

Project Title: Smart Customer Retention & Loyalty Management System

Phase 2: Salesforce Org Setup & Configuration

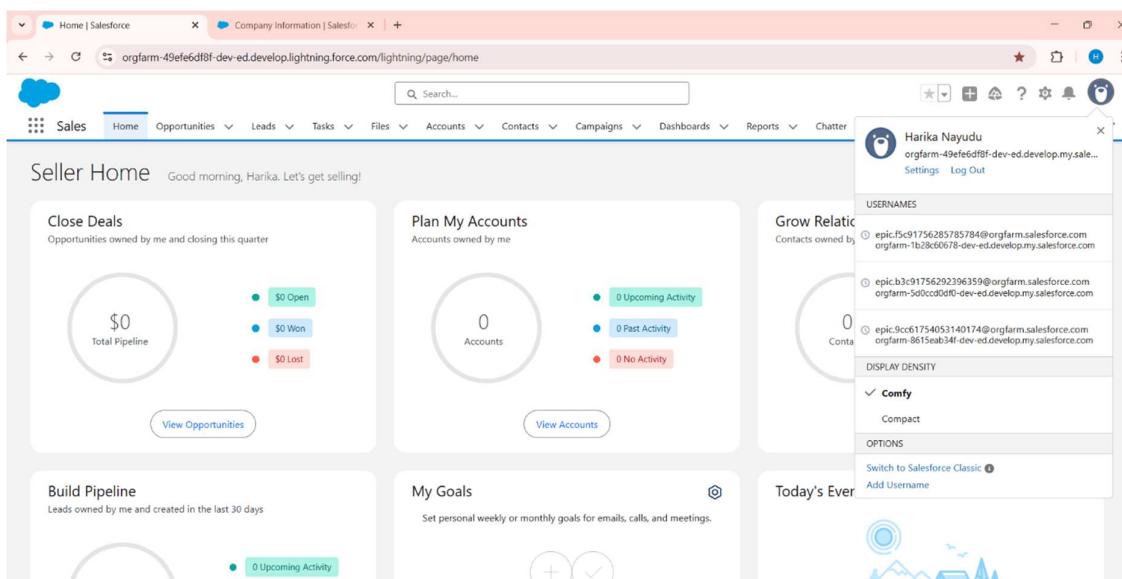
Step 1: Sign Up for Salesforce Developer Edition

1. Go to [!\[\]\(f15d3c54be60b4fd0ce1da9fb3f67256_img.jpg\) https://developer.salesforce.com/signup.](https://developer.salesforce.com/signup)
2. Fill the form:
 - **First Name / Last Name** → Enter your details
 - **Email** → Valid email (you will get verification)
 - **Job Title** → Developer / Student
 - **Company** → College name
 - **Country** → Select your country
3. Click **Sign Me Up**.
4. Check your email → Click the **verification link**.

Step 2: Log in to Salesforce Developer Org

1. Once verified, go to:
 [!\[\]\(b1b781be830eb908d845c527ab08d5f8_img.jpg\) https://login.salesforce.com](https://login.salesforce.com)
2. Enter your registered email and the password you set.

You will be redirected to the **Salesforce Lightning Experience Dashboard**



Step 3: Explore the Org Setup

Now that you're inside Salesforce:

