

Corporate IT Helpdesk System

This phase focuses on creating the custom objects, fields, and relationships that will form the database structure for your IT ticketing application.

Step 1: Create the Custom Objects

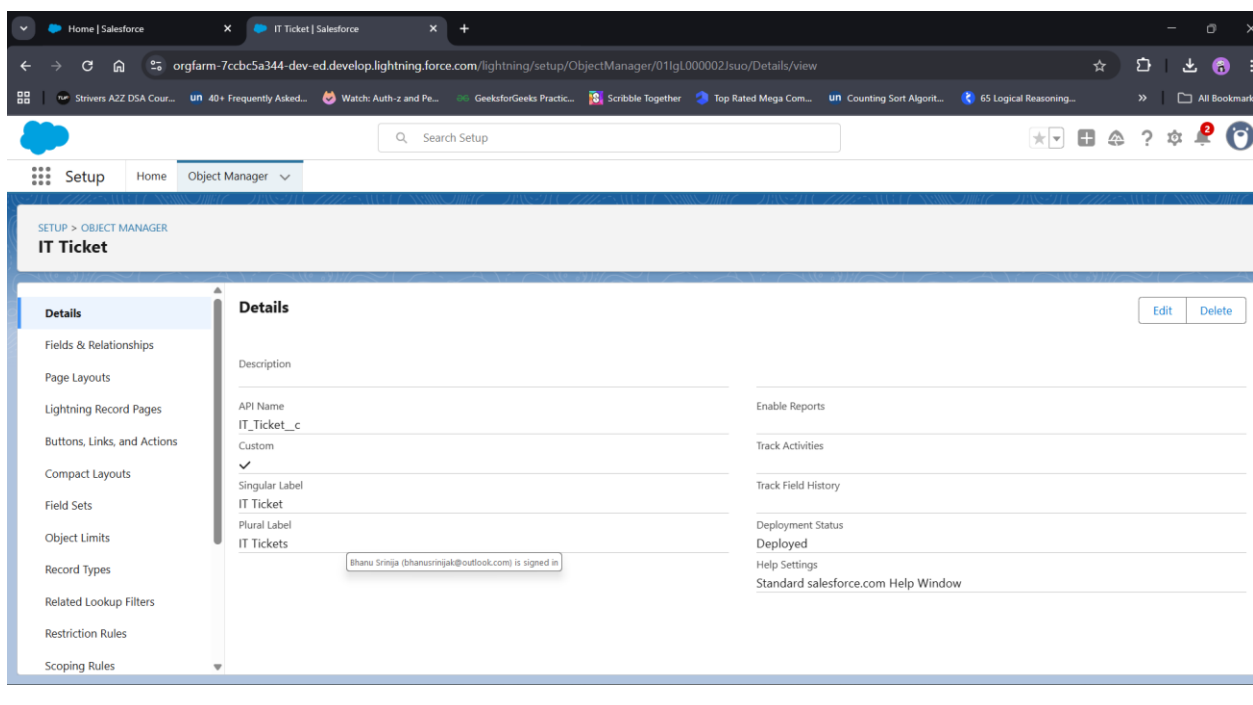
A. Create the "Asset" Object

- **Purpose:** This object will maintain a catalog of all company hardware (laptops, monitors, etc.) that can be associated with an IT ticket.
- **Navigation:**
 1. Go to **Setup**.
 2. Click on the **Object Manager** tab.
 3. In the top-right corner, click **Create > Custom Object**.
- **Instructions:**
 - **Label:** Asset
 - **Plural Label:** Assets
 - **Object Name:** Asset
 - For **Record Name**, enter Asset Tag and leave the Data Type as **Text**.
 - Check the box to **Launch New Custom Tab Wizard after saving**.
 - Click **Save**.
 - On the "New Custom Object Tab" screen, choose a **Tab Style** (like a computer chip icon) and click **Next**, then **Next**, then **Save**.

The screenshot shows the Salesforce Setup interface. At the top, there's a search bar labeled 'Search Setup' and a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below this, the breadcrumb trail reads 'SETUP > OBJECT MANAGER' and the object name 'Asset' is displayed. A left-hand menu lists various configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, and Scoping Rules. The 'Details' section is currently selected and expanded, showing a list of fields: Description, API Name (Asset__c), Custom (checked), Singular Label (Asset), Plural Label (Assets), and Assets. To the right of the field list, there are checkboxes for 'Enable Reports', 'Track Activities', and 'Track Field History', all of which are currently unchecked. At the bottom right of the details section, there are links for 'Deployment Status', 'Help Settings', and a link to the 'Standard salesforce.com Help Window'. In the top right corner of the details section, there are 'Edit' and 'Delete' buttons.

