

Salesforce Project Implementation Phases with Concepts (Admin + Developer)

Project Title: Manufacturing After-Sales & Service CRM

Phase 3: Data Modelling & Relationships

1. Custom Objects & Fields

Registered Product

- **Name (Product Name)** – Text (80) → *Required*
- **Purchase Date** – Date → *Required*
- **Warranty Expiry** – Date → *Optional*
- **AMC Expiry** – Date → *Optional*
- **Serial Number** – Text (50), Unique → *Required*

Service Case

- **Name (Service Case ID)** – Auto Number (CASE-{0000}) → *Required*
- **Subject** – Text (80) → *Required*
- **Status** – Picklist (New, In Progress, Resolved, Closed) → *Required*
- **Priority** – Picklist (High, Medium, Low) → *Required*
- **SLA Deadline** – Date/Time → *Optional*
- **Registered Product** – Lookup (Registered Product) → *Required*

Engineer

- **Name (Engineer Name)** – Text (80) → *Required*
- **Skills** – Multi-Select Picklist (Electronics, Mechanical, Software, Installation, Maintenance) → *Required*
- **Location** – Geolocation (Latitude/Longitude, 5 decimals) → *Optional*

Dispatch

- **Name (Dispatch ID)** – Auto Number (DSP-{0000}) → *Required*
- **Service Date** – Date/Time → *Required*
- **Engineer Assigned** – Lookup (Engineer) → *Required*
- **Service Case** – Lookup (Service Case) → *Required*

Feedback

- **Name (Feedback ID)** – Auto Number (FDB-{0000}) → *Required*
- **Rating** – Number (1,0) [Scale 1–5] → *Required*
- **Comments** – Long Text Area (32,768 chars, 3 visible lines) → *Optional*
- **Service Case** – Master-Detail (Service Case) → *Required*

2. Relationships

- **Registered Product** → **Service Case** (One-to-Many)
- **Service Case** → **Dispatch** (One-to-One)
- **Engineer** → **Dispatch** (One-to-Many)
- **Service Case** → **Feedback** (One-to-One, Master-Detail)

3. Naming Conventions

- **Text Name** used where human-readable names make sense: Registered Product, Engineer.
- **Auto Number** used where system-generated IDs are better: Service Case, Dispatch, Feedback.

4. Verification Steps

- Created Tabs for all custom objects → made visible in App Launcher.
- Added objects to Navigation in **Service/Custom App**.
- Used **Schema Builder** to confirm relationships.
- Created sample test records in order: Registered Product → Engineer → Service Case → Dispatch → Feedback.

5. Outcome

The data model now supports the core **Manufacturing After-Sales & Service CRM** process:

- Products can be registered.
- Customers can raise cases linked to products.
- Engineers can be dispatched to service jobs.
- Feedback can be collected for each case.

