

# Phase 3: Data Modeling & Relationships

## Step 1: Standard & Custom Objects

Main custom objects were created to store business-critical data for the Customer Support Ticket Management System:

- **Customer\_\_c** – Stores customer information such as name, email, phone number, and account type.
- **Support\_Ticket\_\_c** – Stores all customer support tickets raised in the system.
- **Ticket\_Category\_\_c** – Stores different types of customer issues such as Technical Issue, Billing Issue, and General Query.

### Steps Followed:

1. Navigated to **Setup → Object Manager → Create → Custom Object**
2. Provided **Label, Name**, and enabled **Reports/Search**
3. Saved the object and created a **Tab** for each object

The screenshot shows the Salesforce Setup interface for the 'Customer' custom 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 Limits, Record Types, Related Lookup Filters, and Restriction Rules. The main content area is titled 'Customer' and includes a 'Details' section with the following fields: Description, API Name (Customer\_\_c), Custom (checked), Singular Label (Customer), Plural Label (Customers), Enable Reports (checked), Track Activities (checked), Track Field History (checked), Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). There are 'Edit' and 'Delete' buttons in the top right corner of the details section.

The screenshot shows the Salesforce Setup interface for the 'Support Ticket' custom 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 Limits, Record Types, Related Lookup Filters, and Restriction Rules. The main content area is titled 'Support Ticket' and includes a 'Details' section with the following fields: Description, API Name (Support\_Ticket\_\_c), Custom (checked), Singular Label (Support Ticket), Plural Label (Support Tickets), Enable Reports (checked), Track Activities (checked), Track Field History (checked), Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). There are 'Edit' and 'Delete' buttons in the top right corner of the details section.

Setup

Home

Object Manager

Search Setup

Star

Grid

Refresh

Help

Settings

Notifications

User

SETUP > OBJECT MANAGER

Ticket Category

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

Details

Description

API Name

Ticket\_Category\_\_c

Custom

✓

Singular Label

Ticket Category

Plural Label

Ticket Categories

Enable Reports

✓

Track Activities

✓

Track Field History

✓

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Edit

Delete

Step 2: Fields

Customer\_\_c

Field Label	Data Type	Notes
Name	Text	Standard Name field
Email	Email	Valid customer email
Phone	Phone	Customer contact number
Account Type	Picklist	Individual, Business

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SETUP > OBJECT MANAGER

Customer

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

Fields & Relationships

8 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields


Field Dependencies

Set History Tracking







FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account Type	Account_Type__c	Picklist		
Created By	CreatedById	Lookup(User)		
Customer Name	Name	Text(80)		✓
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Text(20)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone_c	Phone		

Support\_Ticket\_\_c

Field Label	Data Type	Notes
Customer	Lookup(Employee__c)	Links ticket to customer
Ticket Category	Lookup (Ticket_Category__c)	Issue classification
Priority	Picklist	Low, Medium, High
Status	Picklist	New, In Progress, Resolved, Closed
Description	Long Text Area	Issue details



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER  
Support Ticket

Details

Fields & Relationships  
8 Items, Sorted by Field Label

Quick Find


NewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer	Customer__c	Lookup(Customer)		✓
Description Field	Description_Field__c	Long Text Area(260)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Priority	Priority__c	Picklist		
Status	Status__c	Picklist		







Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Restriction Rules

Ticket\_Category\_\_c

Field Label	Data Type	Notes
Category Name	Text	Technical, Billing, General
Description	Text Area	Category explanation



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER  
Ticket Category

Details

Fields & Relationships  
6 Items, Sorted by Field Label

Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Category Name	Category_Name__c	Text(80)		
Created By	CreatedById	Lookup(User)		
Description	Description__c	Long Text Area(32768)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Ticket Category Name	Name	Text(80)		✓

Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters

## Step 4: Page Layouts

Each custom object is configured with page layouts to display relevant fields based on user roles such as support agents and managers. Page layouts help organize information and improve usability.

Examples:

### Customer\_\_c Layout:

- Name
- Email
- Phone
- Account Type

### Support\_Ticket\_\_c Layout:

- Customer
- Ticket Category
- Priority
- Status
- Description
- Created Date

### Ticket\_Category\_\_c Layout:

- Category Name
- Description

## Step 5: Compact Layouts

Compact layouts provide a summarized view of important fields in hover cards and mobile views, enabling quick access to key information.

Examples:

### Customer\_\_c Compact Layout:

- Name
- Email
- Phone

### Support\_Ticket\_\_c Compact Layout:

- Customer

- Priority
- Status

## **Step 6: Schema Builder**

- Schema Builder is used to visually represent all custom objects and their relationships within the system. It displays object relationships, field types, and lookup connections in a single view.
- This helps stakeholders and developers understand the data structure, relationships, and overall data flow of the Customer Support Ticket Management System.

