

# PHASE 3: DATA MODELING & RELATIONSHIPS

## 1. Standard & Custom Objects

- **Account** → Businesses or Customers (B2B vs B2C).
- **Contact** → Customer details.
- **Order** → Customer orders.
- **Product** → Items for sale.
- **Case** → Support tickets/complaints.
- **Campaign** → Marketing campaigns.

### ❖ Custom Objects

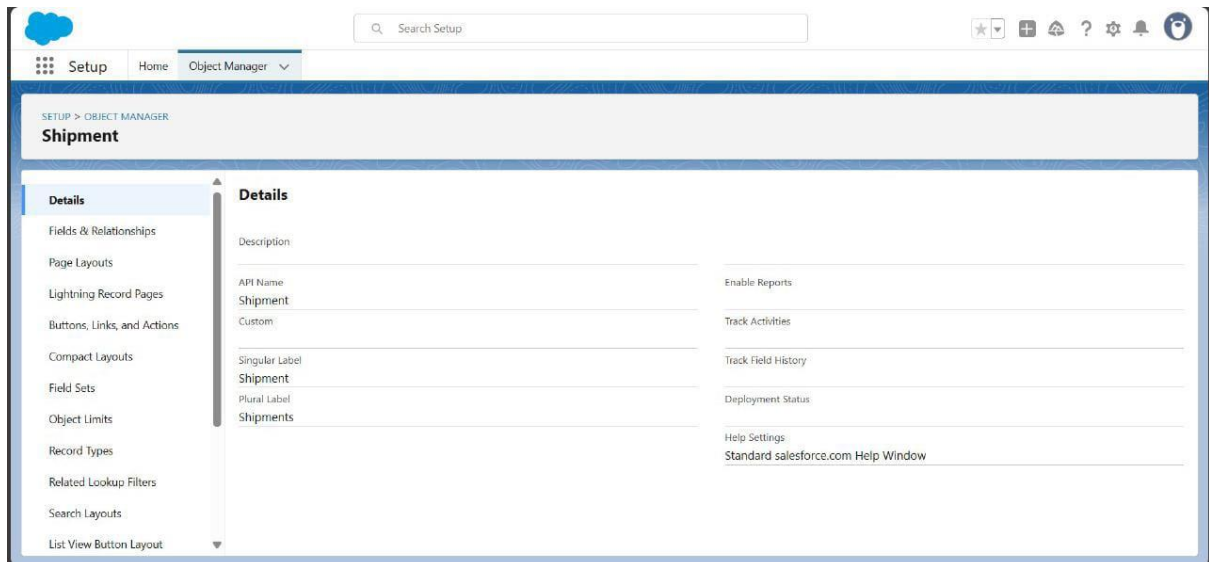
- **Wishlist**

The screenshot shows the Salesforce Setup interface for the 'Wishlist' custom object. The left sidebar contains a 'Details' menu with options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, and Scoping Rules. The main content area is titled 'Wishlist' and includes a description: 'Use: Track products users save for later.' Below the description are fields for API Name (Wishlist\_c), Custom (checked), Singular Label (Wishlist), and Plural Label (Wishlists). On the right, there are checkboxes for 'Enable Reports' (checked), 'Track Activities' (checked), and 'Track Field History' (checked). The 'Deployment Status' is set to 'Deployed'. At the bottom right, there is a link to 'Help Settings' and a note: 'Standard salesforce.com Help Window'. 'Edit' and 'Delete' buttons are located in the top right corner.

