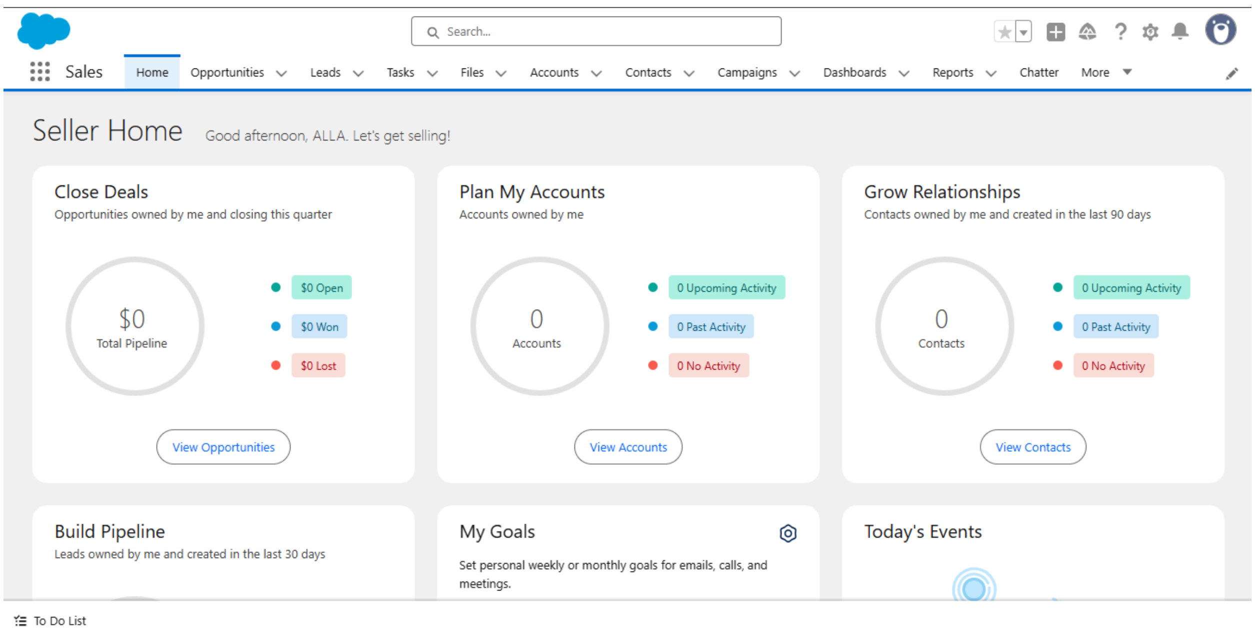
Salesforce Setup Guide: Phase 2 - Retail Customer Complaint Hub

This document outlines the foundational steps to configure your Salesforce org for tracking customer complaints.

