Project Title – "Government Schemes Management System"

Phase 3: Data Modeling & Relationships

Standard & Custom Objects

- Account (Standard): Represents government offices, agencies, or organizations managing schemes.
- Contact (Standard): Stores citizens or scheme applicants.
- Scheme__c (Custom): Tracks government schemes (type, start/end dates, eligibility, budget).
- Scheme_Application__c (Custom): Stores applications submitted by citizens for schemes.
- Fund_Transaction__c (Custom): Tracks fund disbursements and receipts related to schemes.
- Grievance__c (Custom): Records complaints or feedback from citizens regarding schemes or fund transactions.

Data Flow: Account → Contact → Scheme__c -> Scheme_Application__c → Fund_Transaction__c → Grievance__c

---

Master-Detail & Lookup Relationships

1. Scheme_Application__c → Scheme__c
   - Relationship Type: Lookup
   - Purpose: Each application belongs to a particular scheme.
2. Fund_Transaction__c → Scheme_Application__c
   - Relationship Type: Lookup
   - Purpose: Tracks payments/disbursements related to a specific application.
3. Grievance__c → Scheme_Application__c
   - Relationship Type: Lookup
   - Purpose: Links complaints to the corresponding citizen application.
4. Contact → Account
   - Relationship Type: Lookup (or optionally Master-Detail for stricter access)
   - Purpose: Each citizen belongs to a particular account/agency (for internal management).

Fields for Custom Objects

Scheme__c

- Scheme Code (Text, 50, unique, required)

- Scheme Name (Text, 80, required)

- Description (Long Text Area)

- Start Date (Date)

- End Date (Date)

- Active (Checkbox)

- Max Amount (Currency)

- Eligibility Criteria (Long Text Area)

SETUP > OBJECT MANAGER
Scheme

Details		
Fields & Relationships		
Page Layouts		
Lightning Record Pages		
Buttons, Links, and Actions		
Compact Layouts		
Field Sets		
Object Limits		
Record Types		
Related Lookup Filters		
Restriction Rules		
Scoping Rules		
Object Access		
Triggers		
Flow Triggers		
Validation Rules		
URL Slugs		

Fields & Relationships
12 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
Active	Active__c	Checkbox
Created By	CreatedById	Lookup(User)
Description	Description__c	Long Text Area(32768)
Eligibility Criteria	Eligibility_Criteria__c	Long Text Area(32768)
End Date	End_Date__c	Date
Last Modified By	LastModifiedById	Lookup(User)
Max Amount	Max_Amount__c	Currency(16, 2)
Owner	OwnerId	Lookup(User,Group)
Record Type	RecordTypeId	Record Type
Scheme Code	Scheme_Code__c	Text(50) (Unique Case Insensitive)
Scheme Name	Name	Text(80)
Start Date	Start_Date__c	Date

Scheme_Application__c

- Application Name (Auto Number)

- Requested Amount (Currency)

- Approved Amount (Currency)

- Contact (Lookup → Contact)

- Scheme (Lookup → Scheme__c)

- Status (Picklist: Submitted, Approved, Rejected, Pending)

- Submission Date (Date)

SETUP > OBJECT MANAGER
Scheme Application

Details	**Fields & Relationships** 12 Items, Sorted by Field Label	
Fields & Relationships		

Fields & Relationships
12 Items, Sorted by Field Label

FIELD LABEL ▲	FIELD NAME	DATA TYPE
Application Name	Application_Name__c	Auto Number
Approved Amount	Approved_Amount__c	Currency(16, 2)
Contact	Citizen__c	Lookup(Contact)
Created By	CreatedById	Lookup(User)
Last Modified By	LastModifiedById	Lookup(User)
Owner	OwnerId	Lookup(User,Group)
Record Type	RecordTypeId	Record Type
Requested Amount	Requested_Amount__c	Currency(16, 2)
Scheme	Scheme__c	Lookup(Scheme)
Scheme Application Name	Name	Text(80)
Status	Status__c	Picklist
Submission Date	Submission_Date__c	Date

Left sidebar menu items:
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Validation Rules
URL Slugs

Fund_Transaction__c

- Fund Transaction Name (Auto Number)

- Scheme Application (Lookup → Scheme_Application__c)

- Amount (Currency)

- Payment Date (Date)

- Payment Status (Picklist: Pending, Paid, Failed)

Fund Transaction

Fields & Relationships
9 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
Amount	Amount__c	Currency(16, 2)
Created By	CreatedById	Lookup(User)
Fund Transaction Name	Name	Auto Number
Last Modified By	LastModifiedById	Lookup(User)
Owner	OwnerId	Lookup(User,Group)
Payment Date	Payment_Date__c	Date
Payment Status	Payment_Status__c	Picklist
Record Type	RecordTypeId	Record Type
Scheme Application	Application__c	Lookup(Scheme Application)

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
Restriction Rules

Grievance__c

- Grievance Name (Auto Number)

- Contact (Lookup → Contact)

- Scheme Application (Lookup → Scheme_Application__c)