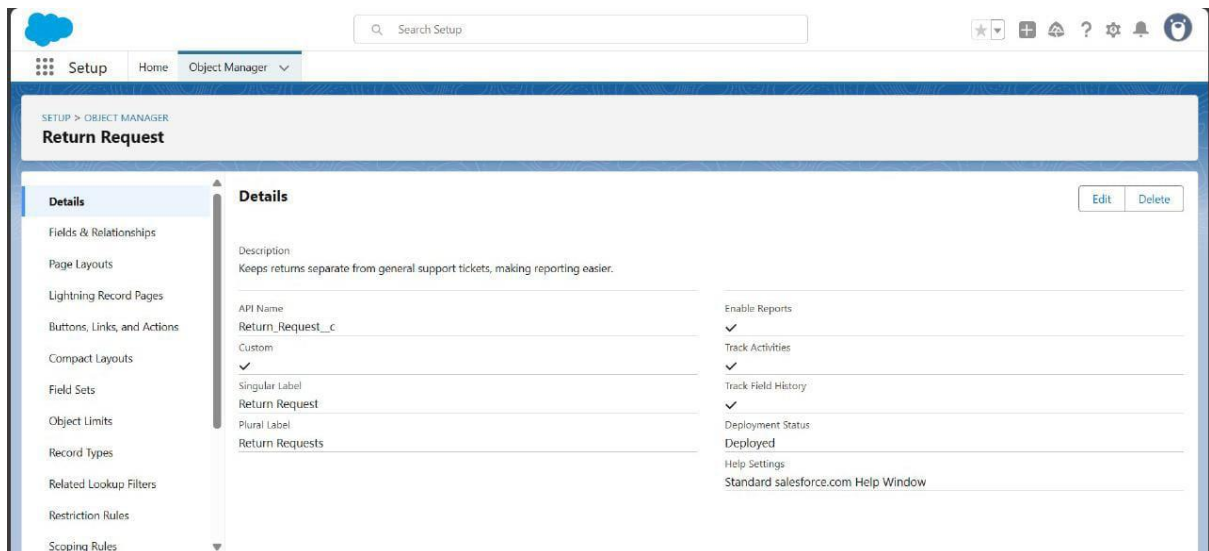
- **Feedback / Review**

The screenshot shows the Salesforce Setup interface for the 'Feedback' custom object. The left sidebar contains a 'Details' menu with options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, and Scoping Rules. The main content area is titled 'Feedback' and includes a description: 'Feedback given by users for the product.' Below the description are fields for API Name (Feedback\_c), Custom (checked), Singular Label (Feedback), and Plural Label (Feedbacks). On the right, there are checkboxes for 'Enable Reports' (checked), 'Track Activities' (checked), and 'Track Field History' (checked). The 'Deployment Status' is set to 'Deployed'. At the bottom right, there is a link to 'Help Settings' and a note: 'Standard salesforce.com Help Window'. 'Edit' and 'Delete' buttons are located in the top right corner.

- **Shipment (Standard)**



- **Return Request**



## 2.Fields

- **Wishlist**

Setup | Home | Object Manager

Search Setup

SETUP > OBJECT MANAGER

### Wishlist

Details

**Fields & Relationships**  
7 Items, Sorted by Field Label

Q, Quick Find | New | Deleted Fields | Field Dependencies | Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer	Customer__c	Text(18)		
Date Added	Date_Added__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Product	Product__c	Lookup(Product)		✓
Wishlist Name	Name	Text(80)		✓

- **Shipment**

Setup | Home | Object Manager

Search Setup

SETUP > OBJECT MANAGER

### Shipment

Details

**Fields & Relationships**  
23 Items, Sorted by Field Label

Q, Quick Find | New | Deleted Fields | Field Dependencies | Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created Date	CreatedDate	Date/Time		✓
Delivered To	DeliveredToId	Lookup(User,Group)		
Description	Description	Long Text Area(32000)		
Destination Location	DestinationLocationId	Lookup(Location)		
Expected Delivery Date	ExpectedDeliveryDate	Date/Time		✓
Fulfillment Order	FulfillmentOrderId	Lookup(Fulfillment Order)		
Last Modified By	LastModifiedById	Lookup(User)		
Last Modified Date	LastModifiedDate	Date/Time		
Owner Name	OwnerId	Lookup(User,Group)		✓
Product	Product__c	Lookup(Product)		✓

- **Feedback**

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER

## Shipment

Details

**Fields & Relationships**

23 Items, Sorted by Field Label

Q, Quick Find New Deleted Fields Field Dependencies Set History Tracking

Field Label	Field Name	Data Type	Controlling Field	Indexed
Created Date	CreatedDate	Date/Time		✓
Delivered To	DeliveredToId	Lookup(User,Group)		
Description	Description	Long Text Area(32000)		
Destination Location	DestinationLocationId	Lookup(Location)		
Expected Delivery Date	ExpectedDeliveryDate	Date/Time		✓
Fulfillment Order	FulfillmentOrderId	Lookup(Fulfillment Order)		
Last Modified By	LastModifiedById	Lookup(User)		
Last Modified Date	LastModifiedDate	Date/Time		
Owner Name	OwnerId	Lookup(User,Group)		✓
Product	Product__c	Lookup(Product)		✓

