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**.

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-{00000}.
  - 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**.
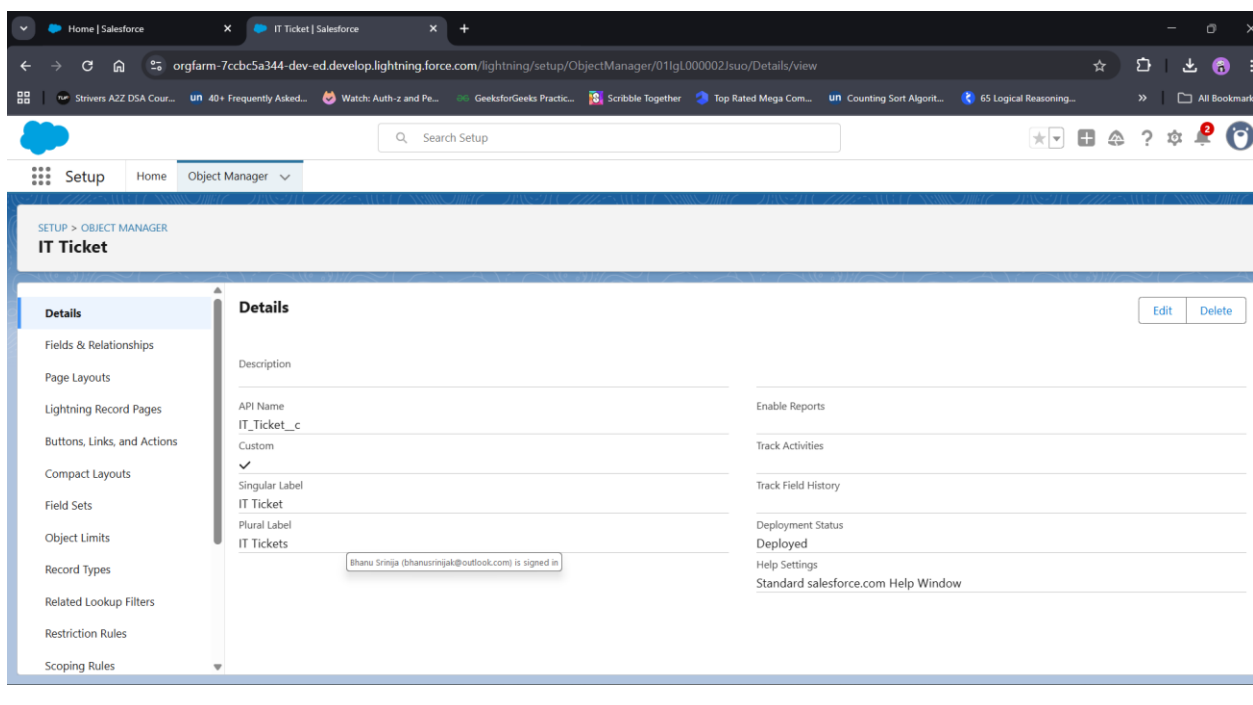
Step 2: Add Custom Fields & Relationships

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**.

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.