📌 Phase 3: Data Modeling & Relationships
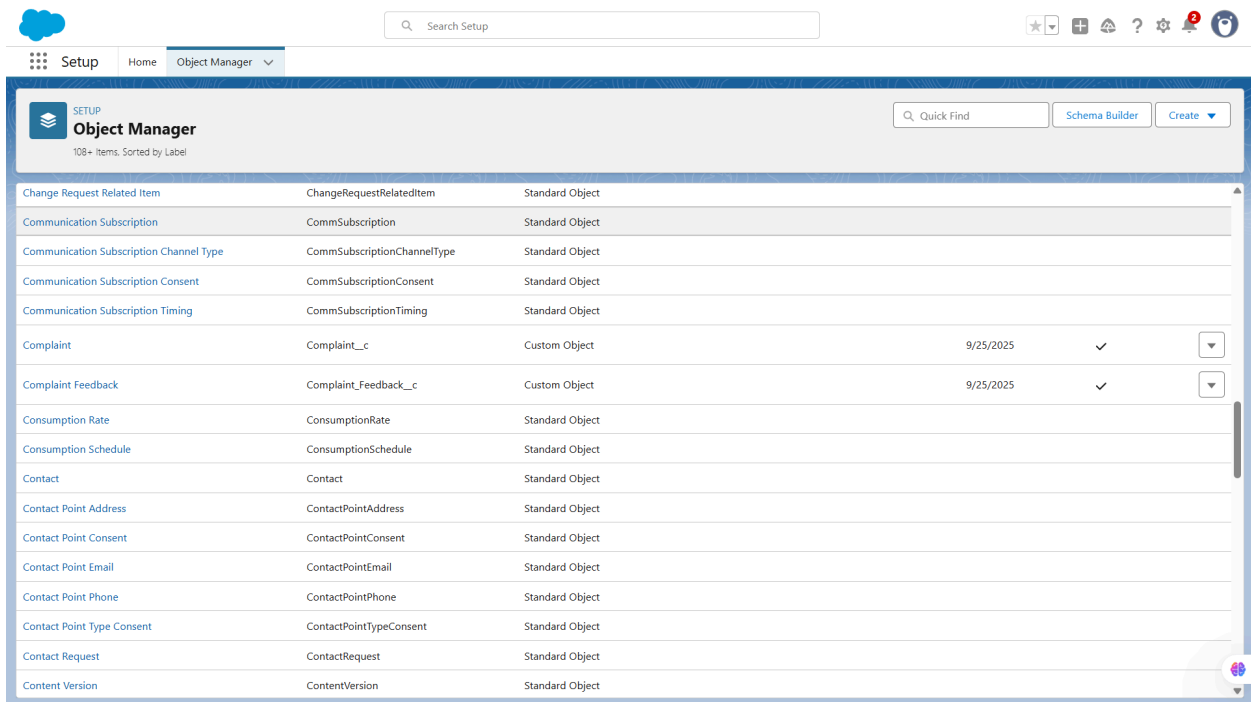
1. Standard & Custom Objects

- **Use Case:**
  Standard objects like **Cases, Contacts, Accounts** will handle customer and complaint info. But since your CRM is focused on complaints, we'll also create **Custom Objects** like:

  1. *Complaint* → to log complaint details.

  2. *Complaint Feedback* → to track customer feedback after resolution.

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2. Fields

- **Use Case:**
  Each object needs specific fields. For example:

  1. *Complaint Feedback*: Rating (Number), Feedback Comments (Text Area).

