

Phase 3: **Data Modeling & Relationships.**

We will do this in two main steps:

1. Create the Custom Objects.
 2. Add Custom Fields to those Objects.
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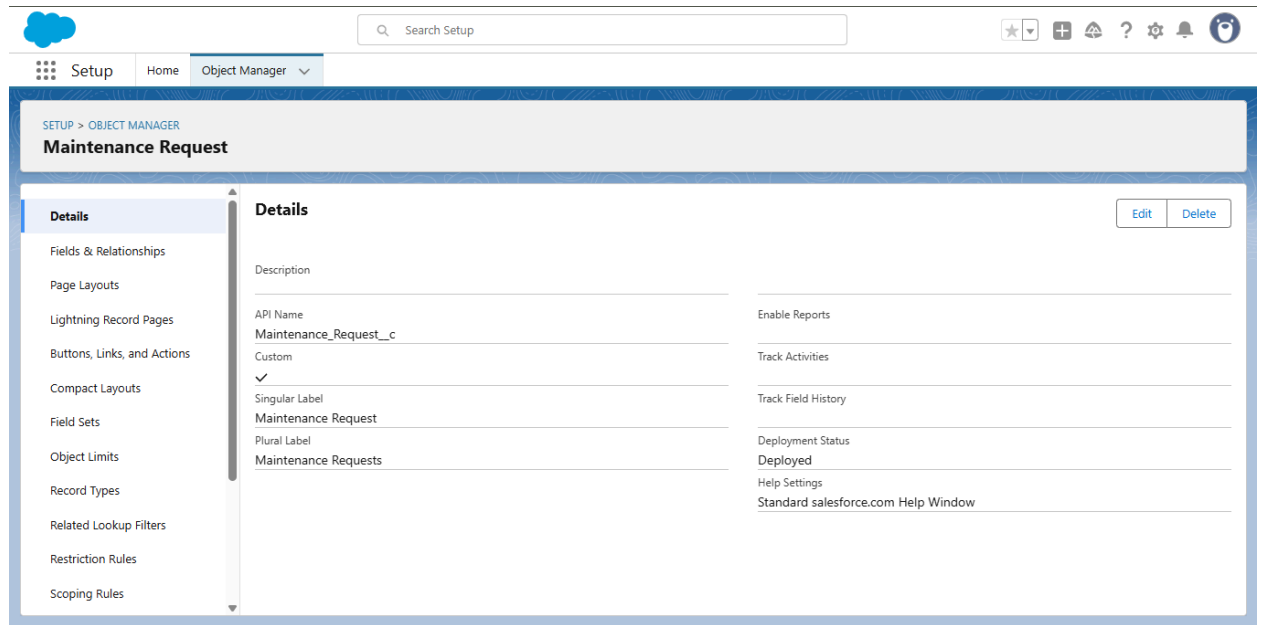
Step 1: Create the Custom Objects.

A. Create the "Property Unit" Object

- **Purpose:** This object will represent each individual apartment, house, or unit that can have a maintenance request.
- **Navigation:**
 1. Go to **Setup**.
 2. Click on the **Object Manager** tab.
 3. In the top-right corner, click **Create > Custom Object**.
- **Instructions:**
 - **Label:** Property Unit
 - **Plural Label:** Property Units
 - **Object Name:** Property_Unit
 - For **Record Name**, enter Unit Number and change the Data Type to **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 house icon) and click **Next**, then **Next**, then **Save**.

B. Create the "Maintenance Request" Object

- **Purpose:** This object will track every single maintenance issue that is submitted.
- **Navigation:** Go back to **Object Manager > Create > Custom Object**.
- **Instructions:**
 - **Label:** Maintenance Request
 - **Plural Label:** Maintenance Requests
 - **Object Name:** Maintenance_Request
 - For **Record Name**, enter Request ID and change the Data Type to **Auto-Number**.
 - For **Display Format**, enter REQ-{0000}.
 - 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 wrench icon) and click **Next**, **Next**, **Save**.



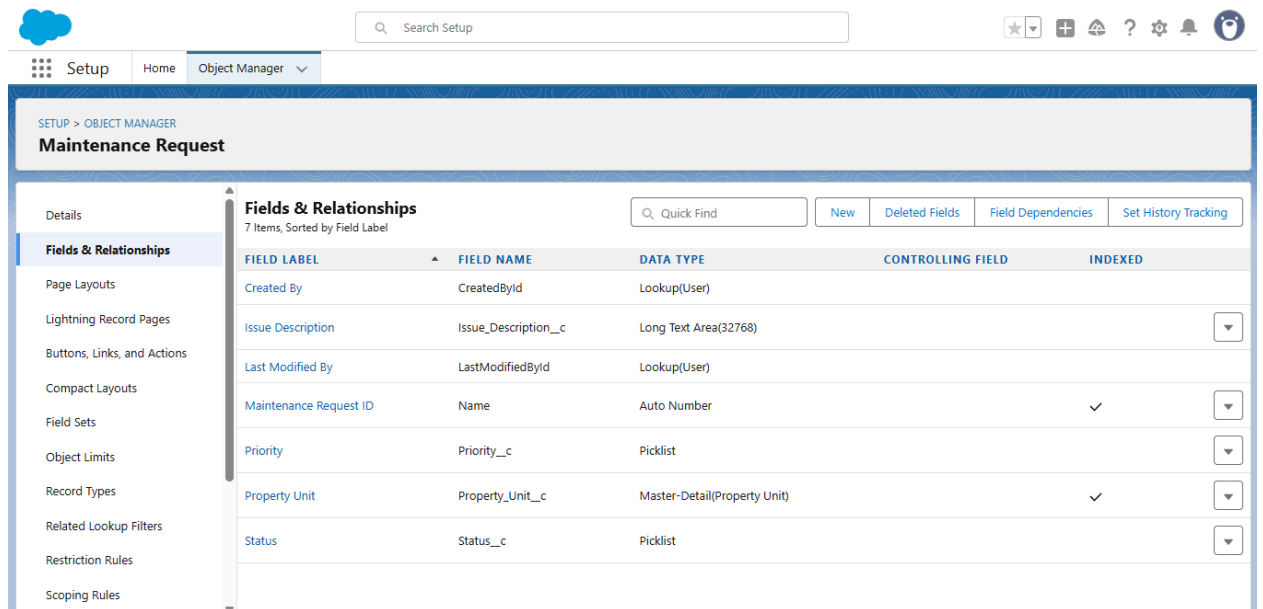
Step 2: Add Custom Fields & Relationships

