

# Smart SLA Tracker: Intelligent Customer Complaint & Escalation Management

## Phase 3: Data Modelling & Relationships

### 3.1 Custom Objects & Fields

#### 1. SLA Rule Object:

- Setup > Object Manager > Create > Custom Object.

The screenshot shows the 'SLA Rule' object configuration page in Salesforce Setup. The 'Details' tab is selected, displaying fields for Description, API Name (SLA\_Rule\_\_c), Custom (checked), Singular Label (SLA Rule), Plural Label (SLA Rules), and Deployment Status (Deployed). There are also links for Enable Reports, Track Activities, Track Field History, Help (Setup), and Standard Salesforce.com Help Window.

- Setup > Object Manager > SLA Rule > Fields & Relationships > New > Priority , Resolution Time, Escalation Tier

The screenshot shows the 'Fields & Relationships' tab for the 'SLA Rule' object. It displays a table of fields with columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are Created By, Escalation Tier, Last Modified By, Owner, Priority, Resolution Time, and SLA Rule Name.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	lookup[User]		
Escalation Tier	Escalation_Tier__c	Picklist		
Last Modified By	LastModifiedBy	lookup[User]		
Owner	OwnerId	lookup[User Group]		✓
Priority	Priority__c	Picklist		
Resolution Time	Resolution_Time__c	Number(75, 0)		
SLA Rule Name	Name	Text(255)		✓

## 2. Product/Service Object:

- Setup > Object Manager > Create > Custom Object.

The screenshot shows the Salesforce Setup interface for the 'Product/Service' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Links, Record Types, Related Lookup Filters, Permission Rules, Sharing Rules, and Object Access. The main content area is titled 'Details' and includes a description field, API Name (Product\_Service\_\_c), Customization status (checked), Singular Label (Product/Service), Plural Label (Products/Services), and a list of related items: Custom Reports, Track Actions, Track Field History, Deployment Status (Deployed), Help Settings, and Standard Salesforce.com Help Window. 'Add' and 'Delete' buttons are in the top right.

- Setup > Object Manager > SLA Rule > Fields & Relationships > New > Product Name, Category, Status

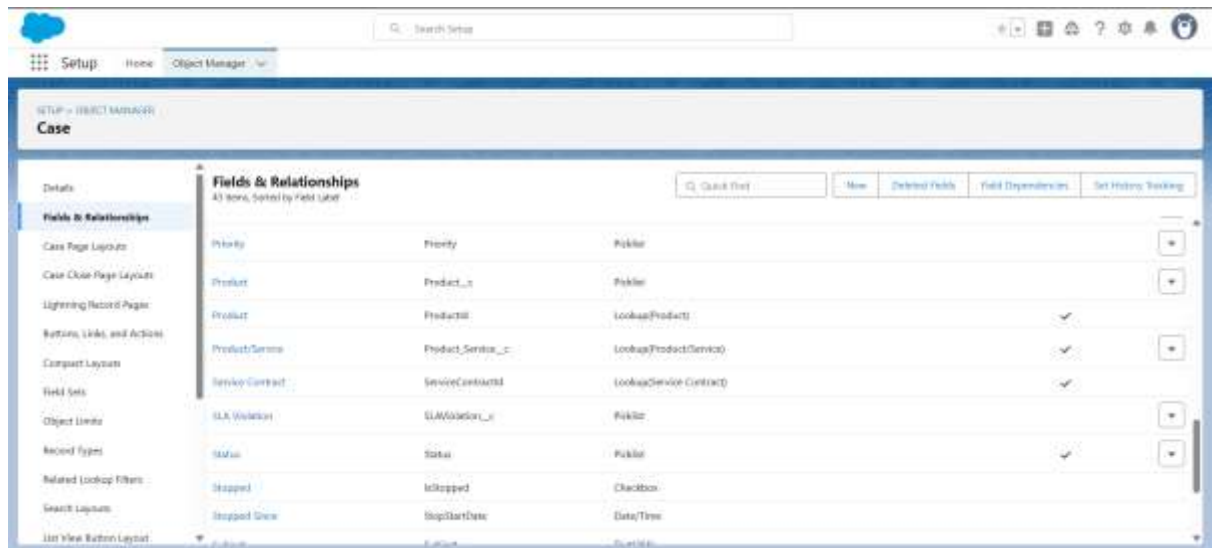
The screenshot shows the 'Fields & Relationships' tab for the 'Product/Service' object. It displays a table of fields with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. There are 7 items listed, sorted by field label. Buttons for 'Quick Find', 'New', 'Deleted Fields', 'Field Dependencies', and 'Set Hiding/Tracking' are at the top right.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Category	Category__c	Picklist		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(Hier Group)		✓
Product Name	Product_Name__c	Text(255)		
Product/Service Name	Name	Text(255)		✓
Status	Status__c	Picklist		

