

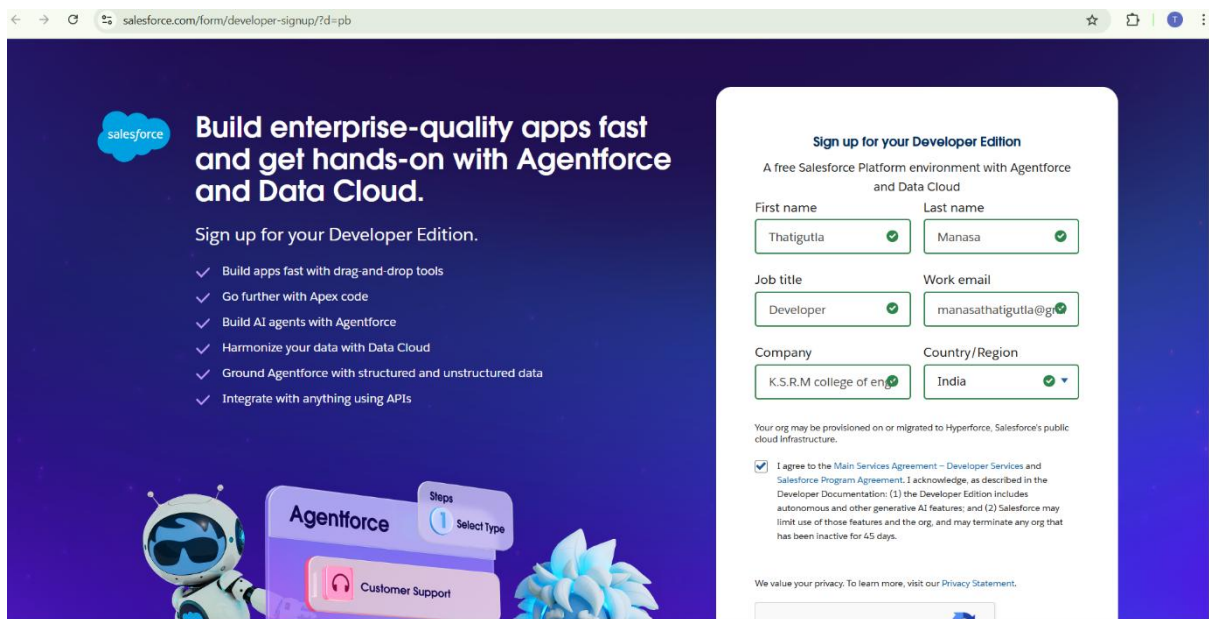
Phase 2: Org Setup & Configuration

Project : GoldenEra Enterprises CRM

This document summarizes the work performed in **Phase 2** of the capstone: setting up the Salesforce Developer Org and configuring the resources required for the Intelligent Case Routing project. It includes step-by-step actions completed and a screenshot of the custom object & fields created for routing configuration.

