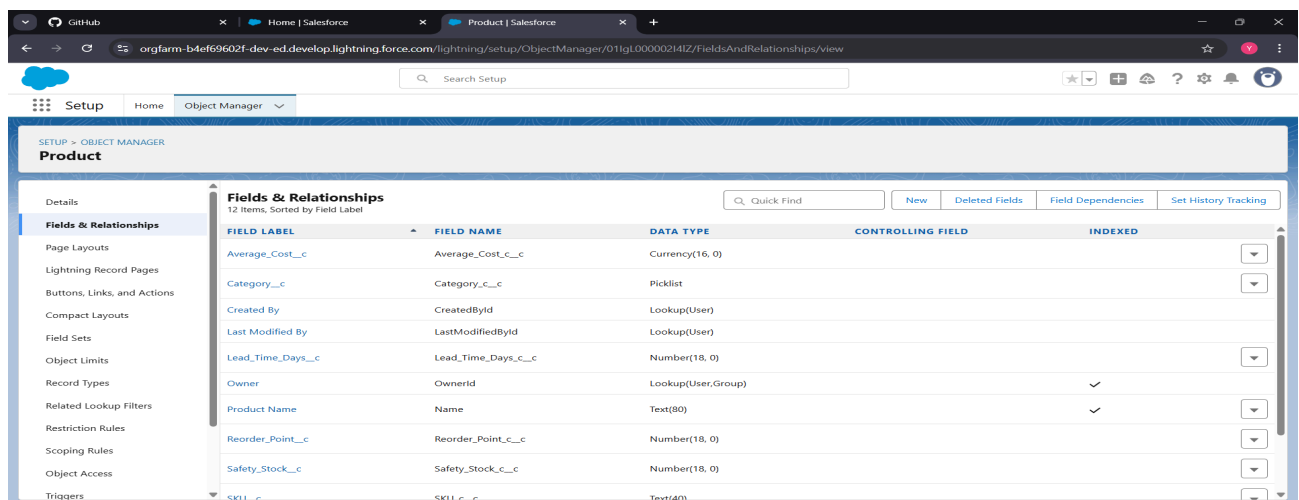


Phase3:-

Recommended Data Model for StockSense (objects & fields):-

Product (Product__c) — product master

- API name: **Product__c**
- Record Name: **Name** (Product Name)
Fields:
- **SKU__c** — Text(40) — **External ID, Unique** — SKU/code
- **Category__c** — Picklist — Raw Material; Finished Goods; Consumables
- **UoM__c** — Picklist — Unit, Kg, L, Box
- **Lead_Time_Days__c** — Number(0) — supplier lead time
- **Reorder_Point__c** — Number — recommended reorder threshold
- **Safety_Stock__c** — Number — safety stock
- **Total_Stock__c** — **Roll-Up Summary** (SUM **Stock_Quantity__c** on Inventory) — shows total across warehouses
- **Average_Cost__c** — Currency

