

# Customer Support Ticketing System

## PHASE-2 REPORT

### Step 1: Salesforce Editions

- Confirmed that the org being used is **Developer Edition**.
- Developer Edition provides most features but does not support Sandboxes or Change Sets.

Salesforce.com Organization ID	00DgK000007kjKf
Organization Edition	Developer Edition
Instance	CAN96
Modified By	Bindhu Maruthi Patchava, 9/19/2025, 7:48 AM

### Step 2: Company Profile Setup

- Verified organization information under **Company Information**.
- Organization Edition = Developer Edition, Instance = CAN96, Org ID = **00DgK000007kjKf**.
- Default Locale = English (United States), Currency = USD, Time Zone = IST (GMT+5:30) Organization name = Customer Support Ticketing System.

SETUP

Company Information

Customer SupportTicketing System

The organization's profile is below.

User Licenses (10+) | Permission Set Licenses (10+) | Feature Licenses (11) | Usage-based Entitlements (10+)

Organization Detail

Edit

Organization Name	Customer SupportTicketing System	Phone	(809) 602-9444
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (United States)
Address	United States	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (United States) - USD
Enable Data Translation	<input type="checkbox"/>	Used Data Space	342 KB (7%) <a href="#">View</a>
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) <a href="#">View</a>
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00DgK000007kjKf
		Organization Edition	Developer Edition
		Instance	CAN96

---

### Step 3: Business Hours & Holidays

- Created **Business Hours**: 9:00 AM – 6:00 PM, Monday to Friday.
- Marked them as **Default Business Hours**.
- Added **Holidays** (New Year's Day, Independence Day) so workflows and escalations skip those days.

The screenshot shows the 'Business Hours' setup page. At the top, there's a 'Business Hours Detail' section with an 'Edit' button. Below it, a table lists business hours for each day of the week. The 'Default Business Hours' checkbox is checked. The 'Time Zone' is set to '(GMT+05:30) India Standard Time (Asia/Kolkata)'. Below the table, there's an 'Active' checkbox which is checked, and fields for 'Created By' and 'Last Modified By' both showing 'Bindhu Manu Patchang'. At the bottom, there's a 'Holidays' section with an 'Add/Remove' button. A table lists holidays, with 'Independence Day' on '8/15/2026 All Day'.

Business Hours Name	Customer Support Hours	Time Zone
Business 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)

Holiday Name	Description	Date and Time
Independence Day		8/15/2026 All Day

---

### Step 4: Fiscal Year Settings

- Confirmed **Standard Fiscal Year** is in use.
- Fiscal Year starts in April.
- Custom fiscal year not required for this project.

The screenshot shows the 'Fiscal Year' setup page. At the top, there's a 'Fiscal Year' section with a 'Setup' button. Below it, the page title is 'Organization Fiscal Year Edit: Customer SupportTicketing System'. A message states: 'To specify the fiscal year type for your organization, choose one of the options below.' There are two radio buttons: 'Standard Fiscal Year' (selected) and 'Custom Fiscal Year'. A 'Fiscal Year Information' section explains that the organization can change the fiscal year start month and specify whether the fiscal year name is set to the starting or ending year. A warning message states: 'Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing this change.' Below this, there's a 'Change Fiscal Year Period' section with a 'Save' button and a 'Cancel' button. The 'Name' field is 'Customer SupportTicketing System'. The 'Fiscal Year Start Month' is set to 'April'. The 'Fiscal Year is Based On' section has two radio buttons: 'The ending month' (selected) and 'The starting month'.

**Fiscal Year Information**

Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example, if your fiscal year starts in April 2025 and ends in March 2026, your Fiscal Year setting can be either 2025 or 2026.

Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing this change.

**Change Fiscal Year Period**

Name: Customer SupportTicketing System

Fiscal Year Start Month: April

Fiscal Year is Based On: ☒ The ending month ☐ The starting month

## Step 5: User Setup & Licenses

- Created a **Test User** with username **pbindhumaruthi+test@gmail.com**.
- License used: **Salesforce**.
- This test user helps validate profiles, roles, and permissions.

The screenshot shows the 'Users' page in the Salesforce Setup interface. The 'User Detail' section for a 'Test User' is displayed. The user's email is pbindhumaruthi+test@gmail.com, and the username is pbindhumaruthi+test@gmail.com. The user is assigned the 'Salesforce' role and the 'Standard User' profile. The user is active and has a nickname of 'user'. The user's language is English, and the time zone is (GMT+05:30) India Standard Time (Asia/Kolkata). The user's locale is English (United States). The user's delegated approver is 'Manager'. The user's manager is 'Only if I am an approver'. The user's federation ID is 'App Registration: One-Time Password Authenticator'. The user's app registration is 'Salesforce Authenticator'. The user's security key is 'Security Key (U2F or WebAuthn)'. The user's lightning login is 'Lightning Login'. The user's role is 'Salesforce', and the user's profile is 'Standard User'. The user's marketing user, offline user, knowledge user, flow user, service cloud user, site.com contributor user, site.com publisher user, WDC user, mobile push registrations, data.com user type, accessibility mode (classic only), debug mode, high-contrast palette on charts, load lightning pages while scrolling, Salesforce CRM content user, receive Salesforce CRM content email alerts, and receive Salesforce CRM content alerts as daily digest are all checked.

