

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)

1. Executive Summary

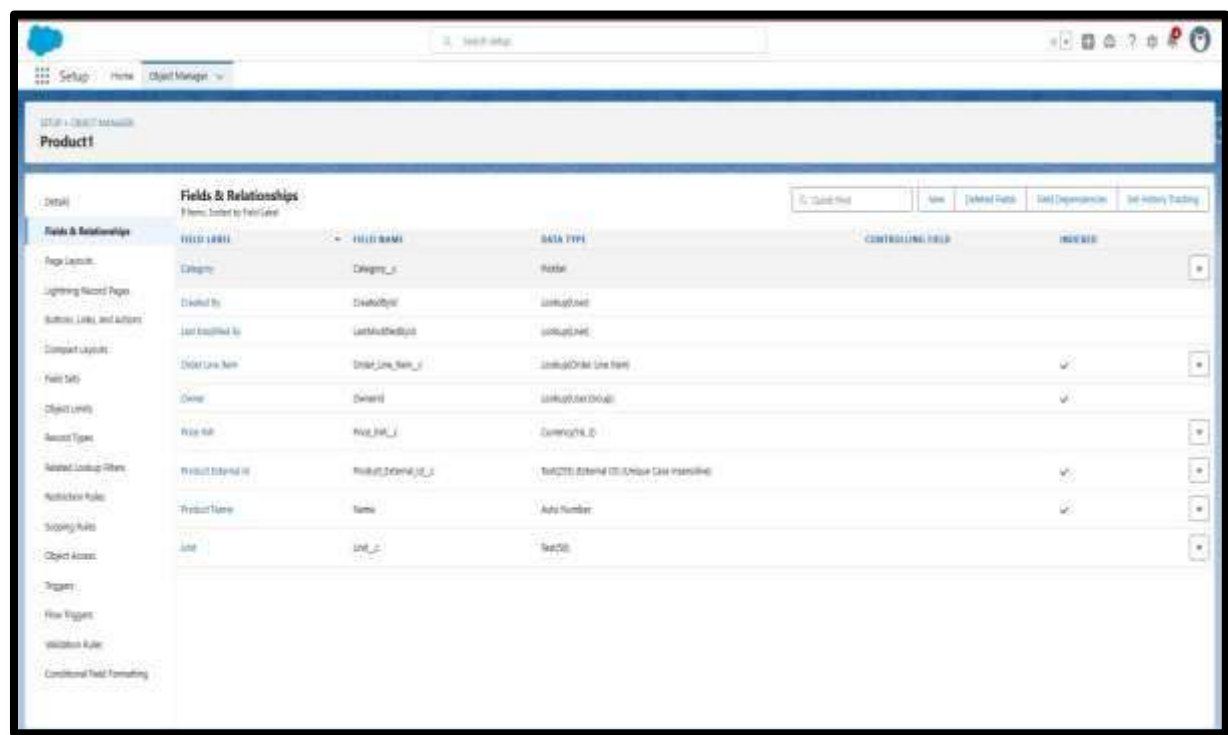
This document captures all the data modeling and relationship configurations created in **Phase 3: Data Modeling & Relationships** for the AgriEdge OMS project. It includes the custom objects, fields, record types, page layouts, and relationships that define the system’s data structure. This serves as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

2. Objects Created

Custom Objects

1. Product

- Fields:
  - Name (Standard)
  - Category (Picklist: Seeds, Fertilizers, Crops, Processed Food)
  - Price (Currency)
  - Stock (Number)
  - Expiry Date (Date)



	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Category	Category__c	Picklist		
Lightning Record Pages	Created By	CreatedBy	Lookup (User)		
Buttons, Links, and Actions	Last Modified By	LastModifiedBy	Lookup (User)		
Compact Layouts	Order Line Item	OrderLineItem__c	Lookup (Order Line Item)		
Field Sets	Order	Order	Lookup (Order Detail)		
Object Limits	Price Unit	PriceUnit__c	Currency (USD)		
Record Types	Product External ID	ProductExternalID__c	Text (255 Characters, Case Sensitive)		
Related Lookup Relationships	Product Name	Name	Auto Number		
Restriction Rules	Unit	Unit__c	Text (50)		