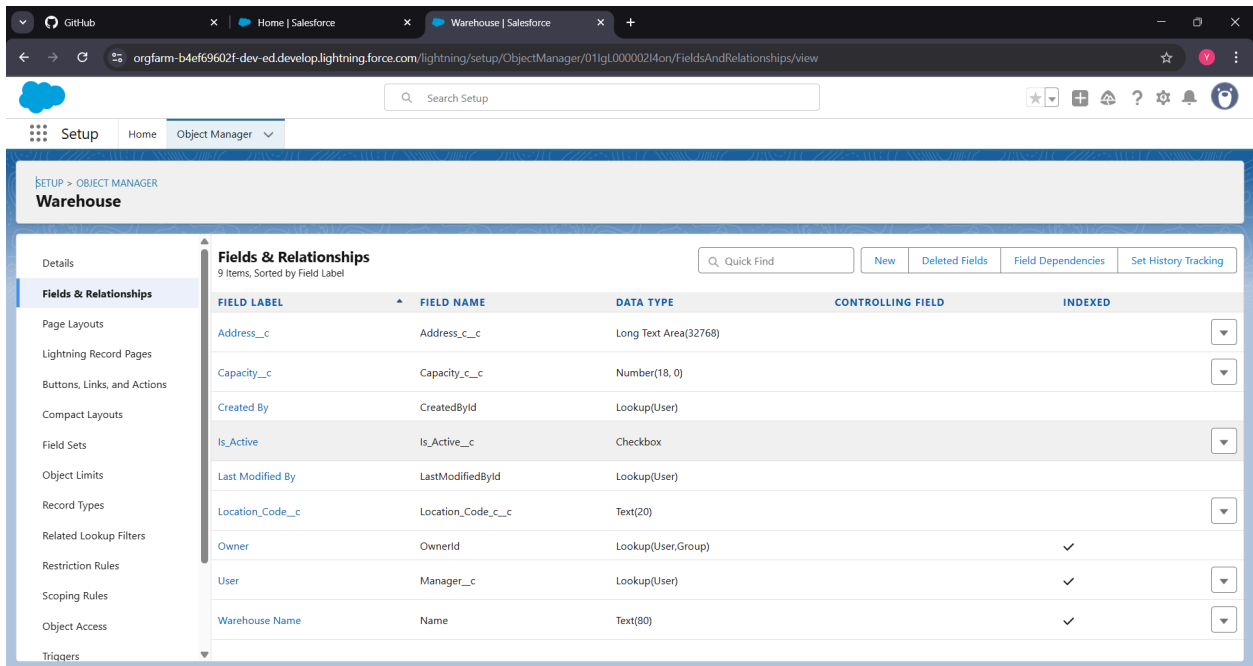


The screenshot displays the Salesforce Object Manager interface for the 'Product' object. The 'Fields & Relationships' tab is active, showing a list of 12 fields sorted by label. The fields include Average_Cost__c, Category__c, Created By, Last Modified By, Lead_Time_Days__c, Owner, Product Name, Reorder_Point__c, Safety_Stock__c, and SKU__c. Each field entry shows its label, name, data type, and whether it is indexed. The interface also includes a search bar, navigation tabs for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking', and a left-hand menu with various setup options like Page Layouts, Lightning Record Pages, and Field Sets.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Average_Cost__c	Average_Cost__c	Currency(16, 0)		
Category__c	Category__c	Picklist		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Lead_Time_Days__c	Lead_Time_Days__c	Number(18, 0)		
Owner	OwnerId	Lookup(User,Group)		✓
Product Name	Name	Text(80)		✓
Reorder_Point__c	Reorder_Point__c	Number(18, 0)		
Safety_Stock__c	Safety_Stock__c	Number(18, 0)		
SKU__c	SKU__c	Text(40)		

Warehouse (Warehouse__c)

- Record Name: **Name** (Warehouse name)
Fields:
- Location_Code__c** — Text(20)
- Address__c** — Long Text
- Manager__c** — Lookup(User)
- Capacity__c** — Number
- Is_Active__c** — Checkbox



Setup > OBJECT MANAGER

Warehouse

Details

Fields & Relationships
9 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address__c	Address_c__c	Long Text Area(32768)		
Capacity__c	Capacity_c__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Is_Active	Is_Active__c	Checkbox		
Last Modified By	LastModifiedById	Lookup(User)		
Location_Code__c	Location_Code_c__c	Text(20)		
Owner	OwnerId	Lookup(User, Group)		✓
User	Manager__c	Lookup(User)		✓
Warehouse Name	Name	Text(80)		✓

Inventory (Inventory__c) — Junction / inventory per product per warehouse

- Record Name: Auto Number (e.g., **INV- {0000}**) or Name = Product+Warehouse

- **Create two Master-Detail relationships:**

- Master-Detail → **Product__c** (first master)
 - Master-Detail → **Warehouse__c** (second master)
- Fields:

- **Stock_Quantity__c** — Number — **required**
- **Reserved_Quantity__c** — Number — default 0
- **Available_Quantity__c** — Formula (Number): **Stock_Quantity__c - Reserved_Quantity__c**
- **Reorder_Level__c** — Number (can default from Product.Reorder_Point__c or override)
- **Bin_Location__c** — Text
- **Last_Updated_Date__c** — Date/DateTime (can be updated via Flow)
- **Average_Cost__c** — Currency

The screenshot shows the Salesforce Object Manager interface for the 'Inventory' object. The 'Fields & Relationships' section is active, displaying a list of 13 items sorted by field label. The interface includes a search bar, navigation tabs (New, Deleted Fields, Field Dependencies, Set History Tracking), and a sidebar with various setup options.

