

Phase 2: Org Setup & Configuration

Project: Customer Support Ticketing System

Step 1- Sign up: Sign up for your developer edition.

- Created a Salesforce Developer Org using <https://developer.salesforce.com/signup>.
- Verified the account, set the password, and gained access to the Salesforce Setup page.

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Sign up for your Developer Edition.

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- ✓ Ground Agentforce with structured and unstructured data
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A free Salesforce Platform environment with Agentforce and Data Cloud

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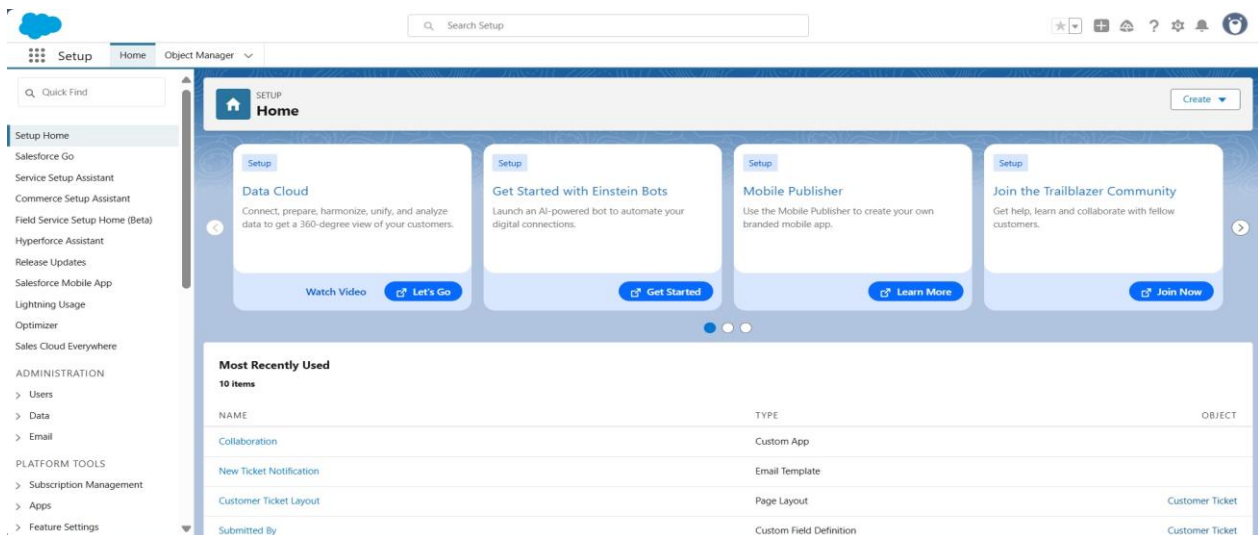
Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

☒ I agree to the Main Services Agreement - Developer Services and Salesforce Program Agreement. I acknowledge, as described in the Developer Documentation: (1) the Developer Edition includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

We value your privacy. To learn more, visit our Privacy Statement.

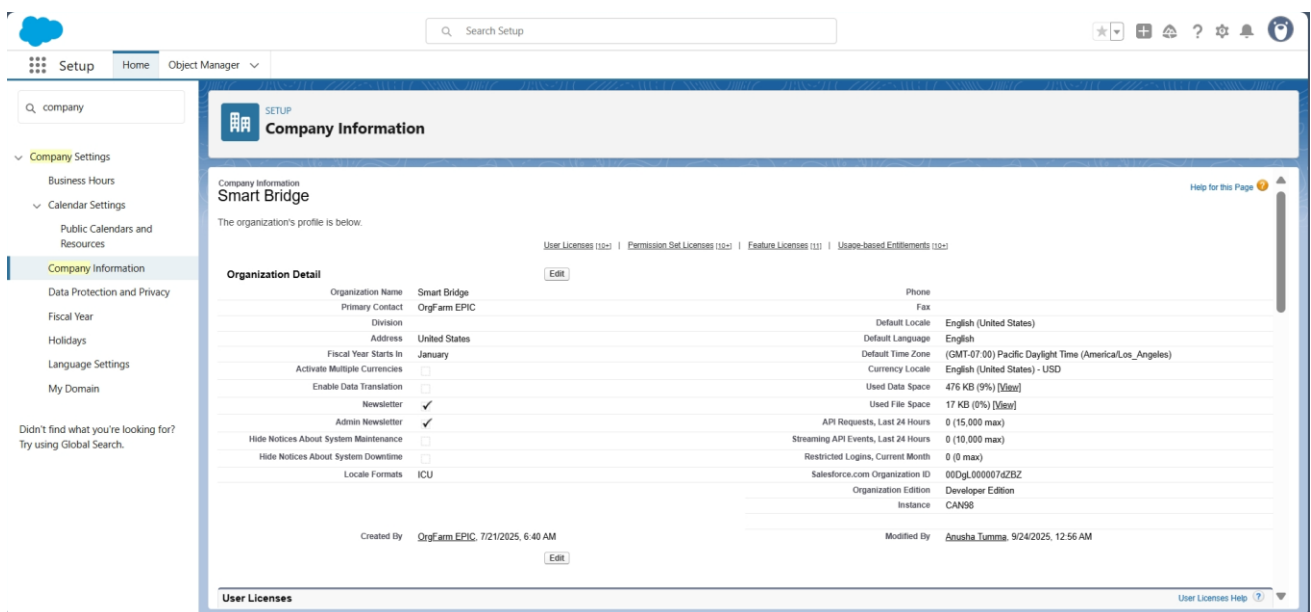
Step 2: Open Setup

1. Login to Salesforce Lightning.
2. Click the **Gear icon** in the top-right → select **Setup**.



Step 3: Update Company Information

1. In Setup, use **Quick Find** → type **Company Information** → open it.
2. Click **Edit**.
3. Update:
 - **Organization Name:** Smart Bridge
 - **Default Time Zone:** (09:00 – 18:00)
4. Click **Save**.



