## Phase 2: Org Setup & Configuration

### 1.Salesforce Editions

Utilize a Salesforce Developer Edition for development and a sandbox environment for testing.

### 2.Company Profile Setup

Configure the company information, including the bank's name, address, and fiscal year settings. Set the default currency to match the bank's primary operating currency.

### 3.Business Hours & Holidays

Define the standard working hours for customer service teams and add all official bank holidays to ensure accurate service level agreements (SLAs).

### 4.User Setup & Licenses

Create users for all service agents, team leads, and managers. Assign appropriate Salesforce licenses (e.g., Salesforce Service Cloud).

## Phase 3: Data Modeling & Relationships

### 1.Standard & Custom Objects

Standard Objects: Account (Bank customer), Contact, Case.

Custom Objects: ServiceRequest (for specific complex requests like loan applications), Product (to track banking products like savings accounts, credit cards).

### 2.Fields

Case Object: Status (New, In Progress, Escalated, Closed), Priority (High, Medium, Low), Sub-Category (Credit Card, Loan, Fraud), Resolution\_Notes\_\_c.

ServiceRequest Object: RequestType\_\_c, LoanAmount\_\_c, ApplicationStatus\_\_c.

### 3.Record Types

Case: Create record types for "Standard Inquiry," "Fraud Report," and "Loan Application" to tailor page layouts and business processes for each.

### 4.Page Layouts

Create distinct page layouts for each record type on the Case object, showing different fields for a fraud report versus a standard inquiry.