1. Customize an Org to Support a New Business Unit
2. Modify Your Data Model

Modify Your Data Model

Introduction

Salesforce offers lots of customization options that allow you to tailor your org to fit the needs of your teams. Like a gearhead tricking out a muscle car, you can add some pretty sleek bells and whistles—creating processes and record types, customizing fields, and creating picklists—all to suit the needs of your business and keep its engine purring.

Customize Fields

Your users need custom fields to capture their unique business data. You can add custom fields for each of the tabs and objects that your organization uses, with a limit of 800 fields.

Note

A custom field name and label must be unique for that object to avoid merge and display issues. For example, if you create a field label called Email and a standard field labeled Email already exists, the merge field may be unable to distinguish between them. Adding a character or a qualifier to the custom field name makes it unique. For example, Email2 or Email Leads.

Manager Kenya Collins would like you to create a custom Support Plan Start Date field for her team. Here’s how to get that done for her:

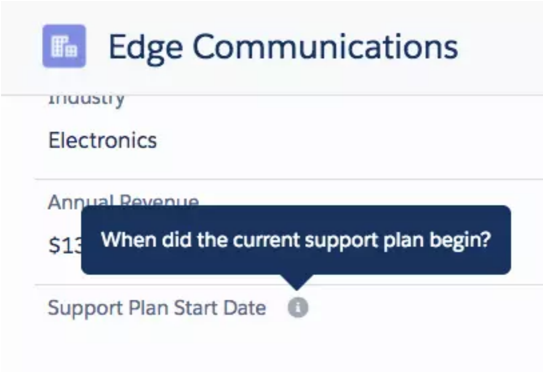
1. Click **Setup** and select **Setup**.
2. Click the **Object Manager** tab.
3. Click **Account**, then click **Fields & Relationships**.
4. At the top of the Fields & Relationships section, click **New**.
5. Select the **Date** radio button, and click **Next**.
6. Complete the new field details in Step 2:

Field	Value
Field Label	`Support Plan Start Date`
Description	`Start date of current support plan`
Help Text	`When did the current support plan begin?`

7. Click **Next**, then complete Step 3.
    - In the Read-Only column header, select the checkbox.
    - In the Read-Only column, deselect the **Custom: Support Profile** and **System Administrator** checkboxes.
8. Click **Next**, then click **Save**.

Kenya also requested you show a few members of her support team how to update support plan information on an account. Use the Edge Communications account as an example:

1. Click the **App Launcher** and select **Sales**.
2. Click **Accounts**, and select **Edge Communications** from the list.
3. Click **Details**.
4. Scroll down. Next to the Support Plan Start Date, hover over the help icon to view the help text.



5. Click in the **Support Plan Start Date** field, then select a date one year ago today.
6. Click **Save**.

Create Dependent Picklists

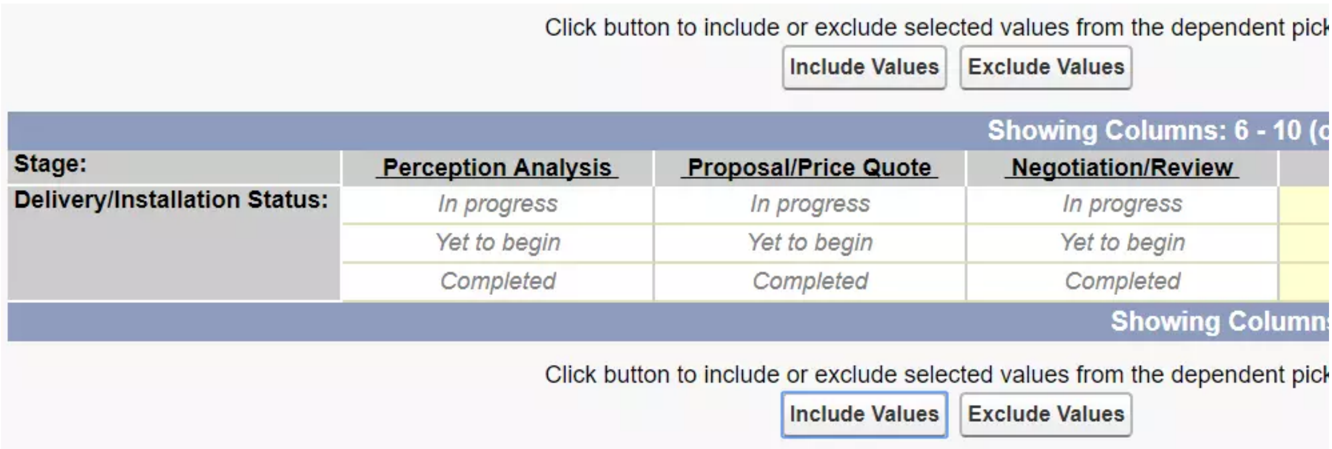
Dependent picklists help users enter accurate and consistent data. A dependent picklist is a custom or multi-select picklist for which the valid values depend on the value of another field, called the controlling field. Controlling fields can be any picklist (with at least one and fewer than 300 values) or checkbox field on the same record.

