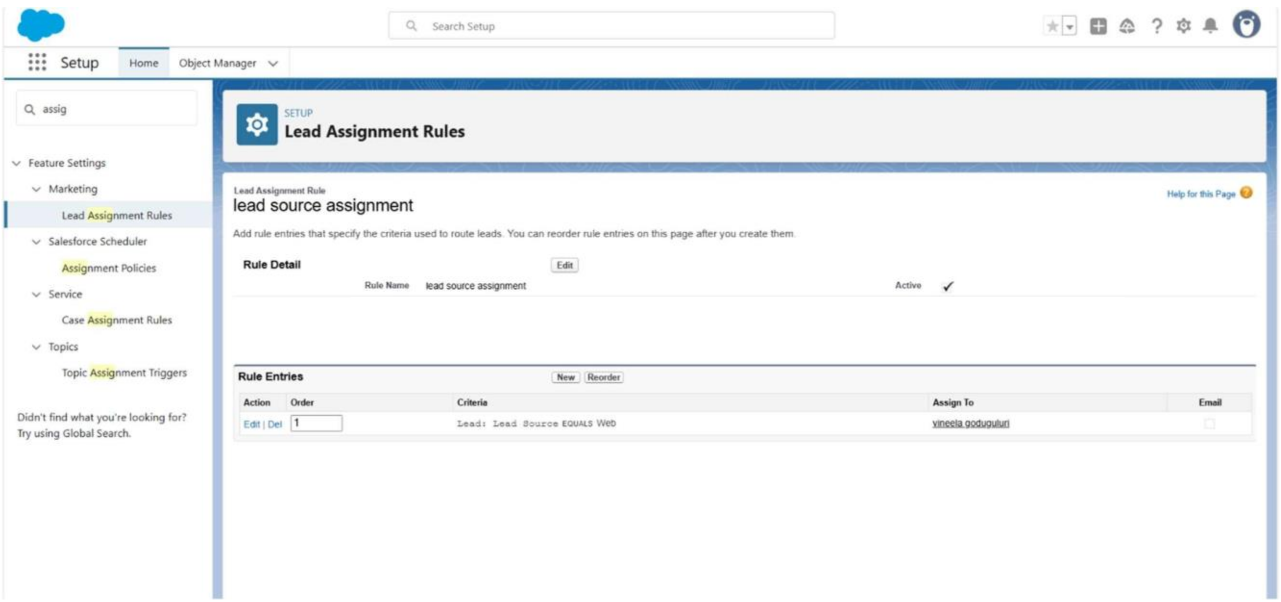
Phase 3 — Step-by-step Implementation (Data Modeling & Relationships)

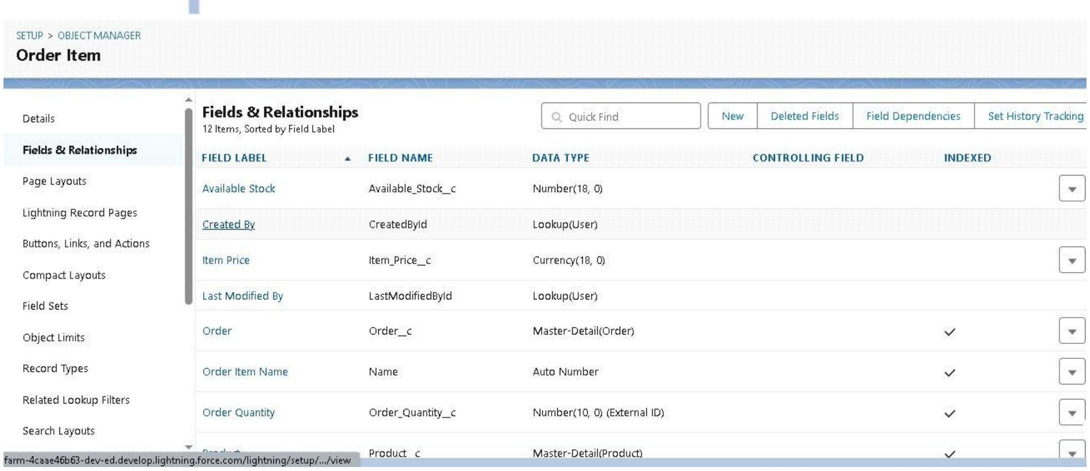
Step 1 — Plan Objects & Fields

• 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.





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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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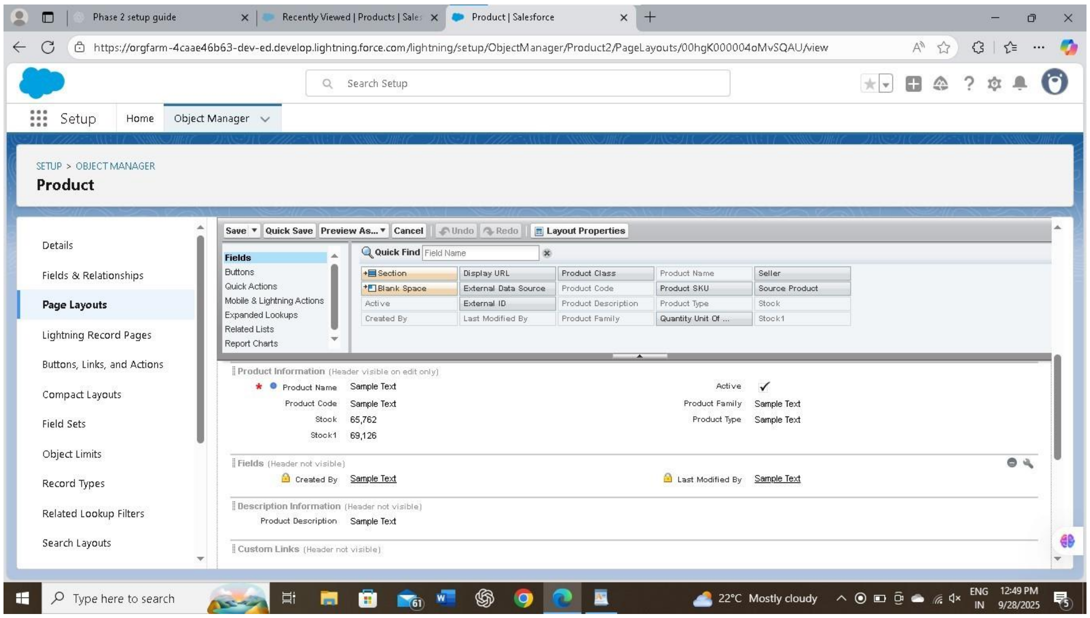
Step 4 — Customize Page Layouts

- 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.