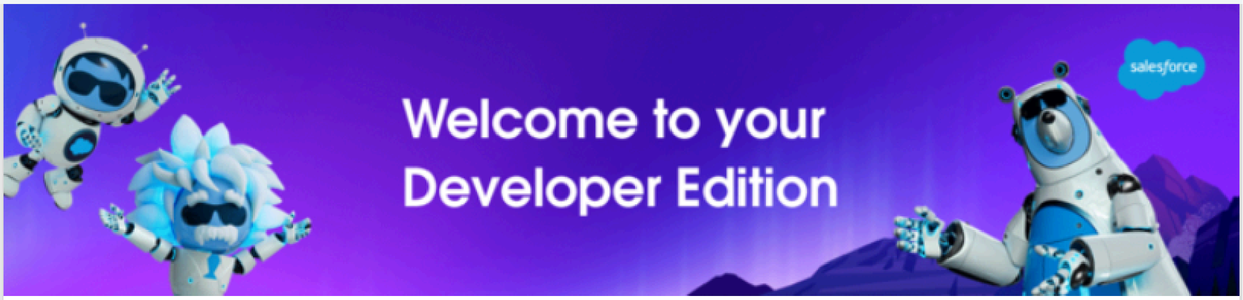
🚀 Phase 2: Org Setup & Configuration

🎯 **Goal:** Set up a fresh Salesforce environment that reflects the structure of your Complaint CRM.

🔹 1. Salesforce Edition – Developer Org

- **Why:** Developer Edition is free and gives you all core features.
- **How:**
    - Go to developer.salesforce.com.
    - Sign up with your email.
    - Confirm the activation email → log in.



Hi Samyak,

Thanks for signing up for a Developer Edition. Now you can start building on Salesforce for free and get hands-on with Agentforce and Data Cloud.

There's just one more step. Use the following link to reset the password for your Developer Edition. This link expires in 24 hours.

Reset Password

To easily log in later, save this URL:
https://orgfarm-e964f57527-dev-ed.develop.my.salesforce.com

Here's the username for your Developer Edition:
sjsam92268@agentforce.com

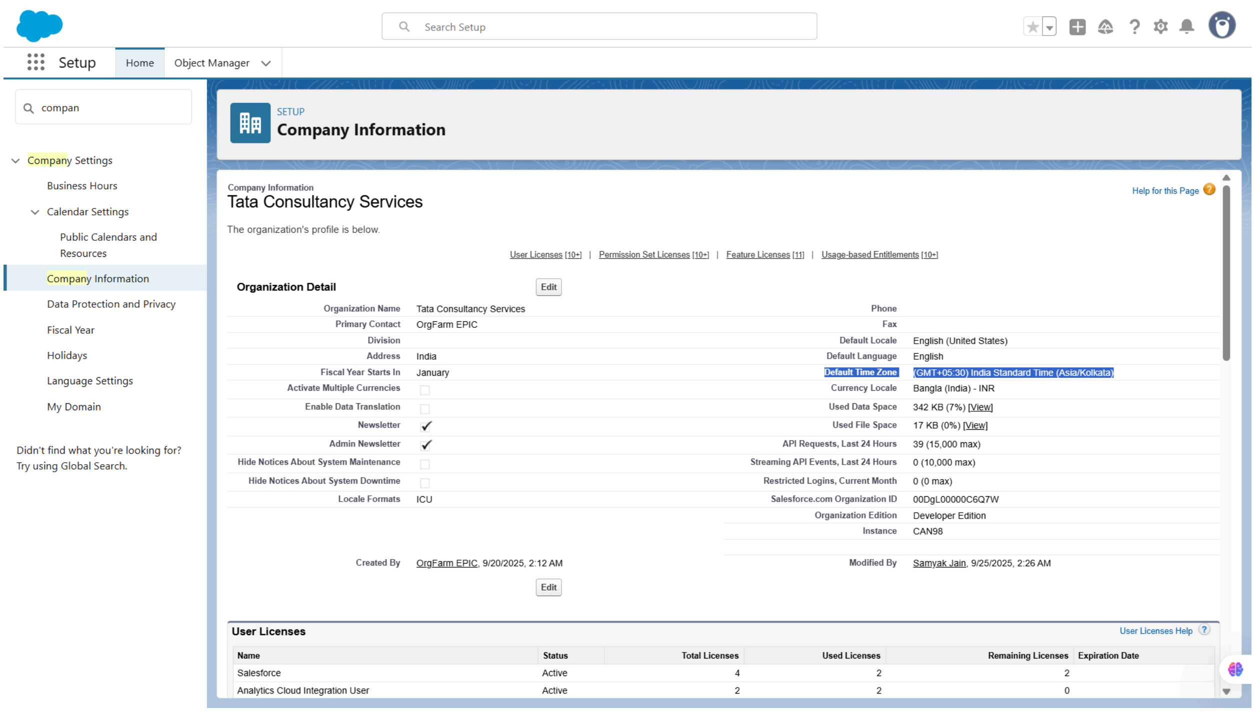
Your Developer Edition, now enabled with Agentforce and Data Cloud, remains active as long as you continue to use it. It expires after 45 days of non-usage.