Create a dependency between the Stage field and the Delivery/Installation Status field:

1. Click **Setup** and select **Setup**.
2. Click the **Object Manager** tab.
3. Click **Opportunity**.
4. Click **Fields & Relationships**.
5. Click **Field Dependencies**.
6. Click **New**, and set up the new field dependency with these details:

Field	Value
Controlling Field	Stage
Dependent Field	Delivery/Installation Status

7. Click **Continue**.
8. At the top of the table, click **Next** until you see the Closed Won and Closed Lost columns.
9. Double-click **In progress, Yet to begin**, and **Completed** in the Closed Won column to highlight them.



10. Click **Preview**, and then test the dependency by selecting different stages and viewing the different close reasons available for the Closed Won stage.
11. Click **Close** to close the preview window.
12. Click **Save**, and click **OK** to accept the warning that not all dependent values have been included.

Create a Support Process

After another meeting with Kenya, it's come to light that your support team needs two different processes for keeping track of the status of customer product support and billing inquires in your Salesforce org.

Create a new support process for them:

1. From Setup, click the **Home** tab.
2. Enter `Support Processes` in the Quick Find box and select **Support Processes**.
3. At the top of the Support Process section, click **New** and fill in these details:

Field	Value

Field	Value
Existing Support Process	Master
Support Process Name	`Product Support`
Description	`Process for logging customer support`

4. Click **Save**.
5. Ensure that **New** is selected in the Default drop-down.
6. Click **Save**.
7. At the top of the Support Process section, click **New** and fill in these details:

Field	Value
Existing Support Process	Master
Support Process Name	`Billing`
Description	`Process for logging billing inquiries`

8. Click **Save**.
9. Ensure that **New** is selected in the Default drop-down.
10. Click **Save**.

Add Picklist Values

Picklist values specific to a situation reduce your users' frustration and improve accuracy over a generic bucket where a catch-all would be otherwise selected. A customer calling with a product issue has different needs than one with a billing issue, and the agent entering the case will need to select different values to handle them.

Add new Case Type picklist values for agents to choose from.

1. From Setup, click the **Object Manager** tab**.**
2. Click **Case**.
3. In the Fields & Relationships list, click **Type**.
4. Click **New** under Case Type Picklist Values and enter the each new picklist values on its own line:
   - `Refund`
   - `Credit Card`
   - `Subscription`
   - `Problem`
   - `Feature Request`
   - `Question`
5. Click **Save**.

Create Record Types

Record types determine the business processes, picklist values, and page layouts that are available to you when creating records. Create Billing and Product Support record types so they can be utilized by your support team.

