Phase 3 — Data Modeling & Relationships

Project: Revolutionizing Agriculture with AgriEdge Or-Mange Ltd — Salesforce OMS
Prepared for: Ijjapureddy Parvathi Devi
Status: Completed (verified steps & settings below)
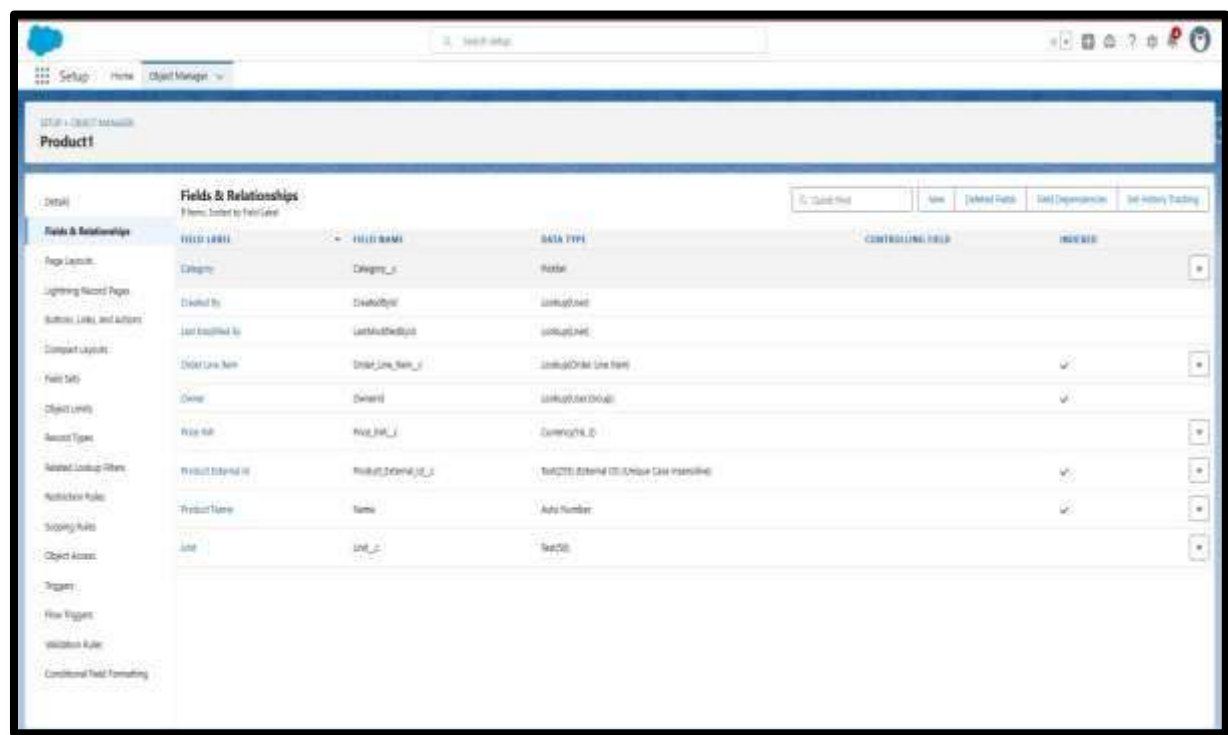
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1. Executive Summary

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)

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**
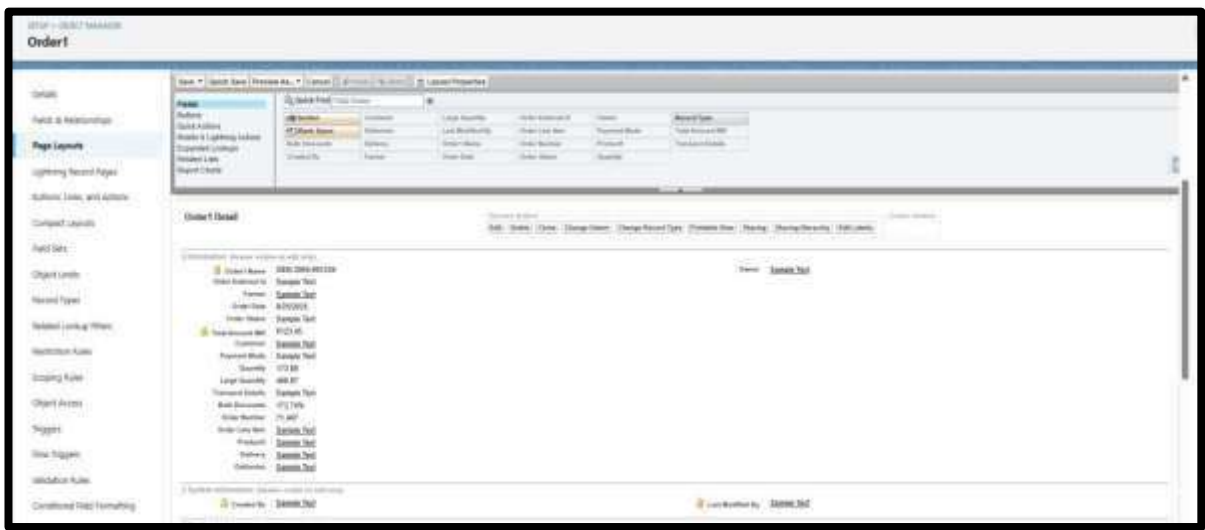
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4. Record Types

