Phase 3: Data Modeling & Relationships

1. Standard & Custom Objects

- **Standard Object Used:** Case (provided by Salesforce).

- **Custom Object:** Not created in this project (we extended the standard Case object with custom fields).

- ✅ Already addressed in **Phase 2** when we set up the Case object and added fields.

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2. Fields

- Custom fields added to the Case object:

    - Complaint Type

    - Status (Pending / In Progress / Resolved)

    - Customer Feedback

    - Assigned Agent (Lookup to User)

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3. Record Types

- Created a **Record Type** for Case:

    - Customer Feedback Record Type (linked with Support Process).

- Associated with Customer Feedback Process (New → Working → Escalated→Closed).

Select a value from the Available Values list and add it to the Sele
process will not remove the value from any records already conta
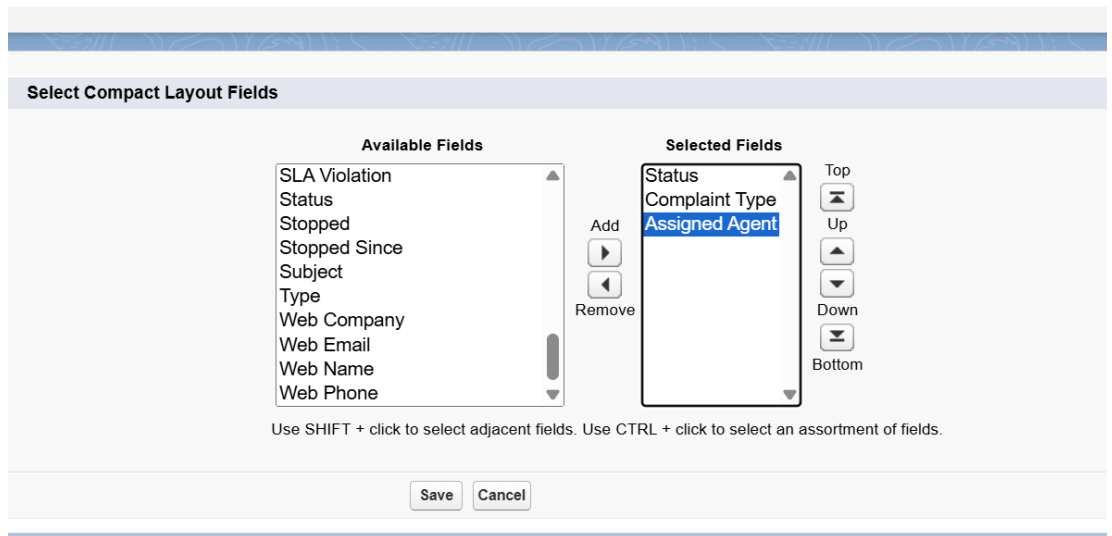
Case Status

Support Process   Customer Feedback Process

Namespace Prefix

Description

Available Values   Selected Values

--None--

New
Working
Escalated
Closed (Closed)

Add

-

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4. Page Layouts

- Created a **Case Page Layout** with important fields:

    o Complaint Type

    o Status

    o Customer Feedback

    o Assigned Agent

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5. Compact Layouts

- Created a Case Compact Layout for quick highlights:

    o Complaint Type

    o Status

    o Assigned Agent

Select Compact Layout Fields

Available Fields		Selected Fields	
SLA Violation		Status	Top
Status	Add	Complaint Type	Up
Stopped	▶	**Assigned Agent**	
Stopped Since	◀		Down
Subject	Remove		Bottom
Type			
Web Company			
Web Email			
Web Name			
Web Phone			

Use SHIFT + click to select adjacent fields. Use CTRL + click to select an assortment of fields.

Save Cancel

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6. Schema Builder

- **Not used in this project.**
  (We directly created fields/relationships without using Schema Builder.)

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7. Lookup vs Master-Detail vs Hierarchical Relationships

- Lookup Relationship Used:

  o Assigned Agent → User.

- Master-Detail Relationship**:** Not used.

- Hierarchical Relationship**:** Not used.

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8. Junction Objects

- **Not used in this project.**
  (No many-to-many relationships needed.)

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9. External Objects

- **Not used in this project.**
  (All data stored within Salesforce standard objects only.)