FoodieConnect CRM – Phase 3: Data Modeling & Relationships

Overview

In Phase 3, we focused on organizing FoodieConnect's data so that information flows seamlessly across the system. This ensures every record—from restaurants to deliveries—is connected, easy to access, and ready for reporting.

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1. Standard & Custom Objects

- **Restaurant:** Stores partner restaurant details.

- **Menu Item:** Lists food items offered by restaurants.

- **Customer:** Tracks customer details and loyalty points.

- **Order:** Manages all orders placed.

- **Delivery:** Monitors delivery assignments and status.

- **Payment:** Records payment information.

- **Issue (Support Case):** Logs customer complaints or queries.

These objects allow the system to capture all business operations efficiently.

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2. Fields

Key fields were added to each object for clarity and operational needs. Screenshots are included for better visualization:

Fields in Restaurant object

New Menu Item

Information

*Menu Item Name

Owner

🧑 mudhuluri lakshminarayanavarma

*Name

*Price

Description

*Category

--None-- ▼

Availability

☑

*Restaurant

Search Restaurants... 🔍

Fields in Menu Item object

New Customer

Information

*Customer Name

Owner

🧑 mudhuluri lakshminarayanavarma

*Name

*Email

Phone

Address

Loyalty Points

Fields in Customer object

New Payment

* = Required Information

Information

* Payment Name

[   ]

Payment Number

Owner

👤 mudhuluri lakshminarayanavarma

Order

[Search Orders...   🔍]

* Amount

[   ]

* Payment Method

[--None--   ▼]

Payment Date

* Date

[📅]

* Time

[🕐]

Fields in Payment object

- **Order:** Order Number, Customer, Total Amount, Status

- **Delivery:** Delivery Number, Order, Rider, Delivery Status

- **Issue:** Issue Number, Customer, Status, Issue Type

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3. Record Types & Page Layouts

- **Record Types:** Differentiate types of orders or issues for better organization.

- **Page Layouts:** Customized by role—Admins see full records; Riders and Support see only relevant info.

This ensures a clean, role-specific view of data.

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4. Compact Layouts

Designed for quick access, especially in the mobile app. Key screenshots:

Compact Layout Detail		Edit Clone Delete Compact Layout Assignment		
Label	Restaurant Highlights		Object Name	Restaurant
API Name	Restaurant_Highlights			
Included Fields	Name Location Cuisine Type Rating			
Created By	mudhuluri lakshminarayanavarma, 14/09/2025, 4:43 pm		Modified By	mudhuluri lakshminarayanavarma, 14/09/2025, 4:43 pm

Edit Clone Delete Compact Layout Assignment

Restaurant Highlights

Menu Item Highlights

« Back to Menu Item

Compact Layout Detail   Edit | Clone | Delete | Compact Layout Assignment

Label	Menu Item Highlights	Object Name	Menu Item
API Name	Menu_Item_Highlights		
Included Fields	Name Price Availability Category		
Created By	mudhuluri lakshminarayanavarma, 14/09/2025, 4:46 pm	Modified By	mudhuluri lakshminarayanavarma, 14/09/2025, 4:46 pm

Edit | Clone | Delete | Compact Layout Assignment

Menu Item Highlights

Customer Compact Layout
Customer Highlights

« Back to Customer

Compact Layout Detail   Edit | Clone | Delete | Compact Layout Assignment

Label	Customer Highlights	Object Name	Customer
API Name	Customer_Highlights		
Included Fields	Name Email Loyalty Points		
Created By	mudhuluri lakshminarayanavarma, 14/09/2025, 4:47 pm	Modified By	mudhuluri lakshminarayanavarma, 14/09/2025, 4:47 pm

Edit | Clone | Delete | Compact Layout Assignment

Customer Highlights

Order Compact Layout
Order Highlights

« Back to Order

Compact Layout Detail   Edit | Clone | Delete | Compact Layout Assignment

Label	Order Highlights	Object Name	Order
API Name	Order_Highlights		
Included Fields	Order Number Customer Total Amount Order Status		
Created By	mudhuluri lakshminarayanavarma, 14/09/2025, 4:48 pm	Modified By	mudhuluri lakshminarayanavarma, 14/09/2025, 4:48 pm