- Return Request

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER

## Return Request

Details

**Fields & Relationships**

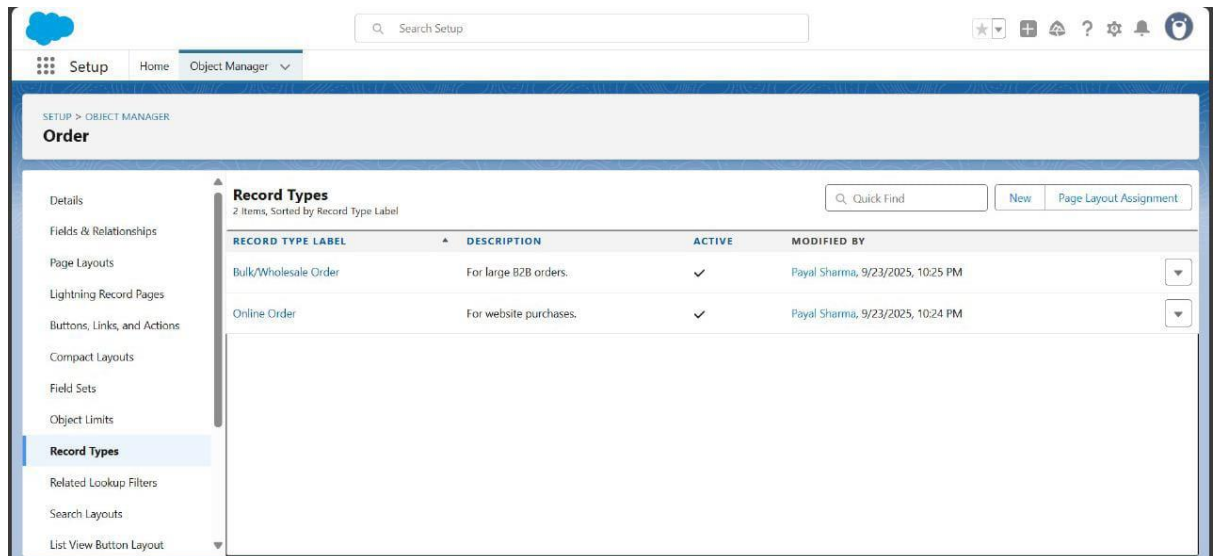
8 Items, Sorted by Field Label

Q, Quick Find New Deleted Fields Field Dependencies Set History Tracking

Field Label	Field Name	Data Type	Controlling Field	Indexed
Contact	Contact__c	Lookup(Contact)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Order	Order__c	Master-Detail(Order)		✓
Product	Product__c	Lookup(Product)		✓
Reason	Reason__c	Picklist		
Return ID	Return_ID__c	Auto Number		
Return Request Name	Name	Text(80)		✓

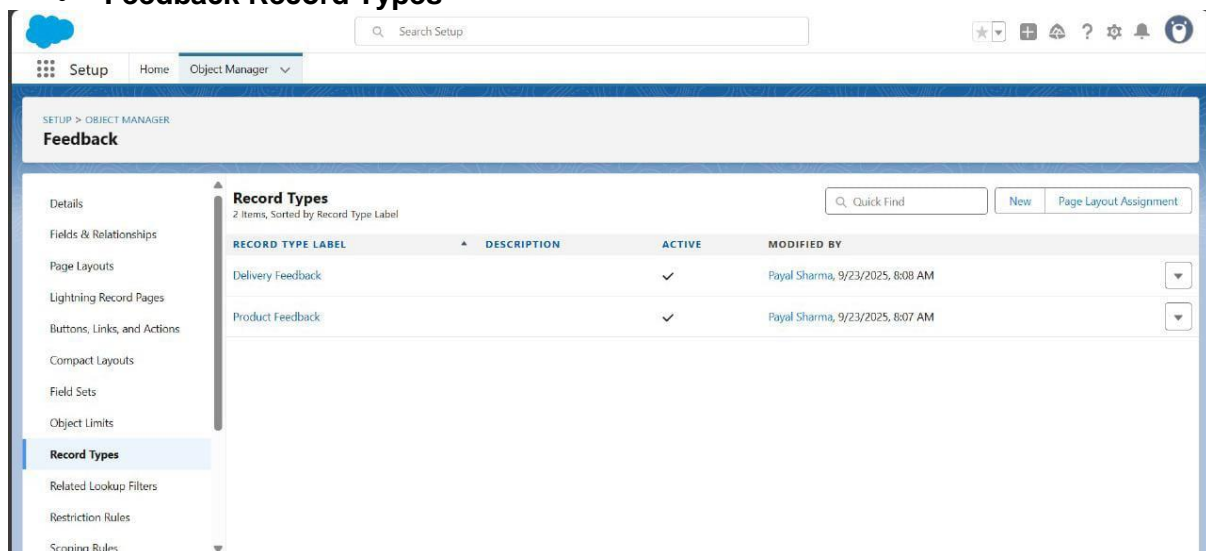
3. Record Types.

