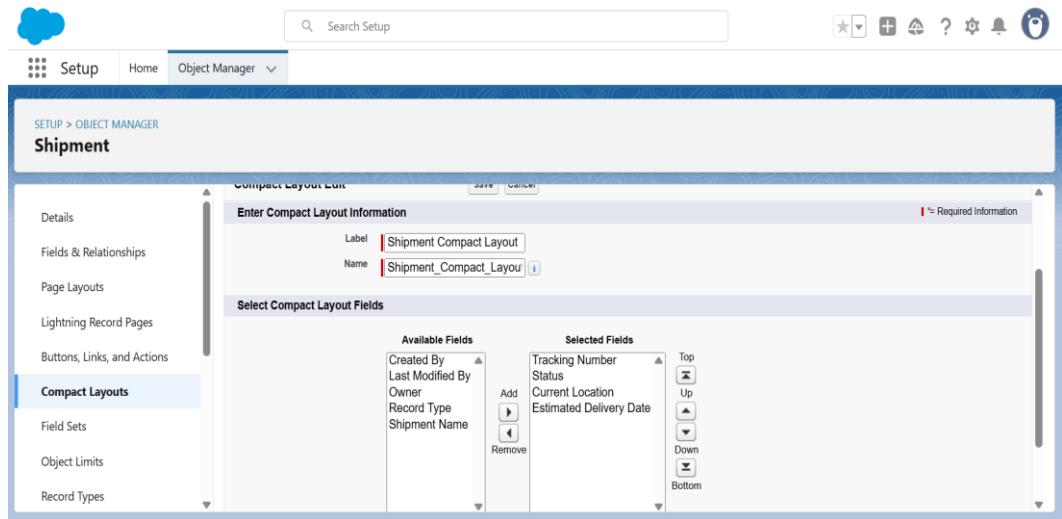
PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Logistics Manager Layout	Gauri Ladvikar, 9/26/2025, 6:49 AM	Gauri Ladvikar, 9/26/2025, 7:01 AM
Shipment Layout	Gauri Ladvikar, 9/26/2025, 6:09 AM	Gauri Ladvikar, 9/26/2025, 6:32 AM
Warehouse Staff Layout	Gauri Ladvikar, 9/26/2025, 7:01 AM	Gauri Ladvikar, 9/26/2025, 7:02 AM
- Buttons:** Quick Find, New, Page Layout Assignment.

Step 5: Compact Layouts

Purpose: To display key record information in the highlights panel and mobile app.

Action:

- Configure **Shipment__c Compact Layout:**
 - Tracking Number
 - Status
 - Current Location
 - Delivery Date

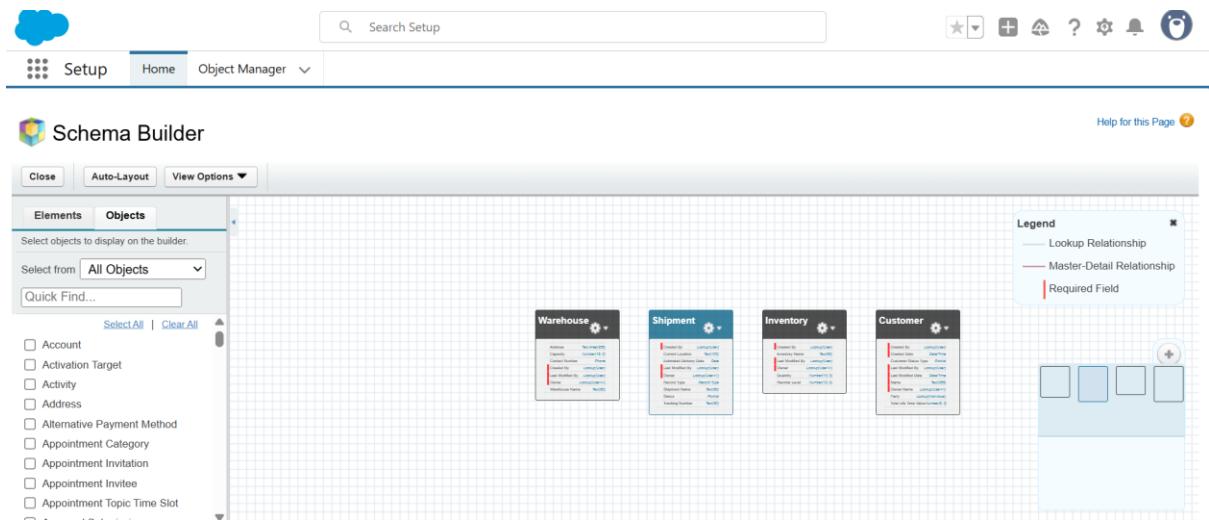


Step 6: Schema Builder [🔗](#)

Purpose: To visualize objects and relationships in Salesforce.

Action:

1. Open **Schema Builder**.
2. Add the objects: Shipment, Inventory, Warehouse, Customer.
3. Verify **relationships** (Lookup and Master-Detail).



Step 7: Lookup, Master-Detail & Hierarchical Relationships [🔗](#)

Purpose: To define how objects relate to each other.

