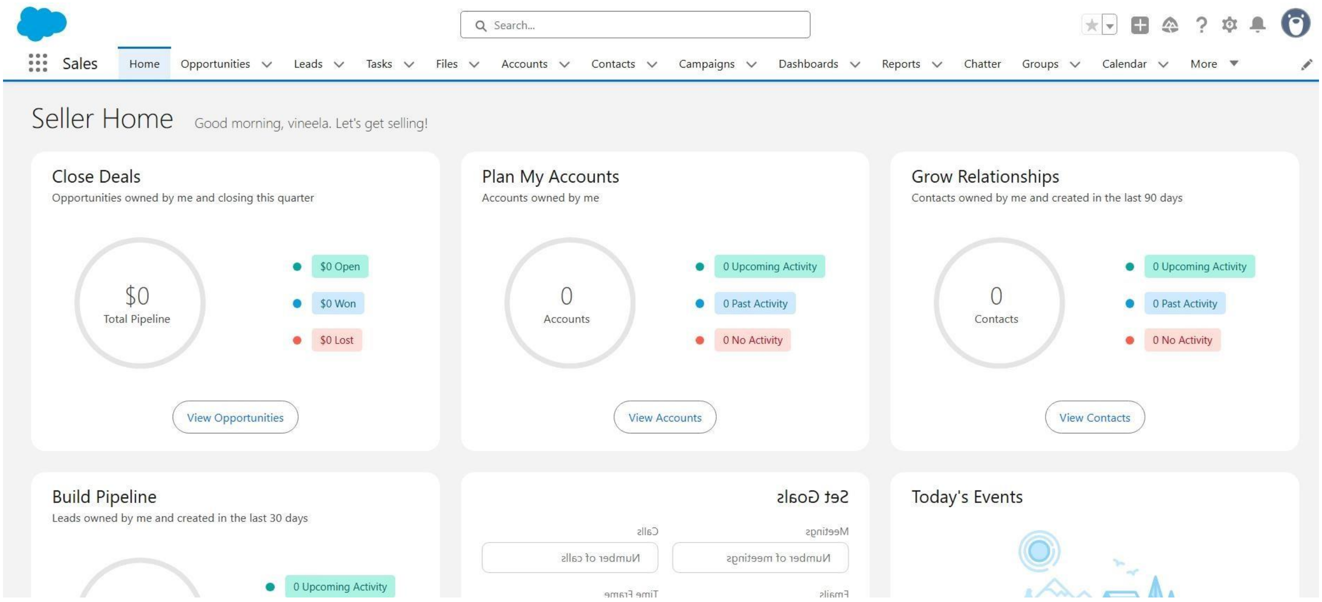
Phase 2 — Salesforce Org Setup & Configuration

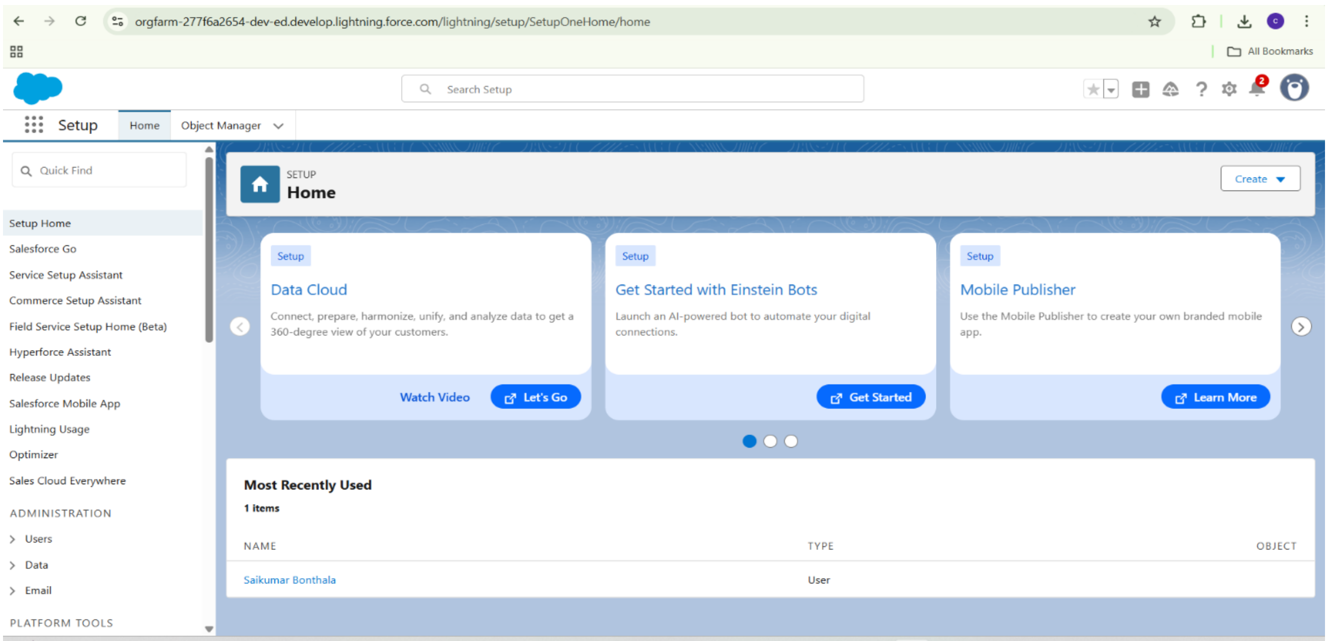
Project: Customer Journey Mapping for Enhanced Customer Experience