Again, welcome to Salesforce!
Developer Relations

🔹 2. Company Settings – Local Time Zone & Currency

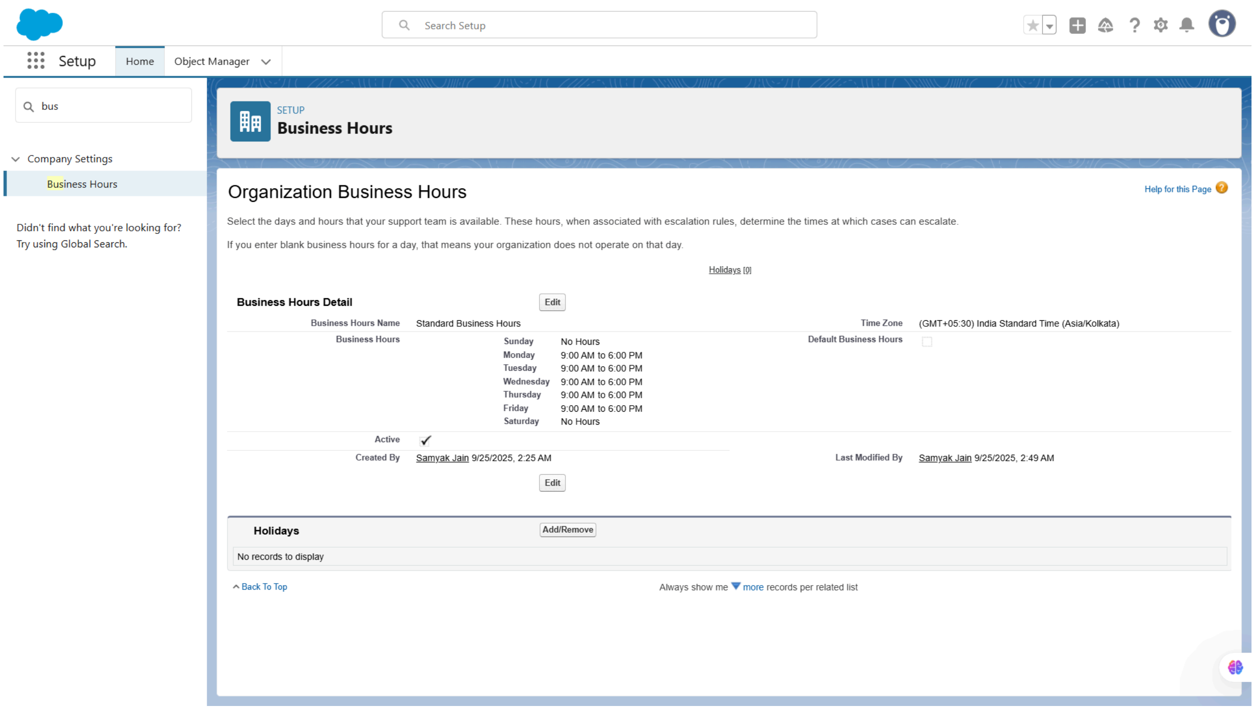
- **Where:** ⚙️ Setup → Company Information → Edit.

- **Do:**
    - Set **Time Zone** = your local (e.g., IST).
    - Set **Default Currency** = (e.g., INR).
- **Why:** Ensures business hours, reports, and dashboards align with your company.



🔹 3. Business Hours – 9 AM to 6 PM

- **Where:** Setup → Business Hours.
- **Do:**
    - Create “Standard Business Hours”.
    - Set **Mon–Fri, 9:00 to 18:00**.
- **Why:** Cases & SLAs will follow these timings.



