

# Information System Architecture Design

32531

## Assessment Task 2

**In-Depth Analysis &  
Prototype development**

**TOPIC: CRM For Online Book Store**

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## **Executive Summary**

In this report for CRM we will discuss about the strategies that are useful for online bookstore. Then we will discuss about five of the journals from different personalities. In which we have to discuss about the relationship capabilities and the relationship links. Then we will discuss about how internet is changing the way of purchasing books. We will also ponder upon the point and discuss about the way for buying the book whether it is for reading purpose or for gift. So, accordingly we will arrive to a particular result that will either support the point that the customer relationship management is totally helpful in integrating the customer whether it is a small firm or a big firm or will deduce that CRM does not play a significant role in the establishment of any E-commerce industry, let it be an online book store.

Customer relationship management strategies are creating so much profit for the company as they are continuously interacting with their customers. By sending electronic mails and other surveys we can take the feedback from our consumers or customers. These points will also be discussed in the report. The prototype for an online book store will also be made.

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## Introduction

CRM is termed as “Customer Relationship Management”. CRM is very important for starting any business model very efficiently whether it is online bookstore. By using customer relationship management, we can make strategies for developing an online bookstore. So, when we are making customer relationship management strategy, we have to focus on the needs of our clients or customers to make sure to complete their needs for books etc. Customer relationship management strategy will help to make a regular customer base for the increment in sales of the books and other products in the store, so they can increase their profits. Also, by using customer relationship management software, mails and using social platforms to provide the information to the customer so that they can at least visit or view the online store.

This way CRM is promoting the Online Bookstore. By promoting online, we can have more customers. So, more customers will give more profit. CRM using social platforms is also helping us to spread more information about online bookstore as compare to the normal ways, in other words CRM is also advertising about the bookstore online. Online we can reach globally customers so that they can also buy our products and this way we can have global customers.

Customer Relationship Management will help in creating surveys to get more information about the customer's supplies and needs. Also, customers can provide their feedback about their experience of purchasing the product. These types of surveys should be displayed on the store's website or on their social media page so that the customers can see the reality.

There is some customer relationship management software which can be used to manage the list of clients E-mails and other personal data that they insert during purchase. This software can keep an eye on success or failures of marketing campaigns of the company.

Customer relationship management helps in reviewing the whole business plan and also CRM can give time to time statements for the monthly income. This will help in calculating the monthly expenses for the store.

Customer relationship management helps both the type of companies or firms whether it is a small firm or big firm it helps to interact with the customers and building the company for future so that it can run with a good base in future.

## In-Depth Topic Analysis

### 1). Do consumers judge a book by its cover? A study of the factors that influence the purchasing of books

Luís Leitão, Suzanne Amaro, Carla Henriques, Paula Fonseca are examining the factors which are influencing the customers, when they are buying fictional books and exploring that is there any difference between buying the books for personal use or as a gift. Aim of their study id to finding out the factors that are affecting the purchasing of books. In this study they discussed about Four attributes while purchasing the book and they are as follows- “Recommending the books for family and colleagues”, “Topics that are going to be covered in the book”, “Synopsis”, “Showing the available discount on the books for sale” so they are totally focusing on the factors like ‘synopsis’, ‘topics covered in book’ while purchasing a book. So, focusing on the subject of book, authors can also conduct a research for discovering/searching which topic or subject is more trending and also appreciable by the readers. In this study, they also focus on the recommendation of the book to the family, friends and relatives. This process of recommendation plays a very important role in the purchase of a book. Recommending is the new and totally different way to promote books. So, talking and sharing about book is helpful in purchasing a book. Social media platforms like Facebook, Instagram are very useful in promoting the books.

**Table 1**  
Demographic profile of respondents (N = 487).

		N	%
Gender	Female	339	69.6%
	Male	148	30.4%
Educational Level	Primary 1st, 2nd and 3rd cycle (grades 1–9)	7	1.4%
	Secondary Education (grades 10–12)	111	22.8%
	Bachelor's Degree	203	41.7%
	Post Graduate Degree	47	9.7%
	Master's Degree	72	14.8%
	Doctorate	47	9.7%
	[18–30]	167	34.3%
Age	[31–45]	224	46.0%
	45 +	96	19.7%

Figure 1: Demographic Profile of Respondents

In above figure, it is showing the demographic profile of respondents in which N is equal to 487. In which female are 339 and males are 148. Regarding educational level there are some figures in percentages also. So, we can see that there is a lot of majority by the students of bachelor's degree which is 41.7 %.

## 2). A multi-layered approach to CRM implementation: An integration perspective

David J. Finnegan \*, Wendy L. Currie talks about the growth of E-commerce industry by using internet. In today's world CRM is uniting or integrating the customers. We here in this article studied about the CRM strategies by developing the strength and skills of people as a component. Here we introduced to the term 'Affordance' in CRM strategy. We can understand the term affordance as an analytical tool to analyze or to understand about the quality of products/elements. We discuss here about multi-layered framework in which we talk about developing CRM strategies from various dimension perspective.

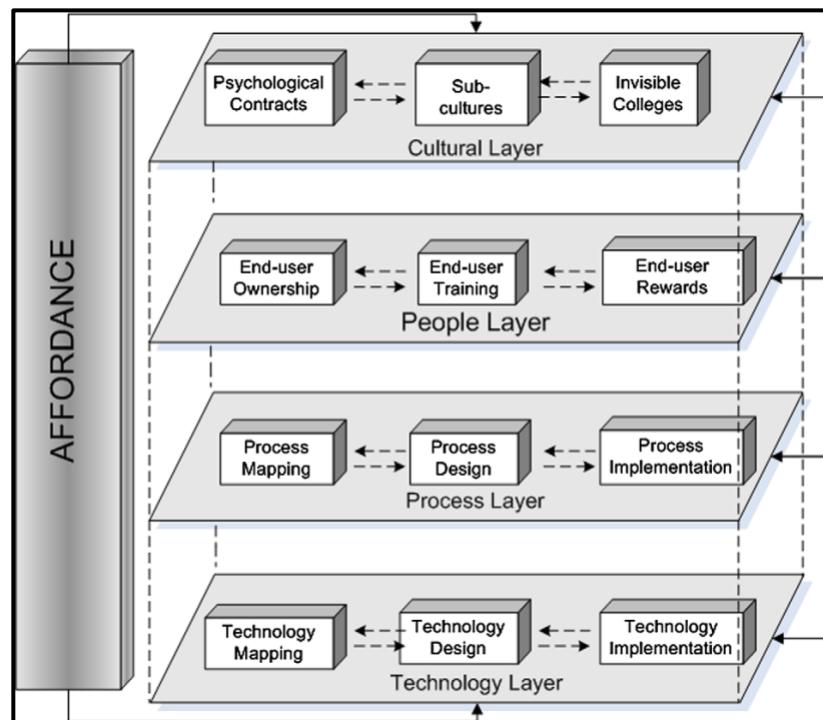


Figure 2: Four layers of Affordance

In above figure, we are depicting about the four layers of affordance which are – Technology layer, Process layer, People layer, cultural layer. Both process and technology layer contain mapping, design, Implementation of process and technology respectively.

### 3). Performance implications of customer-linking capabilities: Examining the complementary role of customer orientation and CRM technology

Adam Rapp, Kevin J. Trainor, Raj Agnihotri discussing about the revolution came in market through the CRM strategies. They find that the customer centric sources of customer relationship management technologies are directly influencing the company's customer linking capabilities. There is a interaction in customer relationship management technology capabilities and customer orientation. This interaction is influencing positively the linking capabilities. So, this study is all about the relationship between customer linking capability and customer relationship performance. This study is making several important contributions to the marketing and promotion of the books online. Customer relationship management strategies are totally capable of making or developing a online bookstore.

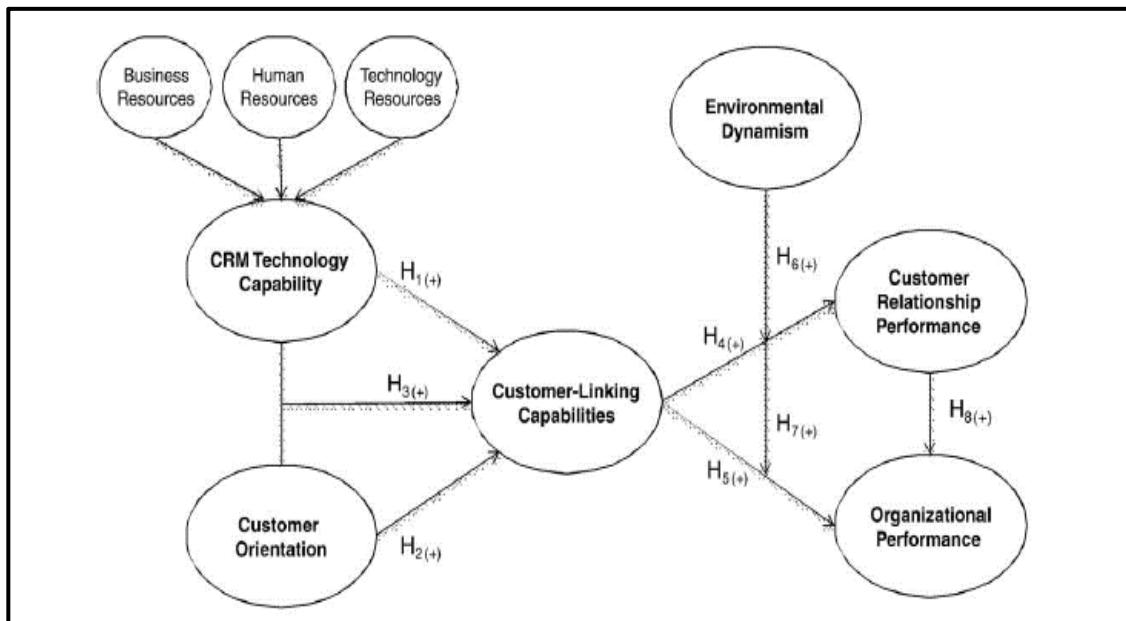


Figure 3: Customer linking capabilities

In the above figure, it is depicted that customer-linking capabilities is attached with the several major factors like CRM technology which has three parts (Business resources, Human resources, technology resources), Environmental Dynamism, Customer relationship performance, organizational performance, customer orientation. Organizational performance is totally based on environmental dynamism.

