

Project Title : “ Inventory & Order Tracking Dashboard “

Phase 3: Data Modeling & Relationships

1. Objects to be Created

- Product (API: Product__c)
Represents items in the inventory.

Fields:

Product Code (Text)

Unit Price (Currency)

Stock Quantity (Number)

- Order (API: Order__c)

Represents a customer’s order.

Fields:

Customer Name (Text)

Order Date (Date)

Status (Picklist: Pending, Shipped, Delivered)

- Order Item (API: Order_Item__c)

Acts as a junction object between Orders and Products.

Fields:

Lookup to Order (Order__c)

Lookup to Product (Product__c)

Quantity (Number)

Total Price (Formula = Quantity × Product.Unit Price)

SETUP > OBJECT MANAGER				
product				
Details	Fields & Relationships			
	8 Items, Sorted by Field Label			
Fields & Relationships	<div>Q Quick Find</div> <div>NewDeleted FieldsField DependenciesSet History Tracking</div>			
Page Layouts	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELDINDEXED
Lightning Record Pages	Created By	CreatedById	Lookup(User)	
Buttons, Links, and Actions	Currency	CurrencyIsoCode	Picklist	
Compact Layouts	Last Modified By	LastModifiedById	Lookup(User)	
Field Sets	Owner	OwnerId	Lookup(User,Group)	✓
Object Limits	product code	product_code__c	Text(10) (Unique Case Insensitive)	✓
Record Types	product Name	Name	Text(80)	✓
Related Lookup Filters	stock quantity	stock_quantity__c	Number(18, 0)	
Search Layouts	unit price	unit_price__c	Currency(18, 0)	
List View Button Layout				

SETUP > OBJECT MANAGER

order

Details

Fields & Relationships
8 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)		
Currency	CurrencyIsoCode	Picklist		
Customer Name	Customer_Name__c	Text(5)		
Last Modified By	LastModifiedById	Lookup(User)		
Order Date	Order_Date__c	Date		
Order Name	Name	Auto Number		✓
Owner	OwnerId	Lookup(User,Group)		✓
Status	Status__c	Picklist		

SETUP > OBJECT MANAGER

Order Item

Details

Fields & Relationships
9 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)		
Currency	CurrencyIsoCode	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
order	order__c	Lookup(order)		✓
Order Item Name	Name	Auto Number		✓
Owner	OwnerId	Lookup(User,Group)		✓
product	product__c	Lookup(product)		✓
Quantity	Quantity__c	Number(18, 0)		
Total Price	Total_Price__c	Formula (Currency)		

2. Relationships Between Objects

Salesforce uses Lookups to connect objects.

- Product (1) ↔ (Many) Order Items

Each product can appear in many order items.

Order Item has a lookup field pointing to Product.

- Order (1) ↔ (Many) Order Items

Each order can contain many order items.

Order Item has a lookup field pointing to Order.

★ Together, this creates a many-to-many relationship between Products and Orders via the Order Item junction object.

3. Schema Builder Visualization

Go to Setup → Schema Builder.

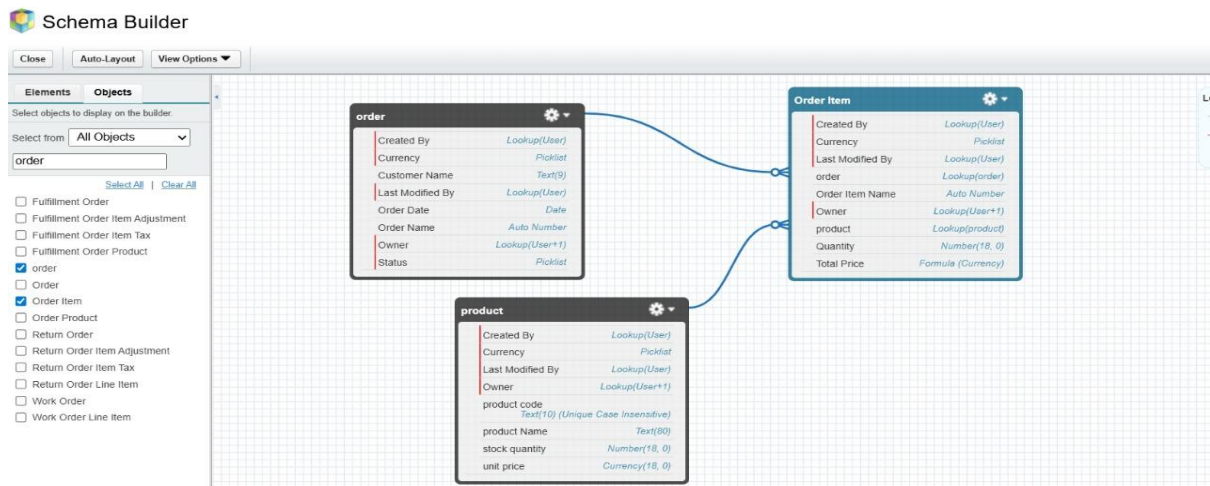
Select Product, Order, and Order Item.

