

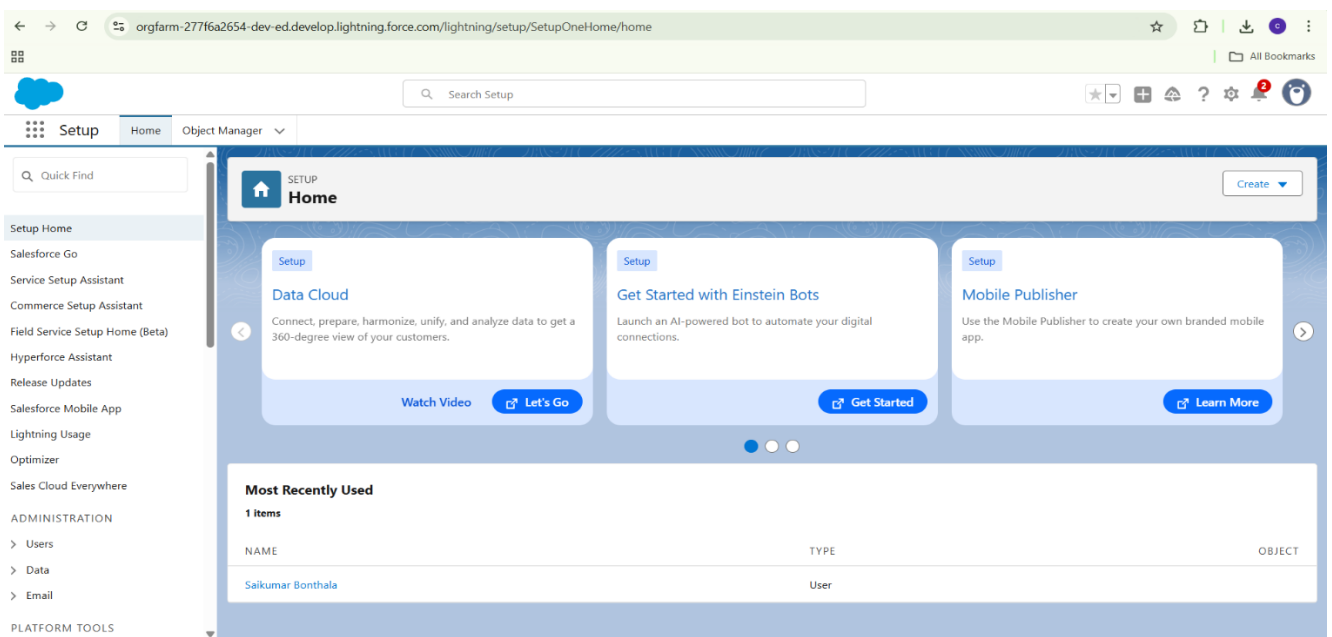
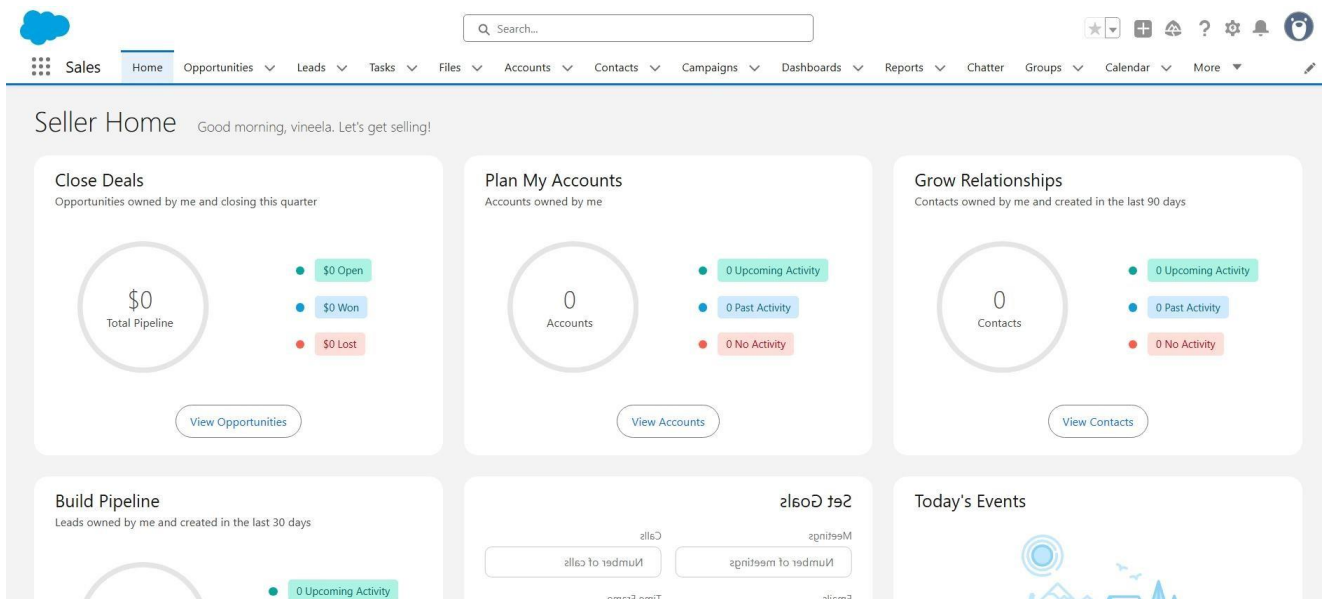
Phase 2 — Salesforce Org Setup & Configuration