#### **4). The effect of Customer Relationship Management systems on firm performance**

Jacob Z. Haislipa, Vernon J. Richardson represents the customer relationship management as a approach or way for the marketing and promoting their products to the customers or consumers. Customer relationship management is developing the relationship between with the customers by interacting with them. So, handling consumers and maintaining them is one of the works of CRM. According to their study, CRM system and strategies increase the consumer satisfaction by completing their all the needs. So, CRM increase the profit percentage of the company. Customer relationship management also helps in improving business processes. So, in their study they are discussing about the benefits that are coming from applying customer relationship management strategies.

The figure below is depicting panel A and panel B in which they are showing the year distributions and industry distributions. Panel A of year distributions sorts according to the years and on the hand industry distribution is sorted according to equipment and the services.

Sample statistics.				
Panel A: year distributions				
Year	CRM implementations	Control firms	All firms	
2001	13	108	121	
2002	22	304	326	
2003	11	152	163	
2004	13	288	301	
2005	10	174	184	
2006	11	89	100	
2007	3	12	15	
2008	1	13	14	
2009	2	15	17	
2010	0	0	0	
2011	1	14	15	
Total	87	1169	1256	

Panel B: industry distributions				
Industry	2-digit SIC code	CRM implementations	Control firms	All firms
Chemicals	28-29	6	101	107
Electrical	36, 38	13	178	191
Equipment	35	5	39	44
Retail sales	50-59	9	37	46
Services	70-79	16	375	391
All others	All others	38	439	477
Total		87	1169	1256

*Figure 4: Year and Industry distributions*

## 5). A group recommendation system for online communities

According to the report of Jae Kyeong Kima, Hyea Kyeong Kima, Hee Young Oha, Young U. Ryu it has reported that the 1.17 billion of world population surfs web now a days. So, by using customer relationship management there is a lot of chances of getting profit from opening an online bookstore. As there are too many social platforms and communities by interacting with them can promote about our bookstore and the products. Also, recommendation plays a very vital role in promoting book. We can see that these days several group activities and interaction are done by using customer relationship management strategies. In this report they propose two phases for the recommendation effects for supporting the several online communities. This report proposed a fully improved recommendation procedure.

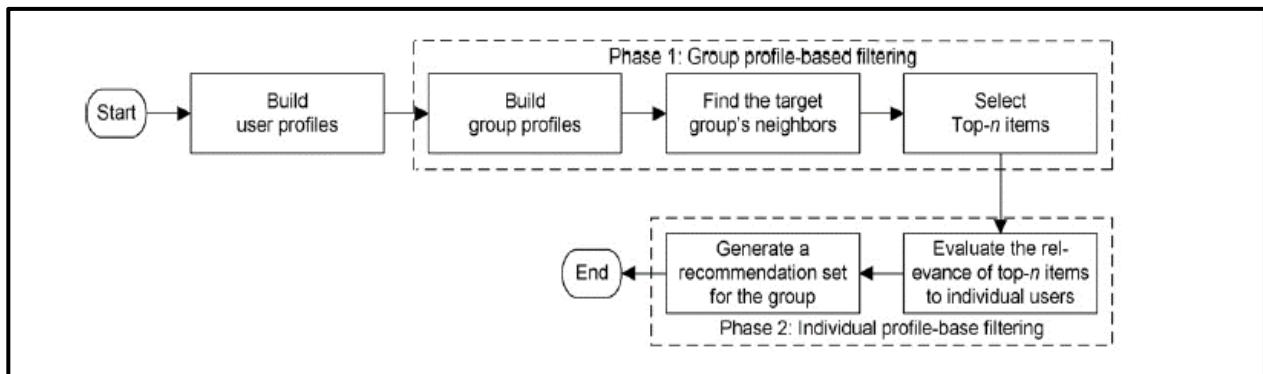


Figure 5: Two user profiles

In above figure, it is depicted two phases in which one phase is Group profile-based filtering and another phase-2 is individual profile-base filtering.

Group (size)	Optimal Database Marketing	The MIS Behavior of Markets	Data Mining Techniques	CRM at the Speed of Light, 3G	Semantic Web and P2P	Executive Recommendation for the Best Products	Link	The Hidden Power of Social Networks
IT Wizards (5)	3	1	1	0	3	0	2	4
Best CRM (7)	0	5	0	1	0	3	3	3
Case Review (9)	1	0	3	0	2	2	1	1
AI World (10)	4	0	0	5	4	1	1	4
Next e-Biz (8)	3	2	1	0	2	4	3	2

Note: The figure in each cell indicates the number of group members who have read the book.

Figure 6: Members of the group who read

In above figure, the members of the group who have read the book is shown.

## Comparison of Scholarly Literature & Current Practice

*Table 1: Comparison table*

<b>Comparison Basis</b>	<b>Current Practice</b>	<b>Academic Literature</b>
A) Does current practice match theory?	As in current practice there are several uses of 'customer relationship management' in various field as well as in online bookstore.	According to the academic literature they talk or discussed about the same things we use currently.
B) Is the 'real world' ahead or behind what the research tells us?	One of the examples in currently is 'Well Fargo' which is responsible for keeping an eye over the property of 70M people. They know that most of their consumers use more than one bank accounts, so they keep track them by using CRM strategy and connectivity.	The current practice does match the literature reviews. The real world in some countries is behind what the research are telling us. CRM in current is used for approaching the customers and promoting the product and this is happening in current practice too.
C) You will need to make sure that your current practice section relates to your literature as this shows how you match applied concepts/theory to the 'real world'	Another example is 'Activision' which is very popular publisher in United States for video game market there.  In current practice they are using the same customer relationship management strategies for completing the needs of customers.	

## Modelling using ArchiMate

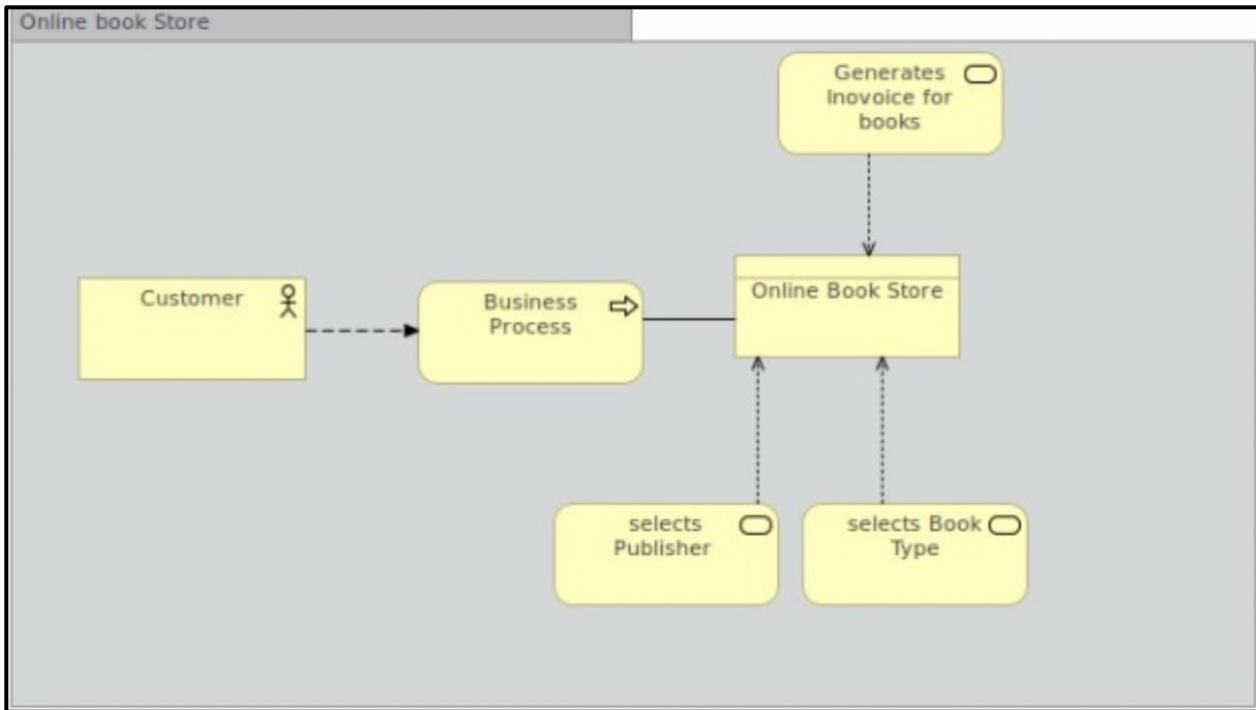


Figure 7: Modelling

# Prototype

## a) Data Objects

The screenshot shows the 'New Custom Object' configuration page in the Salesforce Setup interface. The object name is 'Book\_Type'. The 'Label' field is set to 'Book\_Type' and the 'Plural Label' field is set to 'Book\_Types'. The 'Description' field contains the text 'The type of book'. Under 'Object Classification', the 'Allow Bulk API Access' and 'Allow Streaming API Access' checkboxes are checked. The 'Deployment Status' section shows 'Deployed' selected. The 'Object Creation Options' section has the 'Launch New Custom Tab Wizard after saving this custom object' checkbox checked. The page includes standard Salesforce navigation and save buttons.

Figure 8: Book\_type object

The screenshot shows the first step of the 'Adding field Book\_Type\_ID' wizard. It asks to choose the field type. The 'Auto Number' option is selected. A note explains that it's a system-generated sequence number. The 'Formula' option is also listed. The 'Next' button is visible at the top right.