B. Create the "IT Ticket" Object

- **Purpose:** This will be the central object for tracking every support request from an employee, from creation to resolution.
- **Navigation:** Go back to **Object Manager > Create > Custom Object**.
- **Instructions:**
 - **Label:** IT Ticket
 - **Plural Label:** IT Tickets
 - **Object Name:** IT_Ticket
 - For **Record Name**, enter Ticket Number and change the Data Type to **Auto-Number**.
 - For **Display Format**, enter T-{000000}.
 - For **Starting Number**, enter 1.
 - Check the box to **Launch New Custom Tab Wizard after saving**.
 - Click **Save**.
 - On the "New Custom Object Tab" screen, choose a **Tab Style** (like a life-preserver icon) and click **Next, Next, Save**.



Step 2: Add Custom Fields & Relationships

A. Add Fields to the "IT Ticket" Object

- **Navigation:** Go to **Object Manager > IT Ticket > Fields & Relationships > New**.

1. **Create the Relationship to the Employee (User):**
 - **Data Type:** Select **Lookup Relationship**, then click Next.
 - **Related to:** Select **User**, then click Next.
 - **Field Label:** Employee.
 - Click **Next, Next, Next**, and **Save**.
 - **Why:** This links each ticket to the specific employee (who is also a Salesforce User) that raised the request.
2. **Create the Relationship to the Asset:**
 - **Data Type:** Select **Lookup Relationship**, then click Next.
 - **Related to:** Select **Asset**, then click Next.
 - **Field Label:** Asset.
 - Click **Next, Next, Next**, and **Save**.
 - **Why:** This allows the IT team to link a ticket to a specific piece of hardware, like a malfunctioning laptop.
3. **Create the Category Field:**
 - **Data Type:** Select **Picklist**, then click Next.
 - **Field Label:** Category.
 - Select "Enter values, with each value separated by a new line".
 - Enter the values:
 - Hardware
 - Software
 - Network
 - Account Access
 - Click **Next, Next, Save**.
4. **Create the Status Field:**
 - **Data Type:** Select **Picklist**, then click Next.
 - **Field Label:** Status.
 - Enter the values:
 - New
 - Assigned
 - In Progress
 - Awaiting Employee Response
 - Resolved
 - Closed
 - Click **Next, Next, Save**.
5. **Create the Priority Field:**
 - **Data Type:** Select **Picklist**, then click Next.
 - **Field Label:** Priority.
 - Enter the values: Critical, High, Medium, Low.
 - Click **Next, Next, Save**.
6. **Create the Description Field:**

- **Data Type:** Select **Long Text Area**, then click Next.
- **Field Label:** Description.
- Click **Next, Next, Save**.

B. Add Fields to the "Asset" Object

- **Navigation:** Go to **Object Manager > Asset > Fields & Relationships > New**.

The screenshot shows the Salesforce Setup interface for the 'IT Ticket' object. The 'Fields & Relationships' section is active, displaying a list of 10 fields. The fields are sorted by Field Label. The table below represents the data shown in the screenshot:

Field Label	Field Name	Data Type	Controlling Field	Indexed
Category	Category__c	Picklist		
Created By	CreatedById	Lookup(User)		
Description	Description__c	Long Text Area(32768)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Priority	Priority__c	Picklist		
Status	Status__c	Picklist		
Ticket Number	Name	Auto Number		✓
User	Employee__c	Lookup(User)		✓

1. Create the Assigned To Field:

- **Data Type:** Select **Lookup Relationship**, then click Next.
- **Related to:** Select **User**, then click Next.
- **Field Label:** Assigned To.
- Click **Next, Next, Next, and Save**.
- **Why:** This tracks which employee is currently assigned a specific piece of hardware.

The screenshot shows the Salesforce Setup interface for the 'Asset' object. The 'Fields & Relationships' section is active, displaying a list of 5 fields. The fields are sorted by Field Label. The table below represents the data shown in the screenshot:

Field Label	Field Name	Data Type	Controlling Field	Indexed
Asset Tag	Name	Text(80)		✓
Assigned To	Assigned_To__c	Lookup(User)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