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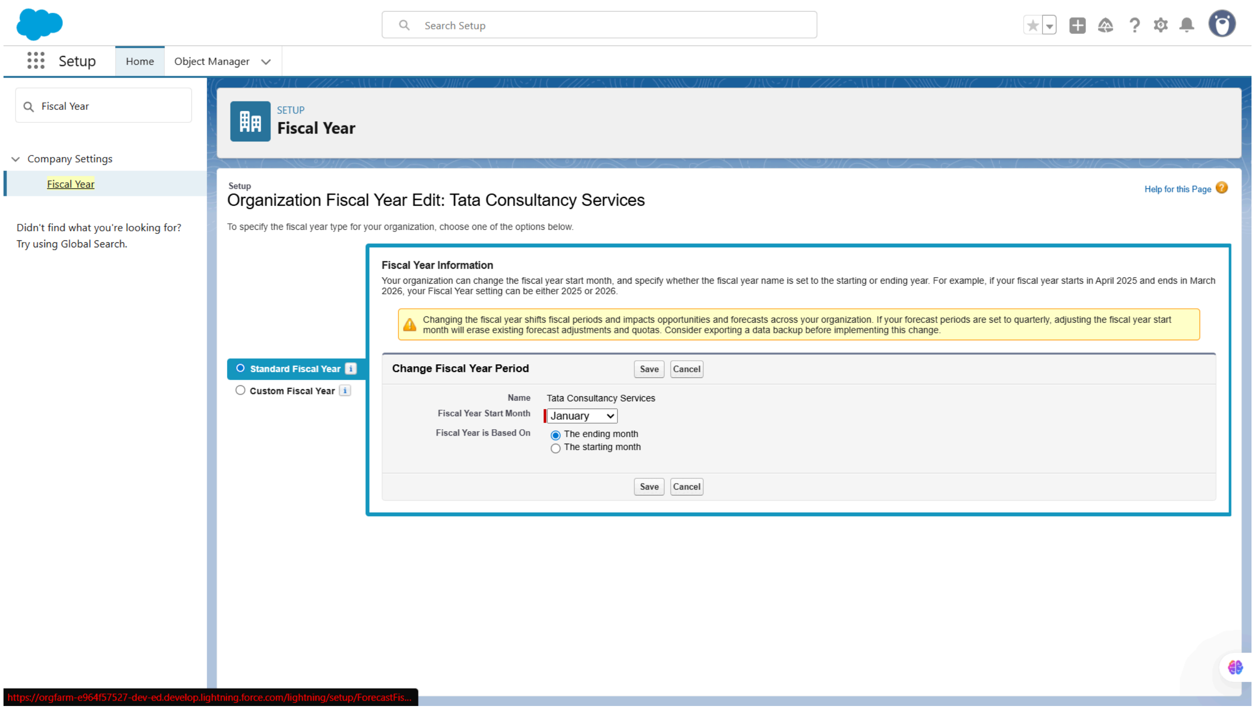
4. Fiscal Year Settings

Use Case:

- Determines the **financial reporting period**, used in reports and dashboards. Salesforce supports **Standard (Jan–Dec)** or **Custom Fiscal Years**.

Steps to Implement:

1. Setup → Quick Find → **Fiscal Year**.
2. Select **Standard Fiscal Year** or configure **Custom Fiscal Year** if needed.
3. Save.