Action:

1. **Lookup Relationship:** Shipment → Warehouse

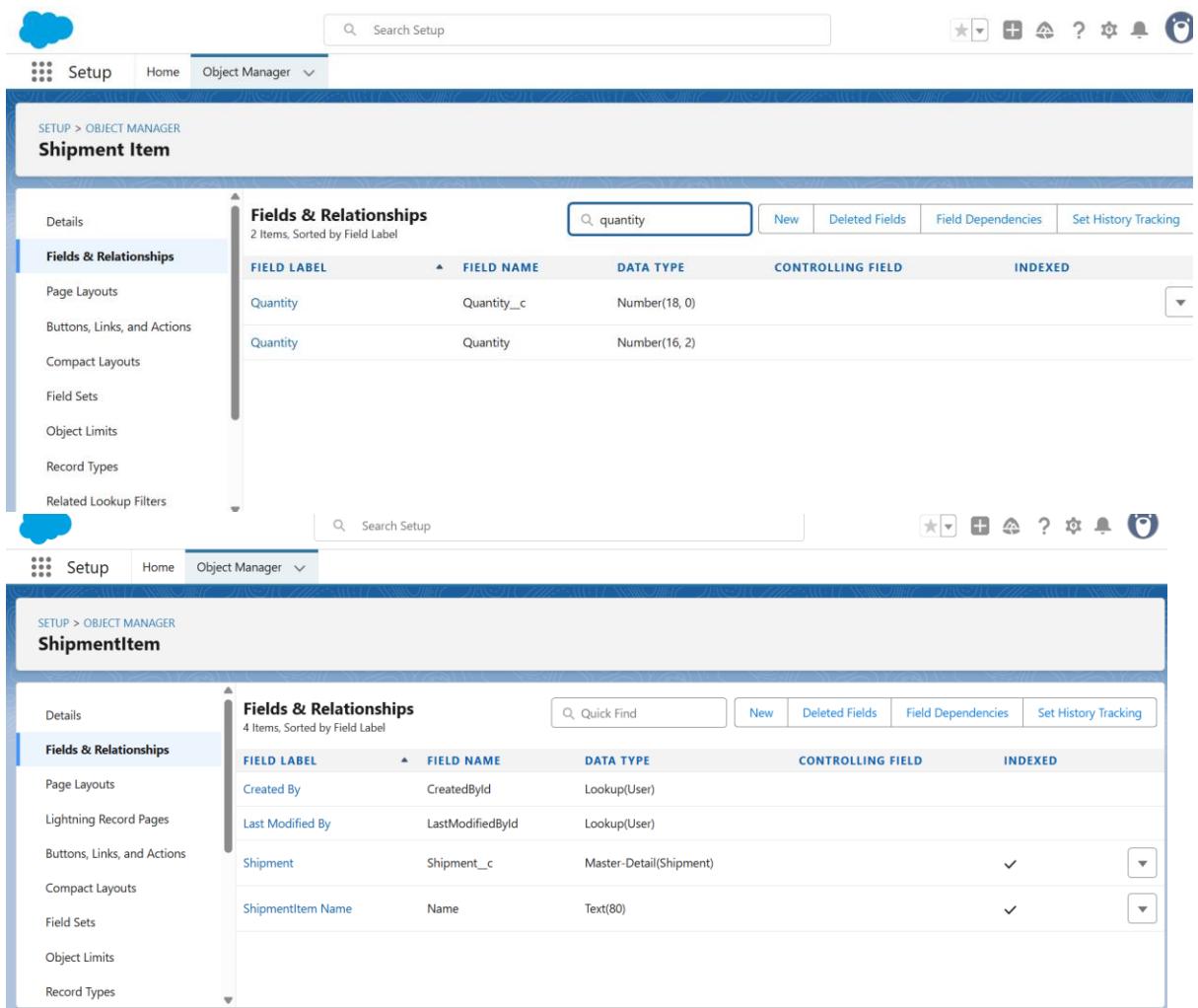
2. **Master-Detail Relationship:** Inventory → Warehouse
 3. **Hierarchical Relationship:** Users → Amit (Manager) supervises Neha (Staff)
-

Step 8: Junction Objects

Purpose: To manage many-to-many relationships between shipments and inventory items.

Action:

1. Create **ShipmentItem__c** as a junction object connecting **Shipment__c** and **Inventory__c**.
2. Add fields: Quantity, Product Condition



The image contains two screenshots of the Salesforce Object Manager interface, illustrating the creation of junction objects.

Screenshot 1: Shipment Item Object Manager

This screenshot shows the 'Fields & Relationships' section for the 'Shipment Item' object. It lists two fields: 'Quantity' (Quantity__c, Number(18, 0)) and another 'Quantity' field (Quantity, Number(16, 2)).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Quantity	Quantity__c	Number(18, 0)		
Quantity	Quantity	Number(16, 2)		

Screenshot 2: ShipmentItem Object Manager

This screenshot shows the 'Fields & Relationships' section for the 'ShipmentItem' object. It lists four fields: 'Created By' (CreatedBy), 'Last Modified By' (LastModifiedBy), 'Shipment' (Shipment__c, Master-Detail(Shipment)), and 'ShipmentItem Name' (Name). The 'Shipment' field is indexed.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Shipment	Shipment__c	Master-Detail(Shipment)		✓
ShipmentItem Name	Name	Text(80)		✓

SETUP > OBJECT MANAGER
Shipment Item

Fields & Relationships
1 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Product Condition	Product_Condition_c	Picklist		

Step 9: External Objects

Purpose: To reference external logistics APIs (e.g., FedEx, DHL) without storing data in Salesforce.

Action:

1. Create **External Object:** Courier_Tracking_x
2. Fields: Courier Name, External Tracking ID, Delivery Status

SETUP > OBJECT MANAGER
Courier Tracking

Fields & Relationships
7 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Courier Name	Courier_Name_c	Text(20)		
Courier Tracking Name	Name	Text(80)		
Created By	CreatedByld	Lookup(User)		
Delivery Status	Delivery_Status_c	Picklist		
External Tracking ID	External_Tracking_ID_c	Text(16)		