Field Label	Field Name	Field Type	Relationship
Bin_Location	Bin_Location__c	Text(40)	
Created By	CreatedById	Lookup(User)	
Inventories	Inventories__c	Text(255)	
Inventory Name	Name	Text(80)	✓
Last Modified By	LastModifiedById	Lookup(User)	
Last_Updated_Date__c	Last_Updated_Date__c	Date/Time	
Product	Product__c	Master-Detail(Product)	✓
Reorder_Level__c	Reorder_Level__c	Number(18, 0)	
Reserved_Quantity__c	Reserved_Quantity__c	Number(18, 0)	

Supplier (Supplier__c)

Fields:

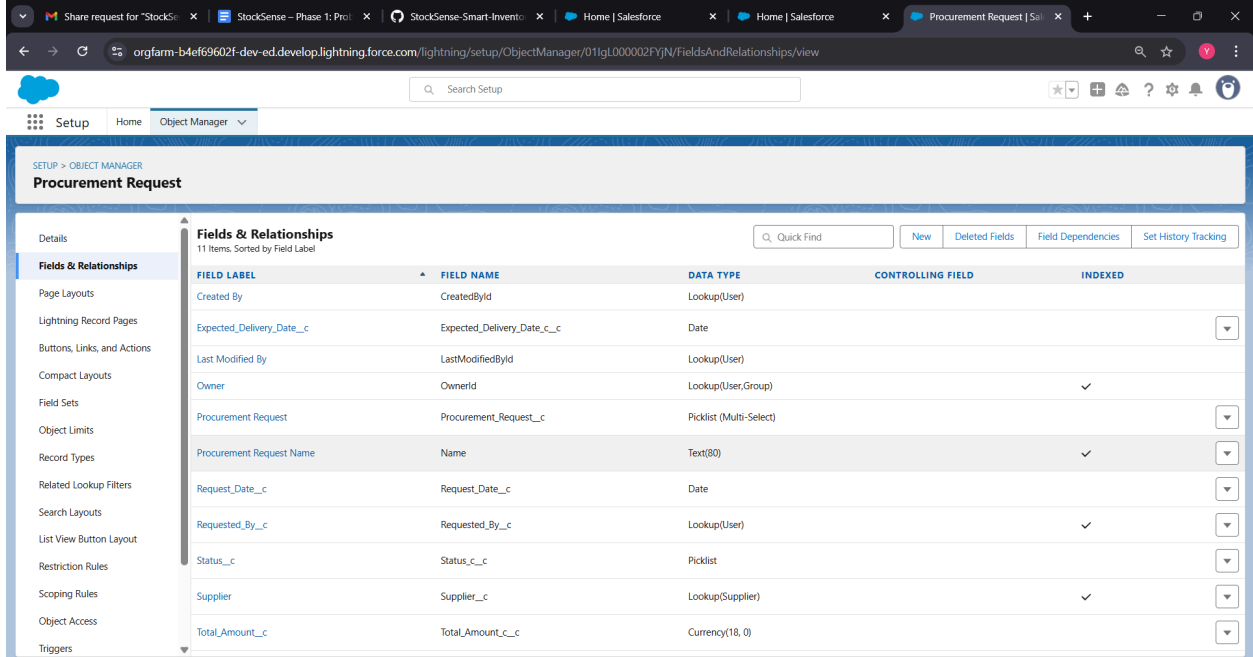
- Name
- Supplier_Code__c — Text (unique)
- Contact_Person__c — Text
- Phone__c, Email__c
- Lead_Time_Days__c — Number
- Address__c — Long Text

The screenshot shows the Salesforce Object Manager interface for the 'Supplier' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), 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, Flow Triggers, and Validation Rules. The main content area is titled 'Fields & Relationships' and shows a list of 10 items, sorted by Field Label. The table below represents the data shown in the screenshot.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address__c	Address__c	Long Text Area(32768)		
Contact_Person__c	Contact_Person__c	Text(12)		
Created By	CreatedById	Lookup(User)		
Email__c	Email__c	Number(18, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Lead_Time_Days__c	Lead_Time_Days__c	Number(18, 0)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone__c	Phone__c	Number(18, 0)		
Supplier Name	Name	Text(80)		✓
Supplier_Code__c	Supplier_Code__c	Text(40) (Unique Case Insensitive)		✓