Objective: Set up the Salesforce Developer Org and configure necessary objects, fields, tabs, profiles, and permissions essential for tracking and visualizing customer journey data.

Step 1 — Sign up & Login

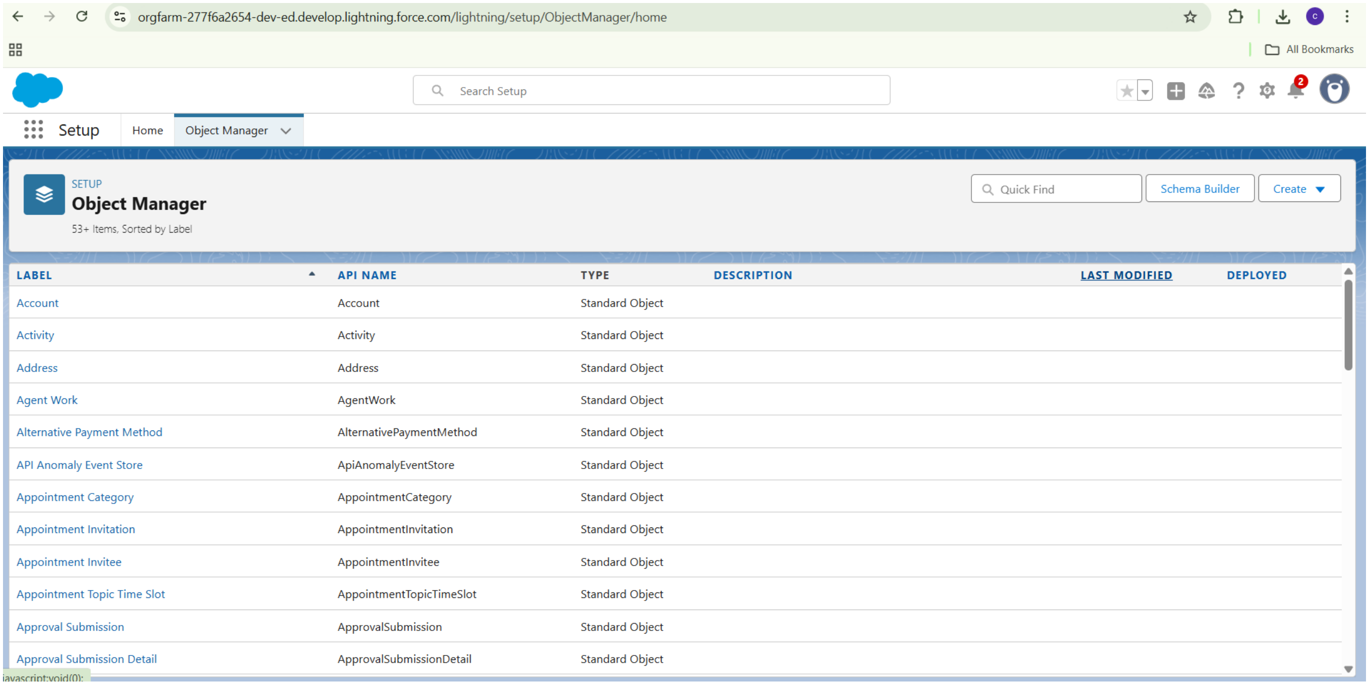
- Sign up for or access a Salesforce Developer Edition org.
- Log in to the Lightning Experience interface.
- Confirm access to the Setup area using the gear icon.