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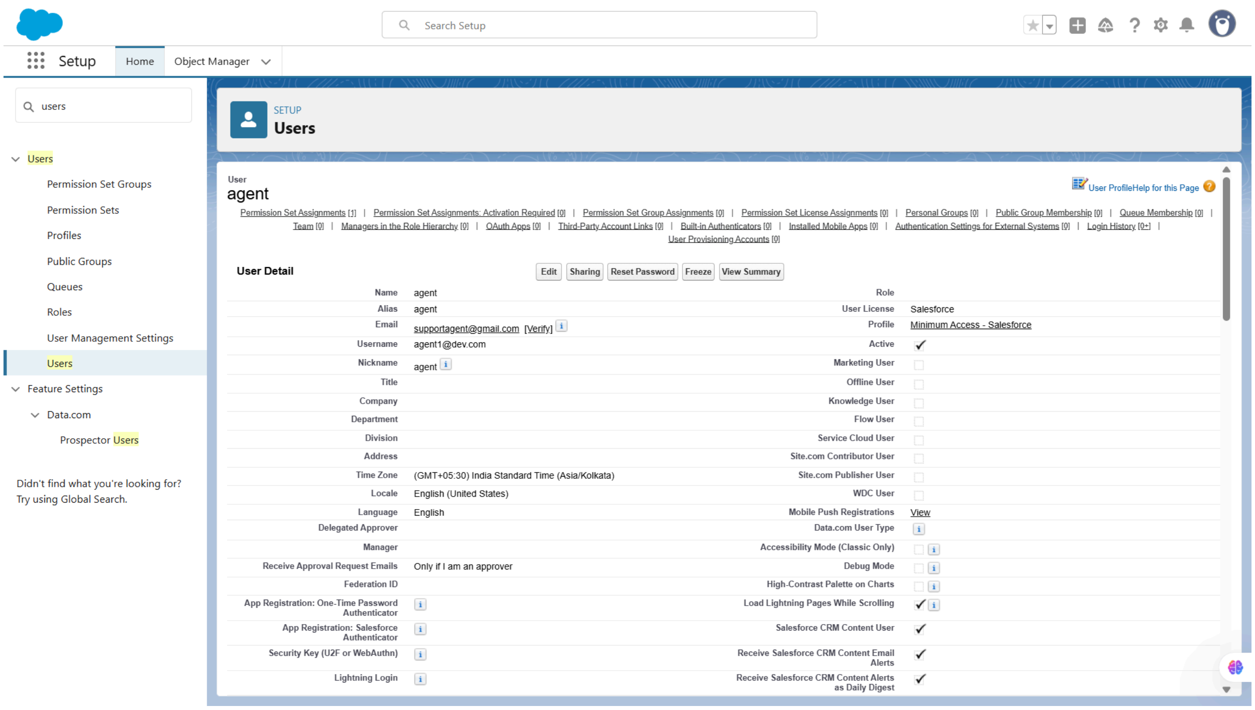
5. User Setup & Licenses

Use Case:

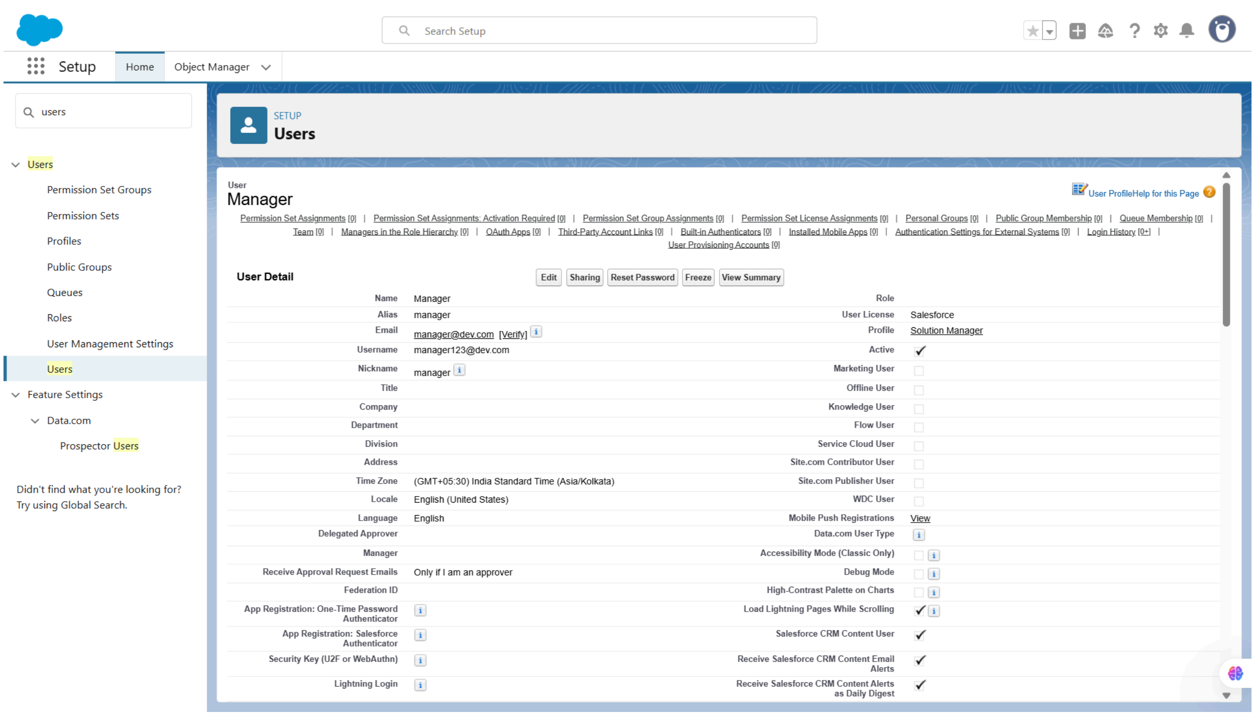
- Users need accounts to access Salesforce. Assigning proper **profiles and licenses** ensures they have the correct access level.