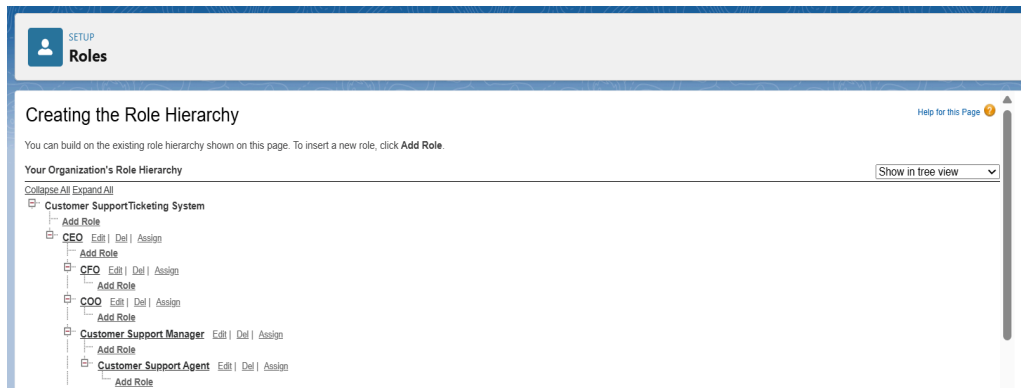
## Step 6: Profiles

- Verified the **System Administrator** profile for Admins.
- For agents, created/adjusted profile cloned from **Standard User** with access to Cases, Accounts, and Contacts.
- Customers would later use a restricted profile (community/portal users if enabled).

The screenshot shows the 'Profiles' page in the Salesforce Setup interface. The 'Profile Detail' section for a 'Customer Support Agent' profile is displayed. The profile is a 'Custom Profile' and is assigned to the 'Salesforce' user license. The profile was created by 'Bhishu Maruthi Patilchaya' on 9/19/2025 at 7:58 AM and was modified by 'Bhishu Maruthi Patilchaya' on 9/19/2025 at 8:00 AM. The profile has access to various features, including Login IP Ranges, Enabled Apex Class Access, Enabled Visualforce Page Access, Enabled External Data Source Access, Enabled Named Credential Access, Enabled External Credential Principal Access, Enabled Custom Metadata Type Access, Enabled Custom Settings Definitions Access, Enabled Flow Access, Enabled Service Presence Status Access, and Enabled Custom Permissions. The 'Page Layouts' section shows the profile's access to various layouts, including Global, Email Application, Home Page Layout, Account, Alternative Payment Method, Appointment Invitation, Location Group Assignment, Macro, Object Milestone, Operating Hours, Opportunity, and Opportunity Product.

## Step 7: Roles

- Configured **Role Hierarchy**: CEO at the top, followed by COO, CFO, and Customer Support Ticketing System Role.
- Ensured Support Agent role reports under CEO (though tree view auto-arranged COO/CFO above visually, reporting is still correct).



---

## Step 8: Permission Sets

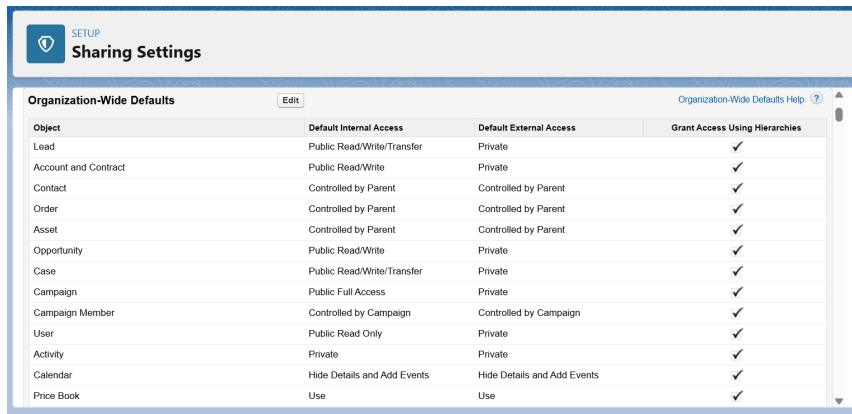
- Created a permission set named **Support\_Agent\_Access**.
- Granted additional access to Cases and related objects for agents.
- Can be assigned to Test User for extended permissions beyond the profile.

---

## Step 9: OWD (Organization-Wide Defaults)

- Configured object-level sharing settings:
  - **Cases** → Public Read/Write/Transfer
  - **Accounts** → Public Read/Write
  - **Opportunities** → Public Read/Write
  - **Contacts** → Controlled by Parent
  - **Users** → Public Read Only

- This establishes the baseline access model.