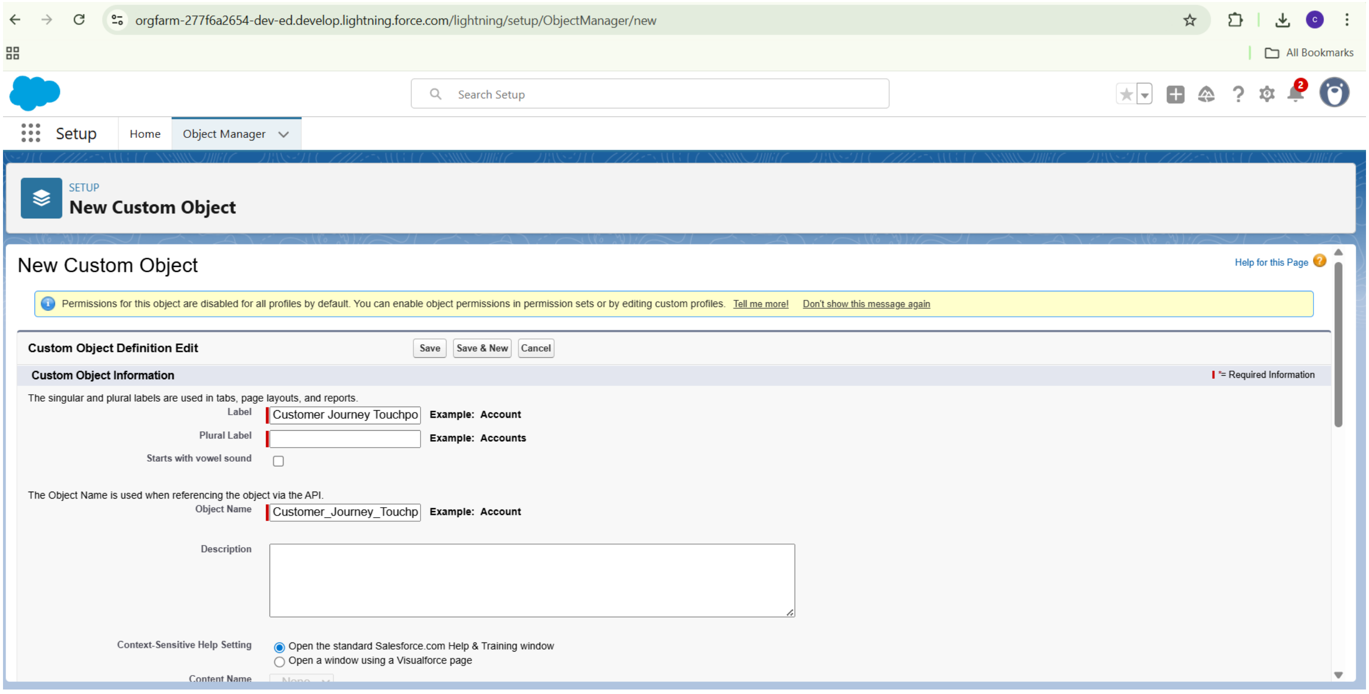
Step 2 — Open Setup & Object Manager

- Open Object Manager from Setup.
- Plan to create custom objects to handle customer journey touchpoints and stages.



