

# Phase 3: Data Modeling & Relationships

**Project:** Logistics & Shipment Tracking System

## 1. Objects Implemented

- Standard Objects Reused: User (Admin, Manager, Agent, Driver), Account & Contact (future customer linkage).
- Custom Objects Created:
  1. Shipment\_\_c → Core object for booking and tracking shipments.
  2. Driver\_\_c → Represents individual drivers assigned to shipments.
  3. Checkpoint\_\_c → Tracks shipment progress across checkpoints.

<div>SETUP <b>Object Manager</b> 3 Items, Sorted by Label</div> <div>shpmeSchema BuilderCreate</div>					
LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Shipment	Shipment__c	Custom Object		9/20/2025	✓

<div>SETUP <b>Object Manager</b> 1 Items, Sorted by Label</div> <div>drivedSchema BuilderCreate</div>					
LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Driver	Driver__c	Custom Object		9/20/2025	✓

<div>SETUP <b>Object Manager</b> 1 Items, Sorted by Label</div> <div>checkSchema BuilderCreate</div>					
LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Checkpoint	Checkpoint__c	Custom Object		9/20/2025	✓

## 2. Fields Defined

- Shipment\_\_c Fields: Auto Number, Name, Origin, Destination, Date, Status (Picklist), Assigned Driver (Lookup), Customer (Lookup to Account), Notes.
- Driver\_\_c Fields: Auto Number, Driver Name, License Number, Phone Number, Status (Picklist).
- Checkpoint\_\_c Fields: Auto Number, Shipment (Master-Detail), Location, Arrival Time, Status (Picklist), Notes.

## Shipment

Details

Fields &amp; 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

## Fields &amp; Relationships

13 Items, Sorted by Field Label

Quick Find

[New](#)[Deleted Fields](#)[Field Dependencies](#)[Set History Tracking](#)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Assigned Driver	Assigned_Driver__c	Lookup(Driver)		✓	
Created By	CreatedById	Lookup(User)			
Delivery Date	Delivery_Date__c	Date/Time			
Destination	Destination__c	Text(100)			
Last Modified By	LastModifiedById	Lookup(User)			
Managed By	Managed__c	Lookup(User)		✓	
Origin	Origin__c	Text(100)			
Owner	OwnerId	Lookup(User,Group)		✓	
Record Type	RecordTypeId	Record Type		✓	
Shipment Date	Shipment_Date__c	Date/Time			

## Checkpoint

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## Fields &amp; Relationships

8 Items, Sorted by Field Label

Quick Find

[New](#)[Deleted Fields](#)[Field Dependencies](#)[Set History Tracking](#)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Checkpoint Name	Name	Auto Number		✓	
Created By	CreatedById	Lookup(User)			
Last Modified By	LastModifiedById	Lookup(User)			
Location	Location__c	Text(100)			
Shipment	Shipment__c	Master-Detail(Shipment)		✓	
Status	Status__c	Picklist			
Time Reached	Time_Reached__c	Date/Time			
Updated By	Updated_By__c	Lookup(User)		✓	

## Driver

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## Fields &amp; Relationships

8 Items, Sorted by Field Label

Quick Find

[New](#)[Deleted Fields](#)[Field Dependencies](#)[Set History Tracking](#)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Created By	CreatedById	Lookup(User)			
Driver Name	Driver_Name__c	Text(100)			
Driver Name	Name	Auto Number		✓	
Last Modified By	LastModifiedById	Lookup(User)			
License Number	License_Number__c	Text(100)			
Owner	OwnerId	Lookup(User,Group)		✓	
Phone Number	Phone_Number__c	Phone			
Shipment	Shipment__c	Lookup(Shipment)		✓	

### 3. Record Types

- Not required at this stage (all shipments share the same process).
- Future scope: Record types for Domestic, International, Express shipments.

The screenshot shows the Salesforce Setup interface for the 'Shipment' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types (selected), Related Lookup Filters, Restriction Rules, Scoping Rules, Object Access, and Triggers. The main content area is titled 'Shipment' and shows 'Record Types' with 2 items, sorted by Record Type Label. A table lists the record types: Domestic Shipment and International Shipment, both active and modified by Shrawani Gongshe. A 'Quick Find' search bar and 'New' and 'Page Layout Assignment' buttons are also visible.

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Domestic Shipment		✓	Shrawani Gongshe, 9/20/2025, 7:49 AM
International Shipment		✓	Shrawani Gongshe, 9/20/2025, 7:42 AM

### 4. Page Layouts

- Shipment Layout: Info (ID, Name, Origin, Destination, Date, Status), Assignment (Driver, Customer), Progress Tracking (Checkpoints), Notes.
- Driver Layout: Driver Info (Name, License, Phone, Status), Related Shipments.
- Checkpoint Layout: Checkpoint Info (Location, Arrival Time, Status), Related Shipment.