Figure 9: Adding field Book\_Type\_ID Step 1

**Step 2. Enter the details**

Step 2 of 4

**Error: Invalid Data.**  
Review all error messages below to correct your data.

Field Label	<input type="text" value="Book_Type_ID"/>
Display Format	<input type="text" value="BT-{0}"/> Example: A-{0000} What Is This?
Starting Number	<input type="text" value=""/> Error: You must enter a value
Field Name	<input type="text" value="Book_Type_ID"/>
Description	<input type="text"/>
Help Text	<input type="text"/>
External ID	<input type="checkbox"/> Set this field as the unique record identifier from an external system

**Step 2 of 4**

[Previous](#) [Next](#) [Cancel](#)

Figure 10: Adding field Book\_Type\_ID Step 2

**New Custom Field**

**Step 3. Establish field-level security**

Step 3 of 4

Field Label	Book_Type_ID
Data Type	Auto Number
Field Name	Book_Type_ID
Description	

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Force.com - App Subscription User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Force.com - Free User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Gold Partner User	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Identity User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Partner App Subscription User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Partner Community Login User	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Partner Community User	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Read Only	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Silver Partner User	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Solution Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Standard Platform User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Standard User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
System Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Work.com Only User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Step 3 of 4**

[Previous](#) [Next](#) [Cancel](#)

Figure 11: Adding field Book\_Type\_ID Step 3

Book\_Type  
New Custom Field

Step 4. Add to page layouts Step 4 of 4

Field Label Book\_Type\_ID  
Data Type Auto Number  
Field Name Book\_Type\_ID  
Description

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field  Page Layout Name  
 Book\_Type Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

Figure 12: Adding field Book\_Type\_ID Step 4

Edit Custom Object Book Help for this Page ?

Custom Object Definition Edit Save Save & New Cancel

**Custom Object Information**

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label  Example: Account  
Plural Label  Example: Accounts  
Starts with vowel sound

The Object Name is used when referencing the object via the API.

Object Name  Example: Account

Description

Context-Sensitive Help Setting  Open the standard Salesforce.com Help & Training window  
 Open a window using a Visualforce page  
Content Name

**Enter Record Name Label and Format**

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name  Example: Account Name  
Data Type

**Optional Features**

Allow Reports  
 Allow Activities  
 Track Field History  
 Allow in Chatter Groups

**Object Classification**

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).

Allow Sharing  
 Allow Bulk API Access  
 Allow Streaming API Access

**Deployment Status**

In Development  
 Deployed

**Search Status**

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

Allow Search

Save Save & New Cancel

Figure 13: Book object

Book  
New Custom Field

Help for this Page 

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label	<input type="text" value="Book_ID"/> 
Display Format	<input type="text" value="B-{0}"/>  Example: A-{0000} <a href="#">What Is This?</a>
Starting Number	<input type="text" value="1"/> 
<input checked="" type="checkbox"/> Generate Auto Number for existing records	
Field Name	<input type="text" value="Book_ID"/> 
Description	<input type="text"/>
Help Text	<input type="text"/>
External ID <input checked="" type="checkbox"/> Set this field as the unique record identifier from an external system 	

Figure 14: Adding field Book\_ID

Book  
New Custom Field

Help for this Page 

Step 3. Establish field-level security Step 3 of 4

Previous Next Cancel

Field Label	Book_ID
Data Type	Auto Number
Field Name	Book_ID
Description	

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Force.com - App Subscription User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Force.com - Free User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Gold Partner User	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Identity User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Partner App Subscription User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Partner Community Login User	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Partner Community User	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Read Only	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Silver Partner User	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Solution Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Standard Platform User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Standard User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
System Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Work.com Only User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Previous Next Cancel

Figure 15: Adding field Book\_ID

Book  
New Custom Field

Step 4. Add to page layouts Step 4 of 4

Field Label: Book\_ID  
Data Type: Auto Number  
Field Name: Book\_ID  
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field  Page Layout Name  
 Book Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

Figure 16: Adding field Book\_ID

- Master-Detail Relationship: 1 (Master-Detail of Book with Publisher)

SETUP > OBJECT MANAGER  
Book

Specify the type of information that the custom field will contain.

Details  
Fields & Relationships  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Object Limits  
Record Types  
Related Lookup Filters

Data Type

None Selected  
 Auto Number  
 Formula  
 Roll-Up Summary  
 Lookup Relationship  
 Master-Detail Relationship

Select one of the data types below.

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.  
A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.  
A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.  
Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.  
Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Figure 17: Master Detail (with Publisher)

Book  
New Relationship

Step 2. Choose the related object Step 2 of 6

Select the other object to which this object is related.

Related To: Publisher

Previous Next Cancel

Figure 18: Master Detail (with Publisher)

Book  
New Relationship

Help for this Page ?

Step 3. Enter the label and name for the lookup field Step 3 of 6

Previous Next Cancel

Field Label	Publisher	<a href="#">i</a>
Field Name	Publisher	<a href="#">i</a>
Description		
Help Text		
Child Relationship Name	Books	<a href="#">i</a>
Sharing Setting	Select the minimum access level required on the Master record to create, edit, or delete related Detail records. <input type="radio"/> Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records. <input checked="" type="radio"/> Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.	

Figure 19: Master Detail (with Publisher)

Book  
New Relationship

Help for this Page ?

Step 4. Establish field-level security for reference field Step 4 of 6

Previous Next Cancel

Field Label	Publisher	
Data Type	Master-Detail	
Field Name	Publisher	
Description		

These are the field-level settings for a Master-Detail relationship. They cannot be changed.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	✓	<input type="checkbox"/>
Analytics Cloud Security User	✓	<input type="checkbox"/>
Authenticated Website	✓	<input type="checkbox"/>
Authenticated Website	✓	<input type="checkbox"/>
Contract Manager	✓	<input type="checkbox"/>
Cross Org Data Proxy User	✓	<input type="checkbox"/>
Custom Marketing Profile	✓	<input type="checkbox"/>
Custom Sales Profile	✓	<input type="checkbox"/>
Custom Support Profile	✓	<input type="checkbox"/>
Customer Community Login User	✓	<input type="checkbox"/>
Customer Community Plus Login User	✓	<input type="checkbox"/>
Customer Community Plus User	✓	<input type="checkbox"/>
Customer Community User	✓	<input type="checkbox"/>
Customer Portal Manager Custom	✓	<input type="checkbox"/>
Customer Portal Manager Standard	✓	<input type="checkbox"/>
External Identity User	✓	<input type="checkbox"/>
Force.com - App Subscription User	✓	<input type="checkbox"/>
Force.com - Free User	✓	<input type="checkbox"/>
Gold Partner User	✓	<input type="checkbox"/>
High Volume Customer Portal	✓	<input type="checkbox"/>
High Volume Customer Portal User	✓	<input type="checkbox"/>
Identity User	✓	<input type="checkbox"/>
Marketing User	✓	<input type="checkbox"/>
Partner App Subscription User	✓	<input type="checkbox"/>
Partner Community Login User	✓	<input type="checkbox"/>
Partner Community User	✓	<input type="checkbox"/>
Read Only	✓	<input type="checkbox"/>
Silver Partner User	✓	<input type="checkbox"/>
Solution Manager	✓	<input type="checkbox"/>
Standard Platform User	✓	<input type="checkbox"/>
Standard User	✓	<input type="checkbox"/>
System Administrator	✓	<input type="checkbox"/>
Work.com Only User	✓	<input type="checkbox"/>

Previous Next Cancel

Figure 20: Master Detail (with Publisher)

Book  
New Relationship

Help for this Page [?](#)

**Step 5. Add reference field to Page Layouts** Step 5 of 6

Previous Next Cancel

Field Label	Publisher
Data Type	Master-Detail
Field Name	Publisher
Description	

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

Add Field Page Layout Name

Book Layout

Figure 21: Master Detail (with Publisher)

Book  
New Relationship

Help for this Page [?](#)

**Step 6. Add custom related lists** Step 6 of 6

Previous Save & New Save Cancel

Field Label	Publisher
Data Type	Master-Detail
Field Name	Publisher
Description	

Specify the title that the related list will have in all of the layouts associated with the parent.

Related List Label Books

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

Add Related List Page Layout Name

Publisher Layout

Append related list to users' existing personal customizations

Previous Save & New Save Cancel

Figure 22: Master Detail (with Publisher)

- Master-Detail Relationship: 2 (Master-Detail of Book with Book\_Type)

SETUP > OBJECT MANAGER  
Book

Details  
Fields & Relationships  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Object Limits  
Record Types  
Related Lookup Filters

**Data Type**

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
 

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

 The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Figure 23: Master Detail of Book with Book\_Type

**Step 2. Choose the related object**

Select the other object to which this object is related.

Related To: Book\_Type

Step 2 of 6

Previous Next Cancel

Figure 24: Master Detail of Book with Book\_Type

**Step 3. Enter the label and name for the lookup field**

Field Label: Book Type

Field Name: Book\_Type

Description:

Help Text:

Child Relationship Name: Books

Sharing Setting:

Select the minimum access level required on the Master record to create, edit, or delete related Detail records:

Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.

Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

Step 3 of 6

Previous Next Cancel

Figure 25:Master Detail of Book with Book\_Type

SETUP > OBJECT MANAGER

**Book**

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Field Types:

- Checkbox: Allows users to select a True (checked) or False (unchecked) value.
- Currency: Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
- Date: Allows users to enter a date or pick a date from a popup calendar.
- Date/Time: Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the popup, that date and the current time are entered into the Date/Time field.
- Email: Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the

Figure 26: Adding Price field

**Step 2. Enter the details**

Field Label: Price

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length: 18

Number of digits to the left of the decimal point

Field Name: Price

Decimal Places: 2

Number of digits to the right of the decimal point

Description:

Help Text:

Step 2 of 4

Previous Next Cancel

Figure 27: Adding Price field

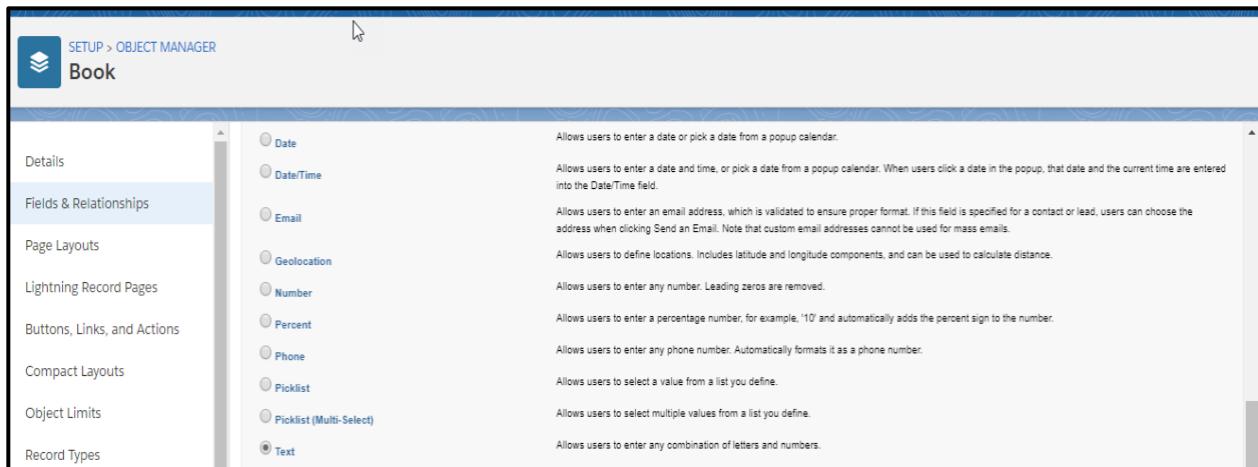


Figure 28: Adding Author field

Field Label	Author	<a href="#">i</a>
Please enter the maximum length for a text field below.		
Length	130	
Field Name	Author	<a href="#">i</a>
Description		
Help Text		

Figure 29: Adding Author field

Fields & Relationships				
10 Items, Sorted by Field Label				
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Author	Author__c	Text(130)		
Book Name	Name	Text(80)		✓
Book Type	Book_Type__c	Master-Detail(Book_Type)		✓
Book_ID	Book_ID__c	Auto Number (External ID)		✓
Created By	CreatedBy	Lookup(User)		
ISBN	ISBN__c	Text(50)		
Last Modified By	LastModifiedById	Lookup(User)		
Price	Price__c	Currency(3, 2)		

Figure 30: Book Fields and Relationships

Edit Custom Object  
Publisher

Custom Object Definition Edit      Save    Save & New    Cancel

**Custom Object Information**      | = Required Information

The singular and plural labels are used in tabs, page layouts, and reports.  
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label	Publisher	Example: Account
Plural Label	Publishers	Example: Accounts
Starts with vowel sound	<input type="checkbox"/>	

The Object Name is used when referencing the object via the API.

Object Name	Publisher	Example: Account
-------------	-----------	------------------

Description: The list of publishers.

Context-Sensitive Help Setting

<input checked="" type="radio"/> Open the standard Salesforce.com Help & Training window
<input type="radio"/> Open a window using a Visualforce page

Content Name: --None-- ▾

**Enter Record Name Label and Format**

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name	Publisher Name	Example: Account Name
-------------	----------------	-----------------------

Data Type: Text ▾

**Optional Features**

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Chatter Groups

**Object Classification**

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).

- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

**Deployment Status**      [What is this?](#)

- In Development
- Deployed

**Search Status**

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

Allow Search

Save    Save & New    Cancel

Figure 31: Publisher object

New Custom Field

Step 2. Enter the details      Step 2 of 4

Previous    Next    Cancel

Field Label	Publisher_ID	<input type="button" value="i"/>
Display Format	P-{0}	Example: A-{0000} <a href="#">What Is This?</a>
Starting Number	1	<input checked="" type="checkbox"/> Generate Auto Number for existing records
Field Name	Publisher_ID	<input type="button" value="i"/>
Description		
Help Text		
External ID	<input checked="" type="checkbox"/> Set this field as the unique record identifier from an external system	

Figure 32: Adding field Publisher\_ID

Publisher  
New Custom Field

Help for this Page ?

Step 4. Add to page layouts Step 4 of 4

Field Label	Publisher_ID
Data Type	Auto Number
Field Name	Publisher_ID
Description	

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

<input checked="" type="checkbox"/> Add Field	Page Layout Name
<input checked="" type="checkbox"/>	Publisher Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

Figure 33: Adding field Publisher\_ID

SETUP > OBJECT MANAGER  
Publisher

Details	Fields & Relationships 5 Items, Sorted by Field Label																																		
Fields & Relationships	<table border="1"> <thead> <tr> <th>FIELD LABEL</th> <th>FIELD NAME</th> <th>DATA TYPE</th> <th>CONTROLLING FIELD</th> <th>INDEXED</th> </tr> </thead> <tbody> <tr> <td>Created By</td> <td>CreatedById</td> <td>Lookup(User)</td> <td></td> <td></td> </tr> <tr> <td>Last Modified By</td> <td>LastModifiedById</td> <td>Lookup(User)</td> <td></td> <td></td> </tr> <tr> <td>Owner</td> <td>OwnerId</td> <td>Lookup(User,Group)</td> <td>✓</td> <td></td> </tr> <tr> <td>Publisher Name</td> <td>Name</td> <td>Text(80)</td> <td>✓</td> <td>▼</td> </tr> <tr> <td>Publisher_ID</td> <td>Publisher_ID__c</td> <td>Auto Number (External ID)</td> <td>✓</td> <td>▼</td> </tr> </tbody> </table>					FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	Created By	CreatedById	Lookup(User)			Last Modified By	LastModifiedById	Lookup(User)			Owner	OwnerId	Lookup(User,Group)	✓		Publisher Name	Name	Text(80)	✓	▼	Publisher_ID	Publisher_ID__c	Auto Number (External ID)	✓	▼
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED																															
Created By	CreatedById	Lookup(User)																																	
Last Modified By	LastModifiedById	Lookup(User)																																	
Owner	OwnerId	Lookup(User,Group)	✓																																
Publisher Name	Name	Text(80)	✓	▼																															
Publisher_ID	Publisher_ID__c	Auto Number (External ID)	✓	▼																															
Page Layouts																																			
Lightning Record Pages																																			
Buttons, Links, and Actions																																			
Compact Layouts																																			
Object Limits																																			
Record Types																																			
Related Lookup Filters																																			

Figure 34: Publisher Fields

New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)

**Custom Object Definition Edit** [Save](#) [Save & New](#) [Cancel](#)

**Custom Object Information** ! = Required information

The singular and plural labels are used in tabs, page layouts, and reports.

Label	Customer	Example: Account
Plural Label	Customers	Example: Accounts

Starts with vowel sound

The Object Name is used when referencing the object via the API.

Object Name	Customer	Example: Account
-------------	----------	------------------

Description

Context-Sensitive Help Setting  Open the standard Salesforce.com Help & Training window  Open a window using a Visualforce page

Content Name

**Enter Record Name Label and Format**

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name	Customer Name	Example: Account Name
-------------	---------------	-----------------------

Data Type

**Optional Features**

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Chatter Groups

**Object Classification**

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).

- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

**Deployment Status** [What is this?](#)

- In Development
- Deployed

**Search Status**

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

- Allow Search

**Object Creation Options (Available only when custom object is first created)**

- Add Notes and Attachments related list to default page layout
- Launch New Custom Tab Wizard after saving this custom object

[Save](#) [Save & New](#) [Cancel](#)

Figure 35: Customer object

Customer  
New Custom Field

Step 1. Choose the field type Step 1

[Next](#) [Cancel](#)

Specify the type of information that the custom field will contain.

**Data Type**

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Figure 36: Adding Customer\_ID

Customer  
New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label  [i](#)

Display Format  Example: A-{0000} [What Is This?](#)

Starting Number

Generate Auto Number for existing records

Field Name  [i](#)

Previous Next Cancel

Figure 37: Adding Customer\_ID

SETUP > OBJECT MANAGER Customer

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Object Limits Record Types

Master-Detail Relationship

The master object is the source of the values in the list.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

External Lookup Relationship

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Allows users to select a True (checked) or False (unchecked) value.

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Allows users to enter a date or pick a date from a popup calendar.

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the popup, that date and the current time are entered into the Date/Time field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Figure 38: Adding Email

Customer  
New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label  [i](#)

Field Name  [i](#)

Description

Help Text

Required  Always require a value in this field in order to save a record

Previous Next Cancel

Figure 39: Adding Email

SETUP > OBJECT MANAGER Customer

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Object Limits Record Types Related Lookup Filters

Fields & Relationships 6 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer Name	Name	Text(80)		
Customer_ID	Customer_ID__c	Auto Number		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		

Figure 40: Customer fields

New Custom Object

Help for this Page

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)

Custom Object Definition Edit Save Save & New Cancel

**Custom Object Information** \* = Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label	Cart	Example: Account
Plural Label	Carts	Example: Accounts

Starts with vowel sound

The Object Name is used when referencing the object via the API.

Object Name	Cart	Example: Account
-------------	------	------------------

Description

Context-Sensitive Help Setting  Open the standard Salesforce.com Help & Training window  Open a window using a Visualforce page

Content Name

**Enter Record Name Label and Format**

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name	Cart Name	Example: Account Name
-------------	-----------	-----------------------

Data Type

**Optional Features**

Allow Reports  
 Allow Activities  
 Track Field History  
 Allow in Chatter Groups

**Object Classification**

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).

Allow Sharing  
 Allow Bulk API Access  
 Allow Streaming API Access

**Deployment Status** [What is this?](#)

In Development  Deployed

**Search Status**

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

Allow Search

**Object Creation Options (Available only when custom object is first created)**

Add Notes and Attachments related list to default page layout  
 Launch New Custom Tab Wizard after saving this custom object

Save Save & New Cancel

Figure 41: Cart object

- Master-Detail Relationship: 3 (Master-Detail of Cart with Book)

SETUP > OBJECT MANAGER

Cart

Details

Fields & Relationships (selected)

Page Layouts

Lightning Record Pages

<input checked="" type="radio"/> Auto Number	A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
<input type="radio"/> Formula	A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
<input type="radio"/> Roll-Up Summary	A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
<input type="radio"/> Lookup Relationship	Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Figure 42: Master Detail of Cart with Book

**Step 2. Choose the related object**

Select the other object to which this object is related.