- Order Record Types



- **Online Order** → For website purchases.
- **Bulk/Wholesale Order** → For large B2B orders.

#### • Feedback Record Types



- **Product Feedback** → Ratings & reviews for items.
- **Delivery Feedback** → Ratings for shipment experience.

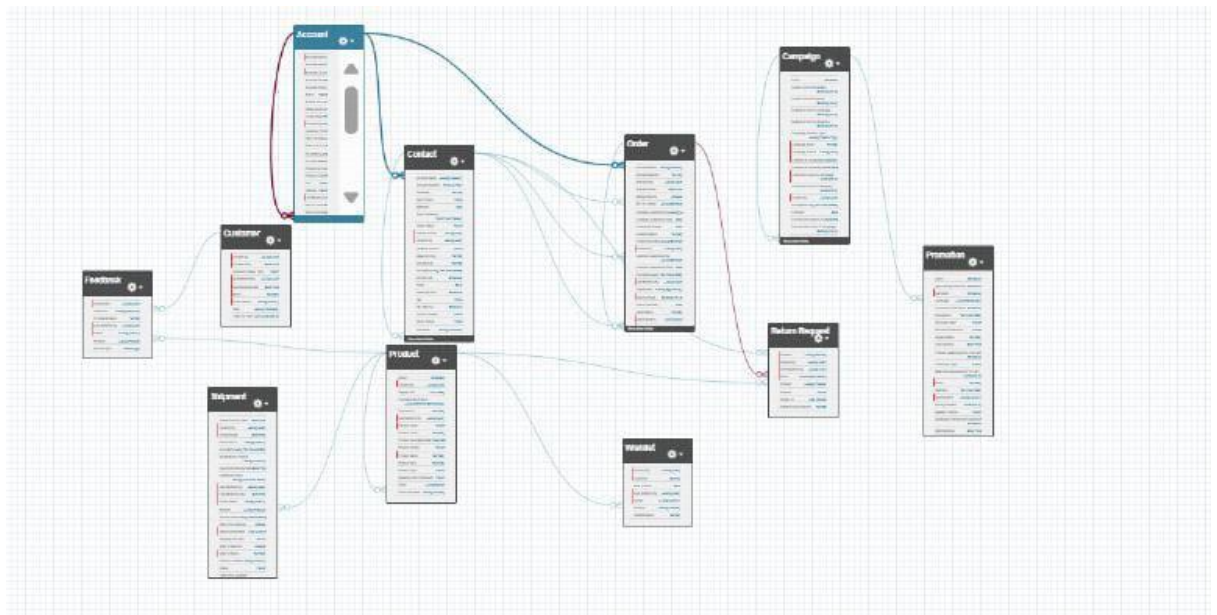
## 4 Page Layouts

- **Product Layout** → Show fields like Product Name, Price, Stock, Vendor.
- **Order Layout** → Customer, Product, Quantity, Delivery Status.
- **Feedback Layout** → Customer, Rating, Comments, Related Order.
- **Return Request Layout** → Order, Product, Reason, Status.

## 5. Compact Layouts

- **Product** → Product Name, Price, Stock Status.
- **Order** → Order Number, Customer, Status, Delivery Date.
- **Feedback** → Rating, Customer, Product.
- **Return Request** → Request ID, Order, Reason, Status.

## 6. Schema Builder



- **Accounts & Customers** separated for business vs. end-user management.
- **Products** centrally linked with Orders, Wishlists, Feedback, and Vendors.
- **Orders & Return Requests** ensure full purchase + refund lifecycle.
- **Campaigns & Promotions** support marketing and discount tracking.
- **Wishlist & Feedback** capture customer preferences and satisfaction.
- **Vendors** tied to Products for supplier management.

## 7. Lookup vs Master-Detail vs Hierarchical Relationships

Parent Object	Child Object	Relationship Type	Notes
Account	Customer	Lookup	Customer linked to an Account.
Customer	Feedback	Lookup	Feedback submitted for a customer.
Product	Feedback	Lookup	Feedback tied to a specific product.

