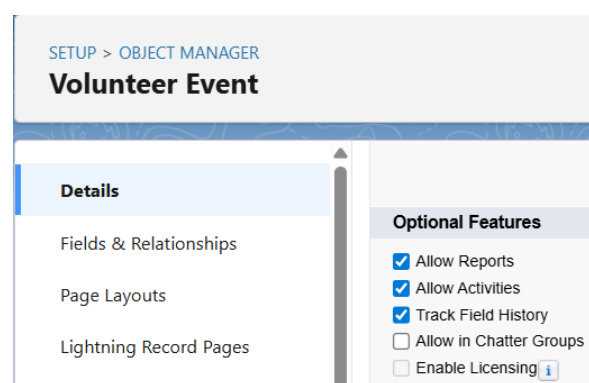
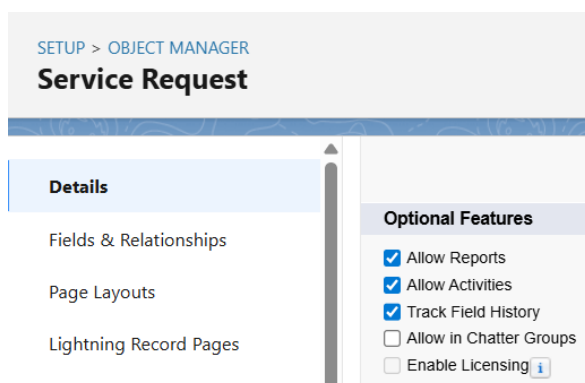


Phase 3: Data Model Configuration

»» Standard & Custom Objects

- Created Custom Object **Service Request** to capture resident service requests.
- Created Custom Object **Volunteer Event** to track community events.
- Verified Standard Objects leveraged:
 - ✓ User (for Assigned Staff, Event Coordinator)
 - ✓ Role (for Manager approvals)
- Configured object settings: enabled Reports, Activities, and Field History Tracking on both custom objects.
- Set object-level security in Profiles: City Staff and Manager profiles granted Create, Read, Edit, Delete on Service Request and Volunteer Event.



»» Fields

- Defined key fields on **Service Request**:
 - ✓ Request_Type__c (Picklist)
 - ✓ Priority__c (Picklist)
 - ✓ Location_Address__c (Text)
 - ✓ Requested_Date__c (Date)
 - ✓ Estimated_Cost__c (Currency)
 - ✓ Assigned_Staff__c (Lookup → User)
 - ✓ Status__c (Picklist: New, Pending Review, In Progress, Resolved, Rejected)

➤ Defined key fields on **Volunteer Event**:

- ✓ Event_Date__c (Date)
- ✓ Event_Location__c (Text)
- ✓ Max_Volunteers__c (Number)
- ✓ Current_Volunteers__c (Number)
- ✓ Event_Status__c (Picklist: Planned, Open, Closed)
- ✓ Event_Coordinator__c (Lookup → User)
- ✓ Registration_Deadline__c (Date)

➤ Enabled Field History Tracking on:

- ✓ Status__c
- ✓ Estimated_Cost__c
- ✓ Event_Status__c
- ✓ Current_Volunteers__c

SETUP > OBJECT MANAGER

Service Request

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Fields & Relationships

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Buttons, Links, and Actions

Compact Layouts

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Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Fields & Relationships

15 Items, Sorted by Field Label

Quick Find

Assigned Staff	Assigned_Staff__c	Lookup(User)
Created By	CreatedById	Lookup(User)
Estimated Cost	Estimated_Cost__c	Currency(16, 2)
Last Modified By	LastModifiedById	Lookup(User)
Location Address	Location_Address__c	Text(255)
Owner	OwnerId	Lookup(User,Group)
Priority	Priority__c	Picklist
Record Type	RecordTypeId	Record Type
Request Description	Request_Description__c	Long Text Area(32768)
Request Type	Request_Type__c	Text(100)
Requested Date	Requested_Date__c	Date

SETUP > OBJECT MANAGER

Volunteer Event

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Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules

Fields & Relationships

14 Items, Sorted by Field Label

Current Volunteers	Current_Volunteers__c	Number(3, 0)
Event Category	Event_Category__c	Picklist
Event Coordinator	Event_Coordinator__c	Lookup(User)
Event Date	Event_Date__c	Date/Time
Event Description	Event_Description__c	Long Text Area(32768)
Event Location	Event_Location__c	Text(255)
Event Name	Event_Name__c	Text(100)
Event Status	Event_Status__c	Picklist
Last Modified By	LastModifiedById	Lookup(User)
Max Volunteers	Max_Volunteers__c	Number(3, 0)

»» Record Types

- Created two Record Types on **Service Request**:
 - ✓ Citizen_Service for resident requests
 - ✓ Infrastructure for city maintenance
- Customized picklist values per record type for Request_Type__c.