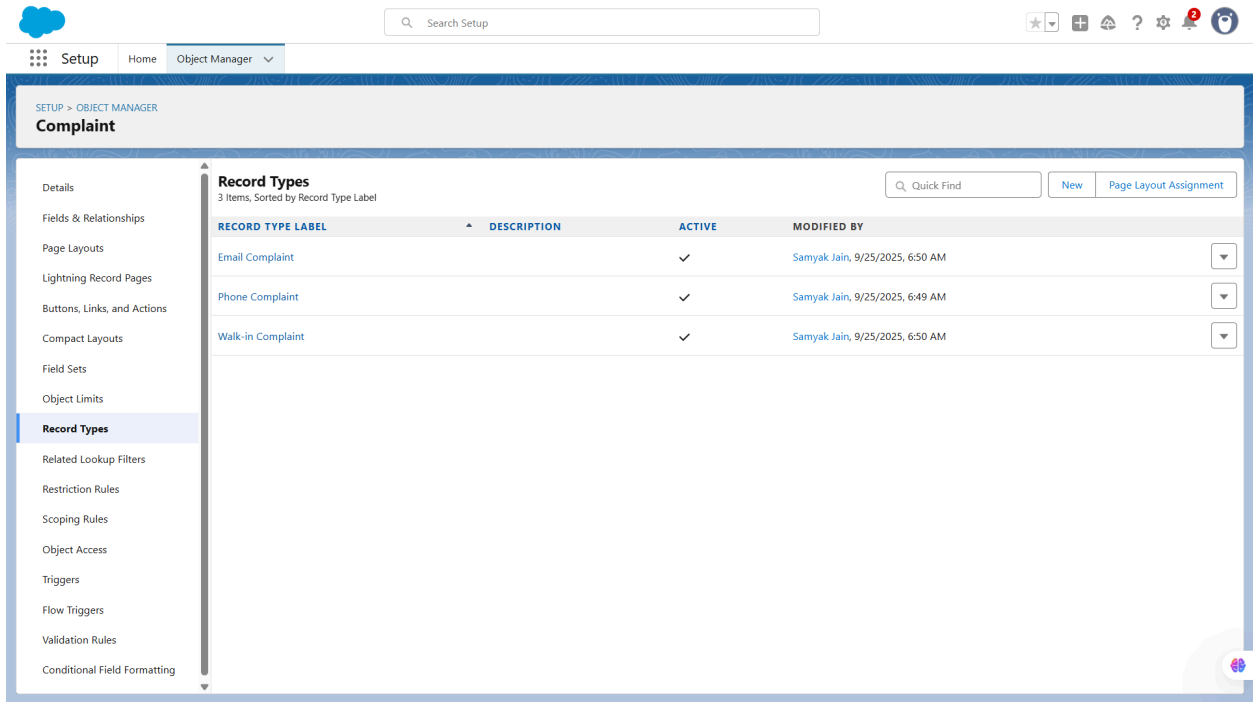| FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Complaint	Complaint__c	Lookup(Complaint)		✓	▼
Complaint Feedback Number	Name	Auto Number		✓	▼
Created By	CreatedById	Lookup(User)			
Customer	Customer__c	Lookup(Contact)		✓	▼
Feedback Comments	Feedback_Comments__c	Long Text Area(32768)			▼
Last Modified By	LastModifiedById	Lookup(User)			
Owner	OwnerId	Lookup(User,Group)		✓	
Rating	Rating__c	Picklist			▼
Resolution Time	Resolution_Time__c	Number(18, 0)			▼

3. Record Types

- **Use Case:**
  Suppose complaints come from **different channels** (Phone, Email, Walk-in). We may need different page layouts and picklist values per channel. Record Types let us customize.

