Phase 2: Org Setup & Configuration - Step-by-Step Guide

Step 1: Salesforce Editions Selection

What to do: Choose the right Salesforce edition for your Customer Success & Support Management CRM project

Steps:

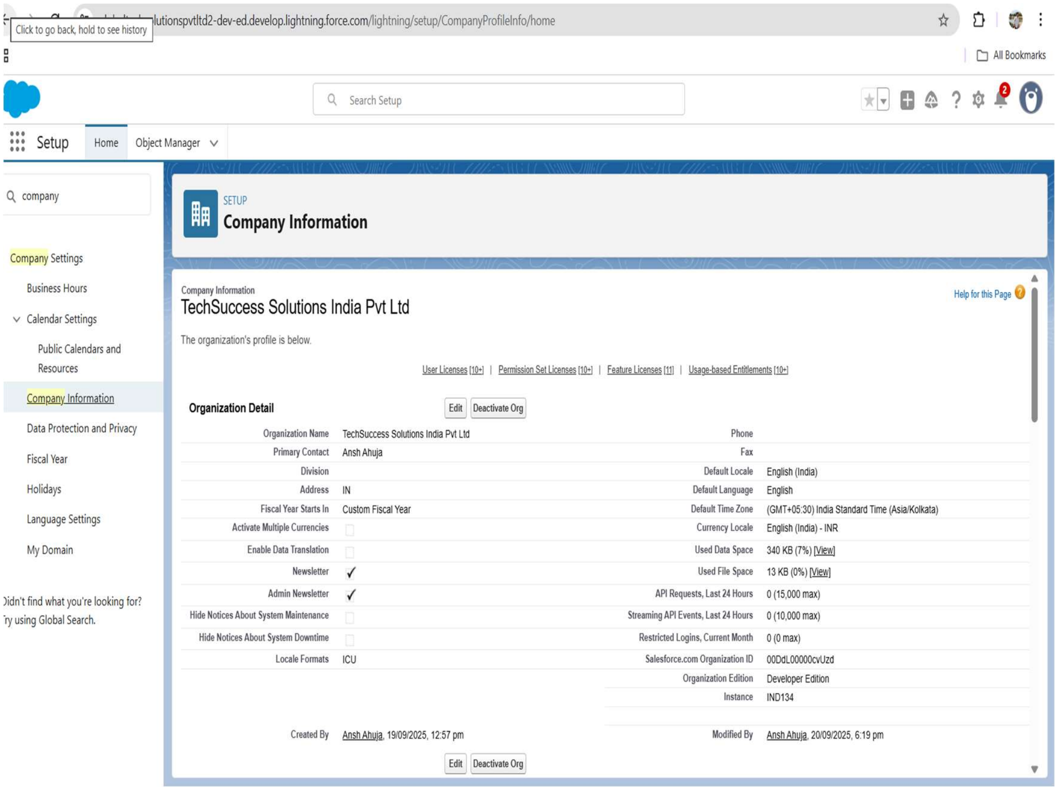
1. Access your org (since this is a capstone project, you'll likely use a Developer Edition)
2. Go to **Setup** → **Company Information** to verify your current edition.
3. Note: For this project, **Developer Edition** is sufficient as it includes all necessary features for custom objects, workflows, and integrations.

Step 2: Company Profile Setup

What to do: Configure basic company information and settings

Steps:

1. Navigate to **Setup** → In Quick Find box, type **"Company Information"**
2. Click **Company Information**
3. Fill in the following details:
    - **Company Name:** "TechSuccess Solutions India Pvt Ltd."
    - **Primary Contact:** Ansh Ahuja.
    - **Company Address:** Madya Pradesh India,482001
    - **Phone:** NILL
    - **Fax:** NILL
    - **Website:** NILL
4. Set **Default Language:** English (India)
5. Set **Default Time Zone:** Indian Standard time zone(Asia/Kolkata)
6. Set **Default Currency:** English (India) - INR
7. Click **Save**



