

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

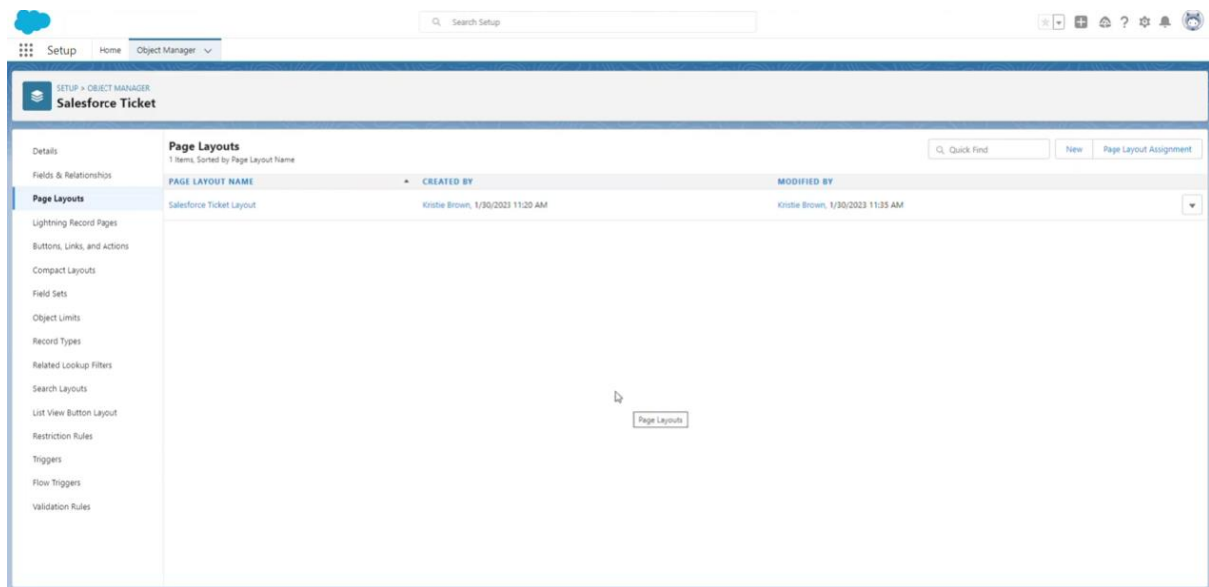
Field Name	Type	Description
Description	Rich Text	Detailed request information
Admin Notes	Long Text Area	Admin documentation of work

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



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

Save Save

Enter Compact Layout Information

Required Information

Label Salesforce Ticket
Name Salesforce_Ticket

Select Compact Layout Fields

Available Fields		Selected Fields	
Approver		Salesforce Ticket Name	Top
Completed Date		Type	Up
Created By		Priority	Down
Data Requested By		Status	Bottom
Department			
Last Modified By			
Owner			
Primary Object			
User			

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

Save Save