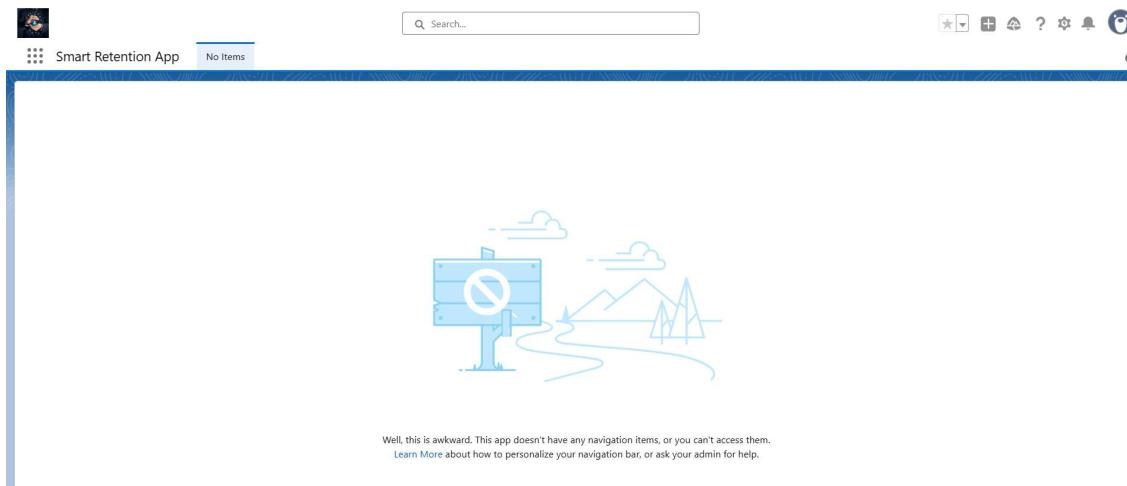
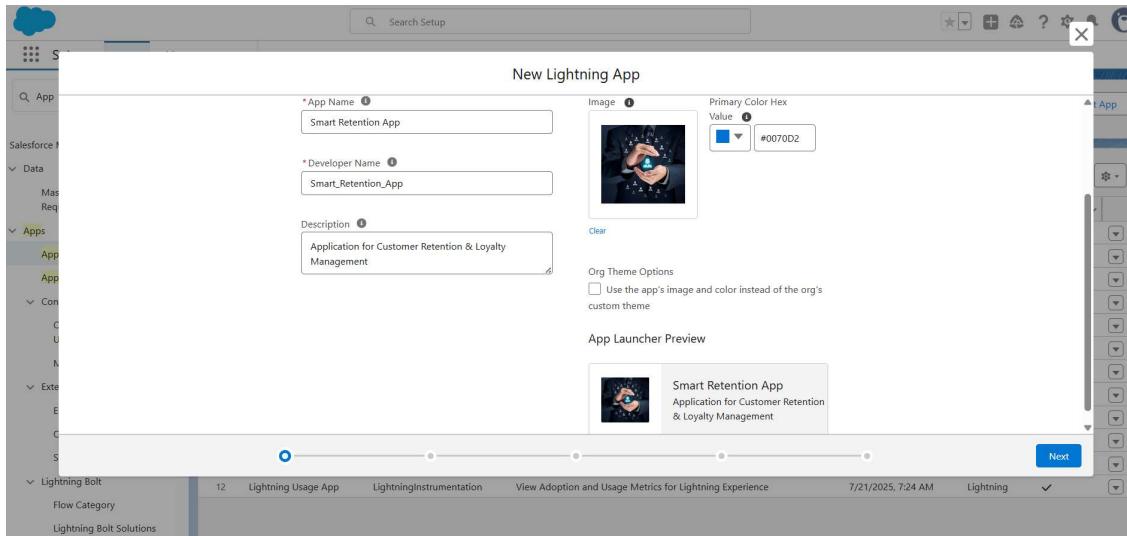
1. Click on the **gear icon** (⚙️) on the top-right corner.
2. Select “**Setup**” from the dropdown.

This will take you to the **Setup Home**, where you can manage and configure your org.