Steps to Implement:

1. Setup → Users → New User.
2. Create:
    - **Support Agent** → Profile: Agent Profile.



- **Manager** → Profile: Manager Profile.



3. Assign **licenses** (usually Salesforce Platform or full Salesforce license).

Screenshot Guidance:

- Screenshot of created Users list.
- Screenshot of User detail page showing Profile & Role.

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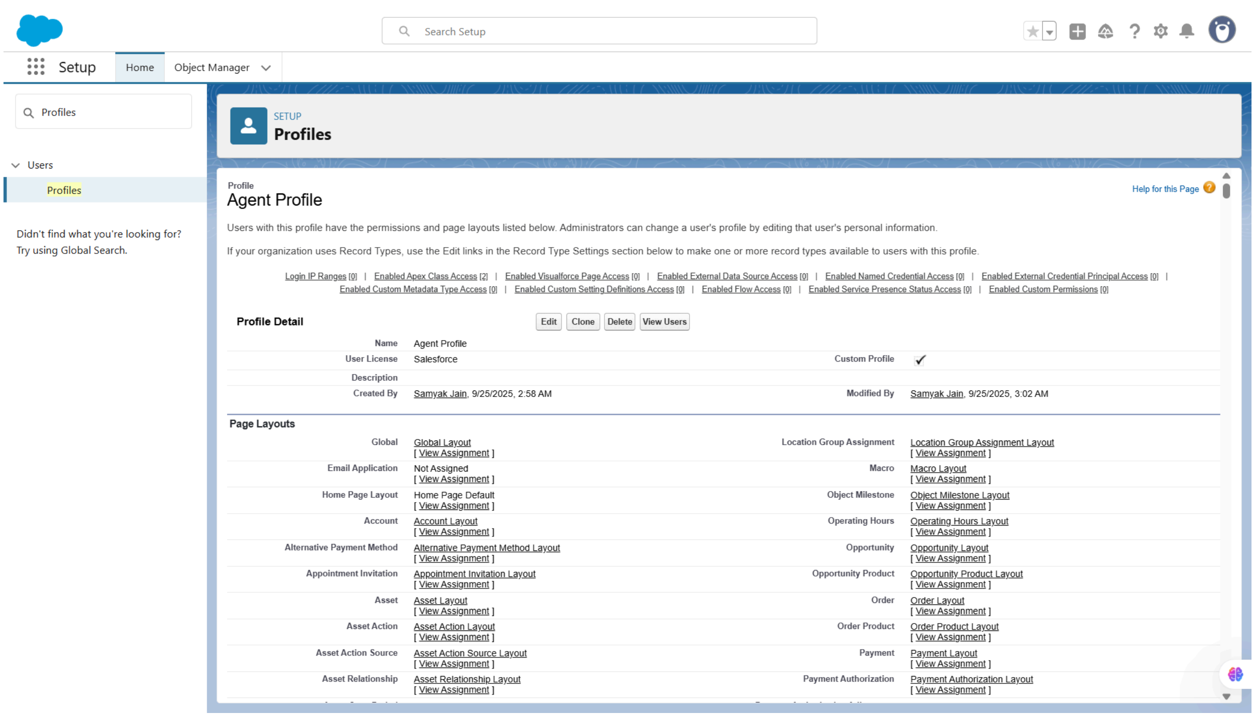
6. Login Access Policies

Use Case:

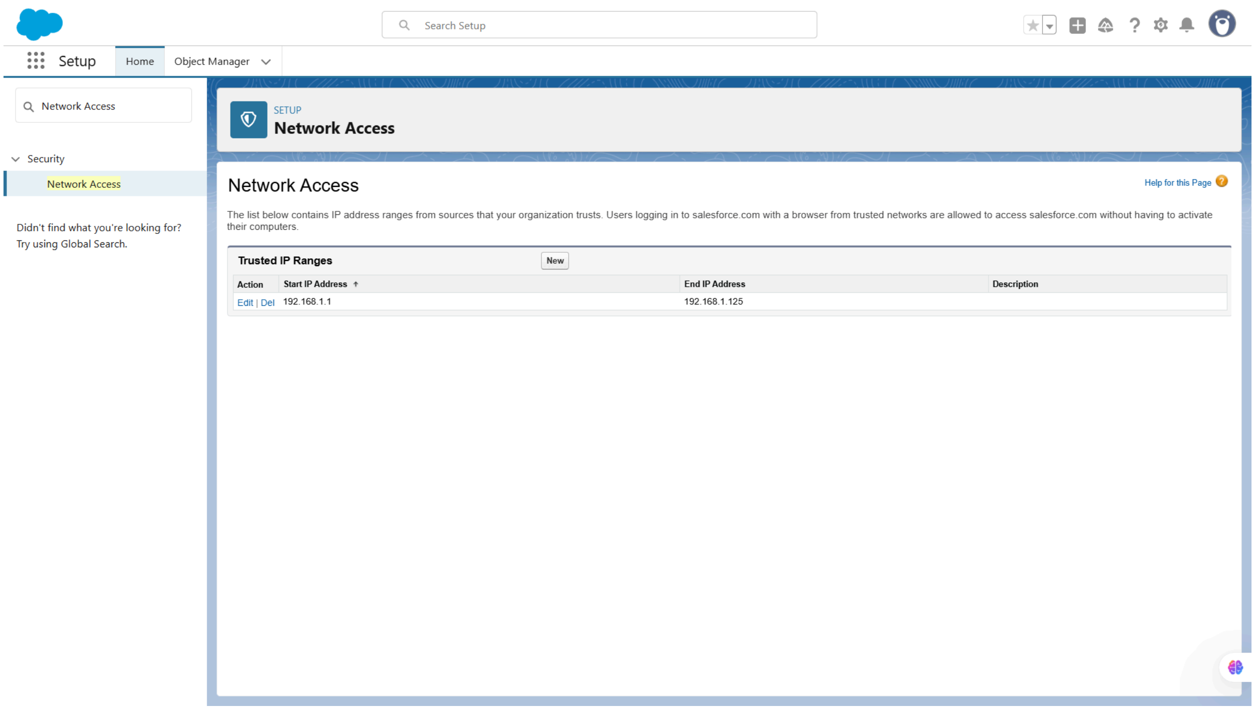
- Restrict login access by **IP ranges or business hours** to ensure users can access Salesforce only when permitted.

Steps to Implement:

1. Setup → Profiles → Agent Profile → Login Hours → Restrict to **9 AM – 6 PM, Mon–Fri**.



2. (Optional) Setup → Network Access → set allowed IP ranges.



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7. Dev Org Setup

Use Case:

- Developer Org is used as a **sandbox environment** for experimentation, testing new features, or building custom objects without affecting production.

Steps to Implement:

1. Already created in Step 1 (Developer Edition signup).
2. Use this org to create **Cases, Queues**, etc.

Step-1:- Access Setup

1. Click the **Gear Icon (⚙️)** → **Setup**.
2. You are now in **Setup**, where you can configure:
    - **Objects** (e.g., Cases, Accounts)

Objects

Use Case: Track customers, complaints, and interactions.

