

# Phase 2: Org Setup & Configuration

🔑 Goal: Prepare Salesforce environment.

## 1.Salesforce Editions

- Use **Developer Edition Developer Org** (free dev org).

## 2.Company Profile Setup

- Go to **Company Settings** → add company info, local time zone.

### Use Case:

A national retail company wants to implement a loyalty and feedback CRM across all stores. To ensure consistency, the Salesforce **Company Profile Setup** is arranged with the company's fiscal year, currency, time zone, business hours, and default language.

The screenshot shows the 'Company Information' setup page in Salesforce. The page title is 'Retail Loyalty CRM Project'. Below the title, it says 'The organization's profile is below.' There are links for 'User Licenses (10+)', 'Permission Set Licenses (10+)', 'Feature Licenses (11)', and 'Usage-based Entitlements (10+)'. The 'Organization Detail' section has an 'Edit' button. The table below contains the following information:

Organization Name	Retail Loyalty CRM Project	Phone	
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-07:00) Pacific Daylight Time (America/Los_Angeles)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (United States) - USD
Enable Data Translation	<input type="checkbox"/>	Used Data Space	356 KB (7%) [View]
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) [View]
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System	<input type="checkbox"/>	Streaming API Events, Last	0 (10,000 max)

## 3.Business Hours & Holidays

- Define working hours (9am–6pm).
- Add public holidays (no approvals on these days).

### Use Case:

In the retail loyalty and feedback CRM, Business Hours are set to align with store operating times (10 AM – 9 PM). Holidays (like Diwali or Christmas) are modified so escalated customer complaints don't trigger notifications to service teams on non-working days. This safeguard customer issues are managed within agreed service levels (SLAs) without straining staff during off hours.

The screenshot shows the 'Business Hours' setup page in Salesforce. The page title is 'Organization Business Hours'. Below the title, there is a description: 'Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate.' and a note: 'If you enter blank business hours for a day, that means your organization does not operate on that day.' There is a link for 'Holidays [5]'. The main section is 'Business Hours Detail' with an 'Edit' button. It contains a table with columns: 'Business Hours Name', 'Retail Business Hours', 'Time Zone', and 'Default Business Hours'. The table lists business hours for Sunday through Saturday, all set to '10:00 AM to 10:00 PM'. The time zone is '(GMT+05:30) India Standard Time (Asia/Kolkata)'. There is an 'Active' checkbox which is checked.

Business Hours Name	Retail Business Hours	Time Zone	Default Business Hours
Business Hours	Sunday 11:00 AM to 10:00 PM	(GMT+05:30) India Standard Time (Asia/Kolkata)	<input type="checkbox"/>
	Monday 10:00 AM to 10:00 PM		
	Tuesday 10:00 AM to 10:00 PM		
	Wednesday 10:00 AM to 10:00 PM		
	Thursday 10:00 AM to 10:00 PM		
	Friday 10:00 AM to 10:00 PM		
	Saturday 10:00 AM to 10:00 PM		

## 4.Fiscal Year Settings

- Standard (Jan–Dec) → good for revenue reporting.

### Use Case:

The company runs loyalty point outlines and redemption reports based on its fiscal year (April–March). Configuring Fiscal Year in Salesforce verifies all loyalty analytics, reward calculations, and financial tracking for customer offers align with corporate accounting periods.

The screenshot shows the 'Fiscal Year' setup page in Salesforce. The page title is 'Organization Fiscal Year Edit: Retail Loyalty CRM Project'. Below the title, there is a description: '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 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 the warning, there is a 'Change Fiscal Year Period' section with a 'Save' button and a 'Cancel' button. It contains a table with columns: 'Name', 'Fiscal Year Start Month', and 'Fiscal Year is Based On'. The table lists 'Retail Loyalty CRM Project' with 'January' as the start month and 'The ending month' as the basis.

Name	Fiscal Year Start Month	Fiscal Year is Based On
Retail Loyalty CRM Project	January	<input checked="" type="radio"/> The ending month <input type="radio"/> The starting month

## 5. User Setup & Licenses

- Create users: Rental Agent, Manager. Assign them Salesforce licenses.

