

Phase 3: Data Modeling & Relationships

Step 1: Standard & Custom Objects

Standard Objects:

Pre-built objects like User, Profile, and Role.

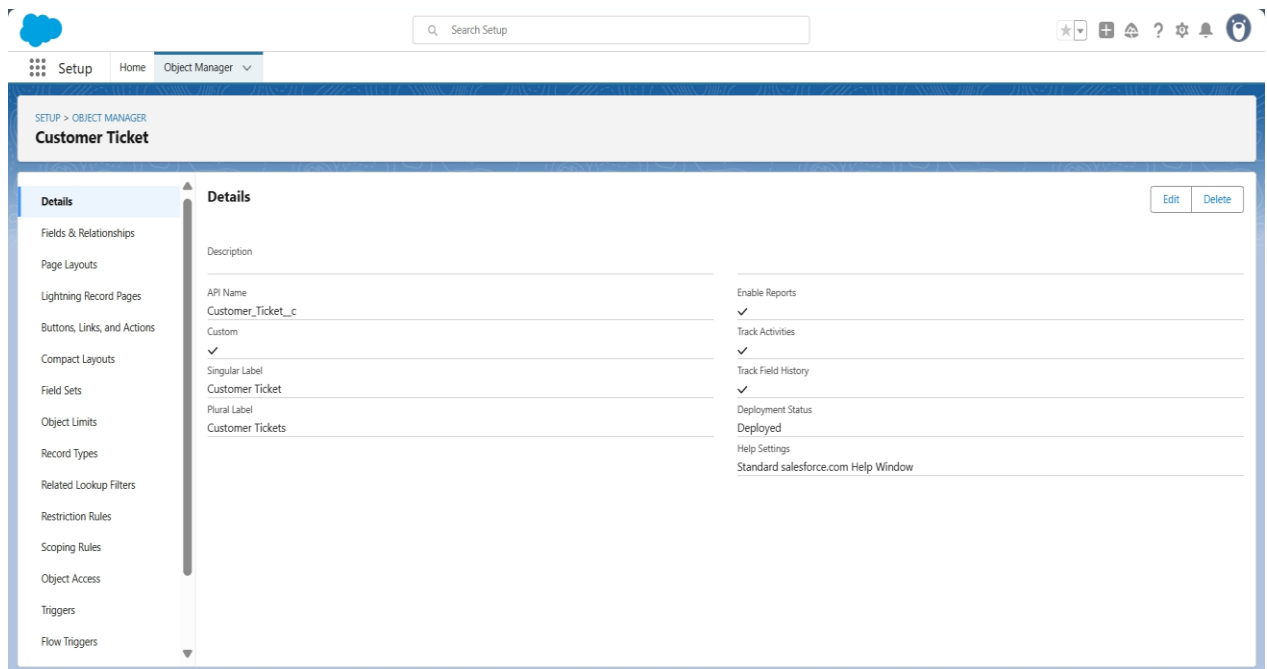
Used to manage HR users, Managers, and their roles.

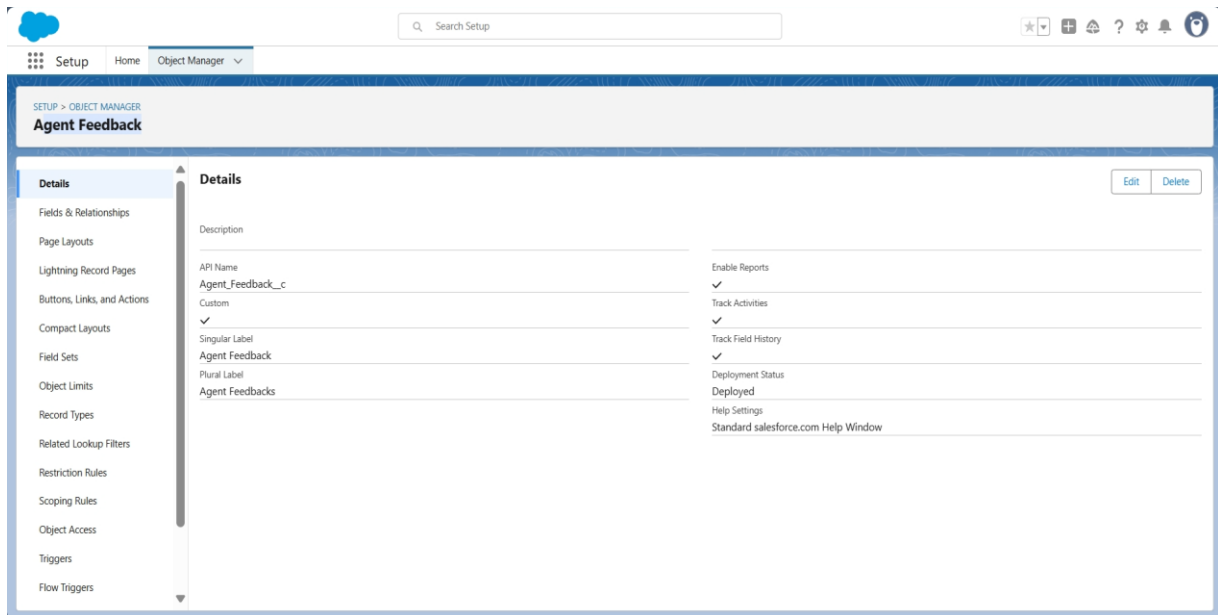
Custom Objects: Created specifically for this project:

- Customer Ticket
- Agent Feedback

Steps followed:

- Navigated to Setup → Object Manager → Create → Custom Object.
- Provided label, name, and enabled reports/search.
- Saved and created Tabs for each object.

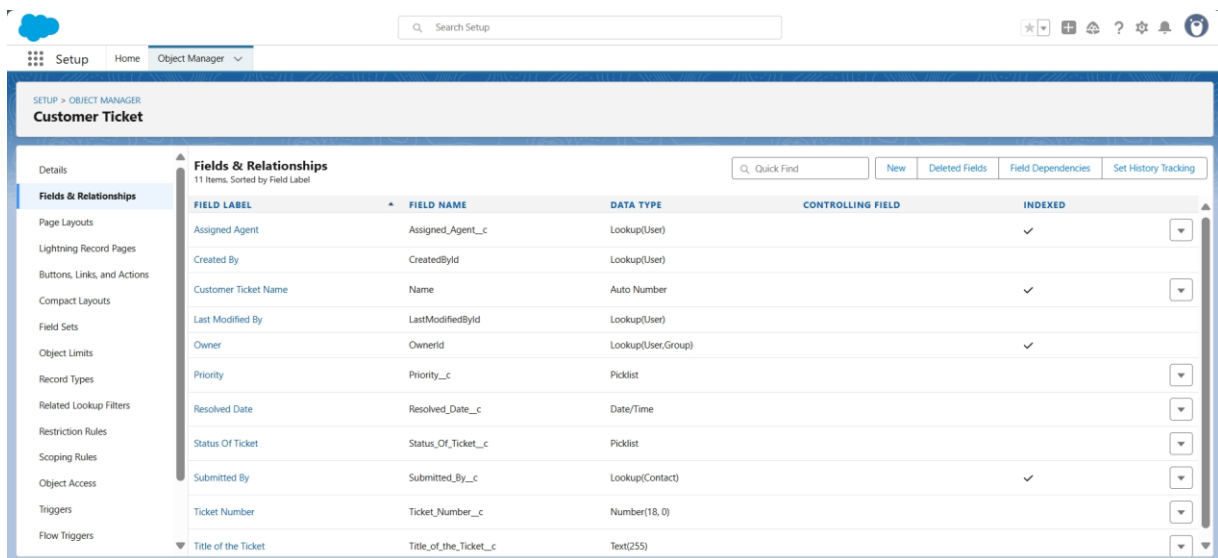




Step 2: Fields & Relationships

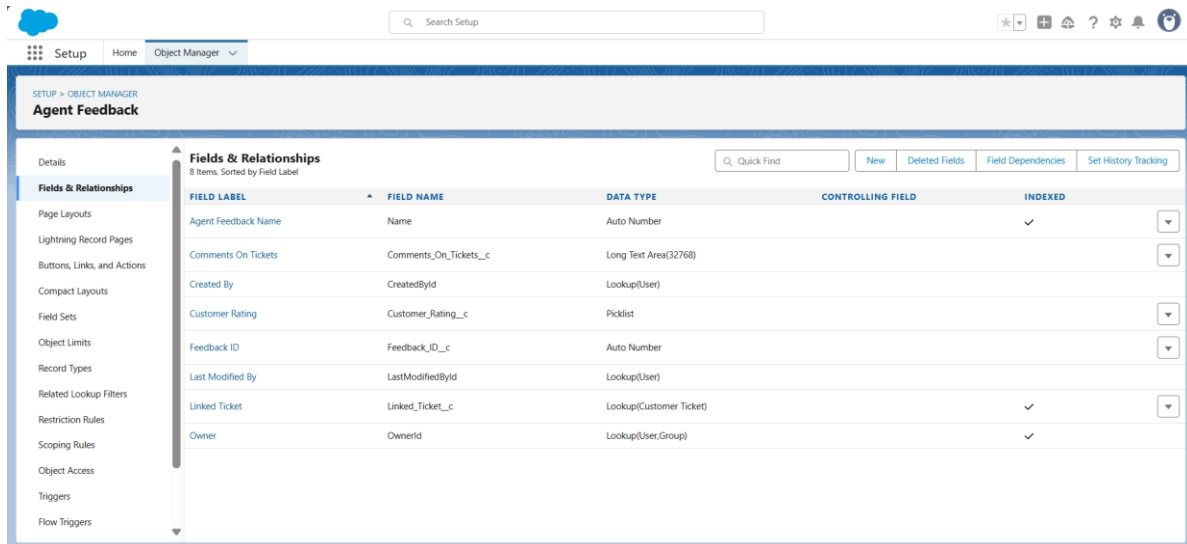
Customer Ticket fields

- **Title** - (Text, 255)
- **Priority** - (Picklist, Values: Low, Medium, High, Critical)
- **Status** - (Picklist, Values: New, Pending, Resolved, Closed)
- **Assigned Agent** - (Lookup Relationship → Related To: User)
- **Submitted By** - (Lookup Relationship → Related To: Contact)
- **Resolved Date** - (Date/Time)



Agent Feedback fields

- **Customer Rating** - (Picklist, Values: 1, 2, 3, 4, 5)
- **Comments** - (Long Text Area, Visible lines: 3–5).
- **Linked Ticket** - (Lookup Relationship → Related To: Customer Ticket).



Setup > OBJECT MANAGER
Agent Feedback

Details

Fields & Relationships
8 Items. Sorted by Field Label

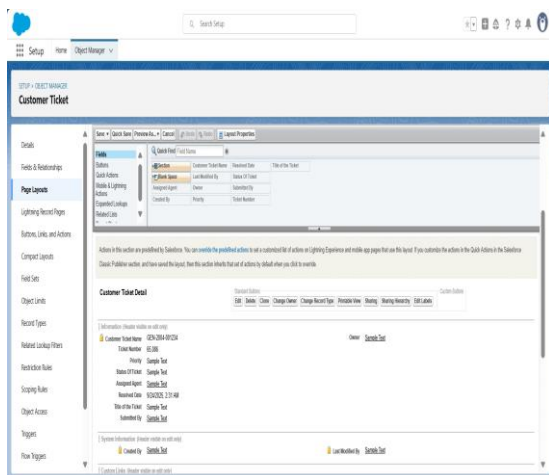
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Agent Feedback Name	Name	Auto Number		✓
Comments On Tickets	Comments_On_Tickets_c	Long Text Area(32768)		
Created By	CreatedById	Lookup(User)		
Customer Rating	Customer_Rating__c	Picklist		
Feedback ID	Feedback_ID__c	Auto Number		
Last Modified By	LastModifiedById	Lookup(User)		
Linked Ticket	Linked_Ticket__c	Lookup(Customer Ticket)		✓
Owner	OwnerId	Lookup(User Group)		✓

3. Record Types

- Not strictly needed unless different types of tickets are tracked.
- Helps in controlling page layouts.