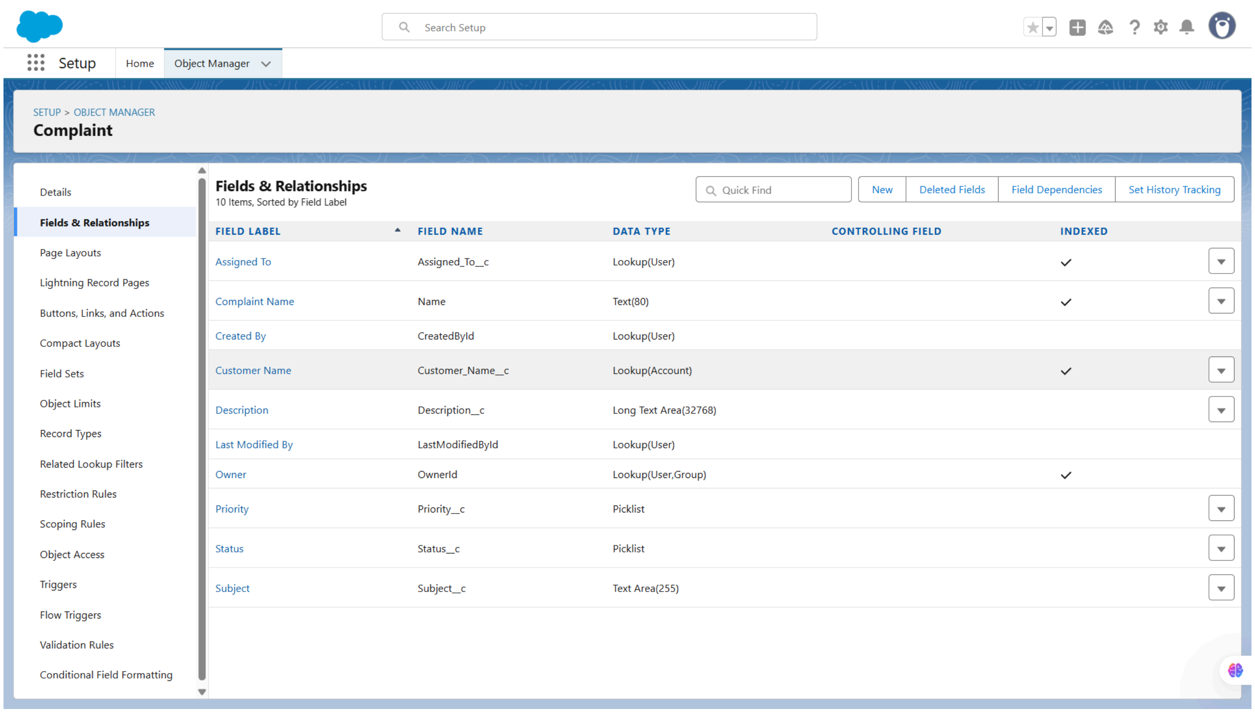
Steps:

1. Setup → **Object Manager** → click **Create** → **Custom Object**.

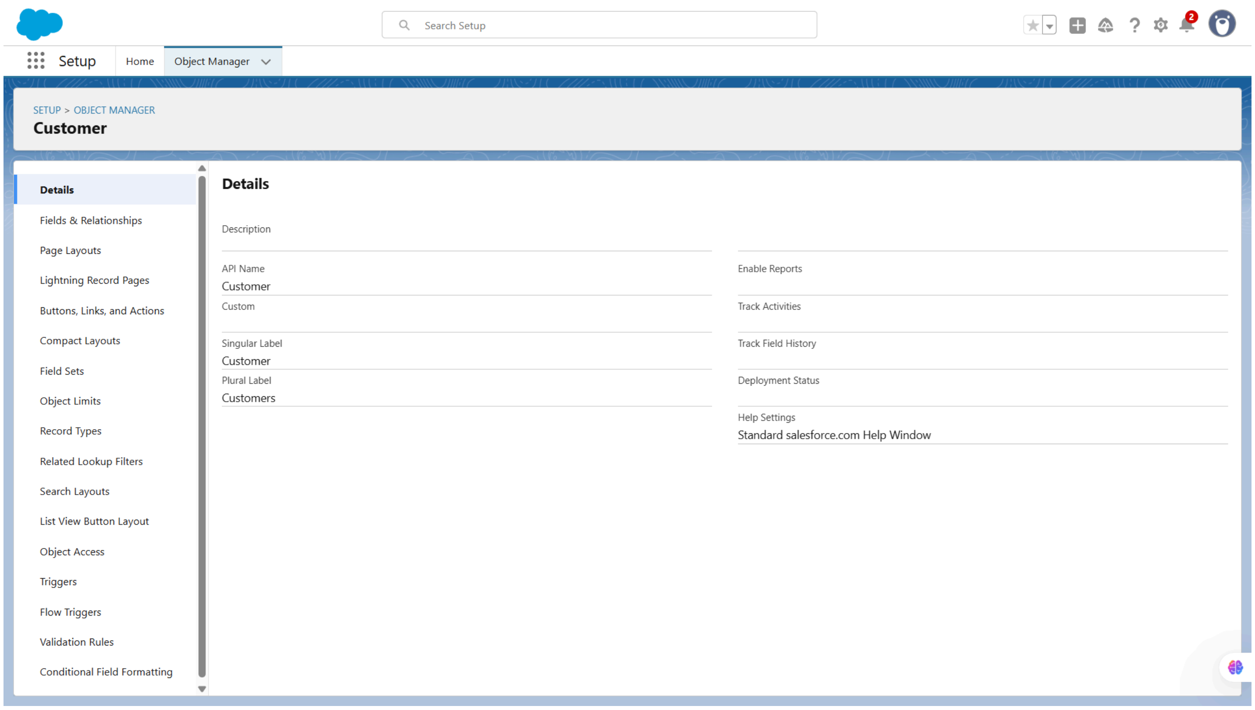
2. Create objects:

    - **Complaint** → to log customer complaints.