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.

The screenshot shows the Salesforce Object Manager interface. The browser address bar displays the URL: `orgfarm-277f6a2654-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home`. The page header includes a search bar labeled "Search Setup" and navigation tabs for "Setup", "Home", and "Object Manager". The main content area is titled "Object Manager" and shows "53+ Items, Sorted by Label". A table lists various standard objects with columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The table includes entries such as Account, Activity, Address, Agent Work, Alternative Payment Method, API Anomaly Event Store, Appointment Category, Appointment Invitation, Appointment Invitee, Appointment Topic Time Slot, Approval Submission, and Approval Submission Detail.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Address	Address	Standard Object			
Agent Work	AgentWork	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Appointment Category	AppointmentCategory	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Approval Submission	ApprovalSubmission	Standard Object			
Approval Submission Detail	ApprovalSubmissionDetail	Standard Object			

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.

The screenshot shows the "New Custom Object" page in Salesforce. The browser address bar displays the URL: `orgfarm-277f6a2654-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new`. The page header includes a search bar labeled "Search Setup" and navigation tabs for "Setup", "Home", and "Object Manager". The main content area is titled "New Custom Object" and includes a message: "Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)". Below the message is the "Custom Object Definition Edit" section, which includes fields for "Custom Object Information". The "Label" field is set to "Customer Journey Touchpoint" (Example: Account). The "Plural Label" field is empty (Example: Accounts). The "Object Name" field is set to "Customer_Journey_Touchp" (Example: Account). The "Description" field is empty. The "Context-Sensitive Help Setting" is set to "Open the standard Salesforce.com Help & Training window".

Custom Object Definition Edit [Save] [Save & New] [Cancel]

Custom Object Information ⓘ Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label: Example: Account

Plural Label: Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name: Example: Account

Description:

Context-Sensitive Help Setting: ☒ Open the standard Salesforce.com Help & Training window ☐ Open a window using a Visualforce page

Content Name:

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.

orgfarm-277f6a2654-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002LRQf/FieldsAndRelationships/view

Setup > OBJECT MANAGER

Customer Journey Touchpoint

Details

Fields & Relationships
5 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer Journey Touchpoint Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Touchpoint Type	Touchpoint_Type__c	Picklist		

Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access

orgfarm-277f6a2654-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002LRQf/FieldsAndRelationships/view