Related To: Book

Step 2

Previous Next Cancel

Figure 43: Master Detail of Cart with Book

**Step 3. Enter the label and name for the lookup field**

Field Label: Book

Field Name: Book

Description:

Help Text:

Child Relationship Name: Carts

Required: Always require a value in this field in order to save a record

What to do if the lookup record is deleted: Clear the value of this field. You can't choose this option if you make this field required.

Step 3 of 6

Previous Next Cancel

Figure 44: Master Detail of Cart with Book

**Cart**

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Book	Book__c	Lookup(Book)		✓
Cart Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		✓
Last Modified By	LastModifiedById	Lookup(User)		✓
Order	Order__c	Master-Detail(Order)		✓
Quantity	Quantity__c	Number(18, 0)		✓

Figure 45: Cart Fields and Relationships

## Order Object Fields

**Step 1. Choose the field type**

Specify the type of information that the custom field will contain.

Data Type

None Selected      Select one of the data types below.

Auto Number      A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Step 1

Next Cancel

Figure 46: Order\_ID field

- [Lookup Relationship: 4 \(Lookup of Order with Customer\)](#)

Order  
New Custom Field

Step 1. Choose the field type Step 1

Specify the type of information that the custom field will contain.

Data Type

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Figure 47: Lookup of Order with Customer

SETUP Object Manager

New Custom Object Help for this Page

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label  Example: Account

Plural Label  Example: Accounts

Starts with vowel sound

The Object Name is used when referencing the object via the API.

Object Name  Example: Account

Description

Context-Sensitive Help Setting

Open the standard Salesforce.com Help & Training window

Open a window using a Visualforce page

Content Name

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name  Example: Account Name

Data Type

Optional Features

Allow Reports

Allow Activities

Track Field History

Allow in Chatter Groups

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).

Allow Sharing

Allow Bulk API Access

Allow Streaming API Access

Deployment Status

In Development

Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

Allow Search

Object Creation Options (Available only when custom object is first created)

Add Notes and Attachments related list to default page layout

Launch New Custom Tab Wizard after saving this custom object

Figure 48: Invoice object

SETUP > OBJECT MANAGER  
Invoice

**Step 1. Choose the field type**

Specify the type of information that the custom field will contain.

**Data Type**

- None Selected Select one of the data types below.
- Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Help for this Page ?

Step 1

Next Cancel

Figure 49: Adding Invoice\_ID field

Invoice

**New Custom Field**

**Step 2. Enter the details**

Help for this Page ?

Step 2 of 4

Previous Next Cancel

Field Label	<input type="text" value="Invoice_ID"/> <a href="#">i</a>
Display Format	<input type="text" value="I-{0}"/> <a href="#">Example: A-{0000}</a> <a href="#">What Is This?</a>
Starting Number	<input type="text" value="1"/>
<input type="checkbox"/> Generate Auto Number for existing records	
Field Name	<input type="text" value="Invoice_ID"/> <a href="#">i</a>
Description	<input type="text"/>

Figure 50: Adding Invoice\_ID field

- [Master-Detail Relationship: 5 \(Master-Detail of Invoice with Order\)](#)

Invoice

**New Custom Field**

**Step 1. Choose the field type**

Specify the type of information that the custom field will contain.

**Data Type**

- None Selected Select one of the data types below.
- Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
- Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
  - The relationship field is required on all detail records.

Help for this Page ?

Step 1

Next Cancel

Figure 51: Master Detail of Invoice with Order

Invoice  
New Relationship

Help for this Page ?

**Step 2. Choose the related object**

Select the other object to which this object is related.

Related To

Step 2 of 6

Previous Next Cancel

Figure 52: Master Detail of Invoice with Order

SETUP > OBJECT MANAGER  
Invoice

Details  
Fields & Relationships  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Object Limits  
Record Types

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

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Invoice Name	Name	Text(80)	✓	▼
Invoice_ID	Invoice_ID_c	Auto Number		▼
Last Modified By	LastModifiedById	Lookup(User)		
Order_ID	Order_ID_c	Master-Detail(Order)	✓	▼

Quick Find New Field Dependencies Set History Tracking

Figure 53: Master Detail of Invoice with Order

## b) Tabs for all objects

SETUP  
Tabs

New Custom Object Tab

Help for this Page ?

**Step 1. Enter the Details**

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object now](#).  
Object   
Tab Style Books

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.  
Splash Page Custom Link

Enter a short description.  
Description

Stop Scroll the content in the selected area X

Next Cancel

Figure 54: Book object tab step 1

New Custom Object Tab

**Step 2. Add to Profiles**

Choose the user profiles for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile.

Profile	Tab Visibility
Analytics Cloud Integration User	Default On
Analytics Cloud Security User	Default On
Authenticated Website	Default On
Authenticated Website	Default On
Contract Manager	Default On
Cross Org Data Proxy User	Default On
Custom: Marketing Profile	Default On
Custom: Sales Profile	Default On
Custom: Support Profile	Default On
Customer Community Login User	Default On
Customer Community Plus Login User	Default On
Customer Community Plus User	Default On
Customer Community User	Default On
Customer Portal Manager Custom	Default On
Customer Portal Manager Standard	Default On
External Identity User	Default On
Force.com - App Subscription User	Default On
Force.com - Free User	Default On
Gold Partner User	Default On
High Volume Customer Portal	Default On
High Volume Customer Portal User	Default On
Identity User	Default On
Marketing User	Default On
Partner App Subscription User	Default On
Partner Community Login User	Default On
Partner Community User	Default On
Read Only	Default On
Silver Partner User	Default On
Solution Manager	Default On
Standard Platform User	Default On
Standard User	Default On
System Administrator	Default On

[Previous](#) [Next](#) [Cancel](#)

Figure 55: step 2

**SETUP** Tabs

**Step 3. Add to Custom Apps**

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App	Include Tab
Sales (standard__Sales)	<input checked="" type="checkbox"/>
Content (standard__Content)	<input checked="" type="checkbox"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>
Sales (standard__LightningSales)	<input checked="" type="checkbox"/>
Lightning Usage App (standard__LightningInstrumentation)	<input checked="" type="checkbox"/>
Authenticated Website User	<input checked="" type="checkbox"/>
High Volume Customer Portal User	<input checked="" type="checkbox"/>
Sample Console (standard__ServiceConsole)	<input checked="" type="checkbox"/>
Marketing (standard__Marketing)	<input checked="" type="checkbox"/>
Service (standard__Service)	<input checked="" type="checkbox"/>
Platform (standard__Platform)	<input checked="" type="checkbox"/>
Site.com (standard__Sites)	<input checked="" type="checkbox"/>
Community (standard__Community)	<input checked="" type="checkbox"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>
Service Console (standard__LightningService)	<input checked="" type="checkbox"/>
Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>

Append tab to users' existing personal customizations

[Previous](#) [Save](#) [Cancel](#)

Figure 56: step 3

**Step 1. Enter the Details**

Choose the custom object for this new custom tab. Fill in other details.

Error: Invalid Data.  
Review all error messages below to correct your data.

Select an existing custom object or [create a new custom object now](#).

Object: Publisher ▾

Tab Style: People

Error: Please choose a tab style.

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link: --None-- ▾

Enter a short description.

Description:

**Step 1 of 3**

Next Cancel

Figure 57: Publisher object tab

**New Custom Object Tab**

**Step 1. Enter the Details**

Choose the custom object for this new custom tab. Fill in other details.

Help for this Page ?

Select an existing custom object or [create a new custom object now](#).

Object: Customer ▾

Tab Style: Flag

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link: --None-- ▾

Enter a short description.

Description:

**Step 1 of 3**

Figure 58: Customer object tab

**SETUP** Tabs

**New Custom Object Tab**

**Step 1. Enter the Details**

Choose the custom object for this new custom tab. Fill in other details.

Help for this Page ?

Select an existing custom object or [create a new custom object now](#).

Object: Cart ▾

Tab Style: Treasure chest

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link: --None-- ▾

Enter a short description.

Description:

**Step 1 of 3**

Next Cancel

Figure 59: Cart object tab

**New Custom Object Tab**

**Step 1. Enter the Details**

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object now](#).  
Object: **Invoice**

Tab Style: **Credit card**

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.  
Splash Page Custom Link: **--None--**

Enter a short description  
Description:

**Step 1 of 3**

[Next](#) [Cancel](#)

Figure 60: Invoice object tab

### c) Customized Page Layout

Page Layouts		
1 Items, Sorted by Page Layout Name		
PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Customer Layout	Group four, 10/4/2018, 12:19 AM	Group four, 10/4/2018, 4:38 PM

Figure 61: Customer Layout

**Customer Sample**

**Highlights Panel**

Customer Name: Sample Text | Email: sarah.sample@company.com | Contact: 1-415-555-1212

**Quick Actions in the Salesforce Classic Publisher**

Post, File, Mobile Smart Actions, Link, Poll, Question

**Salesforce Mobile and Lightning Experience Actions**

Actions in this section are predefined by Salesforce. You can [override the predefined actions](#) to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

**Customer Detail**

Standard Buttons		Custom Buttons			
Edit	Delete	Clone	Change Owner	Change Record Type	Sharing
Customer Name: Sample Text	Customer ID: GEN-2004-001234	Owner: Sample Text			
Email: sarah.sample@company.com	Contact: 1-415-555-1212				

**Mobile Cards (Salesforce mobile only)**

Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.

**Related Lists**

- Orders**
- Invoices**

Figure 62: Customer Layout

Page Layouts			Quick Find	New	Page Layout Assignment
PAGE LAYOUT NAME	CREATED BY	MODIFIED BY			
Invoice Layout	Group four, 10/4/2018, 12:30 AM	Group four, 10/4/2018, 3:18 PM			

Figure 63: Invoice Layout

Invoice Sample

Highlights Panel	
Invoice_ID GEN-2004-001234	Order_ID <u>Sample Text</u>
Customer_ID <u>Sample Text</u>	

Figure 64: Invoice Layout

## d) Data Validation rules

Publisher Validation Rule

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.

