



## Phase 3: Data Modeling & Relationships

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### 1. Standard & Custom Objects

- **Standard Objects (already in Salesforce):**
  - **User** → represents each app user (patient).
  - **Admin** → system admin role to oversee data.
  - **Report/Dashboard** → for analytics.

- **Custom Objects (create in Object Manager):**

#### Custom Objects (create in Object Manager):

1. **Produce\_c** → Main table for agricultural products
  - Tracks crop details, pricing, and availability
2. **Order\_c** → Stores transaction details between stores and farmers
  - Manages order status, quantities, and delivery tracking
3. **Distribution\_Assignment\_c** → Junction object for many-to-many relationships
  - Links produce to multiple distributors
4. **Delivery\_Schedule\_c** → Manages logistics and delivery timelines
  - Tracks delivery dates, routes, and status

#### 👉 Setup:

- **Setup → Object Manager → Create → Custom Object**
  - Fill in Label, Plural Label, and enable Reports, Activities, and Notes
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### 2. Fields

#### i. Produce\_c Fields:

- **Category\_c** (Picklist: Grains, Vegetables, Fruits, Dairy, Meat)
- **Quantity\_Available\_c** (Number) - Stock in kilograms
- **Price\_Per\_Kg\_c** (Currency) - Current market price
- **Harvest\_Date\_c** (Date) - When produce was harvested
- **Is\_Organic\_c** (Checkbox) - Organic certification status
- **Shelf\_Life\_Days\_c** (Number) - Days until expiration

- **Quality\_Grade\_\_c** (Picklist: A, B, C) - Quality rating

**Fields & Relationships**

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Category	Category__c	Picklist		
Created By	CreatedById	Lookup(User)		
Harvest Date	Harvest_Date__c	Date		
Is Organic	Is_Organic__c	Checkbox		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		
Price Per Kg	Price_Per_Kg__c	Currency(18, 0)		
Produce Name	Name	Text(80)		
Quality Grade	Quality_Grade__c	Picklist		
Quantity Available	Quantity_Available__c	Number(10, 2)		
Shelf Life Days	Shelf_Life_Days__c	Number(18, 0)		

## ii. Order\_\_c Fields:

1. **Status\_\_c** (Picklist)
  - Values: Pending, Confirmed, In Transit, Delivered, Cancelled
2. **Order Date \_\_c** (Date) - Order placement date
3. **Quantity\_Ordered\_\_c** (Number, 10, 2) - Kg ordered
4. **Total\_Amount\_\_c** (Currency) - Auto-calculated later
5. **Estimated\_Delivery\_\_c** (Date) - Expected delivery
6. **Actual\_Delivery\_Date\_\_c** (Date) - Actual delivery date
7. **Payment\_Status\_\_c** (Picklist: Pending, Paid, Refunded)

**Fields & Relationships**

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Actual Delivery Date	Actual_Delivery_Date__c	Date		
Created By	CreatedById	Lookup(User)		
Estimated Delivery	Estimated_Delivery__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Order Date	Order_Date__c	Date		
Order Name	Name	Text(80)		
Payment Status	Payment_Status__c	Picklist		
Quantity Ordered	Quantity_Ordered__c	Number(10, 2)		
Status	Status__c	Picklist		
Total Amount	Total_Amount__c	Currency(18, 0)		

### iii. Distribution Assignment c Fields:

1. **Assignment\_Date\_c** (Date) - Assignment date
2. **Status\_c** (Picklist: Assigned, In Transit, Delivered)
3. **Assigned\_Quantity\_c** (Number, 10, 2) - Quantity assigned
4. **Delivery\_Route\_c** (Text, 255) - Delivery route details

The screenshot shows the Salesforce Object Manager interface for the 'Distribution Assignment' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main area displays the 'Fields & Relationships' section with 8 items, sorted by Field Label. The table includes columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Assigned Quantity	Assigned_Quantity_c	Number(10, 2)		
Assignment Date	Assignment_Date_c	Date		
Created By	CreatedById	Lookup(User)		
Delivery Route	Delivery_Route_c	Text(255)		
Distribution Assignment Name	Name	Text(80)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		
Status	Status_c	Picklist		

### iv. Delivery\_Schedule c Fields:

1. **Schedule\_Date\_c** (Date) - Planned delivery date
2. **Vehicle\_Type\_c** (Picklist: Truck, Van, Refrigerated Truck)
3. **Driver\_Contact\_c** (Phone) - Driver contact number
4. **Route\_Details\_c** (Long Text Area) - Route information