## 2. Customer

- Fields:
  - Name (Standard)
  - Contact (Phone/Email)
  - Location (Text)
  - Type (Picklist: Farmer, Distributor)

## 3. Order

- 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)

Setup > OBJECT MANAGER  
Order

Details Fields & Relationships  
20 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Bulk Discounts	Bulk_Discounts__c	Percent(16, 3)		
Lightning Record Pages	Created By	CreatedById	Lookup(User)		
Buttons, Links, and Actions	Customer	Customer__c	Lookup(Account)		✓
Compact Layouts	Delivered	Delivered__c	Lookup(Delivery)		✓
Field Sets	Delivery	Delivery__c	Lookup(Delivery)		✓
Object Links	Farmer	Farmer__c	Lookup(Farmer)		✓
Record Types	Large Quantity	Large_Quantity__c	Number(16, 2)		
Related Lookup Filters	Last Modified By	LastModifiedById	Lookup(User)		
Restriction Rules	Order Date	Order_Date__c	Date		
Scoping Rules	Order External ID	Order_External_ID__c	Text(255) External ID (Unique Case insensitive)		✓
Object Access	Order Line Item	Order_line_item__c	Lookup(Order line item)		✓
Triggers	Order Number	Order_Number__c	Number(16, 0)		
Flow Triggers	Order Status	Order_Status__c	Picklist		
Validation Rules					
Conditional Field Formatting					

<https://na11.sforce.com/develop/lightning/force.com/one/one.aspx?Setup/Order...>

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

- Fields:
  - Quantity (Number)
  - Price (Currency)
  - Order (Master-Detail → Order)
  - Product (Lookup → Product)

The screenshot shows the 'Order Line Item' configuration page in Salesforce Setup. The 'Fields & Relationships' tab is active, displaying a table of fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Required. The fields listed are:

Field Label	Field Name	Data Type	Controlling Field	Required
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Line External ID	Line_External_ID__c	Text(255) (External ID) (Unique Case Sensitive)		✓
Line Item Number	Name	Auto Number		✓
Line Total Price	Line_Total_Price__c	Formula (Currency)		
Order	Order__c	Master-Detail (Order)		✓
Product	Product__c	Lookup(Product)		✓
Product	Product__c	Lookup(Product)		✓
Quantity	Quantity__c	Number(10)		
Unit Price	Unit_Price__c	Currency(16)		

#### 5. Delivery

- Fields:
  - Delivery Date (Date)
  - Carrier(Text)
  - Status (Picklist: Pending, In Transit, Delivered)
  - Order (Lookup → Order)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Customer	Customer_C	Text(255)		
Created By	CreatedBy	Lookup(Owner)		
Delivery Internal ID	DeliveryInternalID_C	Text(255) (Serial ID) (Unique Case Internal)		
Delivery ID	Name	Auto Number		
Dispatch Date	Dispatch_Date_C	Date		
Expected Delivery Date	Expected_Delivery_Date_C	Date		
Last Modified By	LastModifiedBy	Lookup(Owner)		
Order	Order_C	Lookup(Owner)		
Order ID	OrderID_C	Lookup(Owner)		
Order ID	OrderID	Lookup(Owner Group)		
Status	Status_C	Value		