Step 4: Set Business Hours

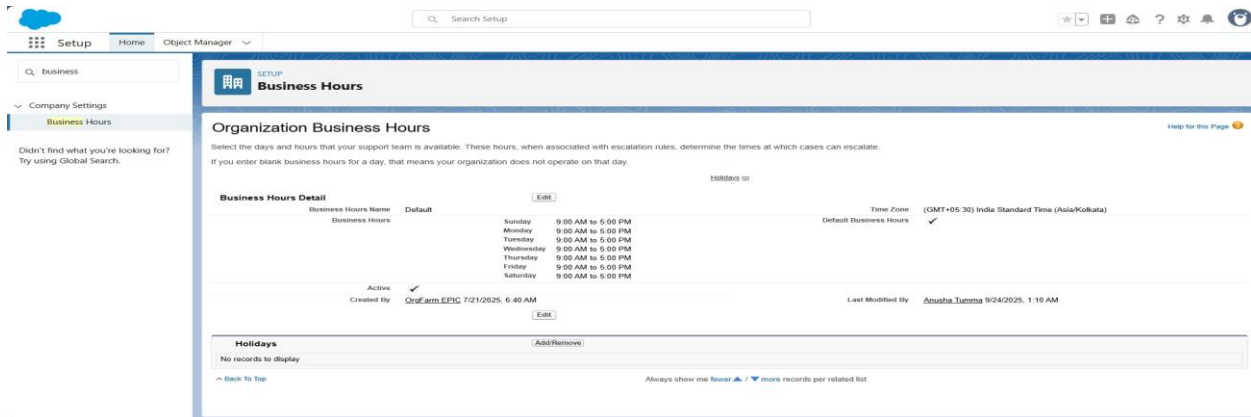
1. Quick Find → **Business Hours** → click **New**.

2. Fill in:

Name: Default Hours

Hours: 09:00 AM – 05:00 PM (or your actual business hours)

3. Click **Save**.



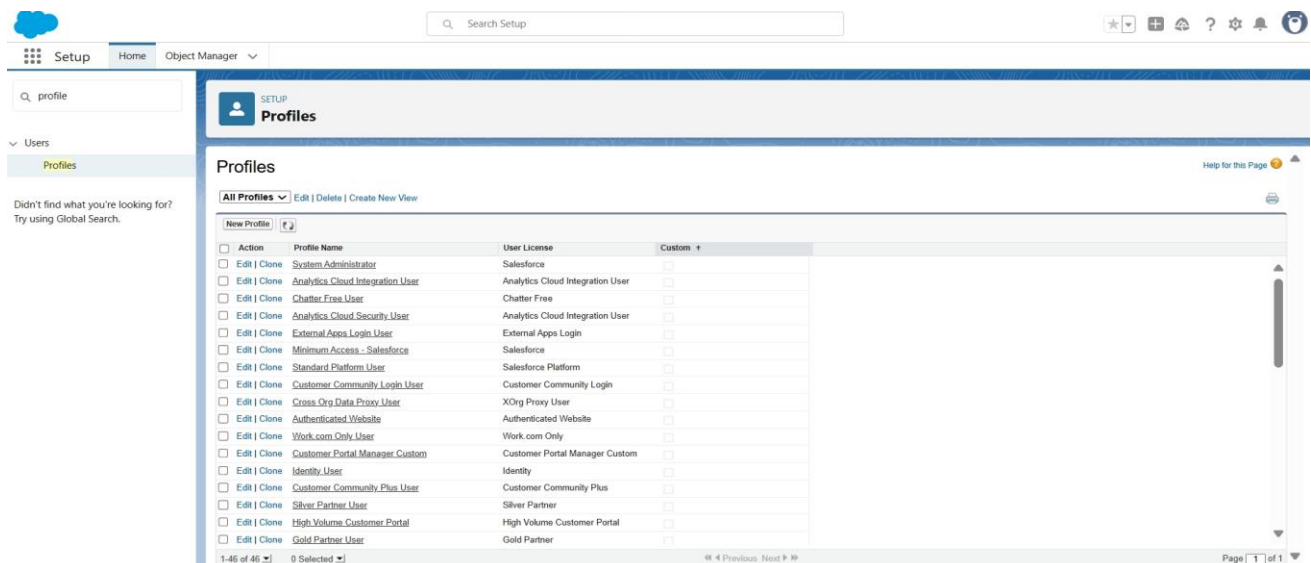
Why: Defines working hours for workflows, notifications, and approval processes.

Step 5: Profiles

Profiles define what users can do. For Customer support ticketing system, you'd create these Salesforce profiles:

a) System Administrator

- Full access to all standard/custom objects, settings, and configuration.
- Used by IT/Admins.



b) Dev Org Setup

- Project is built on Salesforce Developer Org.
- All configurations, Apex triggers, and flows tested here.

c) Sandbox Usage

- For enterprise deployment, a Sandbox is used for testing before moving to production.
- In this project, we worked directly on Developer Org (acts as sandbox).

d) Deployment Basics

1. Deployment methods available in Salesforce:

- a. Change Sets
- b. ANT Migration Tool
- c. Salesforce CLI (SFDX)

2. For this project: Direct configuration in Developer Org.