The screenshot shows the Salesforce Object Manager interface for the 'Delivery Schedule' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main area displays the 'Fields & Relationships' section with 8 items, sorted by Field Label. The table includes columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Delivery Schedule Name	Name	Text(80)		
Driver Contact	Driver_Contact_c	Phone		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		
Route Details	Route_Details_c	Long Text Area(32768)		
Schedule Date	Schedule_Date_c	Date		
Vehicle Type	Vehicle_Type_c	Picklist		

### 3. Create Record Types

Object Manager → [Object] → Record Types → New Record Type

#### Order\_c Record Types:

1. **Bulk Order** - For large wholesale orders
  - Description: Large quantity orders from stores
2. **Retail Order** - For individual consumer orders
  - Description: Small quantity direct consumer orders

The screenshot shows the Salesforce Object Manager interface. The left sidebar is collapsed, and the main area displays the 'Record Types' page for the 'Order' object. The page title is 'SETUP > OBJECT MANAGER Order Record Types'. The table lists two record types: 'Bulk Order' and 'Retail Order'. The 'Bulk Order' record has a description of 'Large quantity orders from stores' and is marked as 'ACTIVE'. The 'Retail Order' record has a description of 'Small quantity direct consumer orders' and is also marked as 'ACTIVE'. The table includes columns for 'RECORD TYPE LABEL', 'DESCRIPTION', 'ACTIVE', and 'MODIFIED BY'. A sidebar on the left provides navigation links for various setup options like Details, Fields & Relationships, Page Layouts, etc., with 'Record Types' currently selected.

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Bulk Order	Large quantity orders from stores	✓	Om Gorle, 9/23/2025, 10:34 AM
Retail Order	Small quantity direct consumer orders	✓	Om Gorle, 9/23/2025, 10:36 AM

#### Produce\_c Record Types:

1. **Perishable** - Short shelf-life items
  - Description: Vegetables, fruits, dairy
2. **Non-Perishable** - Long shelf-life items
  - Description: Grains, packaged goods

**Record Types**

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Non-Perishable	Grains, packaged goods	Om Gorle	9/23/2025, 10:45 AM
Perishable	Vegetables, fruits, dairy	Om Gorle	9/23/2025, 10:44 AM

## 4. Create Page Layouts

Object Manager → [Object] → Page Layouts → New

**Farmer Layout (Produce\_\_c):**

- **Section 1:** Basic Information (Name, Category, Quantity, Price)
- **Section 2:** Harvest Details (Harvest Date, Shelf Life, Quality)
- **Related Lists:** Orders, Distribution Assignments

**Page Layouts**

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Farmer Layout	Om Gorle, 9/23/2025, 10:47 AM	Om Gorle, 9/23/2025, 11:00 AM
Produce Layout	Om Gorle, 9/23/2025, 9:49 AM	Om Gorle, 9/23/2025, 10:09 AM

**Store Manager Layout (Order\_\_c):**

- **Section 1:** Order Details (Status, Quantity, Dates)
- **Section 2:** Financial Information (Total Amount, Payment Status)
- **Related Lists:** Delivery Schedules, Distribution Assignments

**Page Layouts**

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Order Layout	Om Gorle, 9/23/2025, 9:51 AM	Om Gorle, 9/23/2025, 10:18 AM
Store Manager Layout	Om Gorle, 9/23/2025, 7:49 PM	Om Gorle, 9/23/2025, 7:49 PM

