Phase 3 — Data Modeling & Relationships

Project: Revolutionizing Agriculture with AgriEdge Or-Mange Ltd — Salesforce OMS
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Status: Completed (verified steps & settings below)

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1. Executive Summary

This document captures all the data modeling and relationship configurations created in **Phase 3: Data Modeling & Relationships** for the AgriEdge OMS project. It includes the custom objects, fields, record types, page layouts, and relationships that define the system's data structure. This serves as proof of completion and a reference for future enhancements.

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2. Objects Created

Custom Objects

1. **Product**

   o Fields:

   - Name (Standard)

   - Category (Picklist: Seeds, Fertilizers, Crops, Processed Food)

   - Price (Currency)

   - Stock (Number)

   - Expiry Date (Date)

2. **Customer**

   o Fields:

      ▪ Name (Standard)

      ▪ Contact (Phone/Email)

      ▪ Location (Text)

      ▪ Type (Picklist: Farmer, Distributor)

3. **Order**

   o Fields:

      ▪ Order No (Auto Number: ORD-{0000})

      ▪ Customer (Lookup → Customer)

      ▪ Date (Date)

      ▪ Status (Picklist: New, In Progress, Shipped, Delivered, Cancelled)

      ▪ Payment Mode (Picklist: Cash, UPI, Card, Bank Transfer)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Bulk Discounts	Bulk_Discounts__c	Percent(16, 2)			▾
Created By	CreatedById	Lookup(User)			
Customer	Customer__c	Lookup(Account)		✓	▾
Deliveries	Deliveries__c	Lookup(Delivery)		✓	▾
Delivery	Delivery__c	Lookup(Delivery)		✓	▾
Farmer	Farmer__c	Lookup(Farmer)		✓	▾
Large Quantity	Large_Quantity__c	Number(16, 2)			▾
Last Modified By	LastModifiedById	Lookup(User)			
Order Date	Order_Date__c	Date			▾
Order External Id	Order_External_Id__c	Text(255) (External ID) (Unique Case Insensitive)		✓	▾
Order Line Item	Order_Line_Item__c	Lookup(Order Line Item)		✓	▾
Order Number	Order_Number__c	Number(18, 0)			▾
Order Status	Order_Status__c	Picklist			▾

4. **Order Item (Junction Object)**

   o Fields:

   - Quantity (Number)

   - Price (Currency)

   - Order (Master-Detail → Order)

   - Product (Lookup → Product)

5. **Delivery**

   o Fields:

   - Delivery Date (Date)

   - Carrier(Text)

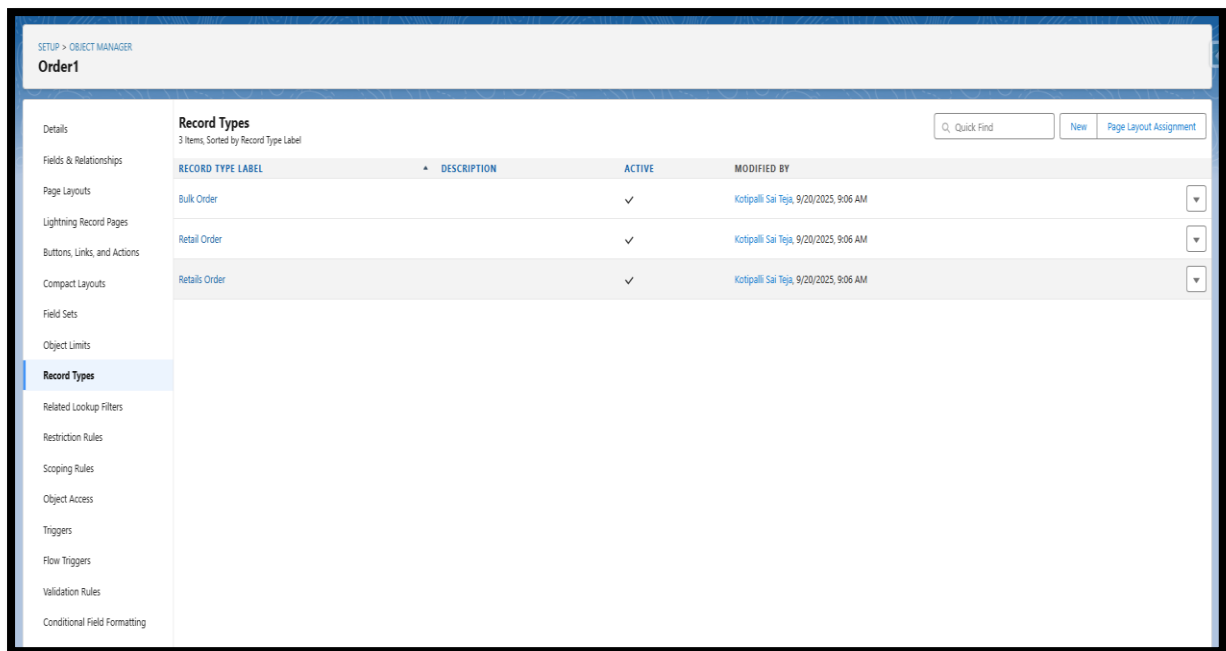   - Status (Picklist: Pending, In Transit, Delivered)