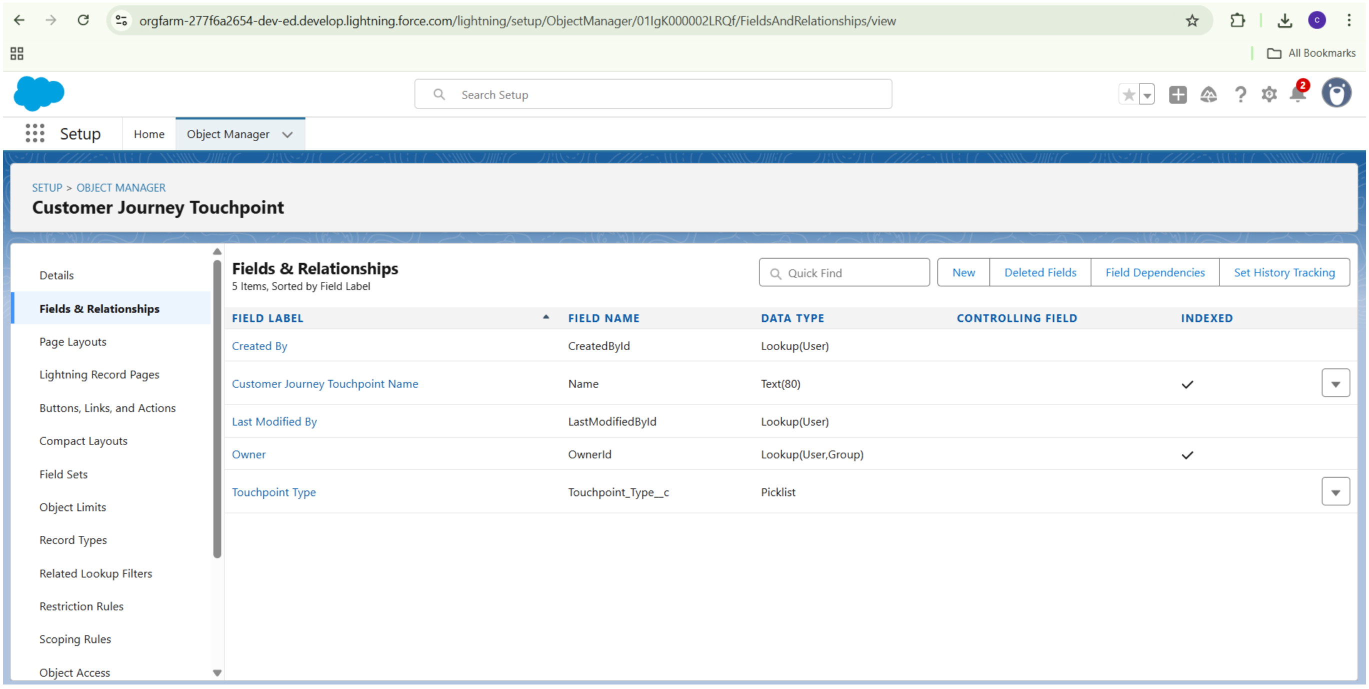
Step 3 — Create Custom Object

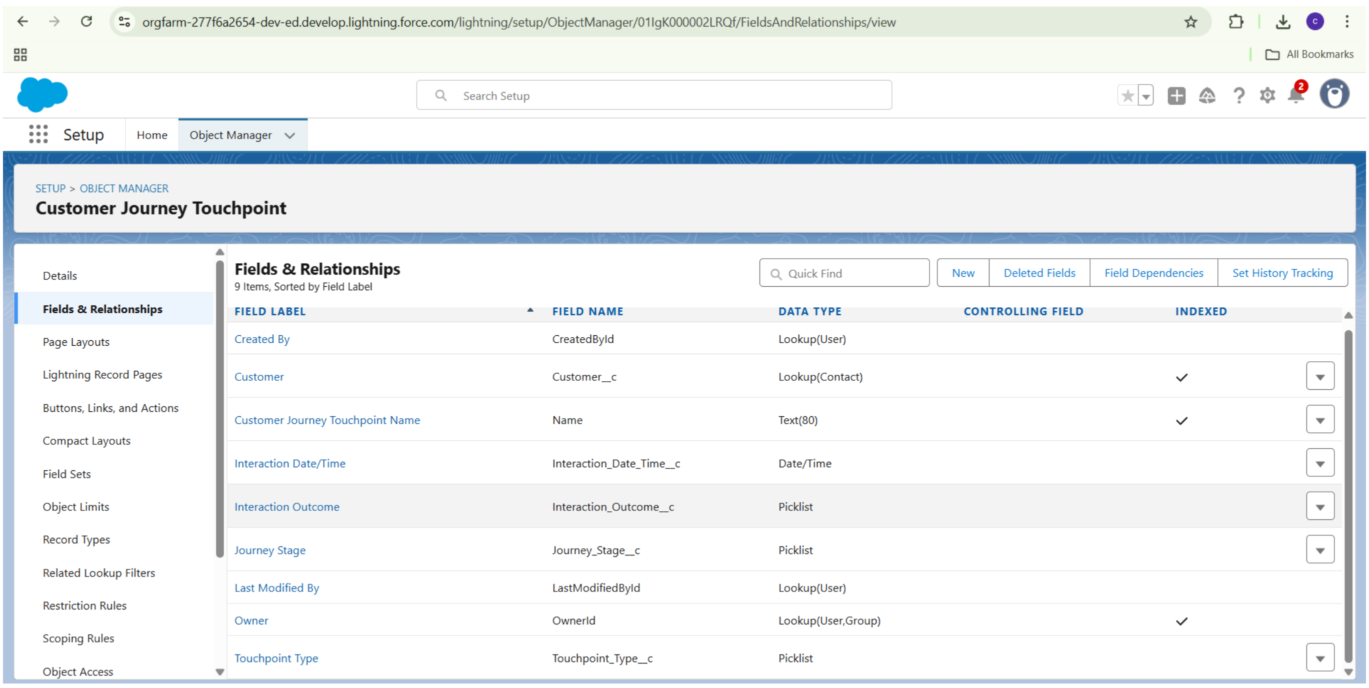
- Create a custom object named Customer Journey Touchpoint to store interaction records (e.g., website visit, campaign response, service case).
- Create another custom object called Journey Stage or use a picklist in the customer record to define stages like Awareness, Consideration, Purchase, Service, Loyalty.