- Category (Picklist: Scheme Complaint, Payment Complaint, General Feedback)

- Status (Picklist: Open, In Progress, Resolved)

- Resolution Notes (Long Text Area)

Grievance

Fields & Relationships
10 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
Category	Category__c	Picklist
Contact	Citizen__c	Lookup(Contact)
Created By	CreatedById	Lookup(User)
Grievance Name	Name	Auto Number
Last Modified By	LastModifiedById	Lookup(User)
Owner	OwnerId	Lookup(User,Group)
Record Type	RecordTypeId	Record Type
Resolution Notes	Resolution_Notes__c	Long Text Area(32768)
Scheme Application	Application__c	Lookup(Scheme Application)
Status	Status__c	Picklist

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
Restriction Rules
Scoping Rules

Page Layouts

Scheme__c Layout

- Sections: Header (Scheme Code, Scheme Name), Details (Start/End Date, Description, Eligibility Criteria, Max Amount, Active)

- Related Lists: Applications, Fund Transactions, Grievances

SETUP > OBJECT MANAGER
Scheme

	Page Layouts	
Details	4 Items, Sorted by Page Layout Name	
Fields & Relationships	**PAGE LAYOUT NAME** ▲	**CREATED BY**
Page Layouts	education scheme layout	Anala Lasya, 9/28/2025, 11:13 AM
Lightning Record Pages	health scheme layout	Anala Lasya, 9/28/2025, 11:13 AM
Buttons, Links, and Actions	infrastructure scheme layout	Anala Lasya, 9/28/2025, 11:14 AM
Compact Layouts	Scheme Layout	Anala Lasya, 9/28/2025, 10:33 AM
Field Sets		
Object Limits		
Record Types		

Scheme_Application__c Layout

- Sections: Header (Application Name, Contact), Application Details (Requested/Approved Amount, Status, Submission Date)

- Related Lists: Fund Transactions, Grievances

SETUP > OBJECT MANAGER
Scheme Application

	Page Layouts	
Details	4 Items, Sorted by Page Layout Name	
Fields & Relationships	**PAGE LAYOUT NAME** ▲	**CREATED BY**
Page Layouts	education application layout	Anala Lasya, 9/28/2025, 11:10 AM
Lightning Record Pages	health application layout	Anala Lasya, 9/28/2025, 11:10 AM
Buttons, Links, and Actions	infrastructure application layout	Anala Lasya, 9/28/2025, 11:11 AM
Compact Layouts	Scheme Application Layout	Anala Lasya, 9/28/2025, 10:34 AM
Field Sets		
Object Limits		
Record Types		
Related Lookup Filters		

Fund_Transaction___c Layout

Fields: Fund Transaction Name, Scheme Application, Amount, Payment Date, Payment Status

Grievance__c Layout

- Fields: Grievance Name, Contact, Scheme Application, Category, Status, Resolution Notes

Compact Layouts

Scheme_____c

Display Fields: Scheme Code, Scheme Name, Active

Details	**Compact Layouts**	
	6 Items, Sorted by Label	
Fields & Relationships		
Page Layouts	LABEL ▲	API NAME	PRIMARY
Lightning Record Pages	Default Scheme Compact Layout	Default_Scheme_Compact_Layout	✓
Buttons, Links, and Actions	Education Scheme Compact Layout	Education_Scheme_Compact_Layout	
Compact Layouts	Health Scheme Compact Layout	Health_Scheme_Compact_Layout	
Field Sets	Infrastructure Scheme Compact Layout	Infrastructure_Scheme_Compact_Layout	
Object Limits	System Default	SYSTEM	
Record Types	Welfare Scheme Compact Layout	Welfare_Scheme_Compact_Layout	
Related Lookup Filters		

Scheme_Application__c

- Display Fields: Application Name, Status, Requested Amount

Details	**Compact Layouts**	
	6 Items, Sorted by Label	
Fields & Relationships		
Page Layouts	LABEL ▲	API NAME
Lightning Record Pages	Custom Compact Layout	Custom_Compact_Layout
Buttons, Links, and Actions	Education Application Compact Layout	Education_Application_Compact_Layout
Compact Layouts	Health Application Compact Layout	Health_Application_Compact_Layout
Field Sets	Infrastructure Application Compact Layout	Infrastructure_Application_Compact_Layout
Object Limits	System Default	SYSTEM
Record Types	Welfare Application Compact Layout	Welfare_Application_Compact_Layout
Related Lookup Filters		
Restriction Rules		

Fund_Transaction__c

- Display Fields: Fund Transaction Name, Amount, Payment Status

Fund Transaction

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Compact Layouts
5 Items, Sorted by Label

LABEL ▲	API NAME
Disbursement Compact Layout	Disbursement_Compact_Layout
Fund Custom Layout	Fund_Custom_Layout
Receipt Compact Layout	Receipt_Compact_Layout
Refund Compact Layout	Refund_Compact_Layout
System Default	SYSTEM

Grievance__c

- Display Fields: Grievance Name, Category, Status

Grievance

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Compact Layouts
5 Items, Sorted by Label