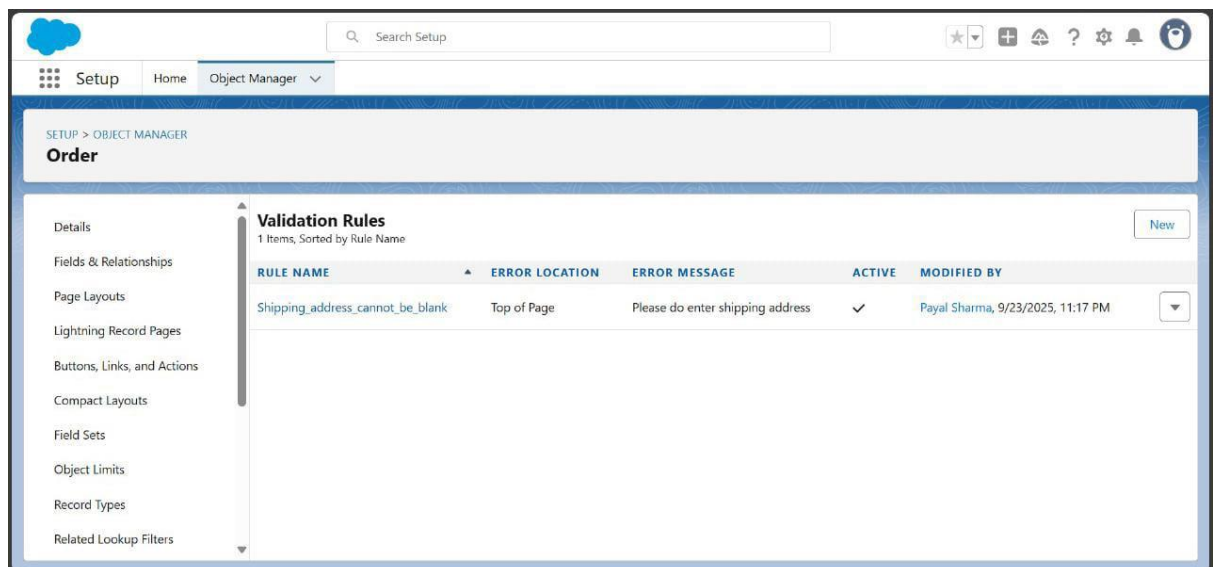


Parent Object	Child Object	Relationship Type	Notes
Customer	Order	Lookup	Order placed by a customer.
Order	Return Request	Master-Detail	Return cannot exist without an order.
Vendor	Product	Lookup	Product supplied by a vendor.
Product	Promotion	Junction Object	Many-to-many → a product can have multiple promotions, and promotions can apply to multiple products.
Campaign	Promotion	Lookup	Promotion linked to a campaign.

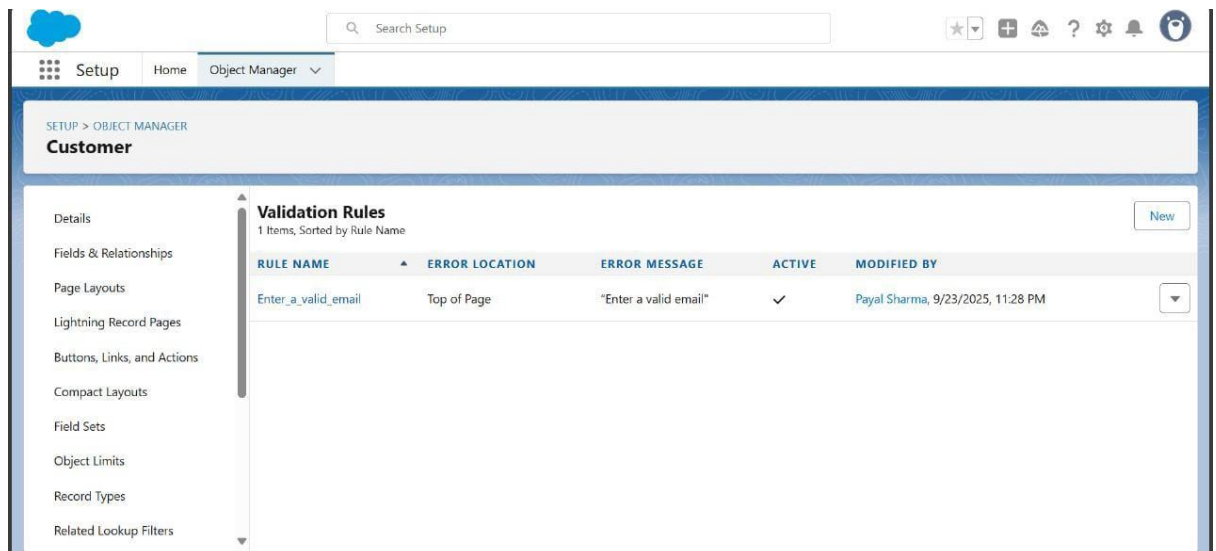
## PHASE 4: PROCESS AUTOMATION (ADMIN)

### 1. Validation Rules

- Shipping address cannot be blank.