Validation Rule Edit

Save Save & New Cancel

Rule Name: Verify\_origin\_year

Active:

Description:

Quick Tips: Operators & Functions

Error Condition Formula

Example: Discount\_Percent\_c>0.30 More Examples... Display an error if Discount is more than 30% If this formula expression is true, display the text defined in the Error Message area

Insert Field Insert Operator Year(Origin\_Year\_c) < 2000

Functions: ABS, ADDMONTHS, AND, BEGINS, BLANKVALUE, BR

Check Syntax No errors found

Help on this function

Error Message

Example: Discount percent cannot exceed 30% This message will appear when Error Condition formula is true

Error Message: The origin year should be less than 2000

This error message can either appear at the top of the page or below a specific field on the page

Error Location: Top of Page Field

Save Save & New Cancel

Figure 65: Validation I

Publisher Validation Rule

[Back to Publisher](#)

[Help for this Page](#)

Validation Rule Detail		Edit	Clone
Rule Name	Verify_origin_year	Active	✓
Error Condition Formula	Year(Origin_Year__c) < 2000		
Error Message	The origin year should be less than 2000.	Error Location	Top of Page
Description			
Created By	Group four, 4/10/2018 4:00 PM	Modified By	Group four, 4/10/2018 4:00 PM
<a href="#">Edit</a> <a href="#">Clone</a>			

Figure 66: Validation 1

Book Validation Rule

[Help for this Page](#)

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.

Validation Rule Edit		Save	Save & New	Cancel
Rule Name	Verify_publication_date			
Active	<input checked="" type="checkbox"/>			
Description				
<b>Quick Tips</b> <ul style="list-style-type: none"> <li><a href="#">Operators &amp; Functions</a></li> </ul>				
<b>Error Condition Formula</b> <p>Example: <code>Discount_Percent__c&gt;0.30</code> <a href="#">More Examples...</a></p> <p>Display an error if Discount is more than 30%</p> <p>If this formula expression is true, display the text defined in the Error Message area</p> <p><a href="#">Insert Field</a> <a href="#">Insert Operator ▾</a></p> <p><code>Publication_Date__c &lt; TODAY()</code></p> <p><b>Functions</b></p> <p>-- All Function Categories -- ▾</p> <p>ABS ADDMONTHS AND BEGINS BLANKVALUE BR</p> <p><a href="#">Insert Selected Function</a></p> <p>ABS(number)</p>				

Figure 67: Validation 2

Book Validation Rule

[Back to Book](#)

Validation Rule Detail		Edit	Clone
Rule Name	Verify_publication_date	Active	✓
Error Condition Formula	Publication_Date__c < TODAY()		
Error Message	the publication date should be less than today	Error Location	Top of Page
Description			
Created By	Group four, 4/10/2018 4:19 PM	Modified By	Group four, 4/10/2018 4:19 PM
<a href="#">Edit</a> <a href="#">Clone</a>			

Figure 68: Validation 2

**Book Validation Rule**

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.

**Validation Rule Edit**

Save Save & New Cancel

Rule Name: Verify\_ISBN  
Active:

Description:

**Error Condition Formula**

Example: Discount\_Percent\_c>0.30 More Examples...  
Display an error if Discount is more than 30%  
If this formula expression is true, display the text defined in the Error Message area

Insert Field Insert Operator ▾  
LEN( ISBN\_\_c ) = 4

Functions

-- All Function Categories --  
ABS  
ADDMONTHS  
AND  
BEGINS  
BLANKVALUE  
BR

Insert Selected Function  
ABS(number)  
Returns the absolute value of a number, a number without its sign  
Help on this function

Check Syntax No errors found

**Error Message**

Example: Discount percent cannot exceed 30%  
This message will appear when Error Condition formula is true  
Error Message: the length of ISBN should be 4.  
This error message can either appear at the top of the page or below a specific field on the page  
Error Location:  Top of Page  Field

Save Save & New Cancel

Figure 69: Validation 3

**Book Validation Rule**

[Back to Book](#)

**Validation Rule Detail**

Edit Clone

Rule Name	Verify_ISBN	Active	<input checked="" type="checkbox"/>
Error Condition Formula	LEN( ISBN__c ) = 4	Error Location	Top of Page
Error Message	the length of ISBN should be 4.	Created By	<a href="#">Group four</a> , 4/10/2018 4:34 PM
Description		Modified By	<a href="#">Group four</a> , 4/10/2018 4:34 PM
Created By		Modified By	

Edit Clone

Figure 70: Validation 3

**Customer Validation Rule**

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.

**Validation Rule Edit**

Save Save & New Cancel

Rule Name: Verify\_contact

Active:

Description:

**Error Condition Formula**

Example: Discount\_Percent\_\_c>0.30 More Examples...

Display an error if Discount is more than 30%

If this formula expression is true, display the text defined in the Error Message area

Insert Field Insert Operator ▾

LEN( Contact\_\_c ) = 10

Functions

-- All Function Categories -- ▾

TRIM  
UPPER  
VALUE  
VLOOKUP  
WEEKDAY  
YEAR

Insert Selected Function

LEN(text)  
Returns the number of characters in a text string

Help on this function

Check Syntax

**Error Message**

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is true

Error Message: The contact should be of 10 digits.

This error message can either appear at the top of the page or below a specific field on the page

Error Location:  Top of Page  Field [i](#)

Save Save & New Cancel

Figure 71: Validation 4

**Customer Validation Rule**

[Back to Customer](#)

**Validation Rule Detail**

Edit Clone

Rule Name	Verify_contact	Active	<input checked="" type="checkbox"/>
Error Condition Formula	LEN( Contact__c ) = 10	Error Location	Top of Page
Error Message	The contact should be of 10 digits.	Created By	Group four, 4/10/2018 4:41 PM
Description		Modified By	Group four, 4/10/2018 4:41 PM
Created By		Modified By	

Save Clone

Figure 72: Validation 4

**Customer Validation Rule**

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.

**Validation Rule Edit**

Save Save & New Cancel

Rule Name: Verify\_customer\_name

Active:

Description:

Quick Tips: Operators & Functions

Error Condition Formula

Example: Discount\_Percent\_c>0.30 More Examples...

Display an error if Discount is more than 30%

If this formula expression is true, display the text defined in the Error Message area

Insert Field Insert Operator ▾

NOT(REGEX( Name , "^[a-z A-Z]\*\$"))

Functions

-- All Function Categories -- ▾

ABS  
ADDMONTHS  
AND  
BEGINS  
BLANKVALUE  
BR

Insert Selected Function  
ABS(number)  
Returns the absolute value of a number, a number without its sign  
Help on this function

Check Syntax No errors found

Error Message

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is true

Error Message: the name should contain no numbers and special characters

This error message can either appear at the top of the page or below a specific field on the page

Error Location:  Top of Page  Field [i](#)

Save Save & New Cancel

Figure 73: Validation 5

**Customer Validation Rule**

[Back to Customer](#)

**Validation Rule Detail**

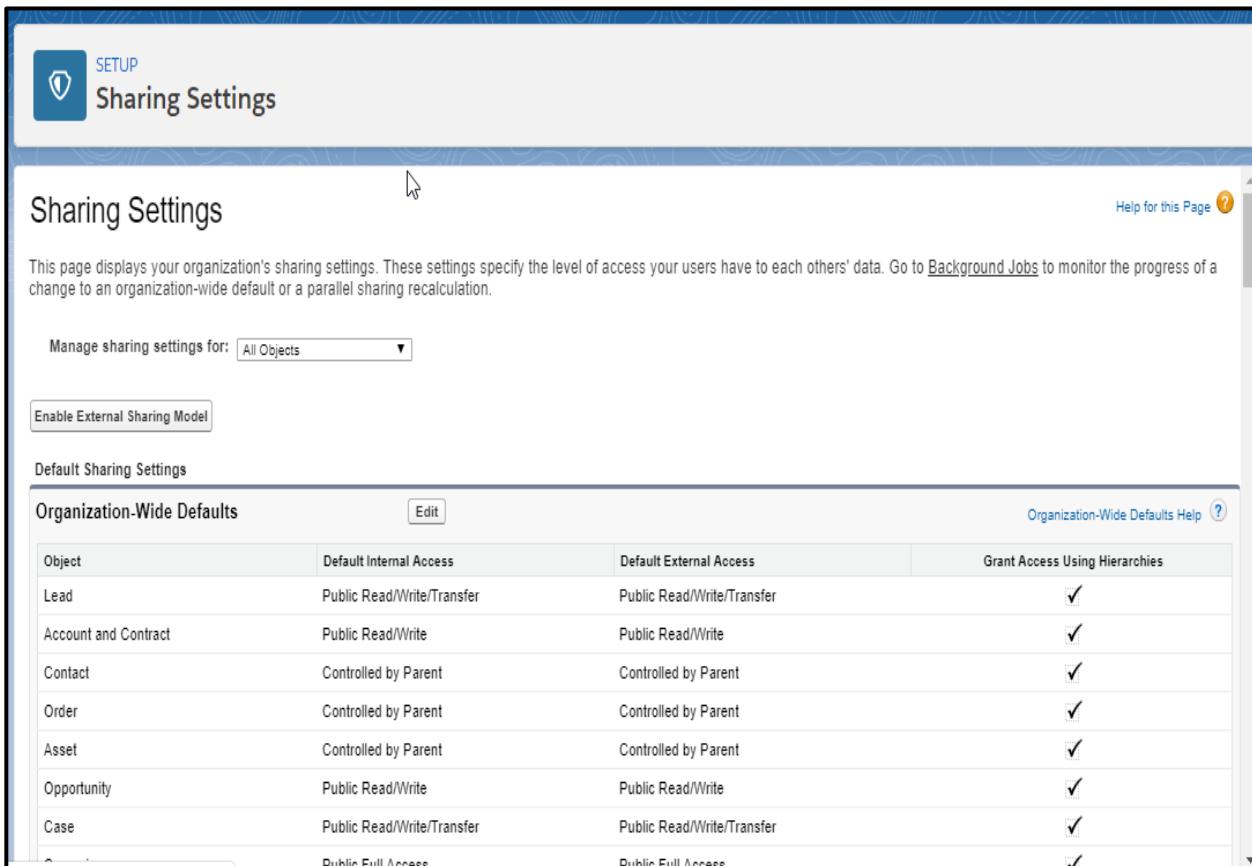
Edit Clone

Rule Name	Verify_customer_name	Active	<input checked="" type="checkbox"/>
Error Condition Formula	NOT(REGEX( Name , "^[a-z A-Z]*\$"))	Error Location	Top of Page
Error Message	the name should contain no numbers and special characters	Created By	<a href="#">Group four</a> , 4/10/2018 4:47 PM
Description		Modified By	<a href="#">Group four</a> , 4/10/2018 4:47 PM
Created By		Modified By	

