

PHASE 3: DATA MODELING & RELATIONSHIPS

This is the core of your system.

Custom Object: Salesforce_Ticket__c

A ticket record contains all metadata about a Salesforce request.

FIELDS CREATED (BASED ON VIDEO)

1 Lookup Fields

Field Name	Type	Description
Requester	Lookup(User)	Internal user who raised the request
Approver	Lookup(User)	Optional approver for request

2 Date Fields

Field Name	Type	Description
Requested Completion Date	Date	Desired completion timeline
Completed Date	Date	When the work was finished

3 Picklist Fields

Field Name	Type	Values
Status	Picklist	New, In Development, In Testing, Closed, Rejected
Priority	Picklist	High, Medium, Low
Department	Picklist	Departments list (added manually)
Primary Object	Picklist	List of Salesforce objects affected
Request Type	Picklist	New User, Existing User, Change, Addition

4 Text & Rich Text Fields

Field Name	Type	Description
Description	Rich Text	Detailed request information
Admin Notes	Long Text Area	Admin documentation of work

PAGE LAYOUT SETUP

You arranged fields in logical order:

Sections Included

- Request Information
- Dates
- Status & Priority
- Object Change Information
- Admin Notes

COMPACT LAYOUT

Fields displayed:

- Request Type
- Priority
- Status

Cloud icon

Setup Home Object Manager

SETUP > OBJECT MANAGER Salesforce Ticket

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Triggers
Flow Triggers
Validation Rules

Salesforce Ticket Compact Layouts
New Compact Layout

Compact layouts are used in the mobile app and some Chatter feed items to display a record's key fields at a glance. You can select and prioritize up to ten fields for the compact layout, but the number of fields that display may vary based on the device's screen, which record page is being viewed, and the permissions of the user.

Compact Layout Edit

Enter Compact Layout Information

Label: Name:

Select Compact Layout Fields

Available Fields: Approver, Created Date, Created By, Date Requested By, Department, Last Modified By, Owner, Primary Object, User

Selected Fields: **Salesforce Ticket Name**, Type, Identity, Status

Top, Up, Down, Bottom buttons for reordering fields

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

Saving... Saving...