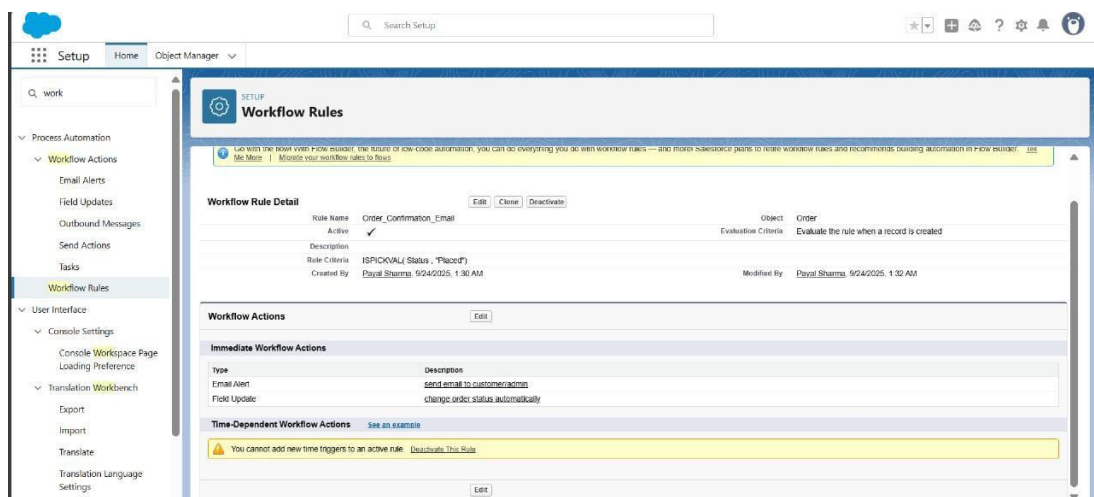


- Customer email must contain "@".



## 2. Workflow Rules

### ➤ Order Confirmation



- **Objective:** Send order confirmation automatically when an order is placed.
- **Trigger:** Status = Placed (ISPICKVAL(Status\_\_c, "Placed") for picklist)
- **Action:** Email alert to customer
- **Benefit:** Instant notification, reduces manual work, improves customer experience

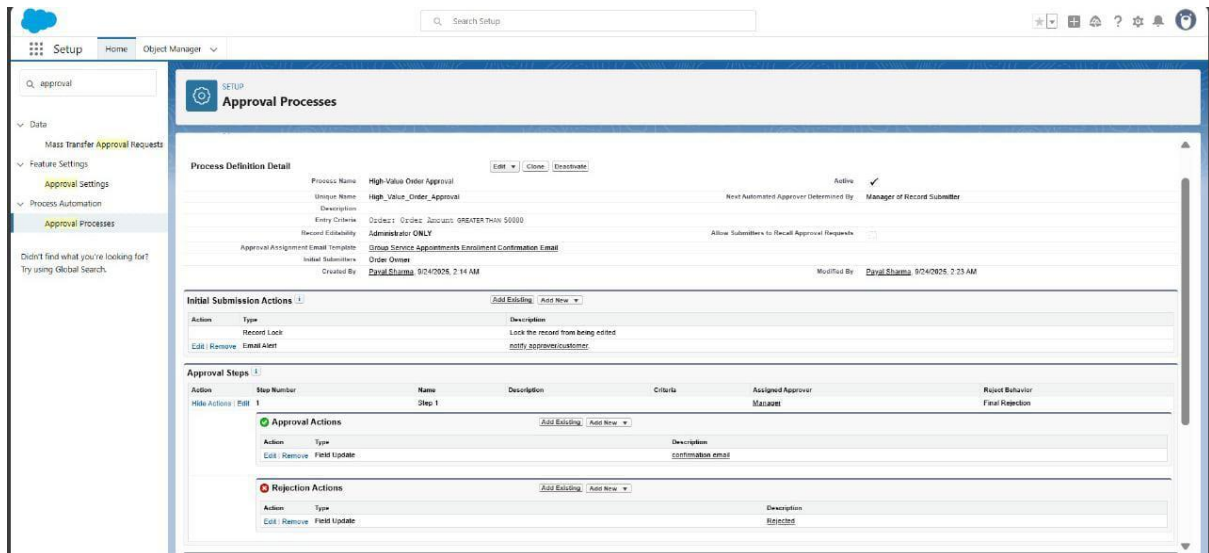
## 3. Process Builder

### ❖ Customer Feedback Request

- **Objective:** Improve post-delivery engagement.
- **Trigger:** Order Status = Delivered
- **Actions:** Send automated feedback request email
- **Benefit:** Increases customer satisfaction and reviews

