

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**

The screenshot shows the Salesforce Setup interface for managing company information. The main title is "Company Information" under the "SETUP" tab. The organization name is listed as "TechSuccess Solutions India Pvt Ltd". The left sidebar includes sections for Company Settings, Business Hours, Calendar Settings, Public Calendars and Resources, and Company Information (which is currently selected). The main content area displays various organization details such as Organization Name, Primary Contact, Division, Address, Fiscal Year Starts In, Activate Multiple Currencies, Enable Data Translation, Newsletter, Admin Newsletter, Hide Notices About System Maintenance, Hide Notices About System Downtime, Locale Formats, Phone, Fax, Default Locale, Default Language, Default Time Zone, Currency Locale, Used Data Space, Used File Space, API Requests, Streaming API Events, Restricted Logins, Current Month, Salesforce.com Organization ID, Organization Edition, and Instance. At the bottom, it shows the creation and modification details by "Ansh Ahuja" on 19/09/2025 at 12:57 pm.

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**

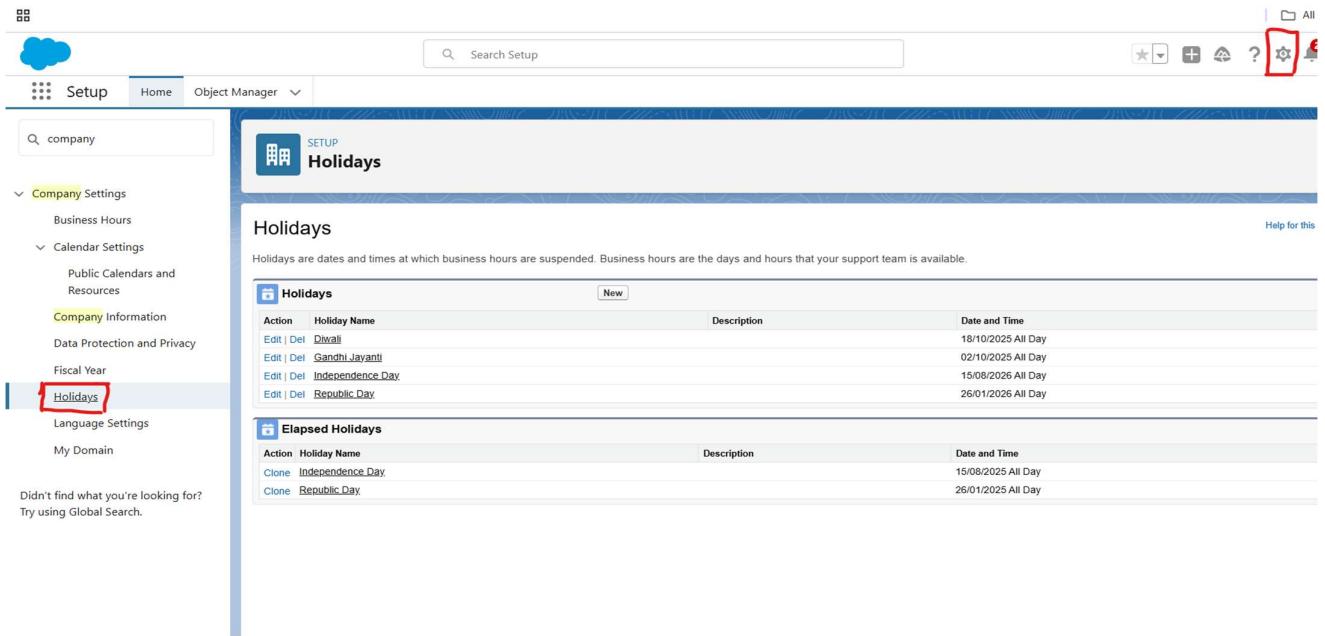
The screenshot shows the Salesforce Setup interface for 'Business Hours'. On the left sidebar, under 'Company Settings', 'Business Hours' is selected and highlighted with a red box. The main content area displays the 'Organization Business Hours' configuration. It lists the days of the week and their respective business hours. The table shows:

Business Hours Name	Customer Success Team Hours	Time Zone																
Business Hours	<table border="1"> <thead> <tr> <th>Day</th> <th>Hours</th> </tr> </thead> <tbody> <tr><td>Sunday</td><td>No Hours</td></tr> <tr><td>Monday</td><td>9:00 am to 6:00 pm</td></tr> <tr><td>Tuesday</td><td>9:00 am to 6:00 pm</td></tr> <tr><td>Wednesday</td><td>9:00 am to 6:00 pm</td></tr> <tr><td>Thursday</td><td>9:00 am to 6:00 pm</td></tr> <tr><td>Friday</td><td>9:00 am to 6:00 pm</td></tr> <tr><td>Saturday</td><td>No Hours</td></tr> </tbody> </table>	Day	Hours	Sunday	No Hours	Monday	9:00 am to 6:00 pm	Tuesday	9:00 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	No Hours	(GMT+05:30) India Standard Time (Asia/Kolkata)
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Below the table, it says 'Active' with a checked checkbox, 'Created By' (Ansh Ahuja), 'Created Date' (20/09/2025, 2:52 pm), and 'Last Modified By' (Ansh Ahuja), 'Last Modified Date' (20/09/2025, 2:52 pm). There is also an 'Edit' button.

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



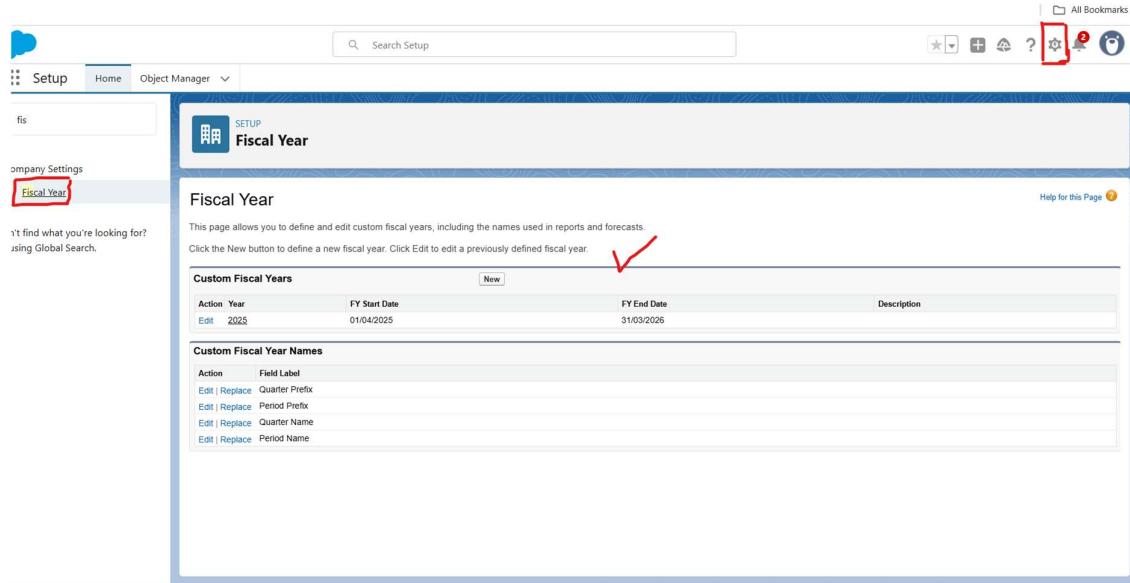
Step 4: Fiscal Year Settings

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

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	AAbul	AAbul	annabhuja12456@apexforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Chatty	Chatty	chatty000000000cvvzuae.40f639ydb@chatty.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input checked="" type="checkbox"/>	Chen_Mike	mchen	mike.chen2@techsuccess.com	Support Agent	<input type="checkbox"/>	Support Agent
<input checked="" type="checkbox"/>	ssara	ssara	sarah.johnson1@techsuccess@gmail.com	Customer Success Manager	<input checked="" type="checkbox"/>	Customer Success Manager
<input type="checkbox"/>	integ	integ	integration000000000cvvzuae.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@009300000cvvzuae.com		<input checked="" type="checkbox"/>	Analytics Cloud Security 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**.

Step 7: Roles

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