LABEL ▲	API NAME
General Feedback Compact Layout	General_Feedback_Compact_Layout
Greivance Custom Layout	Greivance_Custom_Layout
Payment Complaint Compact Layout	Payment_Complaint_Compact_Layout
Scheme Complaint Compact Layout	Scheme_Complaint_Compact_Layout
System Default	SYSTEM

Record Types

Scheme__c

- Health Scheme, Education Scheme, Welfare Scheme, Infrastructure Scheme

Scheme_Application__c

- Health Application, Education Application, Welfare Application, Infrastructure Application

Fund_Transaction__c

- Disbursement, Receipt, Refund

	Record Types
Details	3 Items, Sorted by Record Type Label
Fields & Relationships	

Record Types
3 Items, Sorted by Record Type Label

RECORD TYPE LABEL ▲	DESCRIPTION
Disbursement	Funds released to beneficiaries
Receipt	Funds received from government/donors
Refund	Refunds or returned payments

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

Grievance__c

- Scheme Complaint, Payment/Transaction Complaint, General Feedback

Note: Different record types allow for different page layouts, picklist values, and visibility for officers, auditors, and citizens.

Record Types
3 Items, Sorted by Record Type Label

RECORD TYPE LABEL ▲	DESCRIPTION
General Feedback	Suggestions or general feedback
Payment/Transaction Complaint	Complaints about Fund Transactions
Scheme Complaint	Complaints regarding a scheme

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
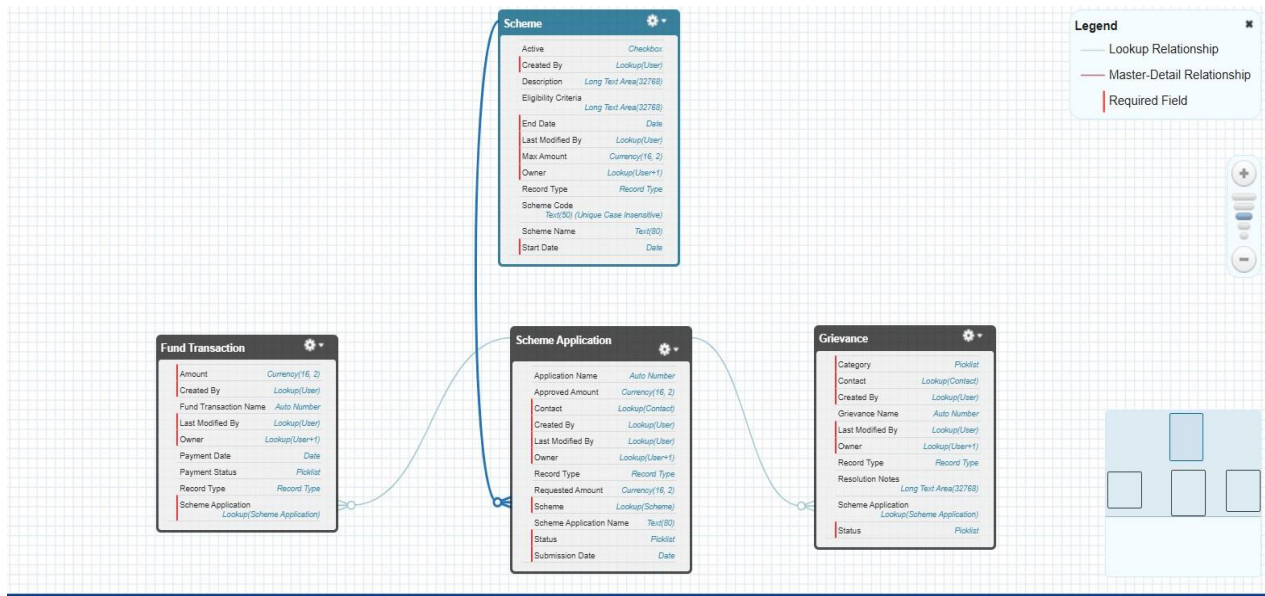Buttons, Links, and Actions
Compact Layouts
Field Sets

Schema Builder

- Used to visually confirm relationships: Lookup and Master-Detail between objects.
- Steps:
    1. Setup → Object Manager → Schema Builder
    2. Select Objects: Scheme, Scheme Application, Fund Transaction, Grievance, Contact, Account

3. Arrange objects to visualize data flow and relationships

4. Verify that Master-Detail and Lookup relationships are correctly displayed

---

Lookup vs Master-Detail vs Hierarchical Relationships

- Lookup: Optional relationship; used for linking Scheme Application → Scheme, Grievance → Scheme Application.

- Master-Detail: Enforces ownership inheritance; can be used if Scheme Application must strictly belong to Scheme.

- Hierarchical: Only available for User object; not used in this project.

Junction Objects

- Not used; no many-to-many relationships needed. Each application, transaction, or grievance links to a single scheme/application.

External Objects

- Not used; no external data sources are integrated. All data is stored within Salesforce standard/custom objects.