Step 4 — Add Fields & Relationships (Key fields added)

- Define key fields in the Customer Journey Touchpoint object such as:
  - Touchpoint Type (Picklist: Website Visit, Campaign, Call, Case, Purchase, etc.)
  - Date/Time of Interaction
  - Customer (Lookup to Contact or Account)
  - Journey Stage (Lookup or Picklist)
  - Interaction Outcome (Text or Picklist)
- On the Customer object (Contact/Account), add a Journey Stage picklist field to indicate current stage.
- Establish lookup relationships for associating touchpoints with customers.

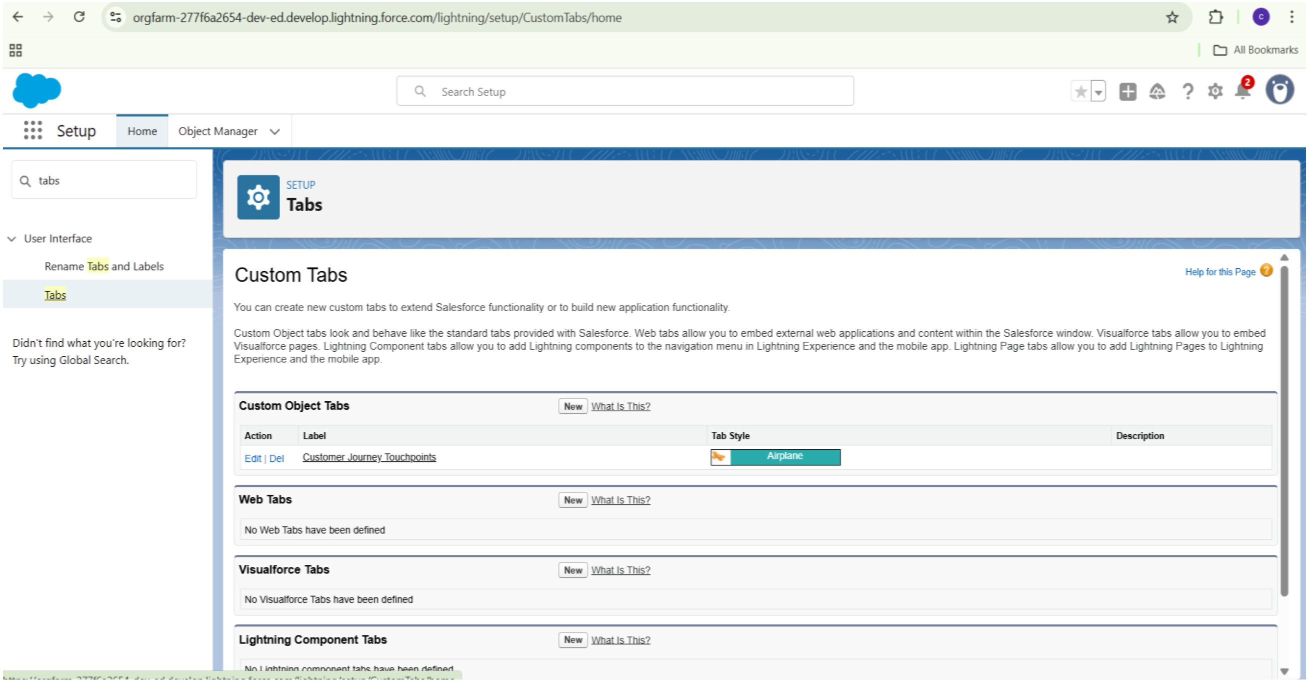




Summary of Important Fields Created (from screenshot)