Setup > OBJECT MANAGER

Customer Journey Touchpoint

Details

Fields & Relationships
9 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

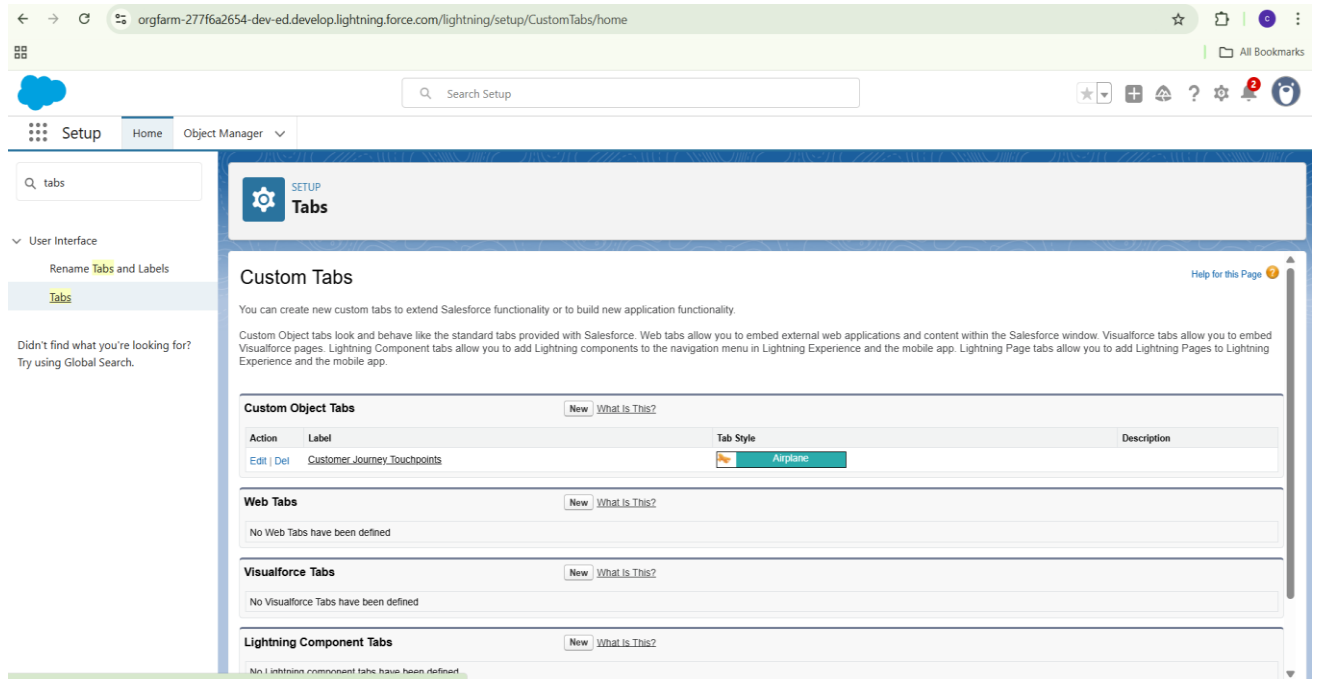
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer	Customer__c	Lookup(Contact)		✓
Customer Journey Touchpoint Name	Name	Text(80)		✓
Interaction Date/Time	Interaction_Date_Time__c	Date/Time		
Interaction Outcome	Interaction_Outcome__c	Picklist		
Journey Stage	Journey_Stage__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Touchpoint Type	Touchpoint_Type__c	Picklist		

Page Layouts
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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

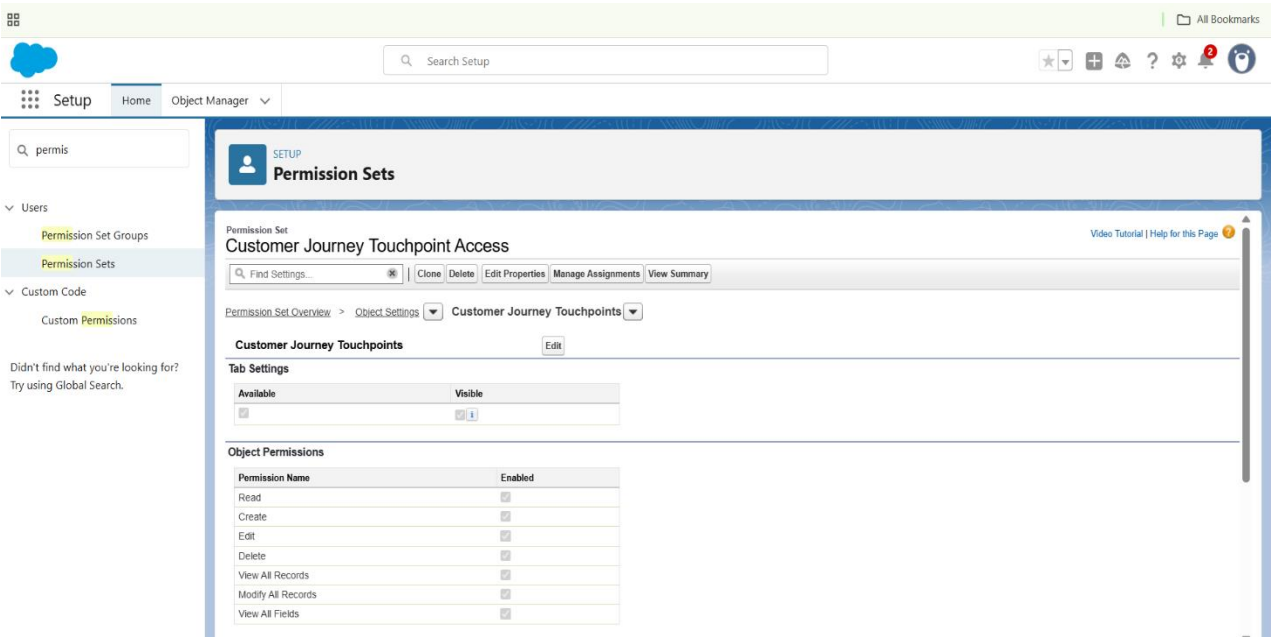
1. Go to Object Manager → Customer Journey Touchpoint → Fields & Relationships.
2. Open each field and click Set Field-Level Security.
3. Ensure the fields are visible/editable to relevant profiles.
4. Navigate to Page Layouts, open default layout.
5. Customize the layout by dragging and placing the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

