

## Phase 3 — Step-by-step Implementation (Data Modeling & Relationships)

### Step 1 — Plan Objects & Fields

- 1.1 Identify standard objects to use: Case, Account, Contact, User, Queue.
- 1.2 Define custom objects: RoutingRule\_\_c, PriorityMatrix\_\_c, Feedback\_\_c.
- 1.3 List required custom fields (Category\_\_c, Severity\_\_c, Assigned\_Agent\_\_c, Resolution\_Time\_\_c, External\_Reference\_ID\_\_c).

### Step 2 — Create Fields in Setup

- 2.1 Go to Setup → Object Manager → Case → Fields & Relationships → New.
- 2.2 Add Category\_\_c as Picklist (values: Billing, Technical, Account Access, etc.).
- 2.3 Add Severity\_\_c as Picklist (Low, Medium, High, Critical).
- 2.4 Add Assigned\_Agent\_\_c as Lookup(User) and Resolution\_Time\_\_c as Number.

The screenshot shows the Salesforce Setup interface for Lead Assignment Rules. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled 'Lead Assignment Rules' and shows a rule named 'lead source assignment'. The rule is active and has one entry: 'Lead: Lead Source EQUALS Web' assigned to 'vinothia.podugupati'.

The screenshot shows the Salesforce Setup interface for the 'Order Item' object. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled 'Order Item' and shows the 'Fields & Relationships' section. The table below lists the fields and their relationships.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Available Stock	Available_Stock__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Item Price	Item_Price__c	Currency(18, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Order	Order__c	Master-Detail(Order)		
Order Item Name	Name	Auto Number		
Order Quantity	Order_Quantity__c	Number(10, 0) (External ID)		
Product	Product__c	Master-Detail(Product)		

### Step 3 — Configure Record Types

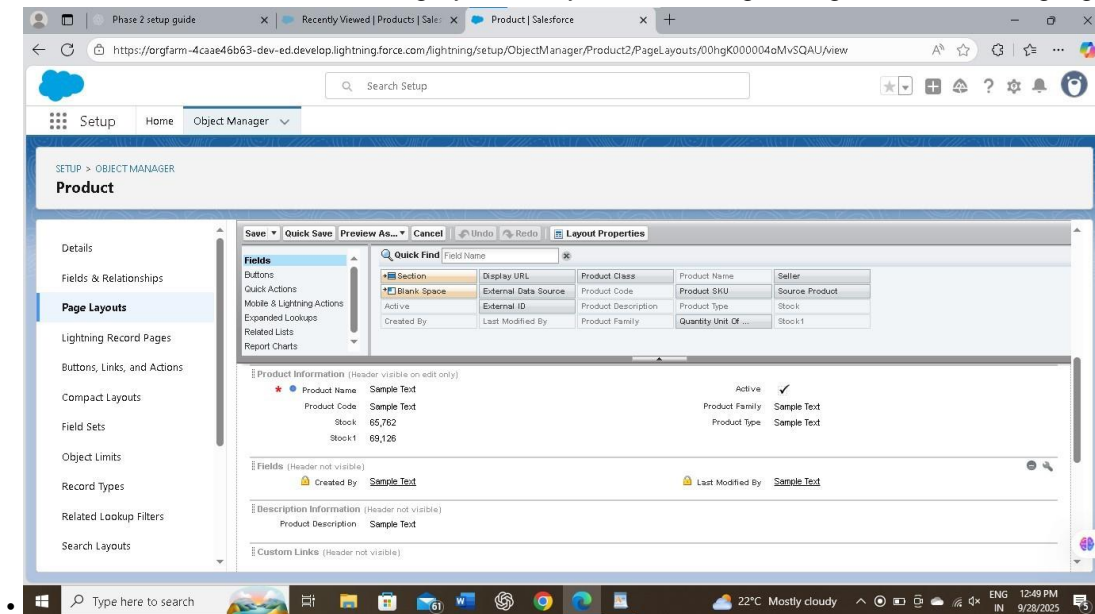
- 3.1 Setup → Object Manager → Case → Record Types → New.
- 3.2 Create 'Customer Support Case', 'Internal IT Request', 'Escalated Case'.
- 3.3 Assign Record Types to profiles (Support Agent, Manager) and set default picklists per type.
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## Step 4 — Customize Page Layouts

- 4.1 Setup → Object Manager → Case → Page Layouts → Edit the main layout.
- 4.2 Add fields: Category\_\_c, Severity\_\_c, Assigned\_Agent\_\_c, Resolution\_Time\_\_c.
- 4.3 Add Related Lists: Feedback, Routing History, CaseAssignment\_\_c.

## Step 5 — Create Compact Layouts

- 5.1 Setup → Object Manager → Case → Compact Layouts → New.
- 5.2 Include: Case Number, Category, Severity, Status, Assigned Agent for mobile highlights.



## Step 6 — Define Relationships

- 6.1 Create Master-Detail: Feedback\_\_c → Case (child records deleted with parent).
- 6.2 Create Lookup: Case → User (Assigned\_Agent\_\_c), Case → Account, Case → Contact.
- 6.3 Use hierarchical on User to model manager → agent reporting if needed.

## Step 7 — Create Junction Object for Flexible Routing

- 7.1 Create CaseAssignment\_\_c with two lookup fields: Case\_\_c and RoutingRule\_\_c.
- 7.2 Add CaseAssignment\_\_c related lists to Case and RoutingRule page layouts.
- 7.3 Use it so a single case can match multiple routing rules and vice versa.

## Step 8 — Schema Builder Validation

- 8.1 Open Setup → Schema Builder.
- 8.2 Drag required objects onto canvas and visually confirm relationships.
- 8.3 Save and note any orphaned fields or missing links for cleanup.

## **Step 9 — External Objects & Integration Mapping (Optional)**

- 9.1 Create Named Credential and External Data Source for external ticket/chat platforms.
- 9.2 Expose External\_Case\_Data\_\_x and map External\_Reference\_ID\_\_c to external IDs.
- 9.3 Test read-only/external lookups before relying on them in routing logic.

## **Step 10 — Testing & Sample Data**

- 10.1 Create sample Accounts, Contacts, Cases, RoutingRule\_\_c, and CaseAssignment\_\_c records.
- 10.2 Simulate case creation with different Category and Severity values.
- 10.3 Verify case is routed to correct Queue/Assigned\_Agent\_\_c per rules.

## **Step 11 — Data Import & External ID Mapping**

- 11.1 Use Data Loader or Import Wizard to bulk import Accounts/Contacts using External\_Reference\_ID\_\_c as External ID.
- 11.2 Map products or third-party records to Salesforce records using External IDs.
- 11.3 Validate imported records and correct any mapping errors.

## **Step 12 — Profiles, Permissions & Deployment**

- 12.1 Assign Record Types and Page Layouts to profiles (Support Agent, Manager).
- 12.2 Create Permission Sets for access to custom objects/fields as needed.
- 12.3 Deploy from sandbox to production using Change Sets or SFDX; run post-deployment smoke tests.

## **Step 13 — Monitoring, Reports & Feedback Loop**

- 13.1 Build reports: Cases by Queue, Average Resolution\_Time\_\_c by Category, RoutingRule matches.
- 13.2 Create dashboards for support managers (backlog, SLA breaches, agent workload).
- 13.3 Use Feedback\_\_c data to refine PriorityMatrix\_\_c and routing criteria iteratively.