Procurement Request (Procurement_Request__c) — header document

- Record Name: Auto Number **PR-{00000}**
Fields:
- Request_Date__c** — Date — default Today
- Requested_By__c** — Lookup(User)
- Supplier__c** — Lookup(Supplier__c)
- Status__c** — Picklist: New, Approved, Ordered, Partially Received, Received, Cancelled
- Total_Amount__c** — Currency (calculated via child line items)
- Expected_Delivery_Date__c** — Date



The screenshot shows the Salesforce Object Manager interface for the 'Procurement Request' object. The 'Fields & Relationships' tab is selected, displaying a list of 11 fields. The fields are sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status. The fields listed are: Created By, Expected_Delivery_Date__c, Last Modified By, Owner, Procurement Request, Procurement Request Name, Request_Date__c, Requested_By__c, Status__c, Supplier, and Total_Amount__c.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Expected_Delivery_Date__c	Expected_Delivery_Date__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Procurement Request	Procurement_Request__c	Picklist (Multi-Select)		
Procurement Request Name	Name	Text(80)		✓
Request_Date__c	Request_Date__c	Date		
Requested_By__c	Requested_By__c	Lookup(User)		✓
Status__c	Status__c	Picklist		
Supplier	Supplier__c	Lookup(Supplier)		✓
Total_Amount__c	Total_Amount__c	Currency(18, 0)		

Procurement Line Item (Procurement_Line_Item__c) — child of Procurement Request

- Master-Detail → `Procurement_Request__c`
Fields:
- `Product__c` — Lookup(Product__c)
- `Quantity__c` — Number (required)
- `Unit_Price__c` — Currency
- `Line_Total__c` — Formula: `Quantity__c * Unit_Price__c`

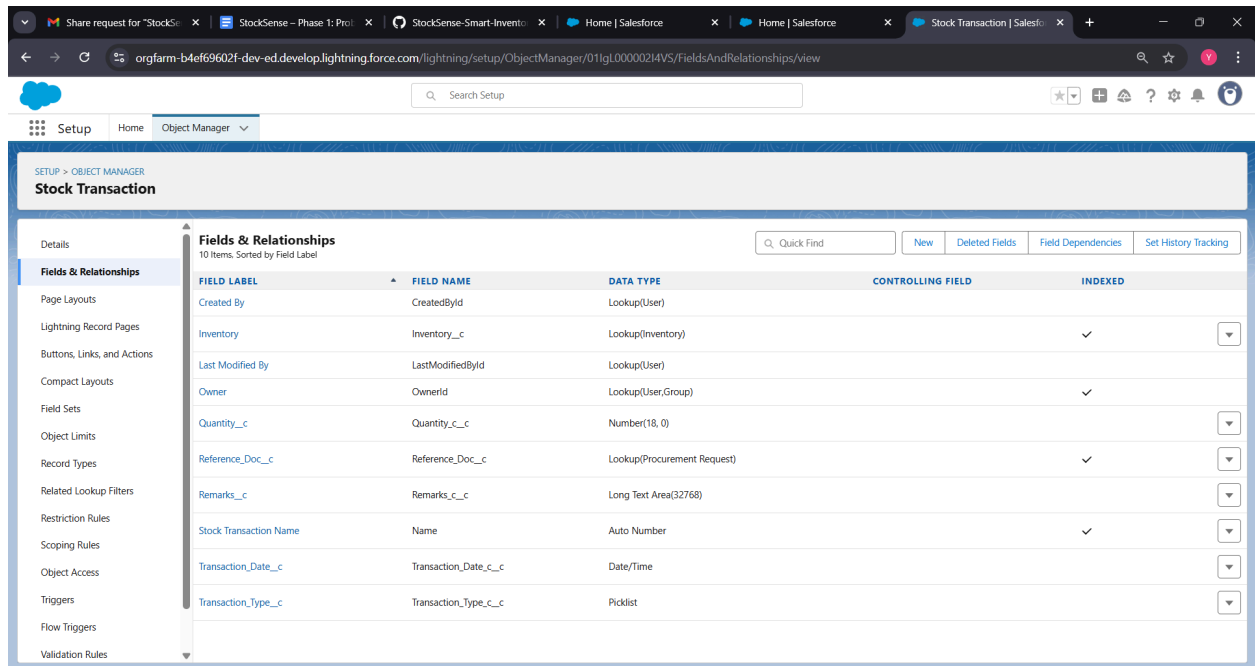
The screenshot shows the Salesforce Setup interface for the 'Procurement Line Item' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers, and Validation Rules. The main content area is titled 'Fields & Relationships' and shows a table of 8 items, sorted by Field Label. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The items listed are Created By, Last Modified By, Line_Total__c, Procurement Line Item Name, Procurement Request, Product, Quantity__c, and Unit_Price__c.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Line_Total__c	Line_Total__c	Formula (Number)		
Procurement Line Item Name	Name	Text(80)		✓
Procurement Request	Procurement_Request__c	Master-Detail(Procurement Request)		✓
Product	Product__c	Lookup(Product)		✓
Quantity__c	Quantity__c	Number(18, 0)		
Unit_Price__c	Unit_Price__c	Currency(18, 0)		