Edit Clone

Figure 74: Validation

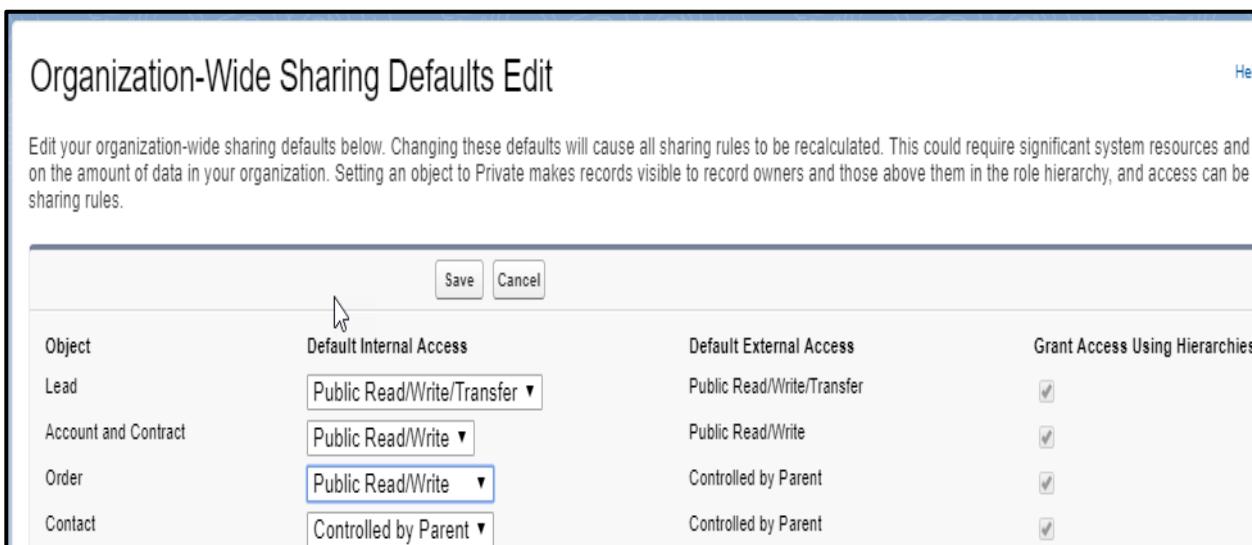
## e) Organization-wide default



The screenshot shows the 'Sharing Settings' page under the 'SETUP' tab. At the top, there's a message about organization-wide sharing settings and a link to 'Background Jobs'. Below that, a dropdown menu says 'Manage sharing settings for: All Objects'. A button labeled 'Enable External Sharing Model' is visible. The main section is titled 'Default Sharing Settings' and contains a table for 'Organization-Wide Defaults'. The table has columns for 'Object', 'Default Internal Access', 'Default External Access', and 'Grant Access Using Hierarchies'. Rows include Lead, Account and Contract, Contact, Order, Asset, Opportunity, and Case. Each row has a 'Public Full Access' row at the bottom. The 'Grant Access Using Hierarchies' column contains checked checkboxes.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Public Read/Write/Transfer	<input checked="" type="checkbox"/>
Account and Contract	Public Read/Write	Public Read/Write	<input checked="" type="checkbox"/>
Contact	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Order	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Asset	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Opportunity	Public Read/Write	Public Read/Write	<input checked="" type="checkbox"/>
Case	Public Read/Write/Transfer	Public Read/Write/Transfer	<input checked="" type="checkbox"/>
	Public Full Access	Public Full Access	<input checked="" type="checkbox"/>

Figure 75: Organization-wide default



The screenshot shows the 'Organization-Wide Sharing Defaults Edit' page. It says 'Edit your organization-wide sharing defaults below. Changing these defaults will cause all sharing rules to be recalculated. This could require significant system resources and on the amount of data in your organization. Setting an object to Private makes records visible to record owners and those above them in the role hierarchy, and access can be controlled by sharing rules.' Below is a table with 'Save' and 'Cancel' buttons at the top.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer ▾	Public Read/Write/Transfer	<input type="checkbox"/>
Account and Contract	Public Read/Write ▾	Public Read/Write	<input type="checkbox"/>
Order	Public Read/Write ▾	Controlled by Parent	<input type="checkbox"/>
Contact	Controlled by Parent ▾	Controlled by Parent	<input type="checkbox"/>

Figure 76: Order settings changed

## f) Role hierarchy

The screenshot shows a user interface for creating a role hierarchy. At the top, there's a blue header bar with a user icon and the text "SETUP Roles". Below it, a title "Creating the Role Hierarchy" is displayed with a small cursor icon next to it. A sub-instruction says "You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role." Under this, a section titled "Your Organization's Role Hierarchy" contains a collapsible tree structure. The root node is "UTS", which has two children: "Add Role" and "CEO". The "CEO" node has three actions: "Edit", "Del", and "Assign". There is also an "Add Role" link under "CEO". Buttons for "Collapse All" and "Expand All" are at the top of the tree.

Figure 77: Role hierarchy

This screenshot shows the "Role Edit" screen for a new role. The title is "Role Edit" above "New Role". It has four input fields: "Label" (Administrator), "Role Name" (Administrator), "This role reports to" (CEO), and "Role Name as displayed on reports" (Administrator). At the bottom are "Save", "Save & New", and "Cancel" buttons.

Figure 78: Administrator role

This screenshot shows the final state of the role hierarchy. The tree starts with "UTS", which contains "Add Role", "CEO", and another "Add Role". The "CEO" node has children: "Administrator", "Customer", "Marketing", "Web Manager", and "SVP, Customer Service & Support". The "Administrator" node has children: "Add Role", "Customer", and "Marketing". The "Customer" node has children: "Add Role" and "Marketing". The "Marketing" node has children: "Add Role" and "Web Manager". The "Web Manager" node has children: "Content Editor", "Designer", and "Developer". The "Content Editor" node has children: "Add Role" and "Designer". The "Designer" node has children: "Add Role" and "Developer". The "Developer" node has children: "Add Role". The "SVP, Customer Service & Support" node has children: "Add Role". Each node includes "Edit", "Del", and "Assign" links.

Figure 79: Final Role Hierarchy tree

## g) Email Notification

The screenshot shows the 'Email Alerts' section under 'SETUP'. The main title is 'Understanding Workflow'. It includes a help link 'Help for this Page' and a 'Don't show me this page again' checkbox. The content discusses what workflow is, how it automates actions like tasks, email alerts, field updates, and outbound messages, and provides examples of how it can be used for follow-up tasks, sales management, and changing owner fields.

Figure 80: Email alerts area

The screenshot shows the 'Edit Email Alert' page under 'Email Alerts'. It includes a 'Save' button, a 'Save & New' button, and a 'Cancel' button. The form fields include 'Description' (New customer email), 'Unique Name' (New\_customer\_email), 'Object' (Customer), 'Email Template' (Sales: New Customer Email), and a 'Protected Component' checkbox. The 'Recipients' section features a 'Search' dropdown set to 'User', a 'Find' button, and two lists: 'Available Recipients' (Integration User, Security User) and 'Selected Recipients' (Group four). Below this, there's a note about entering up to five additional emails and a 'From Email Address' field set to 'Current User's email address'. A checkbox allows making this the default from address.

Figure 81: Email alert 1

**SETUP** Email Alerts

### New Email Alert

Create an email alert to associate with one or more workflow rules, approval processes, or entitlement processes. When changing an email alert, any modifications will apply to all rules, approvals, or entitlement processes associated with it.

**Email Alert Edit**

Description: new staff mail  
 Unique Name: new\_staff\_mail  
 Object: --None--  
 Email Template: SUPPORT: Self-Service Ne...  
 Protected Component:

**Edit Email Alert**

Recipient Type: Search: User for:  Find

Available Recipients		Selected Recipients	
User: Integration User	User: Security User	User: Group four	
Add <input type="button" value="&gt;"/>	<input type="button" value="&lt;"/> Remove		

You can enter up to five (5) email addresses to be notified.  
 Additional Emails:

From Email Address: Current User's email address   
 Make this address the default From email address for this object's email alerts.

Save Save & New Cancel

Figure 82: Email alert 2

**SETUP** Email Alerts

### Forget Password

Create an email alert to associate with one or more workflow rules, approval processes, or entitlement processes. When changing an email alert, any modifications will apply to all rules, approvals, or entitlement processes associated with it.

**Email Alert Edit**

Description: Forget Password  
 Unique Name: Forget\_Password  
 Object: Customer  
 Email Template: Support: Self-Service Reset  
 Protected Component:

**Edit Email Alert**

Recipient Type: Search: User for:  Find

Available Recipients		Selected Recipients	
User: Integration User	User: Security User	User: Group four	
Add <input type="button" value="&gt;"/>	<input type="button" value="&lt;"/> Remove		

You can enter up to five (5) email addresses to be notified.  
 Additional Emails:

From Email Address: Current User's email address   
 Make this address the default From email address for this object's email alerts.

Save Save & New Cancel

Figure 83: Email alert 3

**SETUP** Email Alerts

**Edit Email Alert**  
Order email

Create an email alert to associate with one or more workflow rules, approval processes, or entitlement processes. When changing an email alert, any modifications will apply to all rules, approvals, or entitlement processes associated with it.