Step 3: Business Hours & Holidays

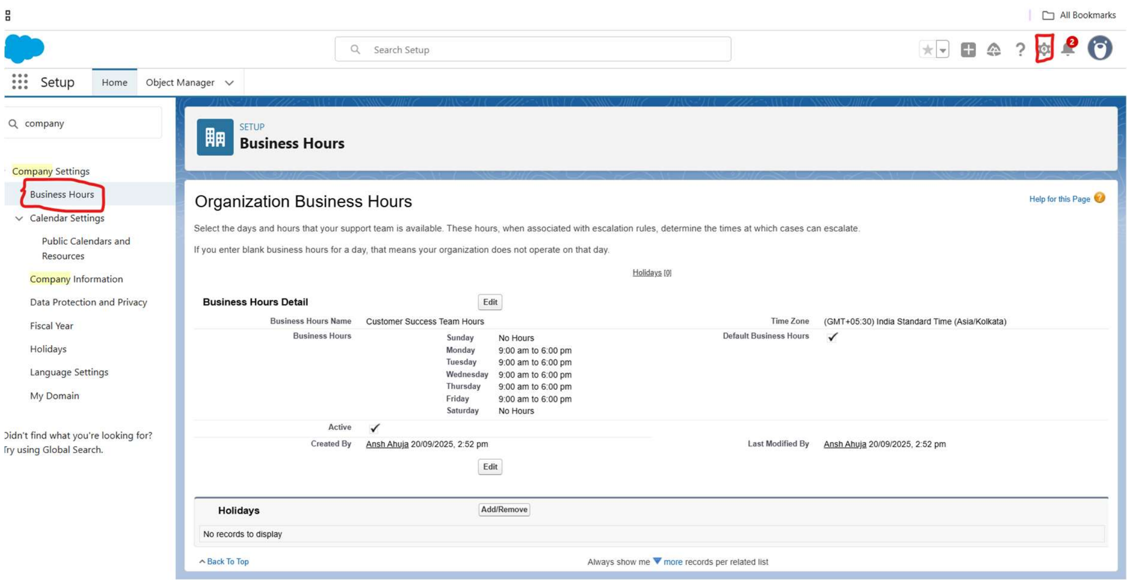
What to do: Configure when your customer success team is available

Steps for Business Hours:

1. Go to **Setup** → Quick Find → type **"Business Hours"**
2. Click **Business Hours**
3. Click **New Business Hours**
4. Enter details:
   - **Name:** "Customer Success Team Hours"
   - **Description:** "Working hours for customer success and support teams"
   - **Time Zone:** Select your time zone
   - **Active:** Check the box
5. Set working hours (for SaaS company):
   - **Monday:** 9:00 AM to 6:00 PM ✓
   - **Tuesday:** 8:00 AM to 6:00 PM ✓
   - **Wednesday:** 9:00 AM to 6:00 PM ✓

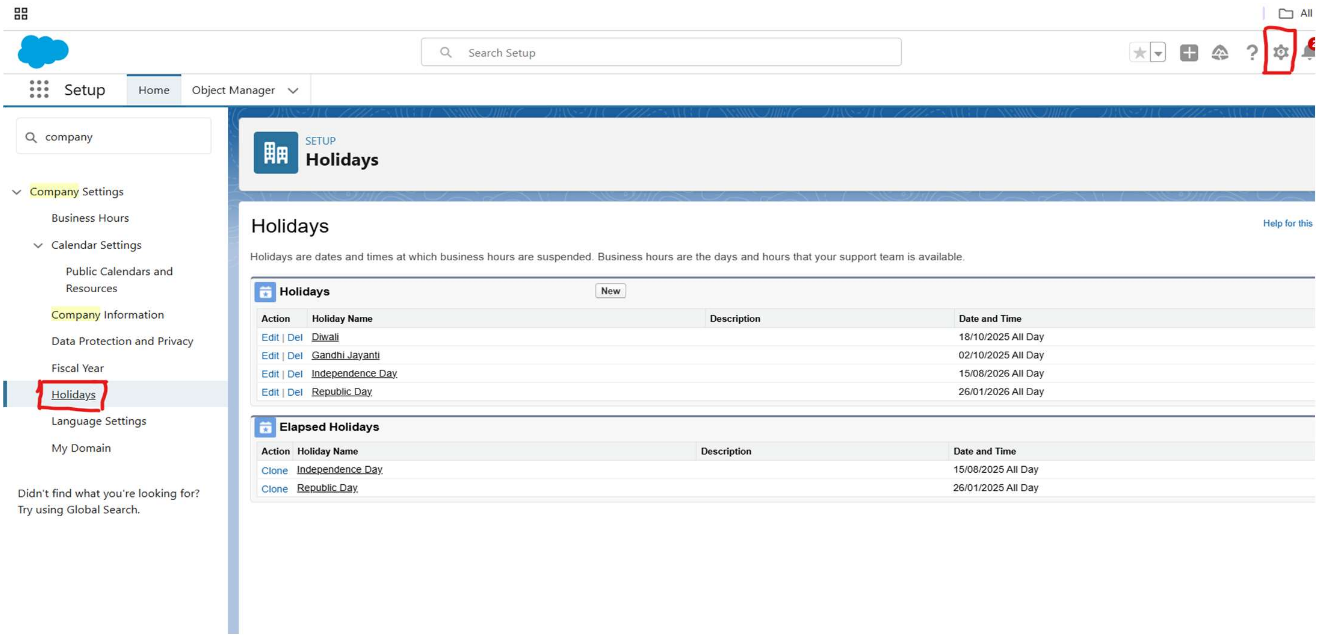
- **Thursday:** 9:00 AM to 6:00 PM ✓
- **Friday:** 9:00 AM to 6:00 PM ✓
- **Saturday:** Leave blank (non-working day)
- **Sunday:** Leave blank (non-working day)

