

Phase 2: Org Setup & Configuration

1. Salesforce Editions

- **Action:** Use Salesforce **Developer Edition** with **Service Cloud + Digital Engagement Add-on**.
- **Outcome:** Provides core Service Cloud features (Case Management, Omni-Channel) and access to WhatsApp, Chat, and Social integrations.

2. Company Profile Setup

- **Action:** Configure company information → support email address, default currency, timezone = IST, fiscal start = April.
- **Outcome:** Ensures all customer interactions (cases, SLAs, reports) are tracked in the right **business context**.

3. Business Hours & Holidays

- **Action:** Define business hours (Mon–Sat, 9 AM–6 PM) and add holidays (e.g., national holidays, weekends).
- **Outcome:** Case escalation timers (SLAs) respect working hours and avoid firing during holidays.

4. Fiscal Year Settings

- **Action:** Enable **custom fiscal year** (April–March).
- **Outcome:** Reports and dashboards align with company's real reporting cycle.

5. User Setup & Licenses

- **Action:** Create users for different roles:
 - **Support Agent (Service Cloud license)** → Handles incoming queries.
 - **Support Manager (Service Cloud + Reporting access)** → Monitors cases and dashboards.
 - **Integration User (API-enabled)** → Connects WhatsApp, Chatbot, Social Media.
 - **Admin/Developer** → Manages configuration and custom development.
- **Outcome:** Proper licensing ensures every stakeholder has the right tools.

6. Profiles

- **Action:**
 - Create **Agent Profile** → Access to Cases, Knowledge, but restricted to their records.
 - Create **Manager Profile** → Full visibility on Cases, Reports, Dashboards.
- **Outcome:** Agents focus on resolving cases; managers get oversight without needing Admin access.

7. Roles

- **Action:** Define hierarchy:
 - Agent → Team Lead → Support Manager → Admin.
- **Outcome:** Case visibility flows upward → managers automatically see their team's cases.

8. Permission Sets

- **Action:**
 - "Sentiment Dashboard Access" → Assigned to managers.

- “Integration Access” → Assigned to developers handling WhatsApp/Chatbot setup.
- **Outcome:** Flexible security → extra access given without modifying base profiles.

9. Org-Wide Defaults (OWD)

- **Action:**
 - Cases = **Private** → Only owner/assigned agent can see.
 - Knowledge Articles = **Public Read Only** → All agents can access solutions.
- **Outcome:** Data confidentiality maintained, but knowledge base remains shareable.

10. Sharing Rules

- **Action:**
 - Auto-share **High Priority Cases** with Support Managers.
 - Share **WhatsApp Cases** with Social Media team.
- **Outcome:** Critical cases are escalated automatically to the right people.

11. Login Access Policies

- **Action:**
 - Restrict login by **IP Range** (e.g., company office IPs only).
 - Set **session timeout = 30 minutes idle**.
- **Outcome:** Increases data security and prevents unauthorized access.

12. Developer Org Setup

- **Action:** Register for a **Salesforce Developer Org** (free).
 - Install required packages (Twilio, Digital Engagement, Einstein Bots).
 - Enable Developer Hub & Scratch Orgs.
- **Outcome:** Ready-to-use environment for building and testing integrations.

13. Sandbox Usage

- **Action:**
 - **Developer Sandbox** → For coding LWCs, Apex triggers.
 - **Partial Copy Sandbox** → For testing with sample customer data.
- **Outcome:** Clear separation of development and testing ensures stable deployment.

14. Deployment Basics

- **Action:**
 - Use **Change Sets** (for Admin configs) → Profiles, OWD, Workflows.
 - Use **SFDX CLI + VS Code** (for Developer work) → LWCs, Apex classes.
- **Outcome:** Structured deployment process → reduces errors when moving to Production or Demo Org.