SETUP > OBJECT MANAGER

Service Request

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions

Record Types

2 Items, Sorted by Record Type Label

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Community Service Request	For community activity requests	✓	Aditya Vishwakarma, 22/09/2025, 3:45 pm
Infrastructure Request	For infrastructure issues like pothole repairs	✓	Aditya Vishwakarma, 22/09/2025, 3:44 pm

»» Page Layouts

- Added Related Lists on Service Request: Approval History, Tasks, Volunteer Participation.

- Placed standard buttons Submit for Approval and Recall Approval Request on Service Request layout.
- Configured Volunteer Event layout to surface Event_Date__c, Max_Volunteers__c, Current_Volunteers__c, and related Volunteer Participation list.

SETUP > OBJECT MANAGER
Service Request

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Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Page Layouts
4 Items, Sorted by Page Layout Name

Q Quick Find New Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY	
Manager Service Request Layout	Aditya Vishwakarma, 22/09/2025, 7:11 pm	Aditya Vishwakarma, 23/09/2025, 6:50 pm	▼
Resident Service Request Layout	Aditya Vishwakarma, 22/09/2025, 6:38 pm	Aditya Vishwakarma, 23/09/2025, 6:50 pm	▼
Service Request Layout	Aditya Vishwakarma, 17/09/2025, 6:55 pm	Aditya Vishwakarma, 23/09/2025, 6:50 pm	▼
Staff Service Request Layout	Aditya Vishwakarma, 22/09/2025, 7:03 pm	Aditya Vishwakarma, 23/09/2025, 6:50 pm	▼

SETUP > OBJECT MANAGER
Volunteer Event

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Page Layouts
1 Items, Sorted by Page Layout Name

Q Quick Find New Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY	
Volunteer Event Layout	Aditya Vishwakarma, 17/09/2025, 6:55 pm	Aditya Vishwakarma, 24/09/2025, 3:13 pm	▼

»» Compact Layouts

- Service Request Compact Layout Fields:
 - ✓ Request_Type__c
 - ✓ Priority__c
 - ✓ Status__c
 - ✓ Estimated_Cost__c
- Volunteer Event Compact Layout Fields:
 - ✓ Event_Name
 - ✓ Event_Date__c
 - ✓ Event_Status__c
 - ✓ Max_Volunteers__c
- Assigned each as Primary Compact Layout under the object settings.

SETUP > OBJECT MANAGER

Service Request

Details

Fields & Relationships

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Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

2 Items, Sorted by Label

Q Quick Find

New

Compact Layout Assignment

LABEL	API NAME	PRIMARY	MODIFIED BY	LAST MODIFIED
Service Request Compact	Service_Request_Compact	✓	Aditya Vishwakarma	22/09/2025, 11:42 pm
System Default	SYSTEM			

SETUP > OBJECT MANAGER

Volunteer Event

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

2 Items, Sorted by Label

Q Quick Find

New

Compact Layout Assignment

LABEL	API NAME	PRIMARY	MODIFIED BY	LAST MODIFIED
System Default	SYSTEM			
Volunteer Event Compact	Volunteer_Event_Compact	✓	Aditya Vishwakarma	22/09/2025, 11:43 pm