## 5. Create Compact Layouts

Object Manager → [Object] → Compact Layouts → New

### Order\_c Compact Layout:

- Fields to show: Status, Total Amount, Order Date

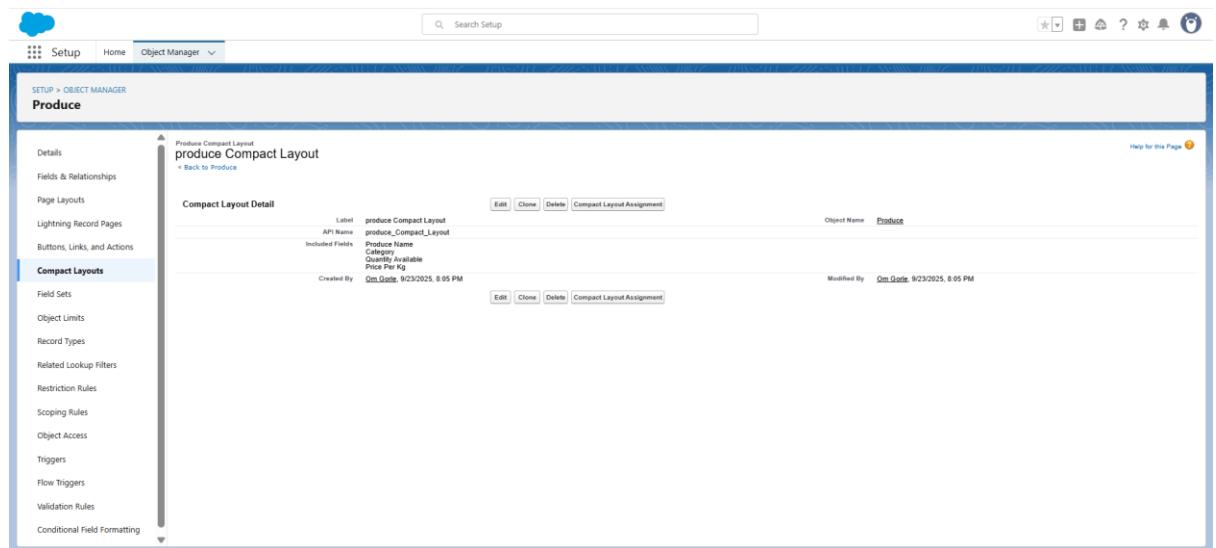
**Compact Layout Detail**

Label	Compact Layout
API Name	Compact_Layout
Included Fields	Status Total Amount Order Date

Created By: Om Gorle, 9/23/2025, 8:00 PM      Modified By: Om Gorle, 9/23/2025, 8:00 PM

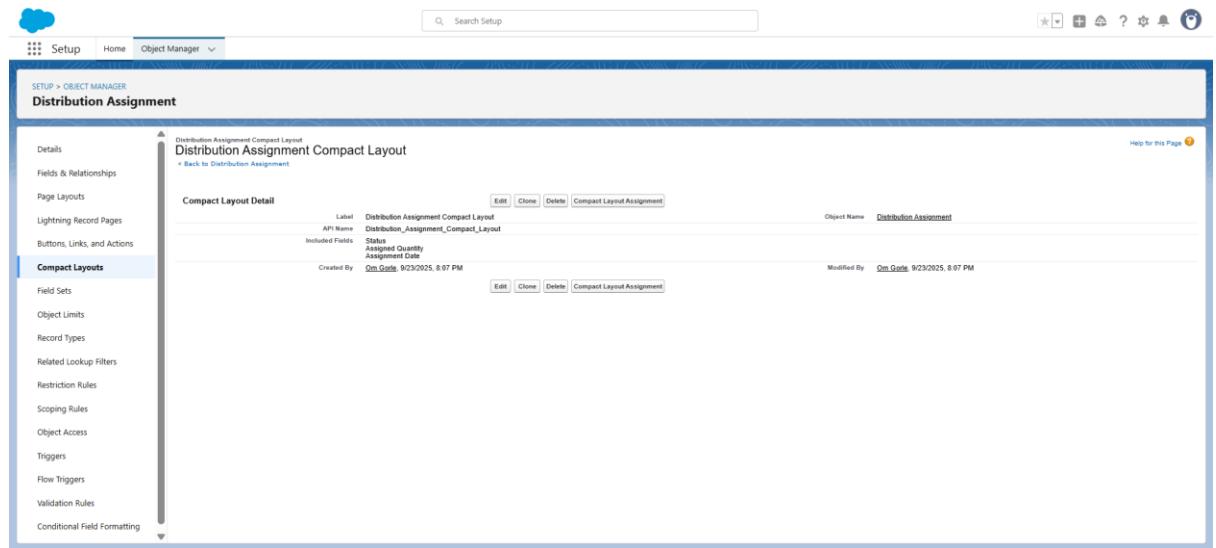
### Produce\_c Compact Layout:

- Fields to show: Produce Name, Category, Quantity Available, Price



## Distribution\_Assignment\_\_c Compact Layout:

- Fields to show: Status, Assigned Quantity, Date



## 6. Use Schema Builder to Visualize

Setup → Quick Find → Schema Builder

- Add Objects:** Check all custom objects + Account + Contact
- Arrange:** Drag to create a logical flow:

