Phase 3: Data Modeling & Relationships

👉 **Goal:** Build the data structure for SSRS.

Step 1: Standard & Custom Objects

We use Salesforce's standard objects such as Account and Contact to manage customer details, and create a custom object called Service Request to track issues raised by customers. This ensures we extend Salesforce without duplicating built-in features.

Step 2: Fields for Service Request

The Service Request object is enriched with key fields:

- Request ID (Auto Number) for unique identification.

- Request Type (Picklist) to classify requests as IT, HR, or Facility.

- Priority (Picklist) to set urgency (High, Medium, Low).

- Status (Picklist) to track progress (New, Assigned, In Progress, Closed).

- Assigned Staff (Lookup to User) for responsibility tracking.

- Created Date (System) for timestamps.

- Resolution Notes (Long Text Area) for closure details.

These fields ensure all critical details are captured for reporting and resolution.

Step 3: Record Types

Two record types are created:

- **Internal Requests** – raised by employees.
- **External Requests** – raised by customers.

This classification helps apply different page layouts and business rules for each scenario.

Step 4: Page Layouts

Page layouts are configured to display relevant information:

- Service Request Layout shows Request ID, Type, Status, Priority, Assigned Staff, and Resolution Notes.
- Contact Layout displays all related service requests raised by a contact.
- Account Layout shows service requests linked to that account.

Layouts improve usability by organizing fields logically.

Step 5: Compact Layouts

For mobile users, compact layouts highlight the most important fields: Request ID, Priority, Status, and Assigned Staff. This allows quick scanning of request details on the go.

Step 6: Schema Builder

Using Schema Builder, relationships are visualized:

- Account → Contact (1:M)

- Contact → Service Request (1:M)

- Service Request → User (M:1)

This graphical model helps stakeholders understand data relationships clearly.

Step 7: Relationship Types

- Contact ↔ Service Request → Lookup, since requests should remain even if a contact changes.

- User ↔ Service Request → Lookup, for flexible staff assignment.

- Account ↔ Contact → Standard One-to-Many, built into Salesforce.

Lookups are chosen over master-detail for flexibility and independent record ownership.

Step 8: Junction Objects (if needed)

A junction object named Request Assignment can be introduced if a single request needs multiple staff members assigned. This enables many-to-many relationships.

Step 9: External Objects (Optional)

If SSRS needs to integrate with external systems (e.g., a TCS knowledge base), External Objects can be used to access external data in real-time without duplication.