6. Click **Save**



Steps for Holidays:

1. Stay in **Business Hours** section
2. Click **New Holiday**
3. Add holidays (examples):
   - **Name:** "Republic Day"
   - **Description:** "January 26th holiday"
   - **Date:** January 26, 2025
   - **All Day Event:** Check this box
   - **Business Hours:** Select "Customer Success Team Hours"
4. Repeat for other holidays (Independence Day, Gandhi Jayanti, Diwali, etc.)
5. Click **Save** for each holiday



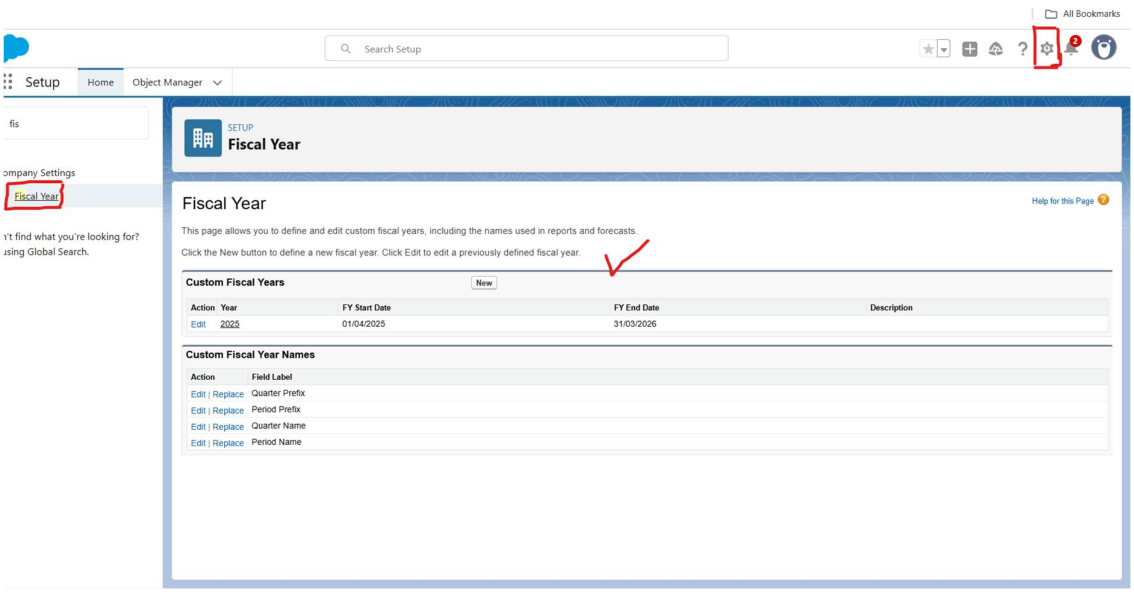
Step 4: Fiscal Year Settings

What to do: Set up your company's financial calendar

Steps:

1. Go to **Setup** → Quick Find → type **"Fiscal Year"**
2. Click **Fiscal Year**
3. Choose **Custom Fiscal Year**
4. Set **Fiscal Year Start Month:** April (or your company's fiscal year start)
5. **Fiscal Year Name Based On:** Starting Month
6. Click **Save**