### 3.2 Relationships & Junction Objects:

#### 1. Lookup Relationship on Case:

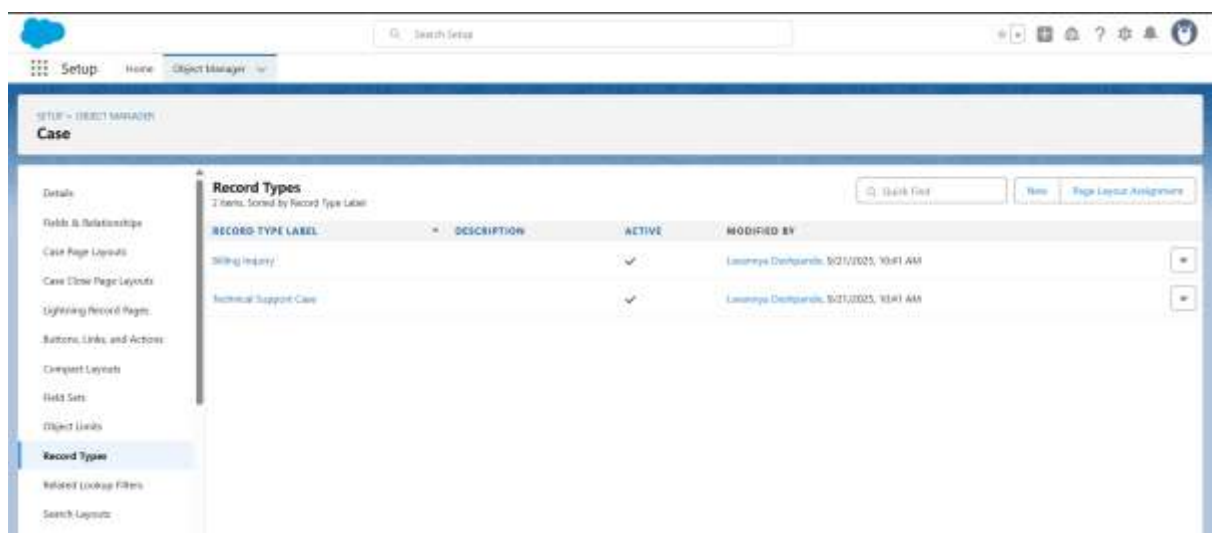
Setup > Object Manager > Field and Relationships > New > Product/Service



### 3.3 Record Types, Page Layouts & Compact Layouts:

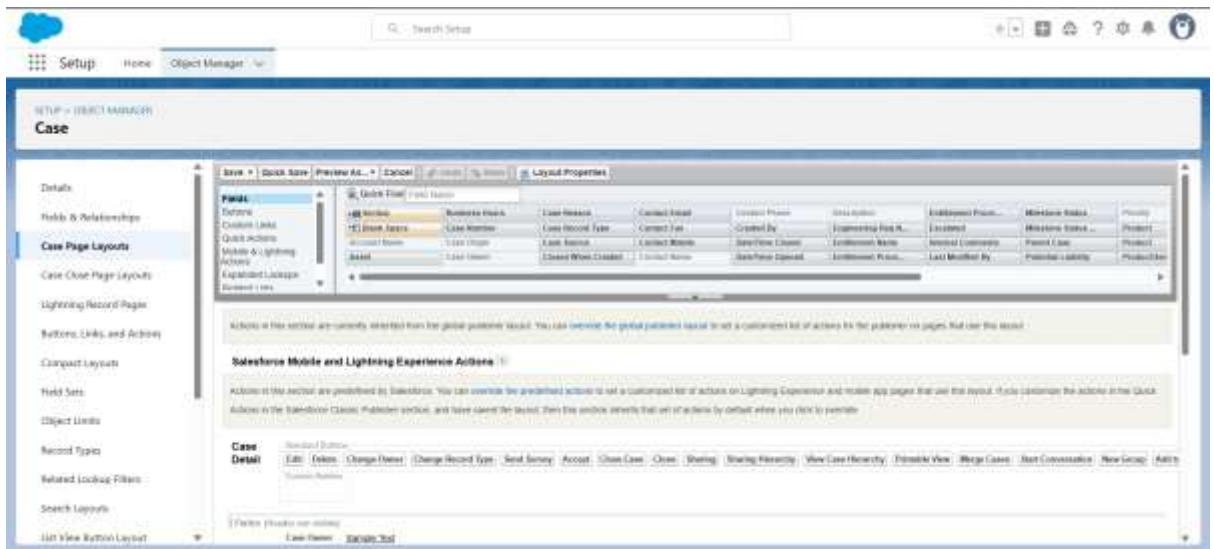
#### 1. Record Types on Case:

Setup > Object Manager > Case > Record Types > New > Technical Support Case and Billing Inquiry



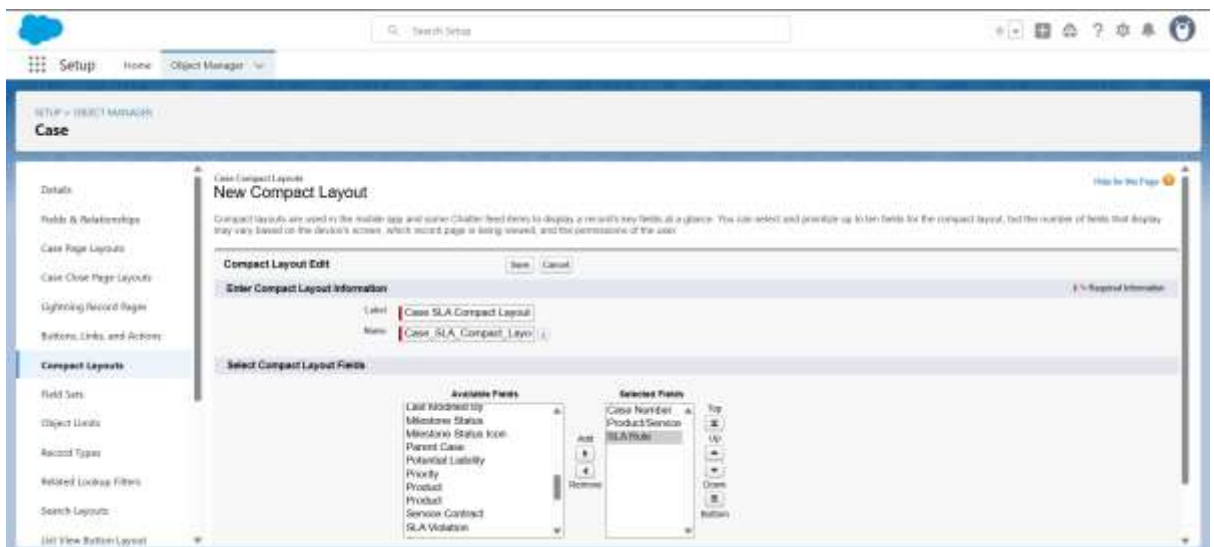
Setup > Object Manager > Case > Page Layouts > New > Technical Support Case Layout and Billing Inquiry Layout

[illegible]



### 3. Compact Layouts:

Setup > Object Manager > Case > Compact Layouts > New > Case SLA Compact Layout



Setup

Home

Object Manager

Search Setup

Setup > OBJECT MANAGER

Case

Details

Fields & Relationships

Case Page Layouts

Case Close Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Links

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Case Compact Layouts

Compact Layout Assignment

SaveCancel

Primary Compact Layout

Select the compact layout to use when this object's records appear as list items in the mobile app.

Primary Compact Layout: Case SLA Compact Layout

Record Type Overrides

This table shows the compact layout assignments for different record types. Use Shift + click or click and drag to select a range of adjacent cells. Use Ctrl + click to select multiple cells that are not adjacent. Then choose a new compact layout from the dropdown.

Compact Layout to Use: Select Compact Layout D Selected D Changed

Record Types	Compact Layouts	
Billing Inquiry		Inherit from Primary
Technical Support Case		Inherit from Primary

SaveCancel

Setup

Home

Object Manager

Search Setup

Setup > OBJECT MANAGER

Case

Details

Fields & Relationships

Case Page Layouts

Case Close Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Links

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Compact Layouts

2 Items, Sorted by Label

Quick FindNewCompact Layout Assignment

LABEL	API NAME	PRIMARY	MODIFIED BY	LAST MODIFIED	
Case SLA Compact Layout	Case_SLA_Compact_Layout	✓	seanmpe@redpoint.co	3/21/2025, 10:51 AM	
System Default	SYSTEM				

### 3.4 Schema Builder:

1. Setup > Schema Builder > Clear All
2. Select Case, SLA Rule, Product/Service objects from the list to display them on the canvas