## 4. Approval Process



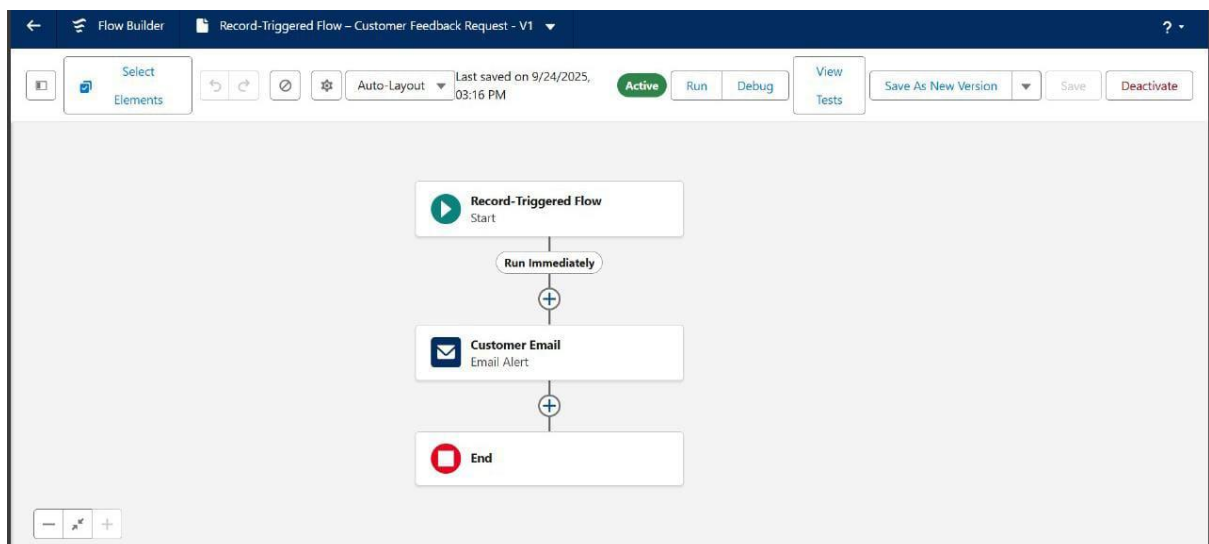


❖ **Objective:** Automate approval of high-value or sensitive orders.

- **Object:** Order
- **Entry Criteria:** Orders above a certain amount (e.g., \$500)
- **Approver:** Manager or team lead
- **Actions:** Update status, notify approver/customer, trigger related processes
- **Benefits:** Ensures control, accountability, and reduces manual oversight

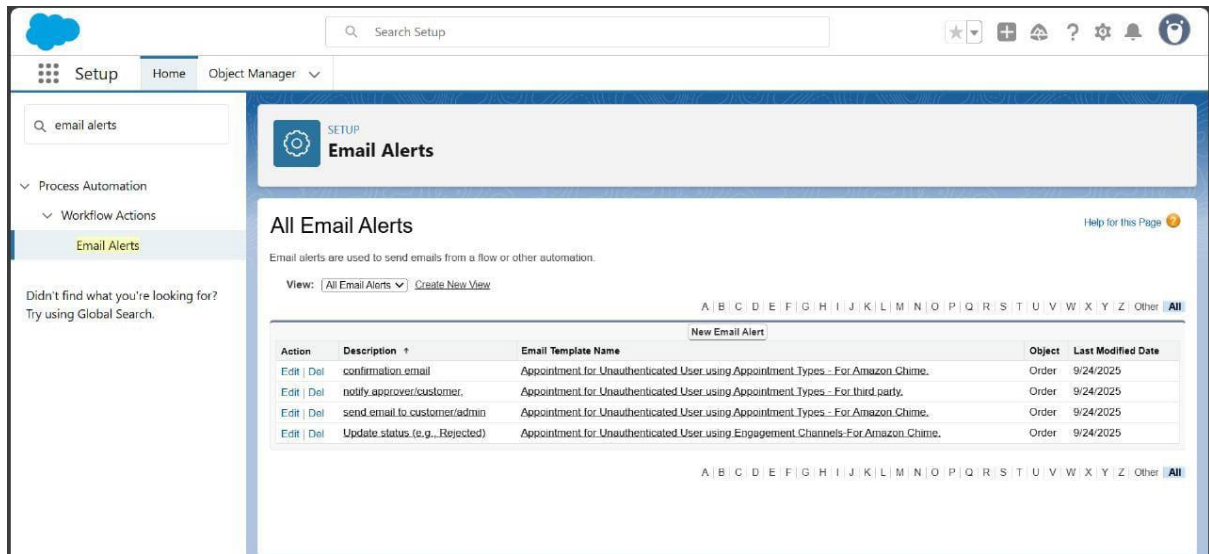
## 5.Flow Builder (Screen, Record-Triggered, Scheduled, Auto-launched)