Stock Transaction (Stock_Transaction__c) — ledger of movements

Fields:

- **Transaction_Date__c** — DateTime
- **Inventory__c** — Lookup(Inventory__c)
- **Transaction_Type__c** — Picklist: IN, OUT, TRANSFER, ADJUSTMENT
- **Quantity__c** — Number (positive; Flow will add/subtract)
- **Reference_Doc__c** — Lookup(Procurement_Request__c) or Text
- **Remarks__c** — Long Text



The screenshot shows the Salesforce Object Manager interface for the 'Stock_Transaction' object. The 'Fields & Relationships' tab is selected, displaying a list of 10 fields. The fields are sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status. The fields listed are: Created By, Inventory, Last Modified By, Owner, Quantity__c, Reference_Doc__c, Remarks__c, Stock Transaction Name, Transaction_Date__c, and Transaction_Type__c.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Inventory	Inventory__c	Lookup(Inventory)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Quantity__c	Quantity__c	Number(18, 0)		
Reference_Doc__c	Reference_Doc__c	Lookup(Procurement Request)		✓
Remarks__c	Remarks__c	Long Text Area(32768)		
Stock Transaction Name	Name	Auto Number		✓
Transaction_Date__c	Transaction_Date__c	Date/Time		
Transaction_Type__c	Transaction_Type__c	Picklist		

Alert (Alert__c)

Fields:

- **Alert_Type__c** — Picklist: Reorder, Overstock, StockOut, Expiry
- **Inventory__c** — Lookup(Inventory__c)
- **Product__c** — Lookup(Product__c) (convenience)
- **Message__c** — Long Text
- **Triggered_On__c** — DateTime
- **Resolved__c** — Checkbox

The screenshot shows the Salesforce Setup interface for the 'Alerts' object. The 'Fields & Relationships' tab is selected, displaying a list of 11 fields. The fields are sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status. The fields listed are: Alert_Type__c (Picklist), Alerts (Picklist (Multi-Select)), Alerts Name (Text(80)), Created By (Lookup(User)), Inventory (Lookup(Inventory)), Last Modified By (Lookup(User)), Message__c (Long Text Area(32768)), Owner (Lookup(User,Group)), Product (Lookup(Product)), Resolved__c (Checkbox), and Triggered_On__c (Date/Time).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Alert_Type__c	Alert_Type__c	Picklist		
Alerts	Alerts__c	Picklist (Multi-Select)		
Alerts Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Inventory	Inventory__c	Lookup(Inventory)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Message__c	Message__c	Long Text Area(32768)		
Owner	OwnerId	Lookup(User,Group)		✓
Product	Product__c	Lookup(Product)		✓
Resolved__c	Resolved__c	Checkbox		
Triggered_On__c	Triggered_On__c	Date/Time		

Record Types & Page Layouts:-

Setup left search → type **Object Manager** → click **Object Manager**.

