

# SALESFORCE PROJECT

**PROJECT TITLE:** AI-Powered Smart Case Routing

**PROBLEM:** Customer support teams face challenges in efficiently prioritizing and routing cases. Manual triage causes delays, dissatisfied customers, and poor SLA compliance.

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## Phase 2: Org Setup & Configuration

### A) Salesforce Editions - Recommendation

**Developer Org** (Free, full features, ideal for practice/project building).

**Enterprise Edition** (Real-world choice for service management, supports multiple profiles, role hierarchy, advanced case management).

**Professional** (Too limited, lacks API access, not suitable for API integration with Hugging Face).

**Unlimited** (Overkill for this project demo).

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### B) Company Profile Setup

#### Company Information

Company Name: Smart Support Solutions

Address, Primary Contact, Currency.

Default Time Zone: IST (+05:30) [adjust per client].

Default Locale: English (India).

**Fiscal Year = Standard Gregorian (Jan–Dec)** [Custom FY possible if required].

#### Business Hours & Holidays

Create Business Hours: Mon–Sat, 9 AM–6 PM.

Add Holidays: National Holidays (Jan 26, Aug 15, Oct 2, etc.).

Used in SLAs, escalations, and case management.

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## C) User Setup & Licenses

### User Types:

**System Administrator** — 2 users (project owner, backup).

**Support Manager** — 1 user, handles escalations & dashboards.

**Senior Agent** — multiple, handles escalated/high-priority cases.

**Junior Agent** — multiple, handles routine cases.

**Integration User** — dedicated API callout user for Hugging Face.

### Licenses:

**Service Cloud License** (for full case management).

**Platform License** (for restricted users needing custom objects only).

**Integration User** — API-only license for external callouts.

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## D) Profiles

### System Administrator

Full access to all objects, Apex, setup, deployment.

Manages org configuration, users, roles, and integration.

### Support Manager

Read/Write on all Cases.

Access to dashboards and reports.

### Senior Agent

Read/Write on assigned cases.

Can update case status and resolutions.

### Junior Agent

Read/Write on own cases only.

Cannot escalate cases manually.

## Integration User

Restricted API access only.

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## E) Roles (Role Hierarchy)

CEO / Head of Support (optional)

- └ Support Manager
  - └ Senior Agents
    - └ Junior Agents

Role hierarchy ensures managers see team records.

Integration User is excluded from hierarchy.

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## F) Permission Sets (Granular Access)

**External API Access** — permission for Hugging Face Named Credential.

**Dashboard Access** — permission for viewing analytics dashboards.

**Flow Admin Access** — permission to manage Case Auto Routing Flow.

**Integration User** — limited API-only access.

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## G) Sharing Rules

**Case:**

High-priority cases shared with Support Manager.

Regular cases visible only to assigned agents.

**Reports/Dashboards:** Shared with Managers & Executives.

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## H) Dev Org Setup

Create a **Developer Edition Org**.

Enable **Dev Hub** for Salesforce DX projects.

Install **VS Code + Salesforce CLI**.

Authorize org:

```
sf org login web --alias SmartCaseOrg --set-default
```

Prepare metadata structure:

```
force-app/main/default/  
├── objects/  
├── classes/  
├── triggers/  
└── flows/
```

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## I) Deployment Basics

Source code managed in GitHub repo → *smart-case-routing*.

Deployment via **Salesforce CLI** (sf project deploy start).

Version tracking enabled for collaboration.