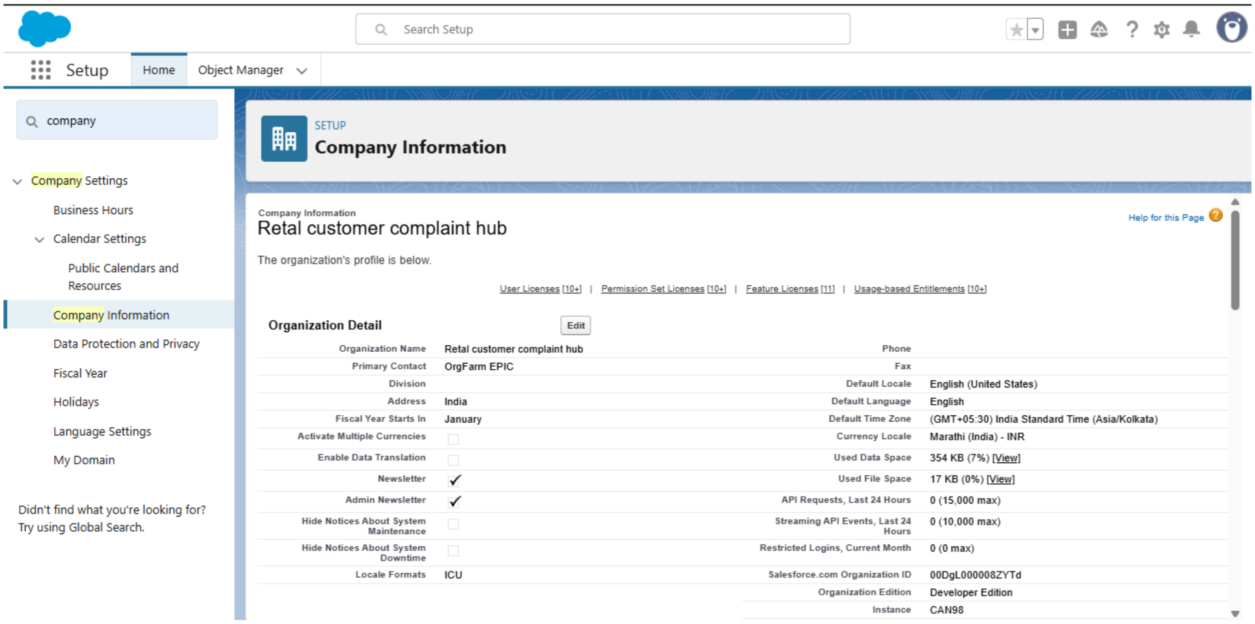
Step 1: Set Up Your Developer Org 🛠️

- **Purpose**: To get a free, safe environment for building and testing the complaint hub.
- **Action**:
  1. Go to developer.salesforce.com/signup.
  2. Fill out the form. Your **Username** must be unique and in an email format (e.g., complaint.hub@dev.com). Your **Email** must be a real address for verification.
  3. Verify your account via the email link and log in.



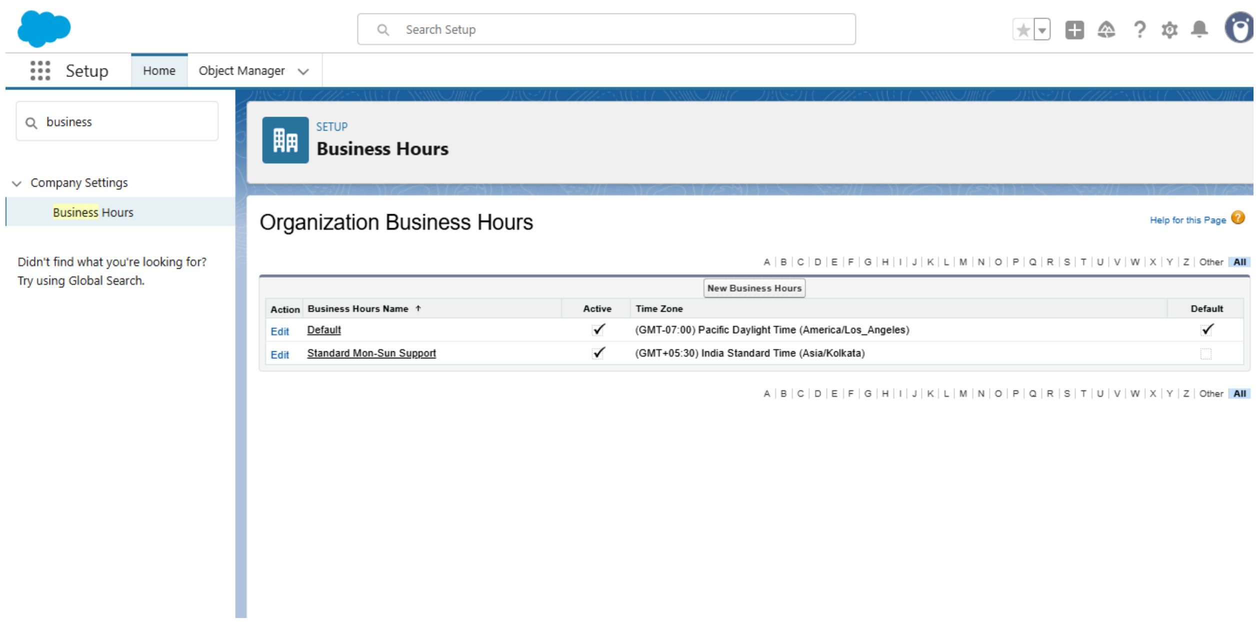
Step 2: Configure Company Information 🏢

- **Purpose**: To set the correct time zone and currency for tracking complaint resolution times and any associated costs.
- **Action**:
  1. Go to **Setup** > **Company Information**.
  2. Click **Edit**.
  3. Set your **Default Time Zone** and **Default Currency**.
  4. Click **Save**.