SETUP > OBJECT MANAGER

Volunteer Event

Details

Fields & Relationships

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Compact Layouts

2 Items, Sorted by Label

Q Quick Find

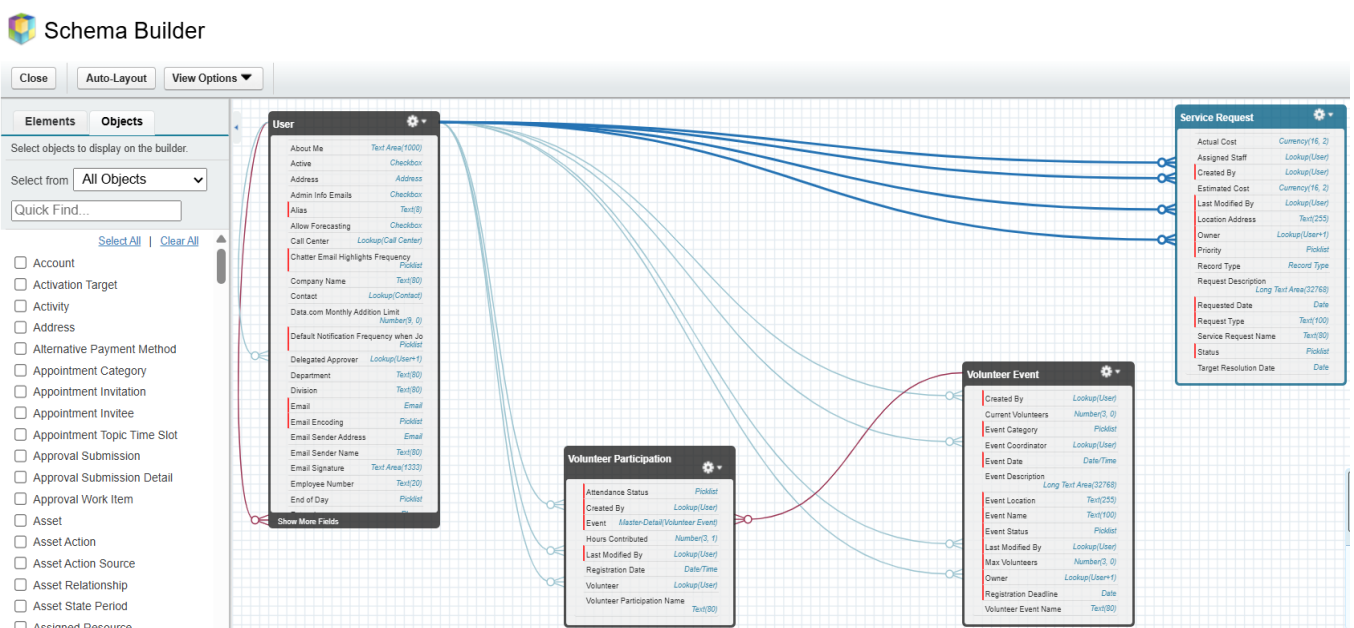
New

Compact Layout Assignment

LABEL	API NAME	PRIMARY	MODIFIED BY	LAST MODIFIED
System Default	SYSTEM			
Volunteer Event Compact	Volunteer_Event_Compact	✓	Aditya Vishwakarma	22/09/2025, 11:43 pm

»» Schema Builder

- Used Schema Builder to validate object relationships:
 - ✓ Service Request → User (Assigned Staff)
 - ✓ Volunteer Event → User (Event Coordinator)
 - ✓ Volunteer Participation junction
- Confirmed correct data types and lookup cardinality visually.
- Exported a snapshot of the model for documentation.



»» Lookup vs Master-Detail vs Hierarchical Relationships

- Implemented Lookup relationships for:
 - ✓ Service_Request__c.Assigned_Staff__c → User
 - ✓ Volunteer_Event__c.Event_Coordinator__c → User
- Planned Master-Detail for Volunteer Participation junction in **Phase 4** to enable roll-up summary behavior.
- Noted Hierarchical relationship available for User-to-User but not used.

SETUP > OBJECT MANAGER
Service Request

Details

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Restriction Rules

Service Request Custom Field
Assigned Staff
[Back to Service Request](#)

Validation Rules (0)

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label	Assigned Staff	Object Name	Service Request
Field Name	Assigned_Staff	Data Type	Lookup
API Name	Assigned_Staff__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Aditya Vishwakarma, 22/09/2025, 1:43 am	Modified By	Aditya Vishwakarma, 22/09/2025, 1:43 am

Lookup Options

Related To	User	Child Relationship Name	Service_Requests
Related List Label	Service Requests		
Required	<input type="checkbox"/>		
What to do if the lookup record is deleted?	Clear the value of this field.		

»» Junction Objects

- Defined Volunteer Participation as a junction object between Volunteer Event and User (Volunteer).
- Created lookup fields:
 - ✓ Volunteer_Participation__c.Volunteer__c → User
 - ✓ Volunteer_Participation__c.Event__c → Volunteer Event
- Added custom fields on junction:
 - ✓ Attendance_Status__c (Picklist)
 - ✓ Hours_Contributed__c (Number)

Volunteer Participation

Details

Fields & Relationships

Page Layouts

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Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

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Related Lookup Filters

Search Layouts

List View Button Layout

Fields & Relationships

8 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Attendance Status	Attendance_Status__c	Picklist		
Created By	CreatedById	Lookup(User)		
Event	Event__c	Master-Detail(Volunteer Event)		✓
Hours Contributed	Hours_Contributed__c	Number(3, 1)		
Last Modified By	LastModifiedById	Lookup(User)		
Registration Date	Registration_Date__c	Date/Time		
Volunteer	Volunteer__c	Lookup(User)		✓
Volunteer Participation Name	Name	Text(80)		✓

»» External Objects

- No external objects implemented in Phase 3.