   - Order (Lookup → Order)

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3. Relationships

- **Customer ↔ Order:** Lookup (One Customer → Many Orders)

- **Order ↔ Order Item:** Master-Detail (Order = Master, controls lifecycle of Order Items)

- **Order Item ↔ Product:** Lookup (One Product can be used in many Order Items)

- **Order ↔ Delivery:** Lookup (One Order can have one or more Delivery records)

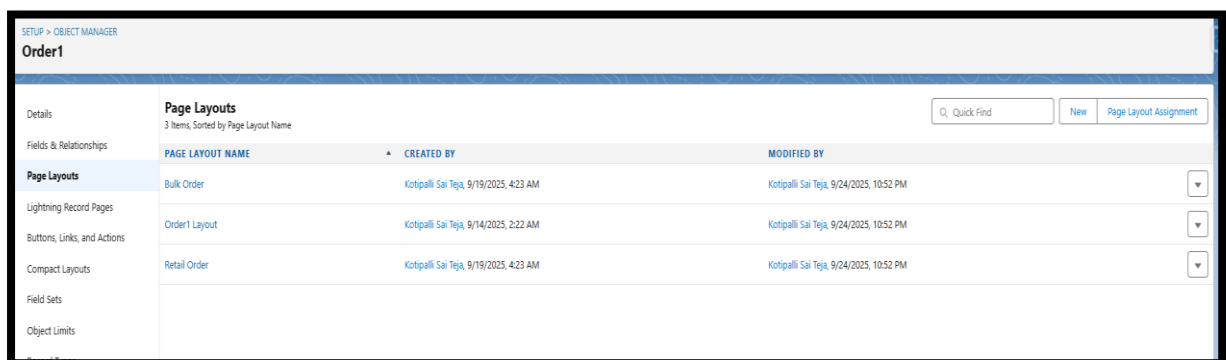- **This relationships has been completed in the previous object creation**

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4. Record Types

- **Retail Orders (Farmer)**

    o Applies to **Order** object

    o Page Layout customized for small quantity/individual transactions

- **Bulk Orders (Distributor)**

    o Applies to **Order** object

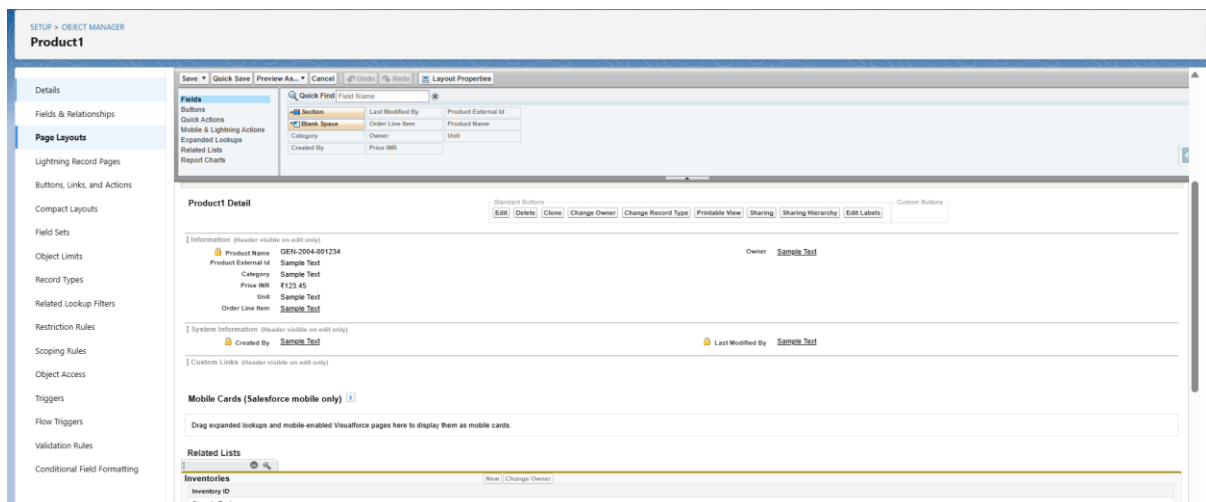   o Page Layout customized for large quantity/distribution transactions

5. Page Layouts

- **Order Layout:** Includes Customer, Status, Payment Mode, related Order Items.

- **Product Layout:** Shows Product details including stock and expiry date.

- **Customer Layout:** Displays customer type (Farmer vs Distributor) for quick reference.

- **Delivery Layout:** Vehicle, Delivery Date, Status.

- **Order Item Layout:** Displays Quantity, Price, and linked Product.

6. Compact Layouts

- **Order Compact Layout:** Displays Order No, Customer, Status, Date.

- **Product Compact Layout:** Displays Name, Category, Stock.

7. Schema Builder Verification

Schema Builder confirms:

- Correct object creation

- Proper relationships between **Customer → Order → Order Item → Product → Delivery**

- Junction object (**Order Item**) is properly linking Orders and Products