### 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**

### 4. Record Types

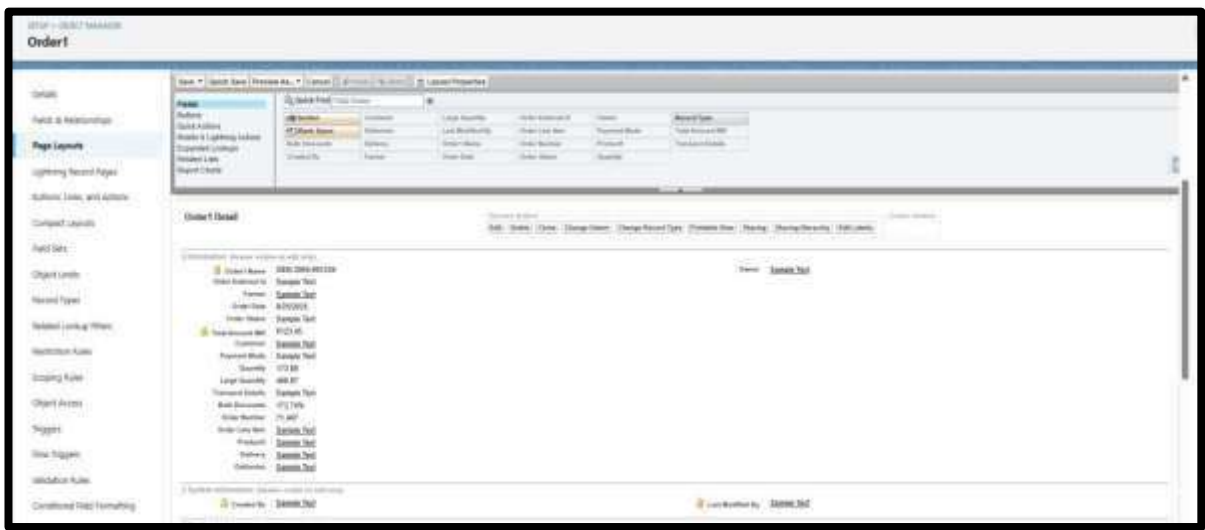
- **Retail Orders (Farmer)**
  - Applies to **Order** object
  - Page Layout customized for small quantity/individual transactions
- **Bulk Orders (Distributor)**
  - Applies to **Order** object
  - Page Layout customized for large quantity/distribution transactions



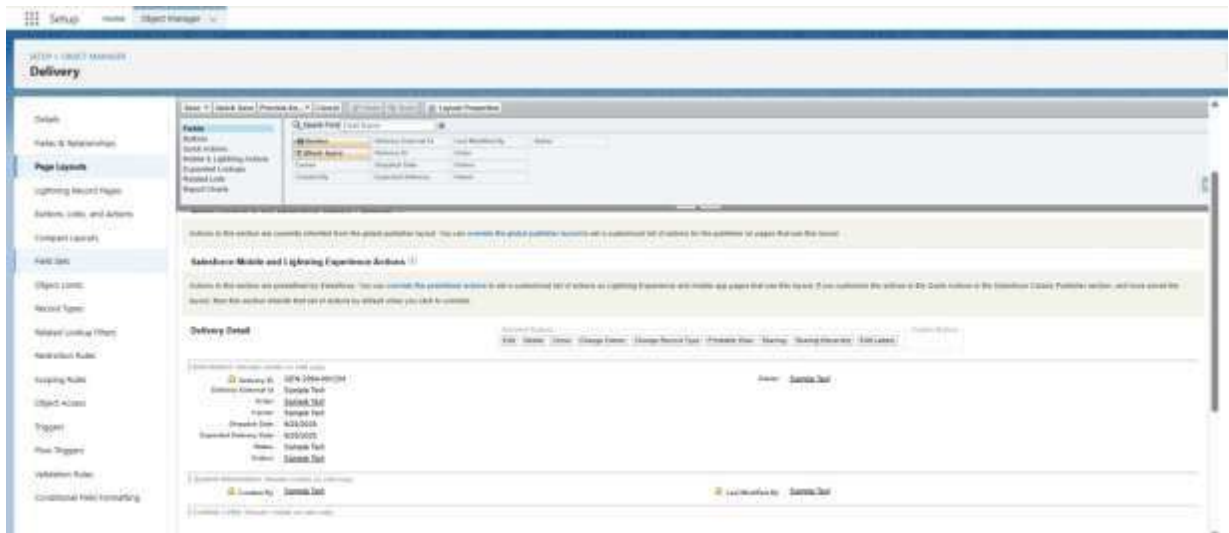
- | Page Layouts                        |   |  | <input type="text" value="Q. Quick Find"/> <input type="button" value="New"/> <input type="button" value="Page Layout Assignment"/> |  |  |  |
|-------------------------------------|---|--|---|--|--|--|
| 3 Items, Sorted by Page Layout Name |   |  |   |  |  |  |
| PAGE LAYOUT NAME                    | CREATED BY                                      | MODIFIED BY                                      |   |  |  |  |
| Bulk Order Layout                   | [[BAPUREDDY Parvathi Devi, 28/09/2025, 6:56 pm] | [[BAPUREDDY Parvathi Devi, 29/09/2025, 11:25 pm] |   |  |  |  |
| Order Layout                        | [[BAPUREDDY Parvathi Devi, 28/09/2025, 1:03 pm] | [[BAPUREDDY Parvathi Devi, 29/09/2025, 11:25 pm] |   |  |  |  |
| Retail Order Layout                 | [[BAPUREDDY Parvathi Devi, 28/09/2025, 6:31 pm] | [[BAPUREDDY Parvathi Devi, 29/09/2025, 11:25 pm] |   |  |  |  |