### Customer Feedback Flow (Record-Triggered)



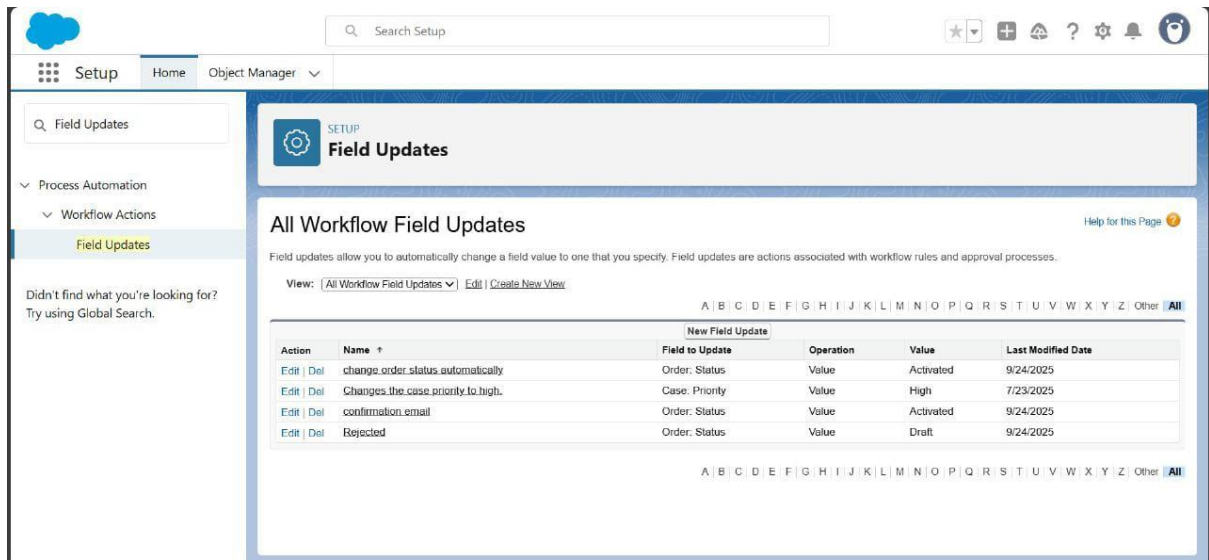
- ❖ **Objective:** Automatically send feedback request email after an order is delivered.
- **Trigger:** Record update → Status = Delivered
- **Actions:**
  - Send feedback email to customer
  - Optionally update Feedback\_Sent field to TRUE
- **Benefits:** Saves manual effort, collects customer feedback automatically, improves engagement and reviews

## 6. Email Alerts



- **Confirmation Email** → Automatically sends confirmation emails to customers after order creation, ensuring they receive immediate acknowledgment.
- **Notify Approver/Customer** → Sends alerts to approvers/customers for required actions, supporting faster order processing and transparency.
- **Customer/Admin Notification** → Configured to notify both customers and administrators regarding order updates, reducing communication gaps.
- **Order Status Update (e.g., Rejected)** → Triggers automated emails when an order is rejected, keeping customers informed about their order lifecycle.

## 7. Field Updates



- **Order Status Automation** → Configured to automatically update the *Order Status* to *Activated* once conditions are met (streamlines order processing).
- **Case Priority Update** → Automatically sets *Case Priority* to *High* for urgent cases (improves customer support efficiency).
- **Order Confirmation Email** → Updates *Order Status* to *Activated* to trigger confirmation workflows (ensures customers receive timely updates).
- **Rejected Orders** → Workflow updates *Order Status* to *Draft/Rejected* when conditions fail (maintains clean records and prevents processing errors).

## 8.Tasks

1. Automatically assign follow-up tasks based on events like refund requests or order shipments.
2. Ensures accountability by assigning tasks to the right users or teams.
3. Reduces manual effort and improves timely action on critical processes.

## 9.Custom Notifications

1. Sends real-time in-app alerts to users for important events (e.g., order ready, low stock).
2. Ensures immediate awareness and faster response by the relevant team.
3. Enhances operational efficiency and prevents missed actions.