Step 1- Sign up

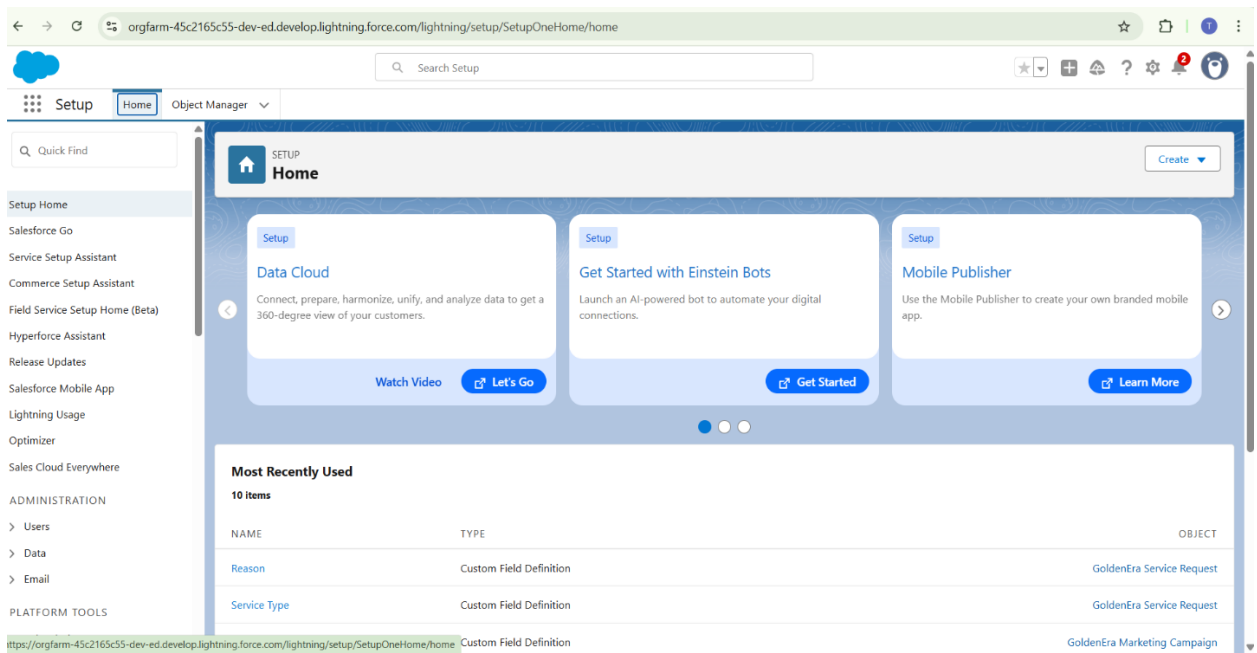
sign up for your developer edition



The screenshot shows the Salesforce Developer Edition sign-up page. The left side features the Salesforce logo and the text "Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud." Below this, it says "Sign up for your Developer Edition." and lists five benefits: "Build apps fast with drag-and-drop tools", "Go further with Apex code", "Build AI agents with Agentforce", "Harmonize your data with Data Cloud", and "Ground Agentforce with structured and unstructured data". At the bottom left, there is an illustration of an Agentforce robot and a "Customer Support" button. The right side is a form titled "Sign up for your Developer Edition" with the subtitle "A free Salesforce Platform environment with Agentforce and Data Cloud". The form fields are: "First name" (Thatigutla), "Last name" (Manasa), "Job title" (Developer), "Work email" (manasathatigutla@gmail.com), "Company" (K.S.R.M college of engg), and "Country/Region" (India). Below the form, there is a checkbox for "I agree to the Main Services Agreement -- Developer Services and Salesforce Program Agreement." and a link to the "Privacy Statement".

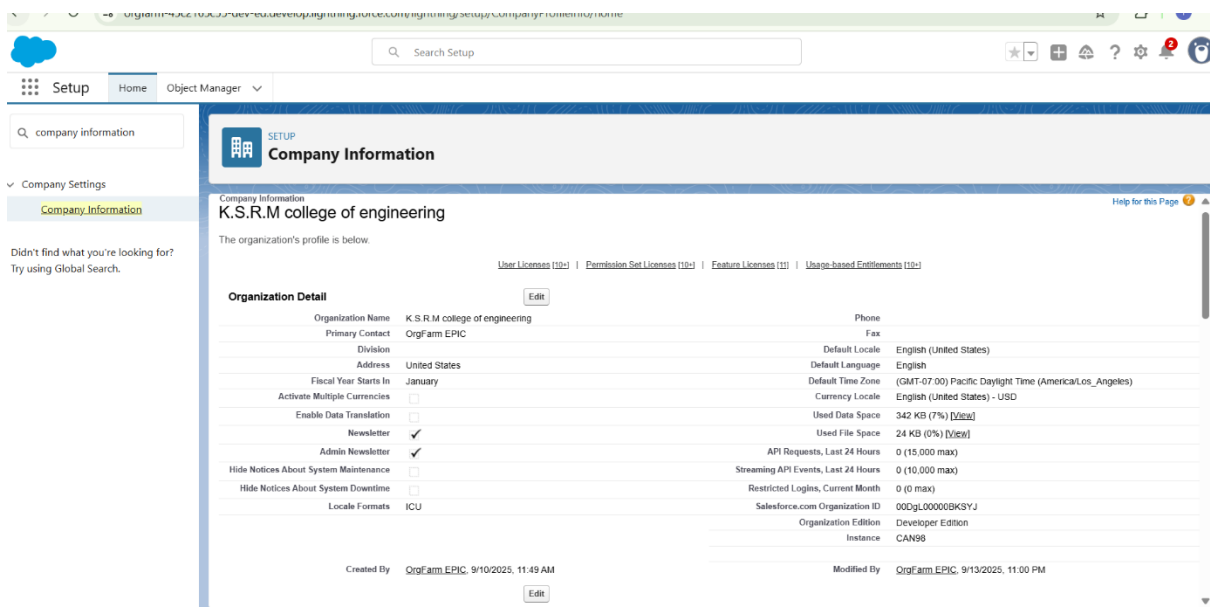
Step 2: Open Setup

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:** KSRM College of Engineering
 - **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 – 18:00 (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 Golden Era Enterprises, you'd create these Salesforce profiles:

a) System Administrator

- Full access to all standard/custom objects, settings, and configuration.
 - Used by IT/Admins
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Step 6: Standard and Custom Objects

1. **GoldenEra Customer**
 - Stores all customer information (profiles, preferences, history).
 - Central object for connecting orders, service requests, and campaigns.
2. **GoldenEra Orders**
 - Tracks all jewelry purchases made by customers.
 - Connects with products and updates inventory.
3. **GoldenEra Products**
 - Holds product catalog details (rings, necklaces, bridal sets, etc.).
 - Links with inventory and orders.
4. **GoldenEra Inventory**
 - Manages stock availability and locations.
 - Supports reorder alerts and stock insights.
5. **GoldenEra Marketing Campaign**
 - Manages campaigns (festive sales, offers, events).
 - Tracks customer engagement and ROI.
6. **GoldenEra Service Request**
 - Handles after-sales services (repairs, resizing, cleaning).
 - Connects with customers and their orders.