4. Page Layouts

- Each object has **custom page layouts** to show only relevant fields to different users.
- Example:
Customer Ticket Layout shows – Ticket number, Priority, Status, Assigned agent.
Agent Feedback Layout shows - Rating and comments.



Setup > OBJECT MANAGER
Customer Ticket

Details

Page Layouts

Buttons, Links, and Actions

Field Set

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Customer Ticket Detail

Information (Viewer visible in all orgs)

Customer Ticket Name (EN326440254) [View] [Details]

Created By (User) [View] [Details]

Priority (High) [View] [Details]

Status (Open) [View] [Details]

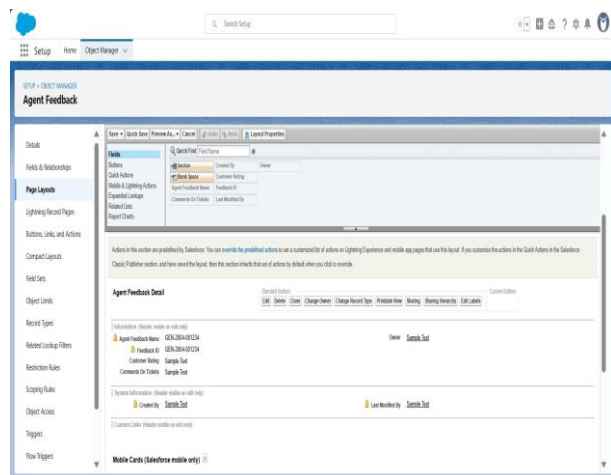
Assigned Agent (User) [View] [Details]

Last Modified By (User) [View] [Details]

Created Date (2022-12-14) [View] [Details]

Linked Ticket (Customer Ticket) [View] [Details]

Owner (User) [View] [Details]



Setup > OBJECT MANAGER
Agent Feedback

Details

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Scoping Rules

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Flow Triggers

Agent Feedback Detail

Information (Viewer visible in all orgs)

Agent Feedback Name (EN326440254) [View] [Details]

Feedback ID (EN326440254) [View] [Details]

Customer Rating (Sample Text) [View] [Details]

Comments On Tickets (Sample Text) [View] [Details]

System Information (Viewer visible in all orgs)

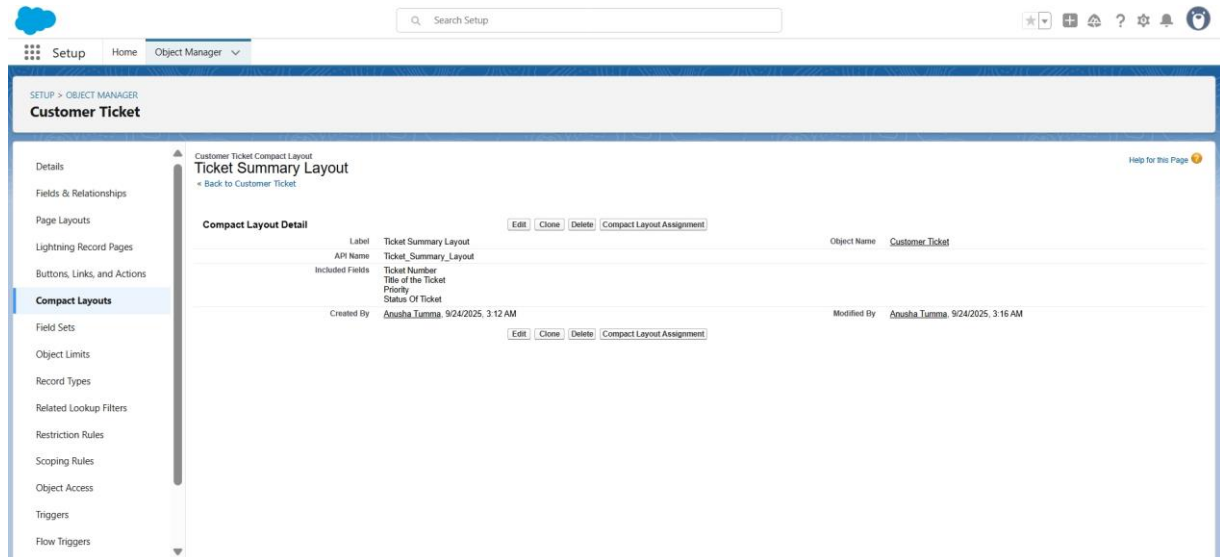
Created By (User) [View] [Details]