Step 4: Perform Configuration Steps

4.1 Create a New Lightning App

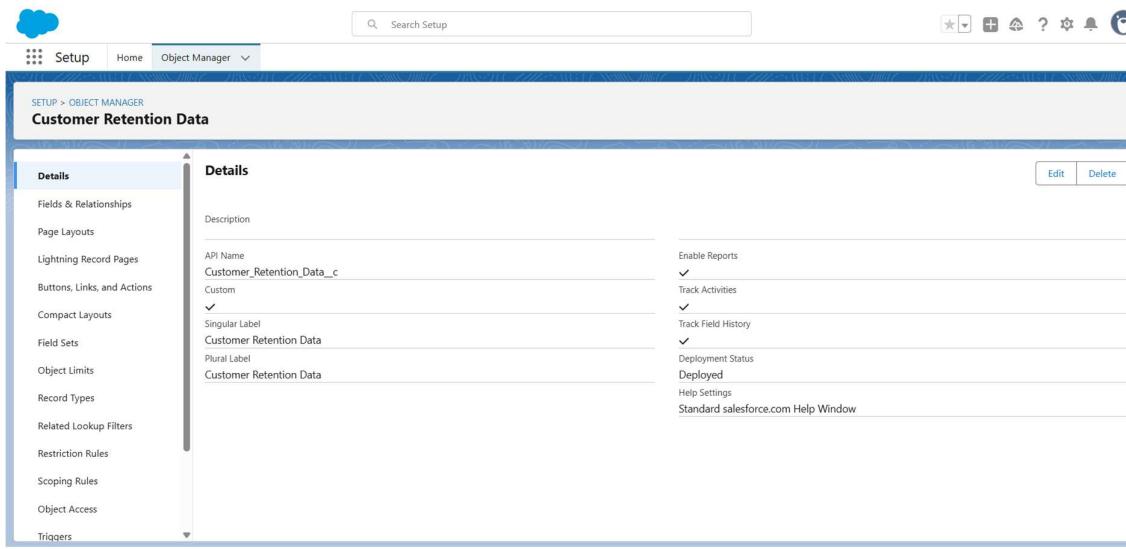
1. In the Setup, left sidebar **Quick Find** search box, type **App Manager** → click it.
2. On the App Manager page, click **New Lightning App**.
3. Fill details:
 - **App Name:** Smart Retention App
 - **Developer Name:** auto-fills
 - **Description:** Application for Customer Retention & Loyalty Management
4. Click **Next**.
5. Keep **Standard Navigation** selected → Click **Next**.
6. Choose a logo/icon (optional) → Click **Next**.
7. Assign the app to the **System Administrator profile** (for now).
8. Click **Save & Finish**.



4.2 Create a Custom Object

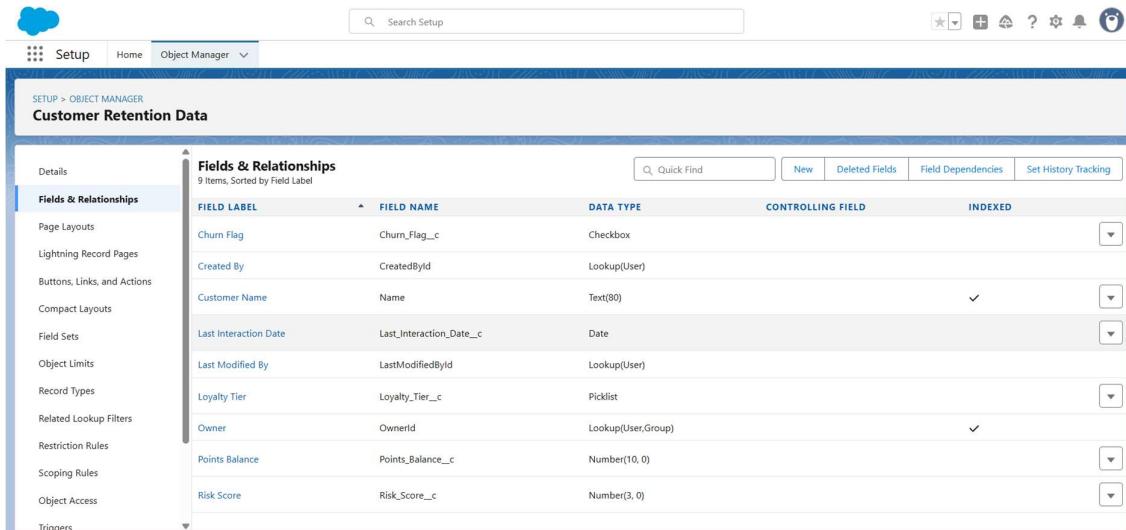
1. In Setup → Quick Find → type **Object Manager** → click it.
2. Click **Create** (top-right) → **Custom Object**.
3. Enter:
 - **Label:** Customer Retention Data
 - **Plural Label:** Customer Retention Data
 - **Object Name:** auto-fills
 - **Record Name:** Customer Name (Data Type: Text)
 - Check these boxes:
 - Allow Reports
 - Allow Activities
 - Track Field History (optional)

