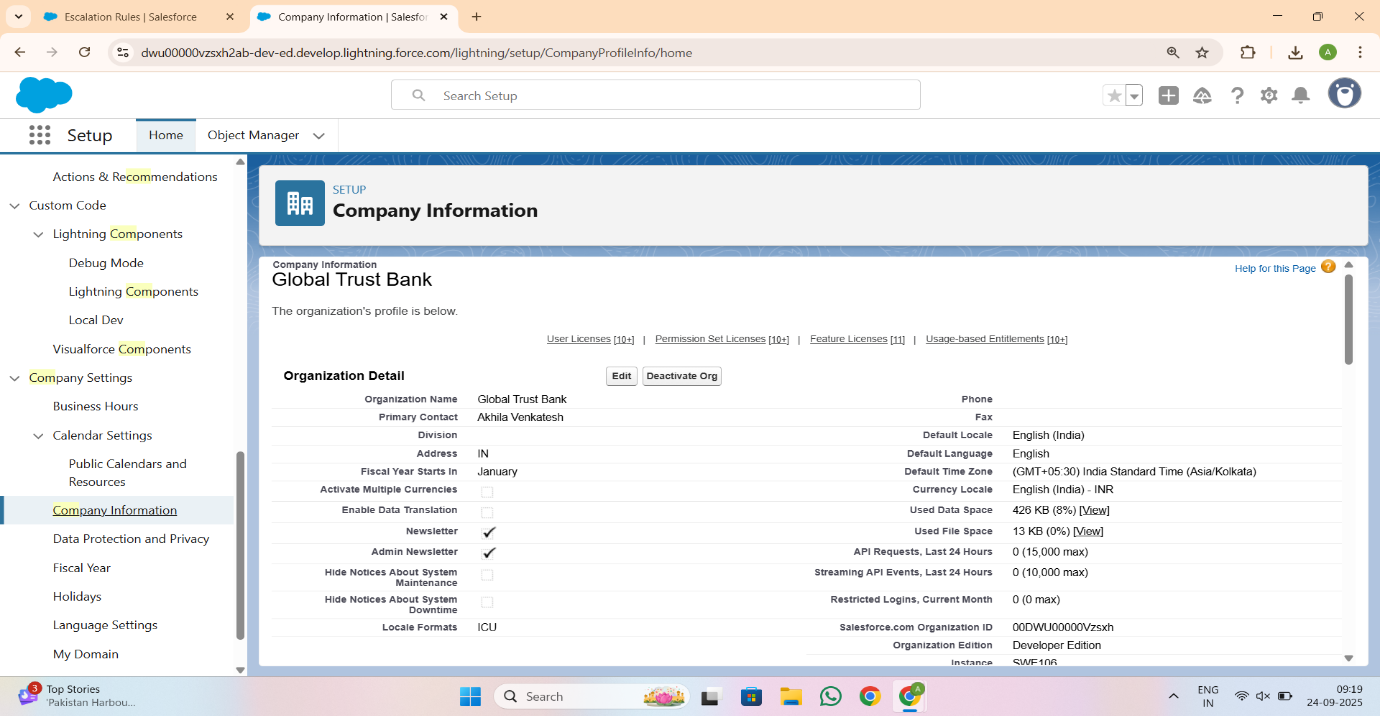
**PHASE 2: ORG SETUP & CONFIGURATION**

**Objective:**

The objective of this phase was to establish the foundational structure of the Salesforce org. This involved configuring company-wide settings, creating the user hierarchy, and setting the baseline security model to prepare the environment for the banking service application.

**Completed Actions:**

* **Salesforce Environment:** A new, clean Salesforce **Developer Edition org** was set up to serve as the dedicated development and testing environment for the project.
* **Company Profile & Org Settings:**
  + The **company profile** was configured with the details of the fictional "Global Trust Bank," including the local time zone and currency.
  + The bank's operational schedule was defined by creating **Business Hours** and adding relevant public holidays.
  + The **Standard Fiscal Year** was reviewed and confirmed as appropriate for the project's reporting needs.
* **User Structure & Management:**
  + A **Role Hierarchy** was created with a "Bank Manager" role positioned above a "Customer Service Agent" role to ensure proper data visibility.
  + Custom **Profiles** for "Bank Manager" and "Customer Service Agent" were created to define their specific permissions.
  + Sample **Users** were created for the manager and agent roles.
* **Security & Sharing Model:**
  + The Organization-Wide Default (**OWD**) for the **Case** object was set to **Private**. This is the most restrictive setting and ensures that, by default, agents can only see their own cases.
  + **Sharing Rules** and **Permission Sets** were considered as part of the security model. It was determined that for the initial phase of the project, the combination of Profiles, Roles, and OWD was sufficient, with these tools available for future requirements.
  + **Login Access Policies** were reviewed to understand the available security controls for user login management.

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