Edit | Clone | Delete | Compact Layout Assignment

Order Highlights

Delivery Compact Layout
Delivery Highlights

« Back to Delivery

Compact Layout Detail   Edit | Clone | Delete | Compact Layout Assignment

Label	Delivery Highlights	Object Name	Delivery
API Name	Delivery_Highlights		
Included Fields	Delivery Number Order Rider Delivery Status		
Created By	mudhuluri lakshminarayanavarma, 14/09/2025, 4:50 pm	Modified By	mudhuluri lakshminarayanavarma, 14/09/2025, 4:50 pm

Edit | Clone | Delete | Compact Layout Assignment

Delivery Highlights

Payment Compact Layout
Payment Highlights

« Back to Payment

Compact Layout Detail   Edit | Clone | Delete | Compact Layout Assignment

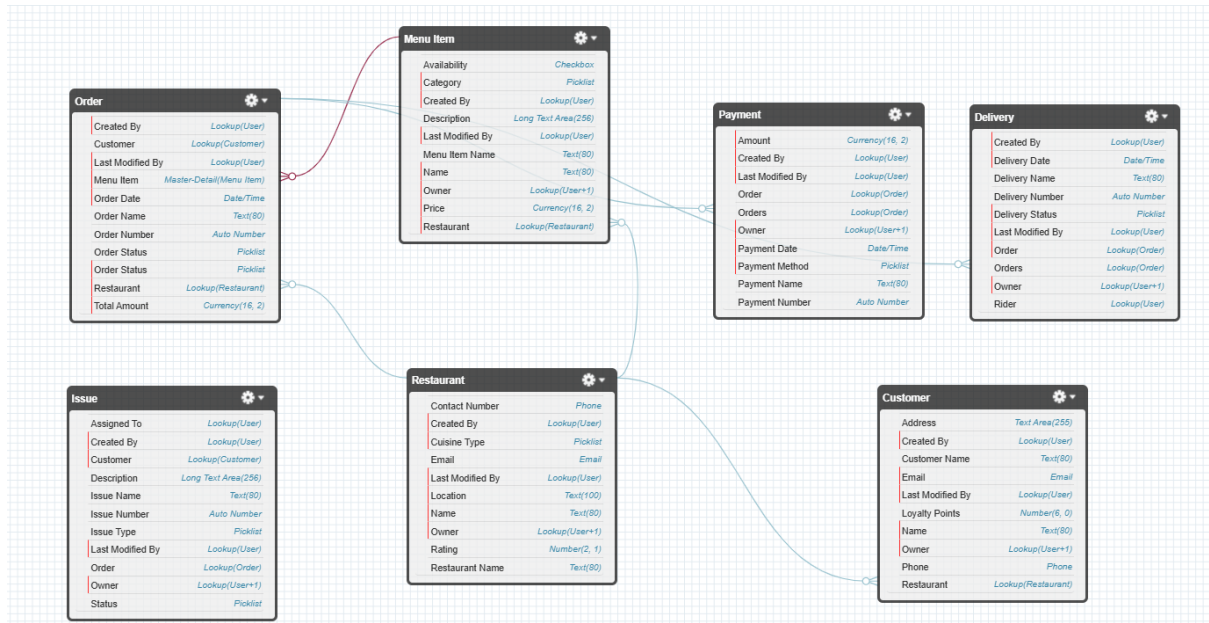|			
Label	Payment Highlights	Object Name	Payment
API Name	Payment_Highlights		
Included Fields	Payment Number Order Amount Payment Method Payment Date		
Created By	mudhuluri lakshminarayanavarma, 14/09/2025, 4:51 pm	Modified By	mudhuluri lakshminarayanavarma, 14/09/2025, 4:53 pm

Edit | Clone | Delete | Compact Layout Assignment

Payment Highlights

These layouts display key information at a glance for faster decision-making.

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5. Schema Builder & Relationships

- **Lookup Relationships:** Connect related records, e.g., Menu Items → Restaurant.

- **Master-Detail Relationships:** Maintain tighter control, e.g., Orders → Menu Items.

Visual map of objects and relationships:

Schema Builder view of all objects and relationships