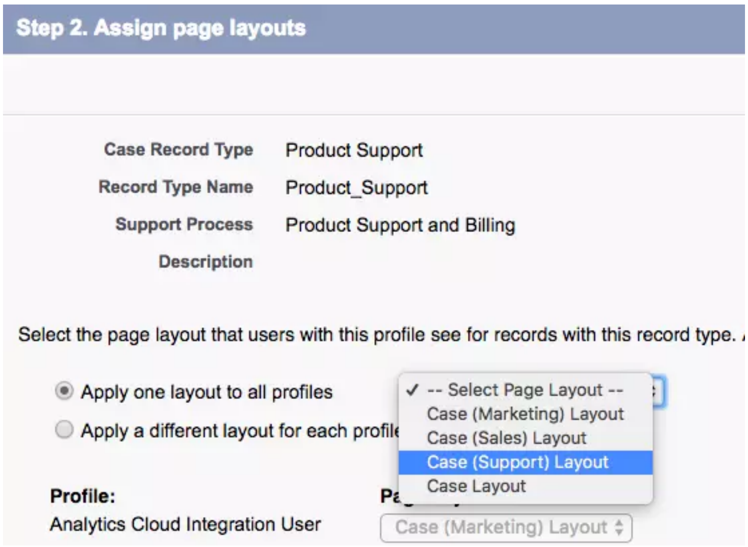
Here's how to create the two new records types:

1. From Setup, click the **Object Manager** tab.
2. Click **Case**.
3. Scroll down to Record Types, then click **New**.
4. Complete the record type details in Step 1:

Field	Value
Existing Record Type	Master
Record Type Label	`Product Support`
Record Type Name	[auto-generated]
Support Process	Product Support
Description	`Use to log customer support issues.`

Field	Value
Active	Select

5. In the Enable for Profile column header, deselect the checkbox.
6. In the Enable for Profile column, select the **Custom: Support Profile** and **System Administrator** checkboxes.
7. Click **Next**.
8. In Step 2, ensure that the **Apply one layout to all profiles** checkbox is selected.
9. From the Select Page Layout list, select **Case (Support) Layout**.



10. Click **Save**.
11. In the Picklists Available for Editing section click **Edit** next to Type. Select and remove **Mechanical**, **Electrical**, **Structural**, **Refund**, **Credit Card**, and **Subscription**.
12. Click **Save**.
13. Select Record Types again and click **New**.
14. Complete the record type details in Step 1:

Field	Value
Existing Record Type	Master
Record Type Label	`Billing`
Record Type Name	[auto-generated]
Support Process	Billing
Description	`Use to report customer billing issues.`
Active	Select

15. In the Enable for Profile column header, deselect the checkbox.
16. In the Enable for Profile column, select the **Custom: Support Profile** and **System Administrator** checkboxes.
17. Click **Next**.
18. In Step 2, ensure that the **Apply one layout to all profiles** checkbox is selected.
19. From the Select Page Layout list, select **Case (Support) Layout**.
20. Click **Save**.
21. In the Picklists Available for Editing section click **Edit** next to Type. Select and remove **Mechanical**, **Electrical**, **Structural**, and **Feature Request**.
22. Click **Save**.

Since you've created a new support processes and record types for Kenya's team, they're now able to create cases for Billing and Product Support that help them more efficiently take care of customer needs. Kenya would like you to show the team leads how to do this task.

Here are the instructions to create a new Product Support case:

1. Click the **App Launcher** and select **Service**.
2. Click **Accounts**, and select **Edge Communications** from the list.
3. Scroll down to the Cases related list and click **New**.
4. From the Record Type of new record picklist select **Product Support**, then click **Next**.
5. Fill in these product support case details:

Field	Value

Field	Value
Product	(choose any product from drop-down)
Type	Electronic
Case Origin	Phone
Case Reason	Performance
Subject	`Laptop Power`
Description	`Laptop does not turn on when the power button is pressed`

6. Click **Save**.

The instructions for creating a new Billing case are very similar:

1. Click **Accounts** and choose **Edge Communications** from the list
2. Scroll down to the Cases related list and click **New**.
3. From the Record Type of new record picklist select **Billing**, then click **Next**.
4. Fill in these billing support case details:

Field	Value
Product	(choose any product from the drop-down)
Type	Electronic
Case Origin	Email
Case Reason	Other
Subject	`CC overpayment not refunded`
Description	`Overpayment for a purchase not refunded to customer`

5. Click **Save**.

Now that you've completed the actions in this step, your support team has what it needs to efficiently address their customers' concerns. Move on to the next step, where we'll add a little customization to daily communications.

Assessment Complete!

+100 points

Customize an Org to Support a New Business Unit
100%
Progress: 100%
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