- **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

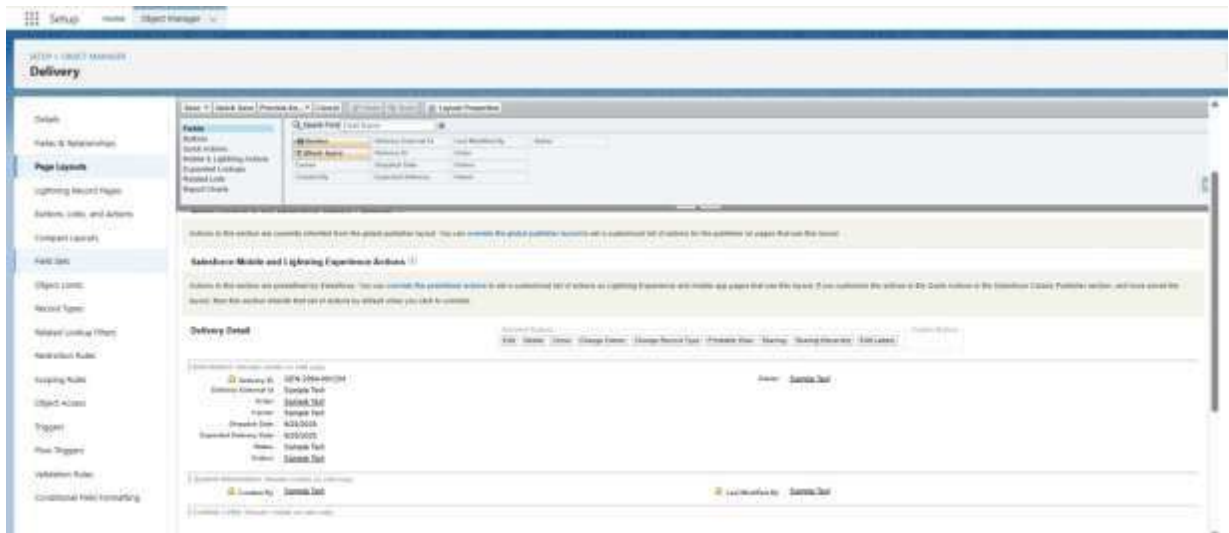 o Page Layout customized for large quantity/distribution transactions

Record Types
2 Items, Sorted by Record Type Label

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Bulk Orders	For large quantity/distribution transactions	✓	GIAPUREDDY Parvathi Devi, 28/09/2025, 11:27 am	▼
Retail Orders	For small quantity/individual transactions	✓	GIAPUREDDY Parvathi Devi, 28/09/2025, 11:27 am	▼

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

5. Page Layouts

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

Page Layouts
3 Items, Sorted by Page Layout Name

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY	
Bulk Order Layout	GIAPUREDDY Parvathi Devi, 28/09/2025, 6:56 pm	GIAPUREDDY Parvathi Devi, 29/09/2025, 11:25 pm	▼
Order Layout	GIAPUREDDY Parvathi Devi, 28/09/2025, 1:03 pm	GIAPUREDDY Parvathi Devi, 29/09/2025, 11:25 pm	▼
Retail Order Layout	GIAPUREDDY Parvathi Devi, 28/09/2025, 6:31 pm	GIAPUREDDY Parvathi Devi, 29/09/2025, 11:25 pm	▼

- **Product Layout:** Shows Product details including stock and expiry date.
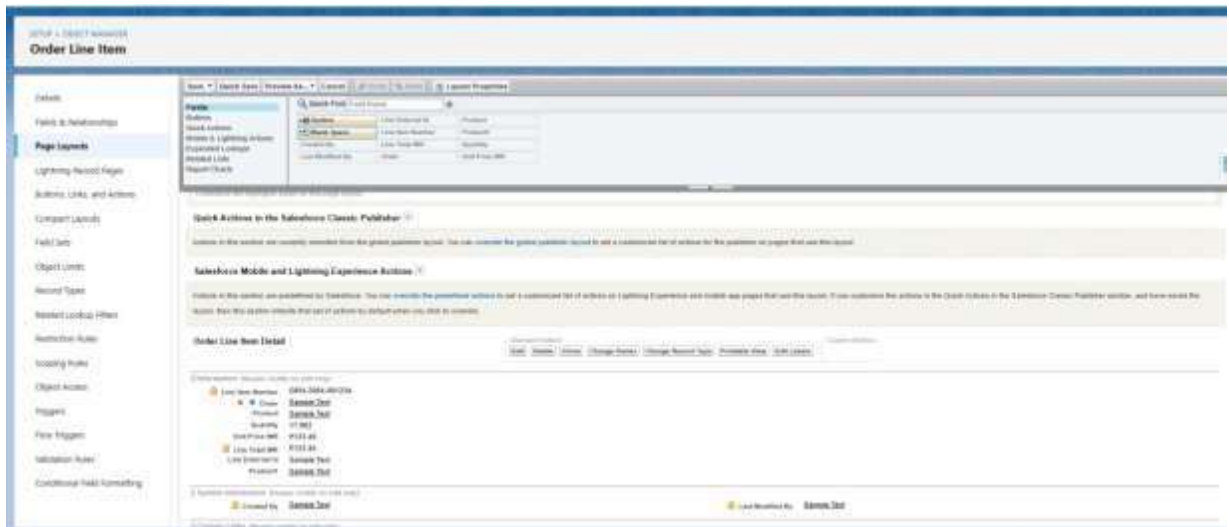
- **Customer Layout:** Displays customer type (Farmer vs Distributor) for quick reference.

- **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