Last Modified By (User) [View] [Details]

Owner (User) [View] [Details]

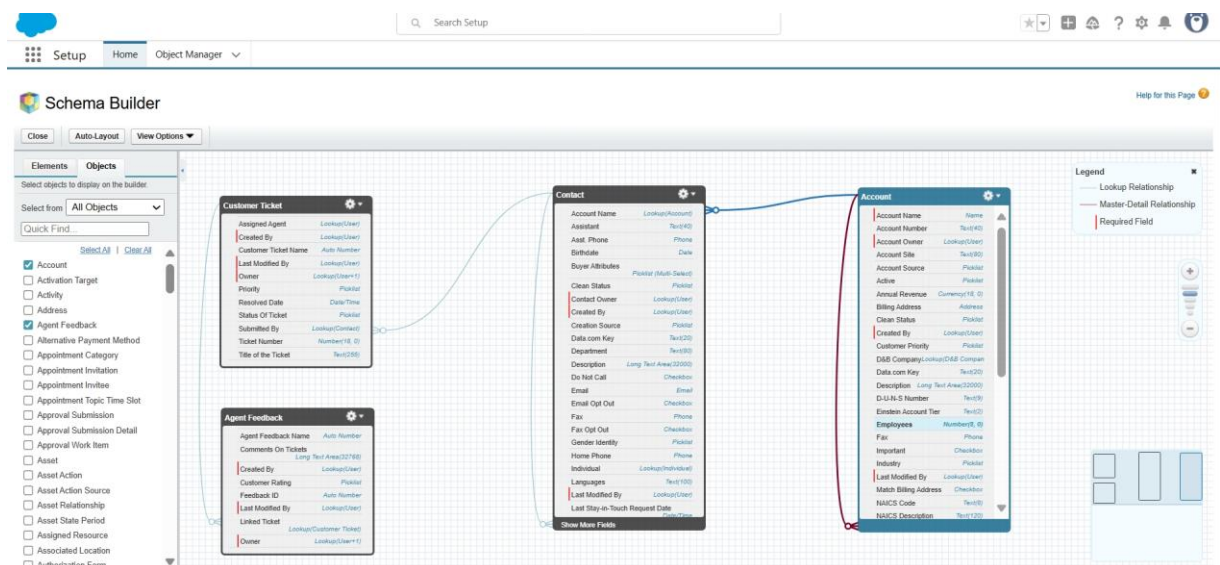
5. Compact Layouts

- Provides **summary info on record highlights** (used in mobile view or hover cards).
- Example: Customer Summary Layout shows Ticket number, Title, Priority, Status.



6. Schema Builder

- Used to **visualize all objects and their relationships**.
- Shows **custom and standard objects**, field types, and lookup/master-detail links.
- Helps stakeholders understand **data flow and connections**.



7. Lookup vs Master-Detail vs Hierarchical Relationships

- **Lookup Relationship:**
 1. Ticket → Contact = Lookup
 2. Ticket → Account = Lookup
- **Master-Detail Relationship:**
Account → Contact = Master-Detail
- **Hierarchical Relationship:** Not used here.

8. Junction Objects

- Used for **many-to-many relationships**.
- Example (optional for future enhancement):
Ticket ↔ Knowledge Article
A ticket could reference **multiple knowledge articles**, and a knowledge article could be linked to **multiple tickets**.