Now that our objects exist, we need to add fields to them to store the details.

A. Add Fields to "Maintenance Request"

- **Navigation:** Go to **Object Manager > Maintenance Request > Fields & Relationships > New**.
- 1. **Create the Relationship to Property Unit:**
 - **Data Type:** Select **Master-Detail Relationship**, then click Next.
 - **Related to:** Select **Property Unit**, then click Next.
 - **Field Label:** Property Unit.
 - Click **Next, Next, Next**, and **Save**.
 - **Why:** This is the most important field. It creates a required link, ensuring no maintenance request can exist without being tied to a specific property unit.
- 2. **Create the Issue Description Field:**
 - **Data Type:** Select **Long Text Area**, then click Next.
 - **Field Label:** Issue Description.
 - Click **Next, Next, Save**.
- 3. **Create the Priority Field:**
 - **Data Type:** Select **Picklist**, then click Next.
 - **Field Label:** Priority.
 - Select "Enter values, with each value separated by a new line".
 - Enter the values:
 - High
 - Medium
 - Low

- Click **Next, Next, Save.**
- 4. **Create the Status Field:**
 - **Data Type:** Select **Picklist**, then click Next.
 - **Field Label:** Status.
 - Enter the values:
 - New
 - In Progress
 - Awaiting Approval
 - Completed
 - Click **Next, Next, Save.**



SETUP > OBJECT MANAGER

Maintenance Request

Details

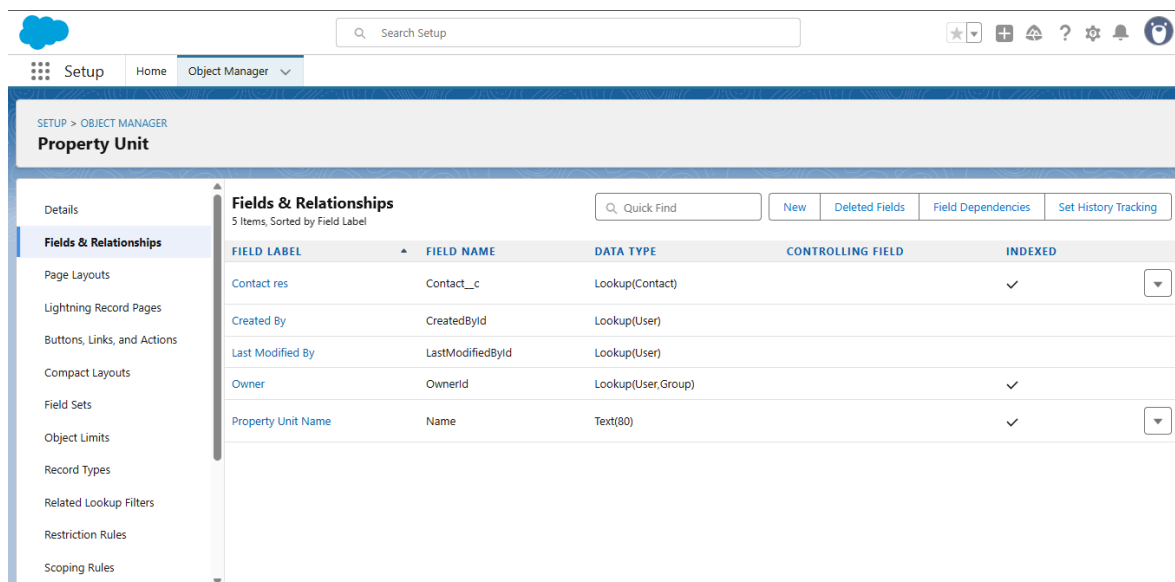
Fields & Relationships
7 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Issue Description	Issue_Description__c	Long Text Area(32768)		
Last Modified By	LastModifiedById	Lookup(User)		
Maintenance Request ID	Name	Auto Number		✓
Priority	Priority__c	Picklist		
Property Unit	Property_Unit__c	Master-Detail(Property Unit)		✓
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
Scoping Rules

B. Add a Field to "Property Unit"



SETUP > OBJECT MANAGER

Property Unit

Details

Fields & Relationships
5 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
Contact res	Contact__c	Lookup(Contact)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Property Unit Name	Name	Text(80)		✓

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