Step 5 — Create Custom Tab

1. In Setup Quick Find, search Tabs and select Tabs under User Interface.
2. Click New in the Custom Object Tabs section.
3. Select the newly created object (Customer Journey Touchpoint).
4. Choose a Tab Style (icon/color), then click Next and Save.
5. Repeat for Journey Stage object if created.



Step 6 — Field Level Security & Page Layouts

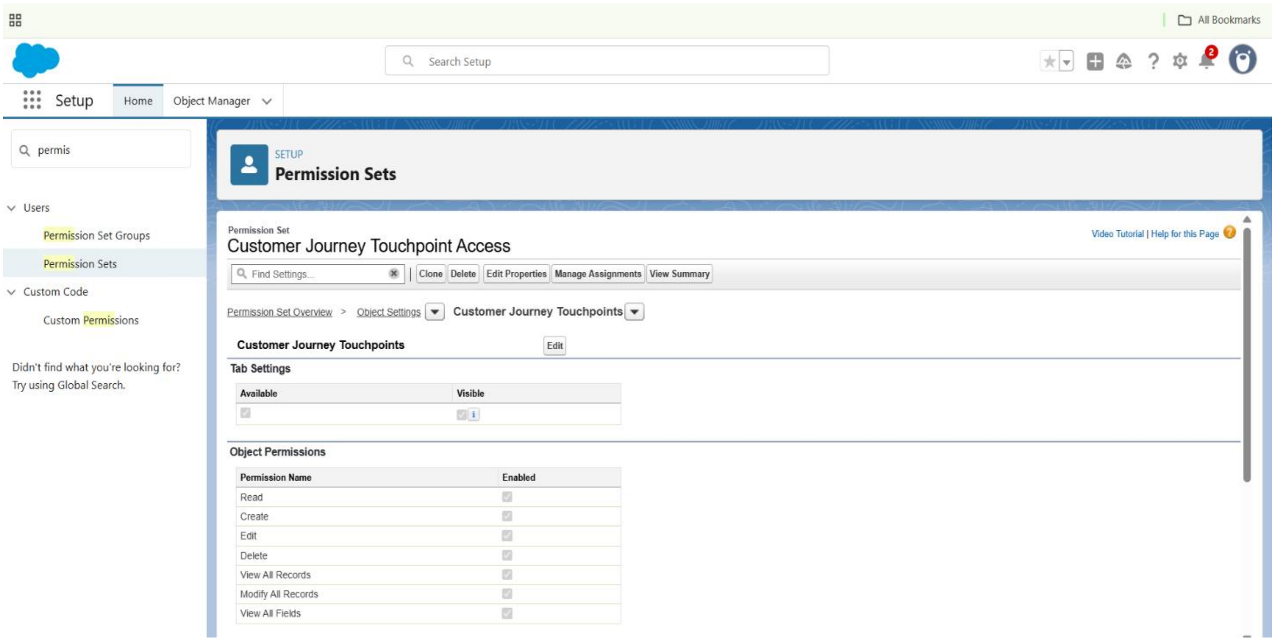
1. Go to Object Manager → Customer Journey Touchpoint → Fields & Relationships.
2. Open each field and click Set Field-Level Security.
3. Ensure the fields are visible/editable to relevant profiles.
4. Navigate to Page Layouts, open default layout.
5. Customize the layout by dragging and placing the fields logically for ease of use.
6. Save the layout.

Step 6 — Field Level Security & Page Layouts

Configured Field-Level Security for relevant profiles and added fields to the page layout. Ensured managers and admins have visibility and edit rights as needed.

Step 8 — Profiles & Permission Sets

Assigned access to System Administrator and created/used custom profiles or permission sets to grant the required object permissions (Read/Create/Edit). Recommended creating a Support Manager profile or a permission set for managers.



Step 9 — Validation & Testing

Added validation rules and tested record creation. Created sample records to confirm the fields, lookups, and related lists are working as intended.