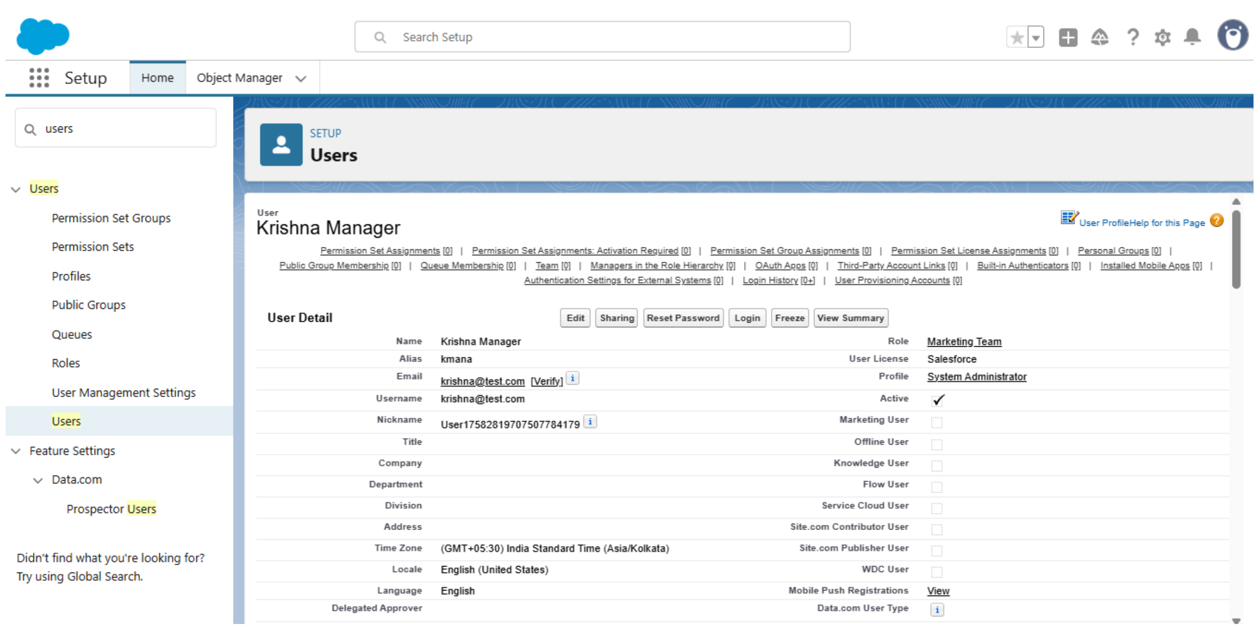
Step 3: Define Business Hours & Holidays 🕒

- **Purpose**: To ensure that the Service Level Agreement (SLA) and response time calculations for complaints are accurate.
- **Action**:
    1. Go to **Setup** > **Business Hours** > **New Business Hours**.
    2. Name it "Customer Support Hours", set the operational times (e.g., 9 AM to 7 PM, Monday-Saturday), and **Save**.
    3. Go to **Setup** > **Holidays** > **New**.
    4. Add your company holidays.
    5. Return to your **Business Hours** record, **Edit** it, and add the holidays you created.



Step 4: Create Users 👥

- **Purpose**: To create accounts for the customer service team who will manage the complaints.
- **Action**:
  1. Go to **Setup** > **Users** > **New User**.
  2. Create a **Support Manager** (e.g., "Sarah Manager"). Assign the **System Administrator** Profile for now.
  3. Create a **Customer Service Agent** (e.g., "Amit Agent"). Assign the **Standard User** Profile for now.
  - *Ensure each user has a unique username and a real email for setup.*



Step 5: Configure Custom Profiles 🎭

- **Purpose**: To create specific permission sets for agents and managers.
- **Action**:
  1. Go to **Setup** > **Profiles**.
  2. **Clone** the "System Administrator" profile and name the new one Support Manager.
  3. **Clone** the "Standard User" profile and name the new one Customer Service Agent.
  4. Go back to **Setup** > **Users**.
  5. Edit Sarah Manager and assign her the **Support Manager** profile.
  6. Edit Amit Agent and assign him the **Customer Service Agent** profile.

Step 6: Establish the Role Hierarchy 🏛️

- **Purpose**: To allow managers to see and report on the complaints handled by their agents.
- **Action**:
  1. Go to **Setup** > **Roles** > **Set Up Roles**.
  2. Under the company name, **Add Role** and name it Support Manager.
  3. Under the new "Support Manager" role, **Add Role** and name it Customer Service Agent.
  4. From the role tree, click **Assign** next to each role to assign Sarah Manager and Amit Agent accordingly.

Step 7: Set Org-Wide Defaults (OWD) 🔒

- **Purpose**: To ensure customer complaints are confidential and seen only by authorized personnel.
- **Action**:
  1. Go to **Setup** > **Sharing Settings** > **Edit**.
  2. Familiarize yourself with this page. When we create our custom Complaint object in the next phase, we will return here and set its default access to **Private**.