The screenshot shows the Salesforce Setup interface for the 'Shipment' object, specifically the 'Page Layouts' section. The left sidebar is the same as in the previous screenshot, but 'Page Layouts' is selected. The main content area shows the 'Shipment Detail' page layout. It includes a 'Fields' section with a table of fields and their values, and an 'Assignment' section. The 'Fields' table lists fields like Shipment Name, Destination, Origin, Shipment Date, Status, and Delivery Date, with sample values. The 'Assignment' section shows 'Managed By' and 'Assigned Driver' with sample text. A 'Layout Properties' window is open, showing a table of fields and their values, including 'Section', 'Blank Space', 'Assigned Driver', 'Created By', 'Delivery Date', 'Destination', 'Last Modified By', 'Managed By', 'Origin', 'Owner', 'Record Type', 'Shipment Date', 'Shipment Name', and 'Status'.

Field Name	Value
Section	Delivery Date
Blank Space	Destination
Assigned Driver	Last Modified By
Created By	Managed By
Delivery Date	Origin
Destination	Owner
Last Modified By	Record Type
Managed By	Shipment Date
Origin	Shipment Name
Owner	Shipment Name
Record Type	Status
Shipment Date	

## Checkpoint

- 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

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

Fields

Field Name	
Section	Last Modified By Time Reached
Blank Space	Location Updated By
Checkpoint Name	Shipment
Created By	Status

### Checkpoint Detail

Standard Buttons: Edit Delete Clone Change Owner Change Record Type Printable View Edit Labels Custom Buttons

#### Checkpoint Info

Location Sample Text  
Time Reached 9/20/2025, 9:02 PM  
Status Sample Text

#### Linkage

Updated By Sample Text  
Shipment Sample Text

#### Information (Header visible on edit only)

Checkpoint Name GEN-2004-001234

#### System Information (Header visible on edit only)

Created By Sample Text Last Modified By Sample Text

#### Custom Links (Header visible on edit only)



Search Setup



## Driver

- Details
- Fields & Relationships
- Page Layouts**
- Lightning Record Pages
- Buttons, Links, and Actions
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Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

Field Name	
Section	Driver Name Phone Number
Blank Space	Last Modified By Shipment
Created By	License Number
Driver Name	Owner

### Driver Detail

Standard Buttons: Edit Delete Clone Change Owner Change Record Type Printable View Sharing Sharing Hierarchy Edit Labels Custom Buttons

#### Driver Info

Driver Name Sample Text  
Driver Name GEN-2004-001234  
Phone Number 1-415-555-1212  
License Number Sample Text

#### Assignments

Shipment Sample Text

#### Information (Header visible on edit only)

Owner Sample Text

#### System Information (Header visible on edit only)

Created By Sample Text Last Modified By Sample Text

#### Custom Links (Header visible on edit only)

## 5. Compact Layouts

- **Driver\_\_c:** Driver Name, License Number, Phone Number

Setup | Home | Object Manager ▾

SETUP > OBJECT MANAGER

### Driver

Help for this Page ⓘ

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

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Triggers

Driver Compact Layout

#### Driver Highlights

◀ Back to Driver

Compact Layout Detail

Edit Clone Delete Compact Layout Assignment

Label	Driver Highlights	Object Name	Driver
API Name	Driver_Highlights		
Included Fields	Driver Name License Number Phone Number		
Created By	Shrawani Gongshe, 9/20/2025, 8:31 AM	Modified By	Shrawani Gongshe, 9/20/2025, 8:31 AM

Edit Clone Delete Compact Layout Assignment

- **Shipment\_\_c:** Shipment Name, Status, Delivery Date, Assigned Driver.

Setup | Home | Object Manager ▾

SETUP > OBJECT MANAGER

### Shipment

Help for this Page ⓘ

Details

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Buttons, Links, and Actions

**Compact Layouts**

Field Sets

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Triggers

Shipment Compact Layout

#### Shipment Highlights

◀ Back to Shipment

Compact Layout Detail

Edit Clone Delete Compact Layout Assignment

Label	Shipment Highlights	Object Name	Shipment
API Name	Shipment_Highlights		
Included Fields	Shipment Name Status Delivery Date Assigned Driver		
Created By	Shrawani Gongshe, 9/20/2025, 8:29 AM	Modified By	Shrawani Gongshe, 9/20/2025, 8:29 AM

Edit Clone Delete Compact Layout Assignment

- **Checkpoint:** Location, Status, Time Reached

Setup Home Object Manager ▾

SETUP > OBJECT MANAGER

## Checkpoint

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**Compact Layouts**

Field Sets

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Checkpoint Compact Layout

### Checkpoint Highlights

[Back to Checkpoint](#)