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- The screenshot shows the SAP Fiori 'Product1' application in the 'Details' view. The left-hand navigation pane lists various app components, with 'Details' currently selected. The main content area is titled 'Product1 Detail' and features several tabs: 'Data', 'Structure', 'Actions', 'Change Structure', 'Change Related Data', 'Technical Data', 'Mapping', and 'Working Memory'. The 'Data' tab is active, displaying a table with the following columns: Product ID, Product Name, Product Type, Product Category, Product Subcategory, Product Description, Product Price, Product Status, and Product Action. A single data row is visible in the table. Above the table, there are filters and a search bar. The top of the screen shows the app title 'Product1' and a user profile icon.

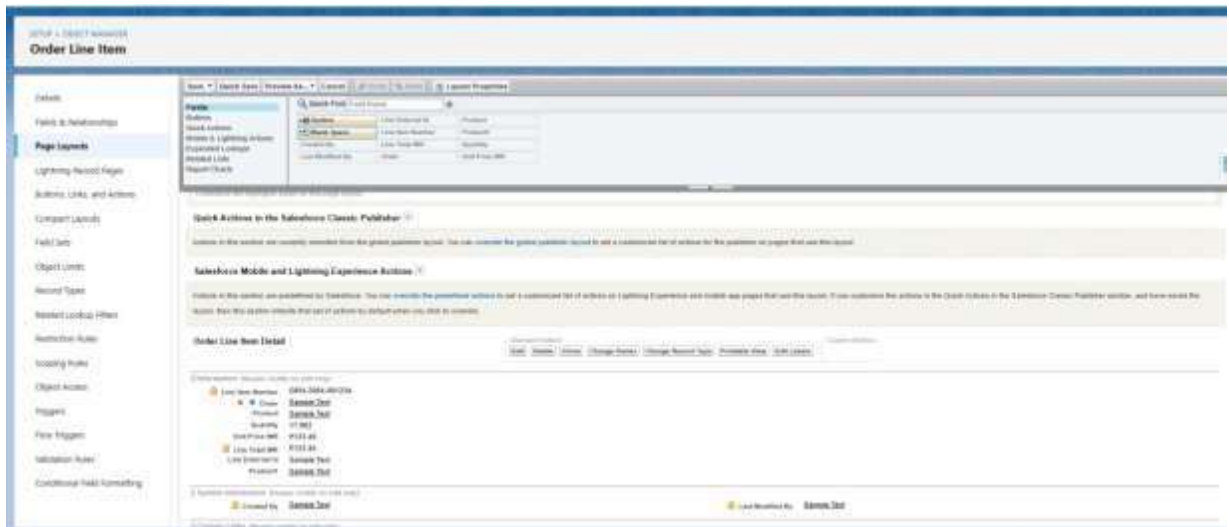
- **Customer Layout:** Displays customer type (Farmer vs Distributor) for quick reference.



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



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



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## 6. Compact Layouts

- **Order Compact Layout:** Displays Order No, Customer, Status, Date.
  - **Product Compact Layout:** Displays Name, Category, Stock.
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## 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