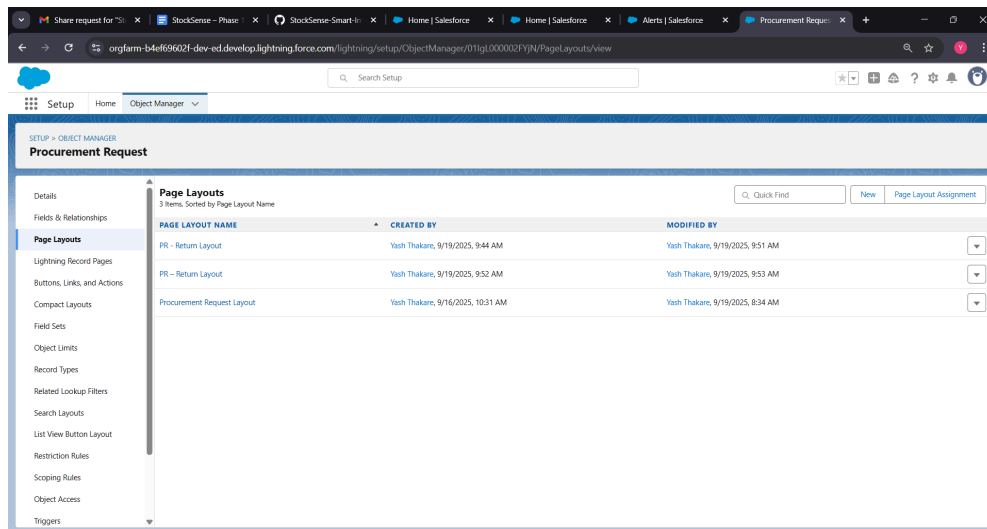
Find and click **Procurement_Request__c** (or the object you want).

From left menu → click **Page Layouts**.

Click **New**

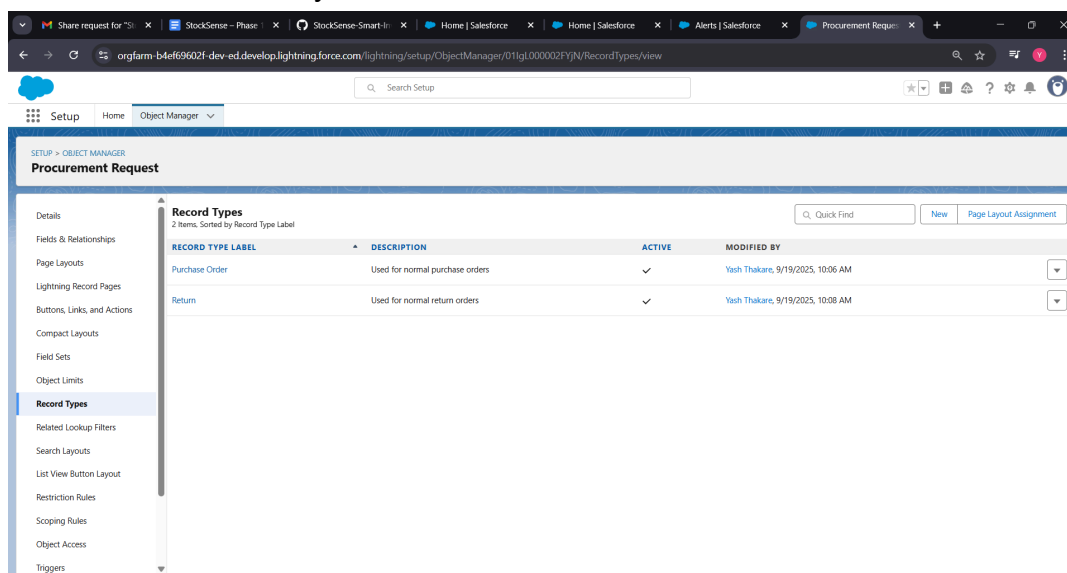
- Choose **Start with a layout**: select an existing layout to clone or choose **Master**.
- **Layout Name: PR - Purchase Order Layout** → **Save**.

Same for **PR - Return Layout**



Record Types:-

- PR - Purchase Order Layout
- PR - Return Layout



Lightning Record Page:-