⚠️ **Important Note:** Once you enable Custom Fiscal Year, you cannot disable it



Step 5: User Setup & Licenses

What to do: Create users for your Customer Success CRM

Steps:

1. Go to **Setup** → **Users** → **Users**
2. Click **New User**
3. Create the following users (examples):

User 1 - Customer Success Manager:

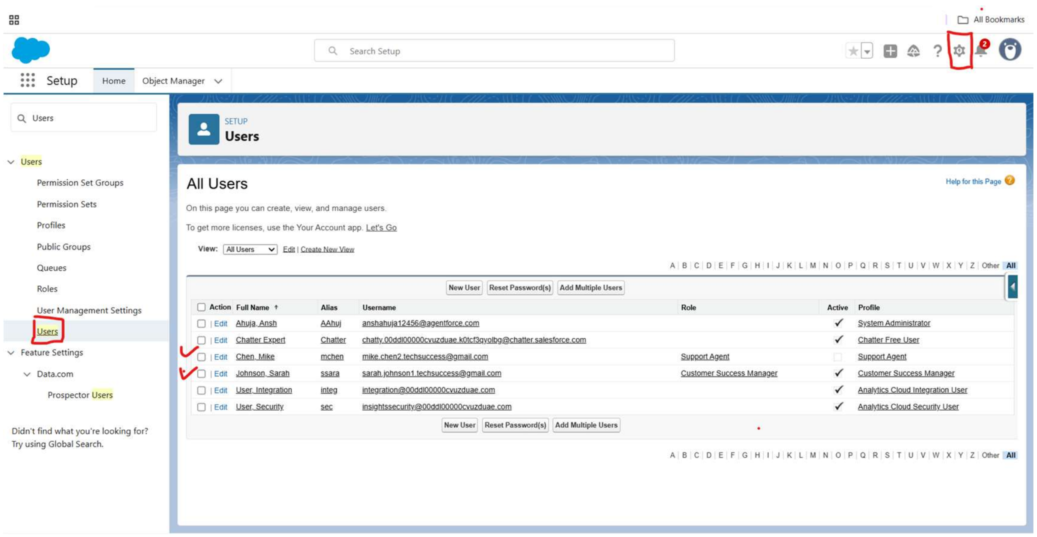
- **First Name:** Sarah
- **Last Name:** Johnson
- **Alias:** SJohn
- **Email:** sarah.johnson@techsuccess.com
- **Username:** sarah.johnson@techsuccess-dev.com
- **Nickname:** Sarah
- **Role:** (We'll set this in Step 7)
- **User License:** Salesforce Platform
- **Profile:** (We'll set this in Step 6)

User 2 - Support Agent:

- **First Name:** Mike

- **Last Name:** Chen
- **Alias:** MChen
- **Email:** mike.chen@techsuccess.com
- **Username:** mike.chen@techsuccess-dev.com
- **User License:** Salesforce Platform
- **Profile:** (We'll set this in Step 6)

4. Click **Save** for each user



Step 6: Profiles

What to do: Create and configure user profiles

Steps:

1. Go to **Setup** → Quick Find → type **"Profiles"**
2. Click **Profiles**
3. Click **New Profile**

Create Customer Success Manager Profile:

1. **Clone From:** Standard User
2. **Profile Name:** "Customer Success Manager"
3. Click **Save**
4. Edit the profile settings:

- **Administrative Permissions:** Give "View Setup and Configuration"
- **General User Permissions:** Enable "API Enabled", "Edit Tasks", "Manage Cases"
- **Standard Object Permissions:** Set Create, Read, Edit, Delete for Accounts, Contacts, Cases, Opportunities

5. Click **Save**.

Create Support Agent Profile:

1. **Clone From:** Standard User
2. **Profile Name:** "Support Agent"
3. Click **Save**
4. Edit permissions:
    - **Standard Object Permissions:** Focus on Cases (Create, Read, Edit), Accounts and Contacts (Read only)
5. Click **Save.**

<u>Step 7: Roles</u>

What to do: Set up role hierarchy

Steps:

1. Go to **Setup** → Quick Find → type **"Roles"**
2. Click **Roles**
3. Create role hierarchy:

Top Level:

- **Role Name:** "VP Customer Success"
- **Role Name as Displayed:** "VP Customer Success"

Second Level (under VP):

- **Role Name:** "Customer Success Manager"
- **This role reports to:** VP Customer Success

Third Level (under CSM):

- **Role Name:** "Support Agent"
- **This role reports to:** Customer Success Manager

4. Click **Save** for each roles.

Step 8: Permission Sets

What to do: Create flexible permission sets for additional access

Steps:

1. Go to **Setup** → Quick Find → type **"Permission Sets"**
2. Click **Permission Sets**
3. Click **New**

Create Integration User Permission Set:

1. **Label:** "API Integration Access"
2. **API Name:** "API_Integration_Access"
3. **Description:** "Permissions for integrating with external systems"
4. Click **Save**
5. Click **System Permissions**
6. Click **Edit**
7. Enable:
   - **API Enabled** ✓
   - **Apex REST Services** ✓
   - **View Setup and Configuration** ✓
8. Click **Save**

Create Advanced Reporting Permission Set:

1. **Label:** "Advanced Analytics Access"
2. **API Name:** "Advanced_Analytics_Access"
3. Enable permissions for:
   - **Run Reports** ✓
   - **Create and Customize Reports** ✓
   - **Create and Customize Dashboards** ✓
4. Click **Save**

Step 9: OWD (Organization-Wide Defaults)

What to do: Set default sharing settings for objects

Steps:

1. Go to **Setup** → Quick Find → type **"Sharing Settings"**
2. Click **Sharing Settings**
3. In **Organization-Wide Defaults** section, click **Edit**
4. Set the following defaults for your Customer Success CRM:
    - **Account:** Public Read/Write (customers need visibility across teams)
    - **Contact:** Controlled by Parent (follows Account sharing)
    - **Case:** Private (support cases should be restricted)
    - **Opportunity:** Private (sales opportunities need restricted access)
    - **Lead:** Private (leads should be assigned to specific users)
    - **Custom Objects:** Private (we'll create custom objects later)
5. Click **Save.**

Step 10: Sharing Rules

What to do: Create exceptions to OWD for specific groups

Steps:

1. Stay in **Sharing Settings** page
2. Scroll down to **Case Sharing Rules**
3. Click **New** in Case Sharing Rules section
4. Create **High Priority Case Sharing Rule:**
    - **Label:** "High Priority to All CS Team"
    - **Rule Name:** "High_Priority_to_All_CS_Team"
    - **Description:** "Share high priority cases with entire customer success team"
    - **Rule Type:** Based on criteria
    - **Criteria:** Priority equals "High"
    - **Share with:** Public Group (create "Customer Success Team" group first)
    - **Access Level:** Read/Write

5. Click **Save**

Step 11: Login Access Policies

What to do: Set up IP restrictions and security policies

Steps for Profile IP Restrictions:

1. Go to **Setup** → **Profiles**.
2. Select **Customer Success Manager** profile
3. Scroll to **Login IP Ranges** section
4. Click **New**
5. Set IP ranges (example):
   - **Start IP Address:** 49.36.27.1
   - **End IP Address:** 49.36.27.255
   - **Description:** "Office Network Range"
6. Click **Save**.

Steps for Organization-Level Network Access:

1. Go to **Setup** → Quick Find → type **"Network Access"**
2. Click **Network Access**
3. Click **New**
4. Add trusted IP ranges:
   - **Start IP Address:** 49.36.27.1
   - **End IP Address:** 49.36.27.255
5. Click **Save**

Step 12: Dev Org Setup

What to do: Prepare development environment

Steps:

1. Since I am using Developer Edition, your current org IS your dev org
2. Go to **Setup** → **Deploy** → **Deployment Settings**.
3. Enable **Allow Inbound Changes** (this allows you to receive deployments).
4. Click **Save**.

Step 13: Sandbox Usage

For my project: As I have use the developer edition org so I did not use the sandbox usage.

Step 14: Deployment Basics

What to do: Set up deployment connections

Steps:

1. Go to **Setup** → **Deployment Settings**
2. Note the **Deployment Connection** settings
3. For future deployments, you would:
   - Create **Outbound Change Sets** to deploy TO other orgs
   - Accept **Inbound Change Sets** FROM other orgs