**Email Alert Edit**

Description: Order email  
Unique Name: Order\_email  
Object: Order  
Email Template: Marketing: Product Inquiry R  
Protected Component:

**Recipient Type:** Search: User for:  Find

Available Recipients	Selected Recipients
User: Integration User User: Security User	User: Group four

Add  Remove

You can enter up to five (5) email addresses to be notified.  
Additional Emails:

From Email Address: Current User's email address   
 Make this address the default From email address for this object's email alerts

Save  Save & New  Cancel

Figure 84: Email alert 4

## **h) Task creation and assignment**

**New Task**

**Step 2 : Configure Task** Step 2 of 2

Create a task to associate with one or more workflow rules, approval processes, or entitlement processes. When changing a task, any modifications will apply to all rules, approvals, or entitlement processes associated with it.

**Edit Task**

Object: Book  
Assigned To: Group four  
Subject: Categorize books  
Unique Name: Categorize\_books  
Due Date: Rule Trigger Date plus days  
Protected Component:

Status: Not Started  
Priority: Normal

**Description Information**

Comments:

Previous  Save  Cancel

Figure 85: Task created and assigned

## i) Time-based workflow

**Organization Business Hours**

Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate.

If you enter blank business hours for a day, that means your organization does not operate on that day.

**Business Hours Edit**

**Step 1. Business Hours Name**

Business Hours Name: My Business Hours

Active:

Use these business hours as the default:

**Step 2. Time Zone**

Time Zone: (GMT-07:00) Pacific Daylight Time (America/Los\_Angeles)

**Step 3. Business Hours**

Day	From	To	Duration
Sunday	09:00 AM	05:00 PM	24 hours
Monday	09:00 AM	05:00 PM	24 hours
Tuesday	09:00 AM	05:00 PM	24 hours
Wednesday	09:00 AM	05:00 PM	24 hours
Thursday	09:00 AM	05:00 PM	24 hours
Friday	09:00 AM	05:00 PM	24 hours
Saturday	09:00 AM	05:00 PM	24 hours

Save Cancel

Figure 86: Business hours

**Time-Based Workflow**

When salesforce.com triggers a workflow rule, its time-dependent actions are placed in the workflow queue. Use the criteria below to monitor the queue.

Object	equals	Customer	AND
Created Date	less than	2/07/2018	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

Search

Record Name	Object	Workflow Rule Name	Scheduled Date	Created By	Created Date
No records to display.					

Figure 87: Time-based Workflow 1

**Time-Based Workflow**

When salesforce.com triggers a workflow rule, its time-dependent actions are placed in the workflow queue. Use the criteria below to monitor the queue.

Record Name	contains	Mona Lisa	AND
--None--	less than		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

Search

Record Name	Object	Workflow Rule Name	Scheduled Date	Created By
No records to display.				

Figure 88: Time-based Workflow 2

## j) Profiles that you have created

The screenshot shows the Salesforce 'Profiles' page under the 'SETUP' tab. The page title is 'Profiles'. At the top, there are buttons for 'All Profiles', 'Edit | Delete', and 'Create New View'. A navigation bar at the top right includes links for 'A', 'B', 'C', 'D', 'E', 'F', 'G', 'H', 'I', 'J', 'K', 'L', 'M', 'N', 'O', 'P', 'Q', 'R', 'S', 'T', 'U', 'V', 'W', 'X', 'Y', 'Z', and 'Other'. Below the navigation is a table with columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The table lists various profiles such as 'Chatter External User', 'Chatter Free', 'Chatter Moderator User', 'Contract Manager', 'Cross Org Data Proxy User', 'Custom: Marketing Profile' (which is checked), 'Custom: Sales Profile' (which is checked), 'Custom: Support Profile', 'Customer Community Login User', 'Customer Community Plus Login User', and 'Customer Community Plus User'. Each row has a 'Edit | Clone' link.

Figure 89: All Profiles

The screenshot shows the 'Custom: Marketing Profile' details page. The title is 'Custom: Marketing Profile'. It includes sections for 'Profile Detail' (Name: Custom: Marketing Profile, User License: Salesforce, Description: , Created By: Group four, 22/09/2018 9:00 PM, Modified By: Group four, 4/10/2018 4:38 PM), 'Console Settings' (Console Layout: [Edit]), and 'Page Layouts' (Standard Object Layouts: Global - Global Layout [View Assignment], Job Tracker - Job Tracker Layout - Winter '16 [View Assignment]; Email Application - Not Assigned [View Assignment], Lead - Lead (Marketing) Layout [View Assignment]). At the bottom, there are links for 'Edit', 'Clone', 'Delete', and 'View Users'.

Figure 90: Custom Profile

The screenshot shows the 'Custom: Sales Profile' details page. The title is 'Custom: Sales Profile'. It includes sections for 'Profile Detail' (Name: Custom: Sales Profile, User License: Salesforce, Description: , Created By: Group four, 22/09/2018 9:00 PM, Modified By: Group four, 4/10/2018 4:38 PM), 'Console Settings' (Console Layout: [Edit]), and 'Page Layouts' (Standard Object Layouts: Global - Global Layout [View Assignment], Job Tracker - Job Tracker Layout - Winter '16 [View Assignment]; Email Application - Not Assigned [View Assignment], Lead - Lead (Marketing) Layout [View Assignment]). At the bottom, there are links for 'Edit', 'Clone', 'Delete', and 'View Users'.

Figure 91: Custom Profile 2

The screenshot shows the 'Custom: Support Profile' page in Salesforce. At the top, there's a navigation bar with 'Profile' and 'Help for this Page'. Below it, a section titled 'Custom: Support Profile' describes the permissions for users with this profile. A horizontal line of links includes 'Login IP Ranges [0]', 'Enabled Apex Class Access [0]', 'Enabled Visualforce Page Access [0]', 'Enabled External Data Source Access [0]', 'Enabled Named Credential Access [0]', 'Enabled Service Presence Status Access [0]', and 'Enabled Custom Permissions [0]'. The main content area is titled 'Profile Detail' and contains fields for 'Name' (Custom: Support Profile), 'User License' (Salesforce), 'Custom Profile' (checked), 'Description', 'Created By' (Group four, 22/09/2018 9:00 PM), and 'Modified By' (Group four, 4/10/2018 4:38 PM). Below this is a 'Console Settings' section with a 'Console Layout' button. At the bottom of the page are standard Salesforce navigation buttons: 'Edit', 'Clone', 'Delete', and 'View Users'.

Figure 92: Custom Profile 3

## k) Show field-level access control

The screenshot shows the 'Permission Sets' page in Salesforce. It features a 'SETUP' icon and a 'Permission Sets' title. A 'Help for this Page' link is at the top right. The main content area is titled 'Permission Sets' and includes a sub-header 'On this page you can create, view, and manage permission sets.' It also mentions the availability of the Salesforce mobile app for iOS and Android. Below this is a toolbar with 'All Permission Sets ▾', 'Edit | Delete | Create New View', and a print icon. A search bar is present above a table. The table has columns for 'Action', 'Permission Set Label', 'Description', and 'License'. The table lists several permission sets:

Action	Permission Set Label	Description	License
<input type="checkbox"/>	<a href="#">CRM User</a>	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/>	<a href="#">Sales Cloud User</a>	Denotes that the user is a Sales Cloud user.	Sales User
<input type="checkbox"/>	<a href="#">Salesforce Console User</a>	Enable Salesforce Console User	Sales Console User
<input type="checkbox"/>	<a href="#">Service Cloud User</a>	Denotes that the user is a Service Cloud user.	Service User
<input type="checkbox"/>	<a href="#">Standard Einstein Activity Capture</a>	Access to Standard Einstein Activity Capture	Standard Einstein Activity Capture User

Figure 93: Permission sets

## I) Show record-level access control

The screenshot shows the Salesforce Sharing Settings page. At the top, there's a 'SETUP' button and a 'Sharing Settings' title. Below that, a sub-header 'Sharing Settings' is displayed. A note says: 'This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculati...'.

A dropdown menu 'Manage sharing settings for:' is set to 'All Objects'. There's also a 'Help for this Page' link.

An 'Enable External Sharing Model' checkbox is checked.

A 'Default Sharing Settings' section is present, with a 'Organization-Wide Defaults' table:

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Public Read/Write/Transfer	<input checked="" type="checkbox"/>
Account and Contract	Public Read/Write	Public Read/Write	<input checked="" type="checkbox"/>
Contact	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Order	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Asset	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Opportunity	Public Read/Write	Public Read/Write	<input checked="" type="checkbox"/>
Case	Public Read/Write/Transfer	Public Read/Write/Transfer	<input checked="" type="checkbox"/>
	Public Full Access	Public Full Access	<input checked="" type="checkbox"/>

Figure 94: Record level access

## **Findings and Discussion**

Here in this report of ‘Customer relationship management’ for online book stores we find that CRM strategies are very useful in approaching the customer. These strategies will make sure to complete the needs of consumers on time. So, it is used to interact with the customers. Maintaining and handling consumers is one of most reasons to use CRM strategies. We can handle consumers individually by keeping an eye on their needs by sending them emails. We can take a review system by taking a feedback filled up by customers. Here I find that these CRM strategies are very useful in making a business model very successful. CRM strategies are formed in such a way that they are very approachable to the consumers and helps in finding their needs and supplies. CRM for online bookstore will lead us to a new way of selling the books and new experience for the buyers also.

We also discussed here about the promoting the book online. This promotion can be done on the basis of some recommendation and using all the social media platforms. By using social media platforms like Facebook, Instagram etc. we can create a promotion campaign so that it can widely spread the information about the online bookstore. Other one is recommendation which is just a mouth publicity like talking about the books to our friends, family and relative and other members so that they can at least approach the book. These all things will surely increase the profit percentage of the company.

## **Conclusion**

A book is a bundle of pages that are bound together inside a cover so that we can change pages and go through them one by one. Here, their main aim is to identify the main factors which are influencing the purchase of fiction books. And we will test these factors when the book is purchased for personal use or gift purpose. Fiction books are the most readable books in most of the countries. Customer relationship management helps in incrementing the operational performance. Also increases the efficiency and profit percentage for the firm. Customer relationship management is helpful for both the types of firms whether it is a small firm or a big firm. In these both the firms. Customer relationship management strategies interact with the customer and take their feedback. So, customer relationship management strategies play a very important role in selling books from the store. Customer relationship management also give monthly statements for the company. Customer relationship management helps in collecting the personal data of the consumers for future promotion of their products.

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