- **Action Steps:**

  1. Go to Object Manager → Complaint → Record Types → New.

  2. Create *Phone Complaint, Email Complaint, Walk-in Complaint*.
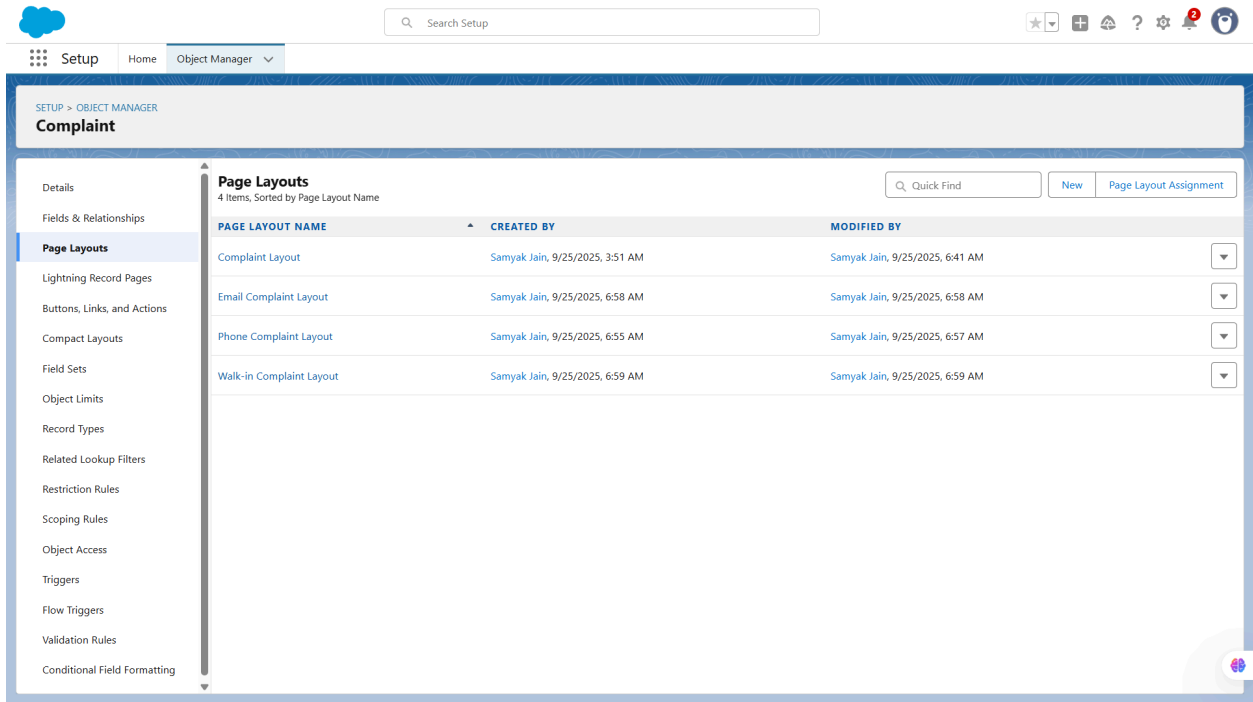
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4. Page Layouts

- **Use Case:**

  - Phone complaints may need *Call Duration* field.

  - Email complaints may need *Email Subject* field.
    Different layouts per record type keep things clean.

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5. Compact Layouts

- **Use Case:**
  When viewing a complaint on mobile or in highlights panel, you don't want 20 fields showing.
  Example: Show only *Complaint ID, Status, Severity, Assigned Agent*.

6. Schema Builder

- **Use Case:**
  Helps visualize all objects and their relationships in one place.
  Example: Complaint → related to Contact (lookup), Complaint Feedback → related to Complaint (lookup).

7. Lookup vs Master-Detail vs Hierarchical Relationships

- **Use Case:**

  - **Lookup:** Complaint → Contact (Customer may exist without complaint).

- ○ **Master-Detail:** Complaint Feedback → Complaint (Feedback depends on Complaint).

- ○ **Hierarchical:** Only for User object, e.g., assigning complaint manager.

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8. Junction Objects

- ● **Use Case:**
  If one complaint can involve **multiple products** and a product can appear in multiple complaints, create a **Complaint_Product__c** junction object.

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9. External Objects

- ● **Use Case:**
  Suppose complaints are logged in an external ERP system. You can connect via Salesforce Connect to expose that external data inside Salesforce without duplication.