4. Click Save.



4.3 Add Custom Fields

1. From Object Manager → click **Customer Retention Data** → **Fields & Relationships** → **New**.
2. Create these fields one by one:
 - o **Risk Score** → Data Type: Number → Length: 3, Decimal: 0
 - o **Loyalty Tier** → Data Type: Picklist → Values: Bronze, Silver, Gold, Platinum
 - o **Points Balance** → Data Type: Number → Length: 10, Decimal: 0
 - o **Last Interaction Date** → Data Type: Date
 - o **Churn Flag** → Data Type: Checkbox → Default Value: Unchecked
3. Save after each field.



4.4 Create a Tab for Custom Object

1. Setup → Quick Find → type **Tabs** → click it.
2. Under **Custom Object Tabs**, click **New**.
3. Select **Customer Retention Data** from the dropdown.
4. Choose an icon (any).
5. Click **Next** → Select **Smart Retention App** → Save.

The image contains two screenshots of the Salesforce Setup interface, illustrating the steps to create a custom tab for the Customer Retention Data object.

Screenshot 1: Creating a New Custom Tab

- The top screenshot shows the "Custom Tabs" page under the "User Interface" section of the Setup menu.
- The "Custom Object Tabs" table has one row:

Action	Label	Tab Style	Description
Edit Del	Customer Retention Data	Locked	
- A tooltip "Help for this Page" is visible in the top right corner.

Screenshot 2: Viewing the Created Custom Tab

- The bottom screenshot shows the "Customer Retention Data" tab detail page.
- The "Custom Tab Definition Detail" table shows the following information:

Tab Label	Object	Tab Style	Description
Customer Retention Data	Customer Retention Data	Splash Page Custom Link	
Created By	Nayudu, Harika	Modified By	Nayudu, Harika
- A tooltip "Help for this Page" is visible in the top right corner.

4.5 Assign Profiles/Permission Sets

1. Setup → Quick Find → type **Permission Sets** → New.
 - Label: **RetentionApp_Access**
 - Save.
2. Open **RetentionApp_Access** → Manage Assignments → Add Assignments.
3. Select your test users (e.g., Customer Success Manager) → Save.

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Search bar with "Search Setup", a gear icon, and a user profile icon.
- Left Sidebar:** "Setup" tab selected. Under "Users", "Permission Sets" is highlighted.
- Main Content:**
 - Section Header:** "Permission Sets" with a user icon.
 - Table:** "RetentionApp_Access" (API Name).

Description	API Name
License	RetentionApp_Access
Session Activation Required	Created By
Permission Set Groups Added To	Last Modified By
0	Harika Nayudu, 9/19/2025, 2:32 AM
	Harika Nayudu, 9/19/2025, 2:32 AM
 - Section Header:** "Apps".
 - Sub-sections:** "Assigned Apps" (Settings that specify which apps are visible in the app menu) and "Assigned Connected Apps" (Settings that specify which connected apps are visible in the app menu).
- Bottom:** "Video Tutorial | Help for this Page" link.

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Search bar with "Search Setup", a gear icon, and a user profile icon.
- Left Sidebar:** "Setup" tab selected. Under "Users", "Permission Sets" is highlighted.
- Main Content:**
 - Section Header:** "RetentionApp_Access" (API Name) with a gear icon.
 - Section Header:** "Assignment Summary".
 - Table:** Assignment summary table.

Full Name	User License	Expires On	Time Zone	Status
OrgFarm EPIC	Salesforce			Success
Harika Nayudu	Salesforce			Success