Phase 2: Org Setup & Configuration

👉 **Goal: Set up Salesforce environment for building SSRS.**

1. **Choose Salesforce Edition**

   ▪ Use a Developer Edition Org (free) for development and testing.

2. **Configure Company Profile**

   ▪ Enter organization details in *Company Settings*.

   ▪ Set local time zone and default currency (INR/USD).

3. **Define Service Hours & Holidays**

   ▪ Create business hours (e.g., 9 AM–6 PM) for service request handling.

   ▪ Mark public holidays so requests are not escalated on non-working days.

4. **Set Fiscal Year**

   ▪ Keep Standard Fiscal Year (Jan–Dec) to align reporting on requests with calendar year.

5. **Create Users**

   ▪ Add users for Admin, Support Staff, and Manager roles.

   ▪ Assign appropriate Salesforce licenses.

6. **Assign Profiles**

- **Admin Profile** – Full customization rights.

- **Support Staff Profile** – Limited to creating and updating service requests.

- **Manager Profile** – Extended access including approvals and dashboards.

7. **Define Role Hierarchy**

- Place Manager role above Support Staff, ensuring visibility rolls up.

- Keep Customer Community/Portal users at the lowest level, limited to their own requests.

8. **Apply Permission Sets**

- Use Permission Sets to grant extra access (e.g., Reports or Dashboards) without changing core profiles.

9. **Set Organization-Wide Defaults (OWD)**

- **Service Request Object** → Private (only owner and manager can see).

- **Accounts/Contacts** → Public Read Only (for better linking and visibility).

10. **Establish Sharing Rules**

- Add rules if requests should be shared across multiple teams or departments.

11. **Restrict Login Policies**

   ▪ Limit login hours for Support Staff (e.g., 9 AM–6 PM).

   ▪ Apply IP restrictions for Admins for extra security.

12. **Prepare Development Org**

   ▪ Use this Org as a sandbox for building and testing SSRS features.

13. **Sandbox Strategy**

   ▪ In real-world implementation, develop in Sandbox and then promote changes to Production.

14. **Deployment Plan**

   ▪ Use Change Sets to move configurations and customizations to Production after testing.