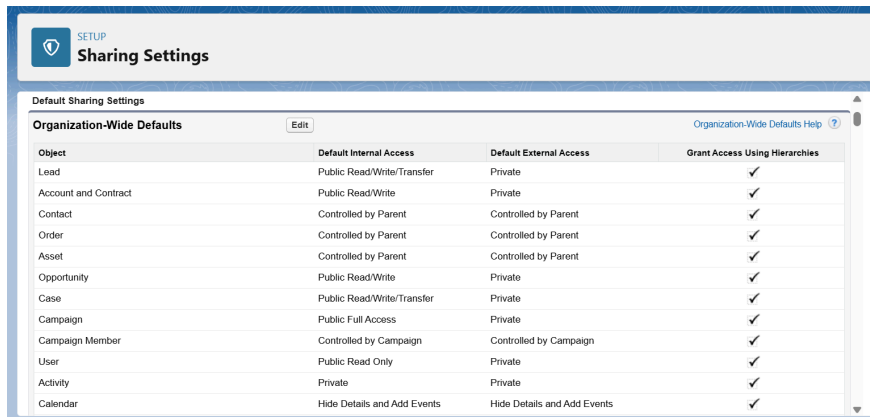
**Sharing Settings**

Organization-Wide Defaults [Edit](#) [Organization-Wide Defaults Help](#)

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓

## Step 10: Sharing Rules

- Added a **Case Sharing Rule** named **Share\_Cases\_Agents**.
- Purpose: Allow agents to share cases among themselves.
- Label: “Share Cases Among Agents.”



**Sharing Settings**

Default Sharing Settings [Edit](#) [Organization-Wide Defaults Help](#)

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓

## Step 11: Login Access Policies

- Enabled **Administrators Can Log in as Any User**.
- Allows Admins to log in as the Test User for validation.

**SETUP** Login Access Policies

Login Access Policies [Help for this Page](#)

Control which support organizations your users can grant login access to.

Changes Saved

**Manage Support Options** [Save](#) [Cancel](#)

Setting	Enabled
Administrators Can Log in as Any User	<input checked="" type="checkbox"/>

Support Organization	Packages	Available to Users	Available to Administrators Only <sup>1</sup>
Salesforce.com Support		<input checked="" type="radio"/>	<input type="radio"/>

[Save](#) [Cancel](#)

---

## Step 12: Dev Org Setup

- Verified project is being built in a **Developer Edition Org**.
- Company Information page confirmed the edition and org ID.
- Dev Hub can be optionally enabled (not mandatory).

Salesforce.com Organization ID	00DgK000007kjKf
Organization Edition	Developer Edition
Instance	CAN96
Modified By	<a href="#">Bindhu Maruthi Patchava</a> , 9/19/2025, 7:48 AM

---

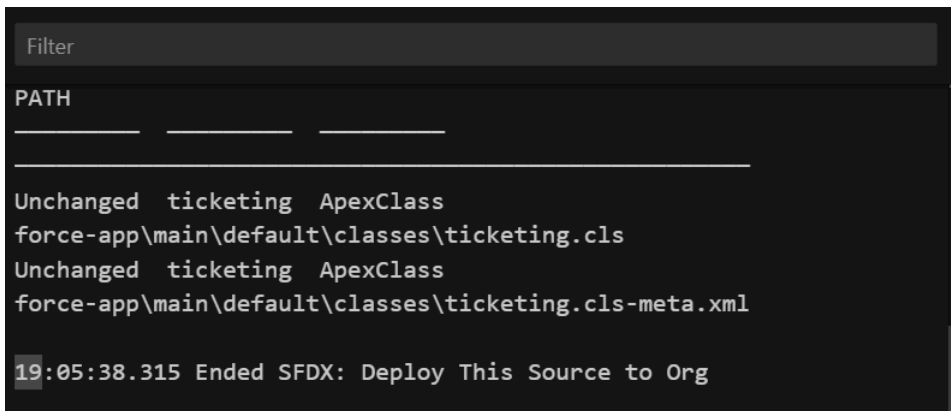
## Step 13: Sandbox Usage

- **Sandboxes are not available in Developer Edition.**
- For enterprises, Sandboxes (Developer, Partial, Full) would be used for testing/deployment.

- For this project, all work is done in the Developer Org directly.
- 

## Step 14: Deployment Basics

- **Change Sets:** Not available in Developer Edition.
- **VS Code + SFDX CLI:** Used for deployment and retrieval.
  - Successfully tested **Retrieve Source** and **Deploy Source** from VS Code.
- This ensures code/config changes can be pushed from local machine to Salesforce Org.

A terminal window with a dark background. At the top, there is a 'Filter' input field. Below it, the word 'PATH' is displayed. The main content of the terminal shows the output of an SFDX command. It lists two files: 'ticketing ApexClass' and 'ticketing ApexClass', each followed by its full file path: 'force-app\main\default\classes\ticketing.cls' and 'force-app\main\default\classes\ticketing.cls-meta.xml'. Both files are preceded by the word 'Unchanged'. At the bottom, a timestamp '19:05:38.315' is followed by the text 'Ended SFDX: Deploy This Source to Org'.

```
Filter
PATH

Unchanged ticketing ApexClass
force-app\main\default\classes\ticketing.cls
Unchanged ticketing ApexClass
force-app\main\default\classes\ticketing.cls-meta.xml

19:05:38.315 Ended SFDX: Deploy This Source to Org
```