### Use Case:

Store Managers, Customer Service Reps, and Regional Admins are set up with appropriate Salesforce licenses. Roles and Profiles ensure store managers can track escalations, while service reps handle feedback cases. This controlled access ensures data security and role-based operations.

The screenshot shows the 'Users' setup page in Salesforce. At the top, there's a header with a user icon and the word 'Users'. Below this, a message states: 'On this page you can create, view, and manage users.' and 'To get more licenses, use the Your Account app. [Let's Go](#)'. There's a 'View:' dropdown set to 'All Users' with links for 'Edit' and 'Create New View'. A navigation bar contains letters A through Z and 'Other' and 'All'. Below this are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'. The main section is a table with columns: Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several users, each with an 'Edit' link and a checkmark in the 'Active' column.

Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	Agent, Service	svcagent	bindusvc@domain.com		✓	Standard Platform User
<a href="#">Edit</a>	Anireddy, Bindu	ani	anireddybindureddy217@agentforce.com		✓	System Administrator
<a href="#">Edit</a>	Chatter Expert	Chatter	chatty.00dgl00000bmewzuan.sgxh26xjdomz@chatter.salesforce.com		✓	Chatter Free User
<a href="#">Edit</a>	EPIC, OrgFarm	OEPIE	epic.4b124a3e674c@orgfarm.salesforce.com		✓	System Administrator
<a href="#">Edit</a>	Manager, Store	storemgr	bindustoremgr@example.com		✓	Standard User
<a href="#">Edit</a>	User, Integration	integ	integration@00dgl00000bmewzuan.com		✓	Analytics Cloud Integration User
<a href="#">Edit</a>	User, Marketing	mktguser	bindumktg@domain.com		✓	Standard User
<a href="#">Edit</a>	User, Security	sec	insightssecurity@00dgl00000bmewzuan.com		✓	Analytics Cloud Security User

## 6. Login Access Policies

- Restrict login hours (9am–6pm for agents).

### Use Case:

For data security, login IP ranges are restricted to corporate networks, and session timeouts are enforced for store devices. Multi-Factor Authentication (MFA) ensures that only authorized staff can access loyalty and feedback data, protecting customer trust.

The screenshot shows the 'Session Settings' page in Salesforce. The header includes a shield icon and the word 'Session Settings'. Below the header, a message states: 'Set the session security and session expiration timeout for your organization.' The page is divided into two main sections: 'Session Timeout' and 'Session Settings'. The 'Session Timeout' section has a 'Timeout Value' dropdown set to '2 hours' and two checkboxes: 'Disable session timeout warning popup' (unchecked) and 'Force logout on session timeout' (checked). The 'Session Settings' section has several checkboxes: 'Lock sessions to the IP address from which they originated' (unchecked), 'Lock sessions to the domain in which they were first used' (checked), 'Terminate all of a user's sessions when an admin resets that user's password' (unchecked), 'Force relogin after Login-As-User' (checked), 'Require HttpOnly attribute' (unchecked), 'Use POST requests for cross-domain sessions' (unchecked), 'Enforce login IP ranges on every request' (unchecked), and 'When embedding a Lightning application in a third-party site, use a session token instead of a session cookie.' (unchecked).

Multi-Factor Authentication (MFA)

☐ Require multi-factor authentication (MFA) for all direct UI logins to your Salesforce org ⓘ
 ☐ Show all verification method registration options instead of starting with Salesforce Authenticator ⓘ
 ☒ Require identity verification during multi-factor authentication (MFA) registration

General

☐ Let users authenticate with a certificate ⓘ
 ☐ Check the revocation status of certificates ⓘ
 ☐ Require identity verification for email address changes ⓘ
 ☒ Require email confirmations for email address changes (applies to users in Experience Builder sites) ⓘ
 ☒ Require security tokens for API logins from callouts (API version 31.0 and earlier)
 ☒ Display a confirmation page during password reset ⓘ

Session Security Level Policies


Require a high assurance level of security for sensitive operations, or block users altogether. If users already have a high assurance session after logging in, they aren't prompted to verify their identity again in the same session, even if you require high assurance for these operations. If you want to see the session levels that users are granted at login, see Session Security Levels in [Session Settings](#).