        - Fields: Subject, Description, Status, Priority, Assigned To, Customer Name (lookup Account/Contact)



- **Customer (Account / Contact)** → Salesforce standard objects; use them to store customer info.



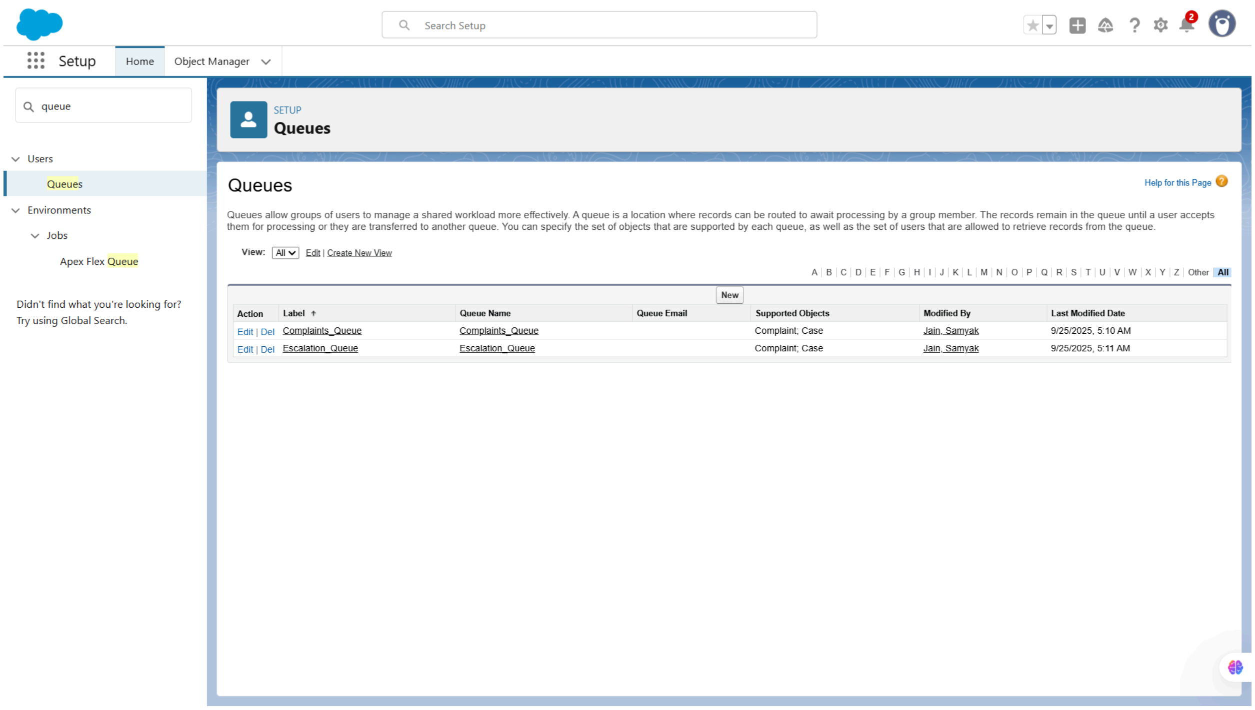
3. Add relationships:
   - Lookup/ Master-Detail fields to connect **Cases** with **Accounts** or **Contacts**.
   - **Queues** (Complaints, Escalation)

Queues

Use Case: Route complaints efficiently.

Steps:

1. Setup → **Queues** → **New**
2. Create:
   - `Complaints_Queue` → assign **Agents**
   - `Escalation_Queue` → assign **Managers**
3. Configure **object = Complaint** so new complaints automatically go to the right queue.



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8. Sandbox Usage

- **Sandbox Usage & Deployment Basics:** While a sandbox wasn't mandatory for this project, Salesforce change sets and VS Code with SFDX CLI were used for deployments.