You will see:

Order Item connected to Product (lookup).

Order Item connected to Order (lookup).

This diagram shows how the three objects interact.



4. Page Layouts & Tabs

Add all new fields into their Page Layouts so they are visible when creating/editing records.

Create Tabs for each object (Product, Order, Order Item) so they appear in the App Launcher.

The screenshot shows the Salesforce Object Manager interface for the **order** object. The left sidebar contains navigation options: Details, Fields & Relationships, **Page Layouts** (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters.

The main area displays the **order** object configuration. The **Fields** tab is active, showing a list of fields: Customer Name, Owner, Last Modified By, Status, Created By, Order Date, Order Name, and Currency. The **Layout Properties** section shows the **order Detail** layout, which includes standard buttons (Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Sharing, Sharing Hierarchy, Edit Labels) and custom buttons. Below the buttons, the **Information** section displays sample data for the **order** object:

Field	Value
Order Name	GEN-2004-001234
Customer Name	Sample Text
Order Date	9/23/2025
Status	Sample Text
Currency	Sample Text

SETUP > OBJECT MANAGER

Order Item

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields
Buttons
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists
Report Charts

Quick Find
Field Name
Section
Blank Space
Created By
Currency
Last Modified By
order
Order Item Name
Owner
product
Quantity
Total Price

Edit Delete Clone Change Owner Change Record Type Printable View Sharing Sharing Hierarchy Edit Labels

Information (Header visible on edit only)
Order Item Name GEN-2004-001234
order Sample Text
product Sample Text
Quantity 6.157
Total Price INR 123.45
Currency Sample Text
Owner Sample Text

System Information (Header visible on edit only)

SETUP > OBJECT MANAGER

product

Details
Fields & Relationships
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

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields
Buttons
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists
Report Charts

Quick Find
Field Name
Section
Blank Space
Created By
Currency
Last Modified By
stock quantity
unit price
product code
product Name

Edit Delete Clone Change Owner Change Record Type Printable View Sharing Sharing Hierarchy Edit Labels

Actions in this section are predefined by Salesforce. You can override the predefined actions to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

product Detail
Standard Buttons
Custom Buttons

Edit Delete Clone Change Owner Change Record Type Printable View Sharing Sharing Hierarchy Edit Labels

Information (Header visible on edit only)
product Name Sample Text
product code Sample Text
unit price INR 123.45
stock quantity 46.325
Currency Sample Text
Owner Sample Text

5. Sample Records

Insert test data for better understanding:

- Products:
 - Laptop (Stock: 10, Price: ₹50,000)
 - Mouse (Stock: 50, Price: ₹500)
 - Keyboard (Stock: 20, Price: ₹1,500)
 - Headphones (Stock: 8, Price: ₹2,000)
- Orders:
 - Order 1: Customer = John, Status = Pending
 - Order 2: Customer = Priya, Status = Delivered
- Order Items:
 - Order 1 → Laptop × 2 (Total Price = ₹1,00,000)
 - Order 1 → Mouse × 1 (Total Price = ₹500)

Order 2 → Keyboard × 2 (Total Price = ₹3,000)

The screenshot displays a Salesforce interface for an 'Order Item' record with ID 'OI-0002'. The top navigation bar includes a search bar and a menu with 'Inventory & Order T...', 'product', 'Orders', and 'Order Items'. The record details are shown in a table-like format:

Order Item Name	OI-0002	Owner	T N KUSHAL
order	ORD-0001		
product	Mouse		
Quantity	20		
Total Price	INR 40,000.00		
Currency	INR - Indian Rupee		
Created By	T N KUSHAL, 9/14/2025, 6:38 AM	Last Modified By	T N KUSHAL, 9/14/2025, 6:38 AM

On the right, the 'Activity' section shows a list of activities with filters for 'All time', 'All activities', and 'Upcoming & Overdue'. It indicates 'No activities to show' and provides a prompt to 'Get started by sending an email, scheduling a task, and'.

6. Outcome of Phase 3

At the end of this phase:

Database model is ready.

Objects (Product, Order, Order Item) are created with proper fields.

Relationships are established using lookups.

Sample records are inserted for testing.

Salesforce is now ready for Phase 4