**Compact Layout Detail** [Edit](#) [Clone](#) [Delete](#) [Compact Layout Assignment](#)

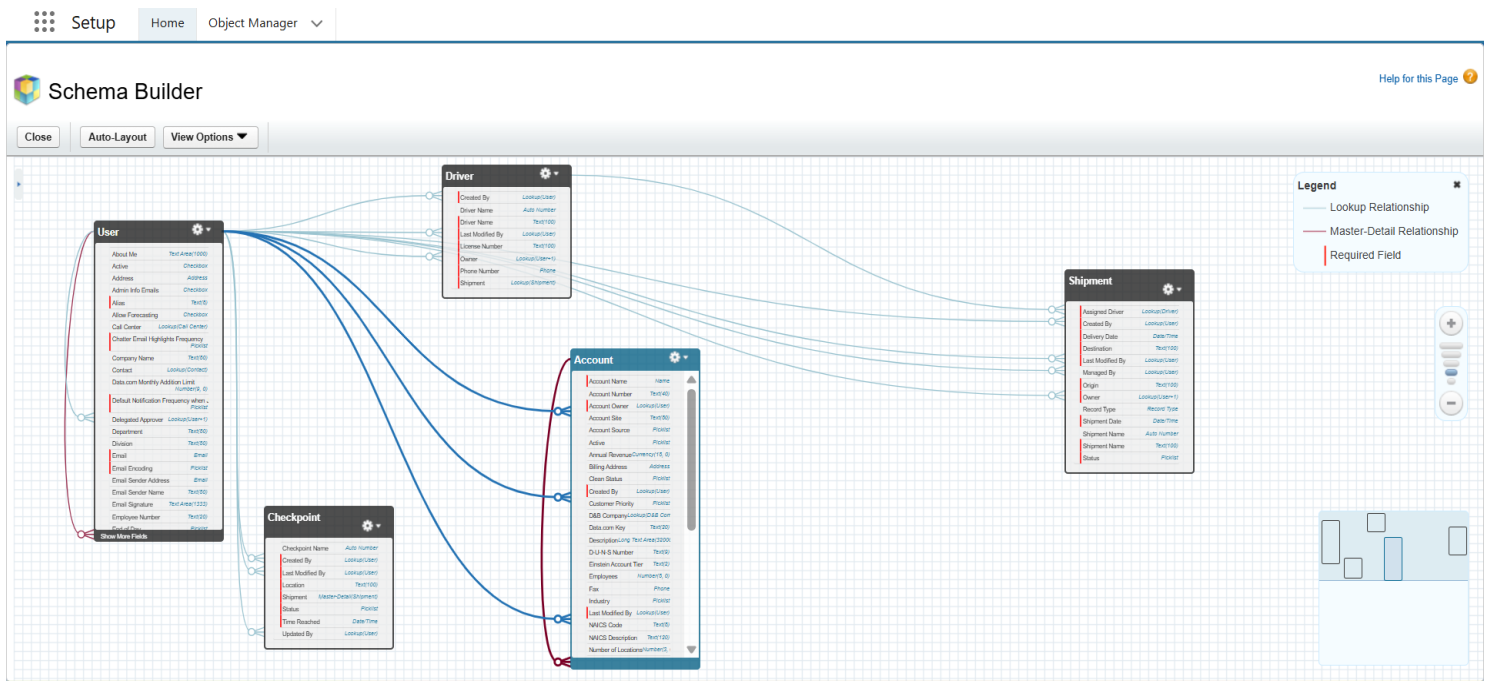
Label	Checkpoint Highlights	Object Name	Checkpoint
API Name	Checkpoint_Highlights		
Included Fields	Location Status Time Reached		
Created By	Shrawani Gongshe, 9/20/2025, 6:32 AM	Modified By	Shrawani Gongshe, 9/20/2025, 6:32 AM

[Edit](#) [Clone](#) [Delete](#) [Compact Layout Assignment](#)

## 6. Schema Builder

Used Schema Builder to visualize relationships:

- Shipment\_\_c ← Master-Detail → Checkpoint\_\_c
- Shipment\_\_c ← Lookup → Driver\_\_c
- Shipment\_\_c ← Lookup → Account



## **7. External Objects (Future Scope)**

- a. GPS Tracking Services integration for real-time checkpoints.
- b. External Customer Portal integration for shipment visibility.

■ *This is optional for project*

## ■ Phase 3 Schema Overview

Shipment_c	Driver c	Checkpoint c
ID, Name, Origin, Destination, Status, Driver, Customer	ID, Location, Arrival Time, Status, Notes	ID, Location, Arrival Time, Status, Notes
Relationships:		
- Lookup → Driver		- Master-Detail → Shipment
- Lookup → Account		

### ■ ***Phase 3 Deliverables Achieved***

- Created custom objects: Shipment, Driver, Checkpoint.
- Defined fields for all logistics data points.
- Designed Page Layouts and Compact Layouts.
- Established Master-Detail & Lookup relationships.
- Visualized schema in Schema Builder.
- Planned external system integrations (GPS, Customer Portal).