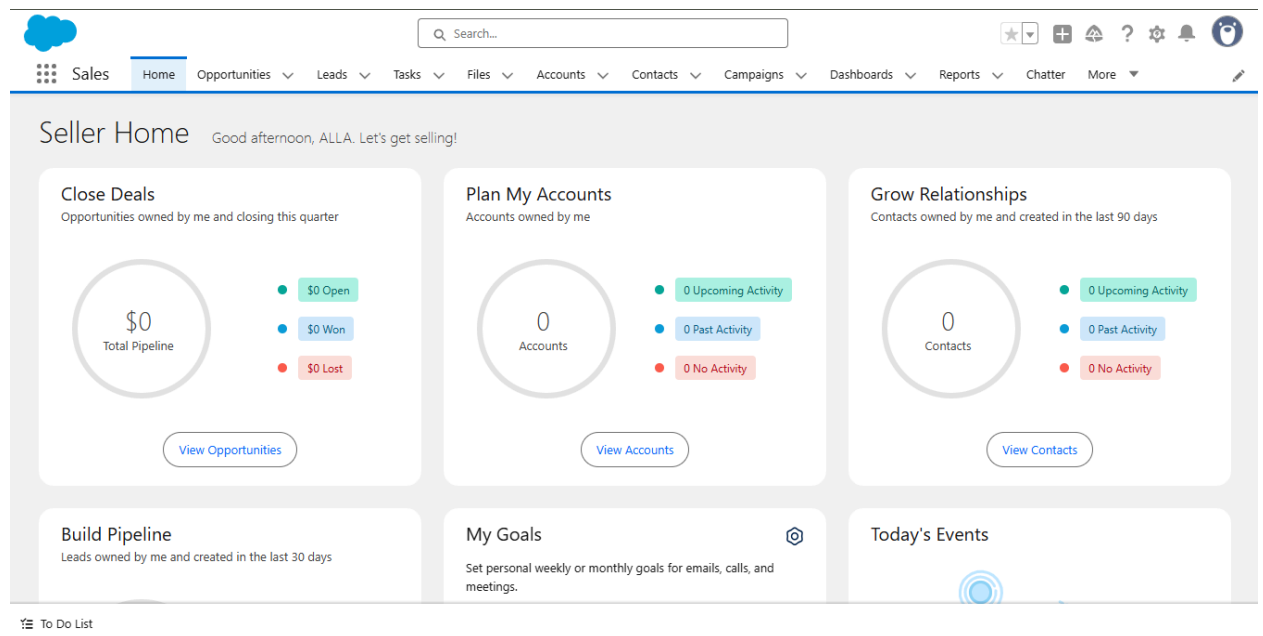

Salesforce Setup Guide: Phase 2 - Retail Customer Complaint Hub

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**.

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'company' and a list of settings including Company Settings, Business Hours, Calendar Settings, Public Calendars and Resources, Company Information (highlighted), Data Protection and Privacy, Fiscal Year, Holidays, Language Settings, and My Domain. The main content area is titled 'Company Information' and shows details for 'Retail customer complaint hub'. It includes links for User Licenses, Permission Set Licenses, Feature Licenses, and Usage-based Entitlements. Below this is the 'Organization Detail' section with an 'Edit' button. The details are organized into two columns: Organization Name, Primary Contact, Division, Address, Fiscal Year Starts In, Activate Multiple Currencies, Enable Data Translation, Newsletter, Admin Newsletter, Hide Notices About System Maintenance, Hide Notices About System Downtime, and Locale Formats; and Phone, Fax, Default Locale, Default Language, Default Time Zone, Currency Locale, Used Data Space, Used File Space, API Requests, Last 24 Hours, Streaming API Events, Last 24 Hours, Restricted Logins, Current Month, Salesforce.com Organization ID, Organization Edition, and Instance.

Organization Detail	
Organization Name	Retail customer complaint hub
Primary Contact	OrgFarm EPIC
Division	
Address	India
Fiscal Year Starts In	January
Activate Multiple Currencies	<input type="checkbox"/>
Enable Data Translation	<input type="checkbox"/>
Newsletter	<input checked="" type="checkbox"/>
Admin Newsletter	<input checked="" type="checkbox"/>
Hide Notices About System Maintenance	<input type="checkbox"/>
Hide Notices About System Downtime	<input type="checkbox"/>
Locale Formats	ICU
Phone	
Fax	
Default Locale	English (United States)
Default Language	English
Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Currency Locale	Marathi (India) - INR
Used Data Space	354 KB (7%) View
Used File Space	17 KB (0%) View
API Requests, Last 24 Hours	0 (15,000 max)
Streaming API Events, Last 24 Hours	0 (10,000 max)
Restricted Logins, Current Month	0 (0 max)
Salesforce.com Organization ID	00Dgl000008ZYtd
Organization Edition	Developer Edition
Instance	CAN98

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.

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "business" entered. Below it, "Company Settings" is expanded, and "Business Hours" is selected. The main content area is titled "Organization Business Hours" and contains a table with two rows of business hours configurations.

Action	Business Hours Name	Active	Time Zone	Default
Edit	Default	✓	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	✓
Edit	Standard Mon-Sun Support	✓	(GMT+05:30) India Standard Time (Asia/Kolkata)	<input type="checkbox"/>

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.*

The screenshot shows the Salesforce Setup interface for user management. The left sidebar has a search bar with "users" entered. Below it, "Users" is selected. The main content area is titled "Users" and shows the details for a user named "Krishna Manager".

User Detail

Name	Krishna Manager	Role	Marketing Team
Alias	kmama	User License	Salesforce
Email	krishna@test.com Verify	Profile	System Administrator
Username	krishna@test.com	Active	✓
Nickname	User17582619707507784179 i	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	i

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**.