## 7.Dev Org Setup

○This is your sandbox → where you build/test.

### Use Case:

A Salesforce Developer Org is created to build and test the loyalty CRM features (like automated feedback flows and custom notifications) without affecting production data. This allows safe prototyping and iterative development.



SETUP


Dev Hub

Enable Dev Hub2 to:

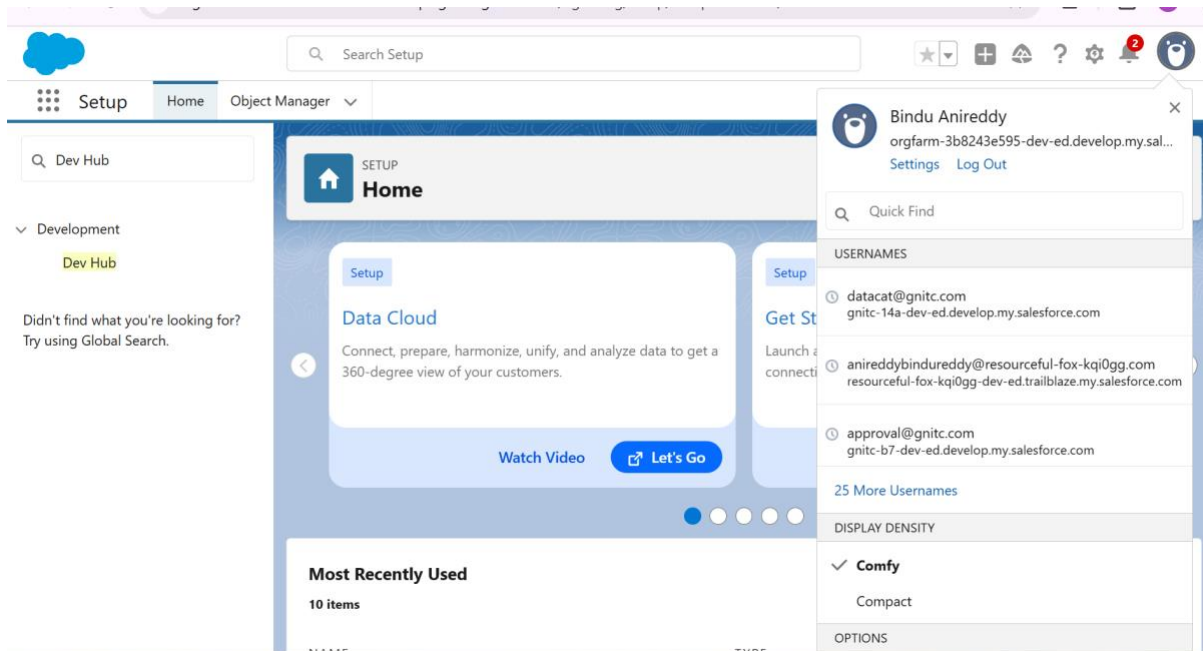
- Create and manage scratch orgs from the command line**  
 Scratch orgs are disposable Salesforce orgs that are used to support development and testing. They are fully configurable, allowing developers to emulate different Salesforce editions with different features and preferences.
- View information about your scratch orgs**  
 Information includes details about requested scratch orgs, including whether they are active, expired or deleted.
- Link namespace orgs**  
 You can link namespace orgs to the Dev Hub for using scratch orgs with namespaces.

Note: You can't disable this setting

Enable Dev Hub



Disabled



## 8.Sandbox Usage

- If this were a real company, we'd build in Sandbox, then deploy to Production.

### Use Case:

A **Full Sandbox** is used to replicate real customer and transaction data for UAT (User Acceptance Testing). A **Developer Sandbox** is used for individual feature testing (e.g., complaint escalation flows). This separation prevents testing errors from impacting live customer data.

## 9.Deployment Basics

- Deployment is moving config/code from sandbox → production using **Change Sets**.

### Use case:

New features, such as feedback automation and loyalty rewards calculation, are first tested in Sandboxes. Change Sets are then used to deploy these features into Production. This structured deployment ensures stable, error-free rollout of CRM functionality across all retail stores.