

Phase 3: Data Modeling & Relationships.

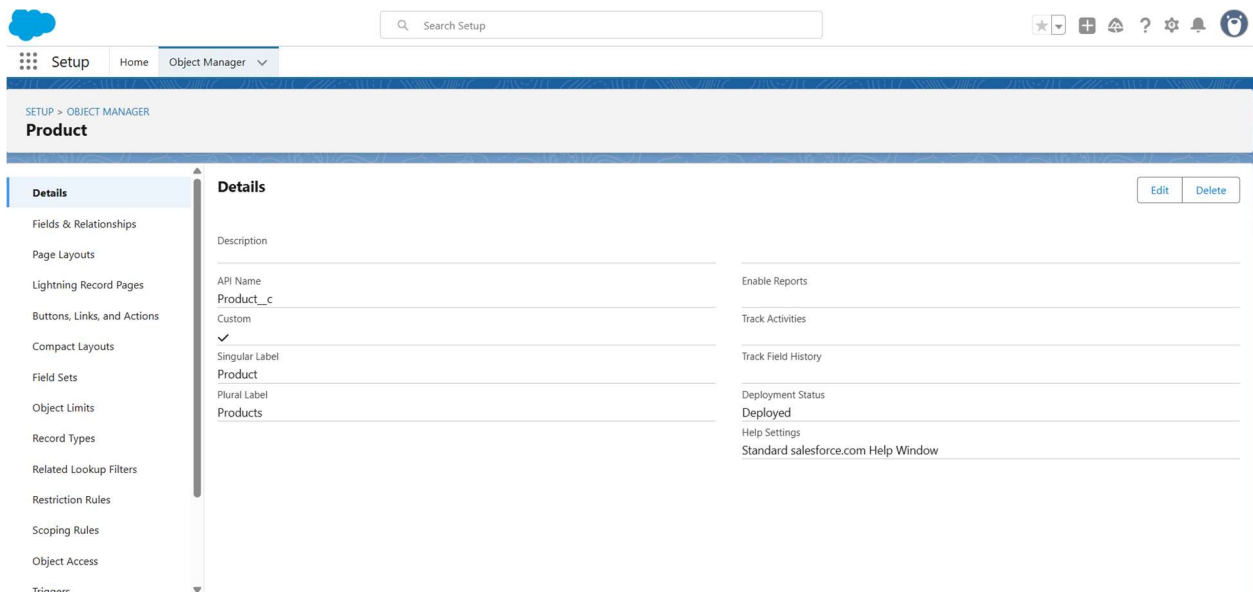
We will do this in two main steps:

1. Create the Custom Objects.
 2. Add Custom Fields to those Objects.
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Step 1: Create the Custom Objects

A. Create the "Product" Object

- **Purpose:** This object will hold a catalog of your retail products, allowing you to link complaints to specific items.
- **Navigation:**
 1. Go to **Setup**.
 2. Click on the **Object Manager** tab.
 3. In the top-right corner, click **Create > Custom Object**.
- **Instructions:**
 - **Label:** Product
 - **Plural Label:** Products
 - **Object Name:** Product
 - For **Record Name**, enter Product Name and leave the Data Type as **Text**.
 - Check the box to **Launch New Custom Tab Wizard after saving**.
 - Click **Save**.
 - On the "New Custom Object Tab" screen, choose a **Tab Style** (like a shopping cart icon) and click **Next**, then **Next**, then **Save**.



B. Create the "Complaint" Object

- **Purpose:** This is the central object that will track every customer complaint from submission to resolution.
 - **Navigation:** Go back to **Object Manager > Create > Custom Object**.
 - **Instructions:**
 - **Label:** Complaint
 - **Plural Label:** Complaints
 - **Object Name:** Complaint
 - For **Record Name**, enter Complaint ID and change the Data Type to **Auto-Number**.
 - For **Display Format**, enter C-{000000}.
 - For **Starting Number**, enter 1.
 - Check the box to **Launch New Custom Tab Wizard after saving**.
 - Click **Save**.
 - On the "New Custom Object Tab" screen, choose a **Tab Style** (like a flag icon) and click **Next, Next, Save**.
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Step 2: Add Custom Fields & Relationships

A. Add Fields to the "Complaint" Object

- **Navigation:** Go to **Object Manager > Complaint > Fields & Relationships > New**.
- 1. **Create the Relationship to the Customer (Contact):**
 - **Data Type:** Select **Lookup Relationship**, then click Next.
 - **Related to:** Select **Contact**, then click Next.
 - **Field Label:** Customer.
 - Click **Next, Next, Next**, and **Save**.
 - **Why:** This links each complaint to the specific customer record.
- 2. **Create the Relationship to the Product:**
 - **Data Type:** Select **Lookup Relationship**, then click Next.
 - **Related to:** Select **Product**, then click Next.
 - **Field Label:** Product.
 - Click **Next, Next, Next**, and **Save**.
 - **Why:** This links the complaint to a specific item from your product catalog.
- 3. **Create the Complaint Type Field:**
 - **Data Type:** Select **Picklist**, then click Next.
 - **Field Label:** Complaint Type.
 - Select "Enter values, with each value separated by a new line".
 - Enter the values:
 - Product Defect
 - Service Issue
 - Shipping Delay
 - Billing Error

- Click **Next, Next, Save.**
- 4. **Create the Status Field:**
 - **Data Type:** Select **Picklist**, then click Next.
 - **Field Label:** Status.
 - Enter the values:
 - New
 - Under Review
 - Awaiting Customer Response
 - Resolved
 - Closed
 - Click **Next, Next, Save.**
- 5. **Create the Complaint Details Field:**
 - **Data Type:** Select **Long Text Area**, then click Next.
 - **Field Label:** Complaint Details.
 - Click **Next, Next, Save.**

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'complaint' and shows the 'Fields & Relationships' section. A table lists 9 fields, sorted by Field Label. The fields are: Complaint details (Long Text Area), Complaint ID (Auto Number), complaint type (Picklist), Created By (Lookup), Customer (Lookup), Last Modified By (Lookup), Owner (Lookup), Product (Lookup), and Status (Picklist). The 'Status' field is highlighted in blue.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Complaint details	Complaint_details__c	Long Text Area(32768)		
Complaint ID	Name	Auto Number		✓
complaint type	complaint_type__c	Picklist		
Created By	CreatedById	Lookup(User)		
Customer	Customer__c	Lookup(Contact)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Product	Product__c	Lookup(Product)		✓
Status	Status__c	Picklist		

B. Add a Field to the "Product" Object

- **Navigation:** Go to **Object Manager > Product > Fields & Relationships > New.**
- 1. **Create the SKU Field:**
 - **Data Type:** Select **Text**, then click Next.
 - **Field Label:** SKU.
 - **Length:** 50.
 - Check the boxes for **Required**, **Unique**, and **External ID**.
 - Click **Next, Next, Save.**

- **Why:** An SKU (Stock Keeping Unit) is a unique product identifier, and marking it as an External ID is crucial for future integrations with inventory systems.

Setup

Home

Object Manager

Search Setup

SETUP > OBJECT MANAGER

Product

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Fields & Relationships

5 Items

Fields & Relationships

Q, Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Product Name	Name	Text(80)		✓
SKU	SKU__c	Text(50) (Unique Case Insensitive)		✓