


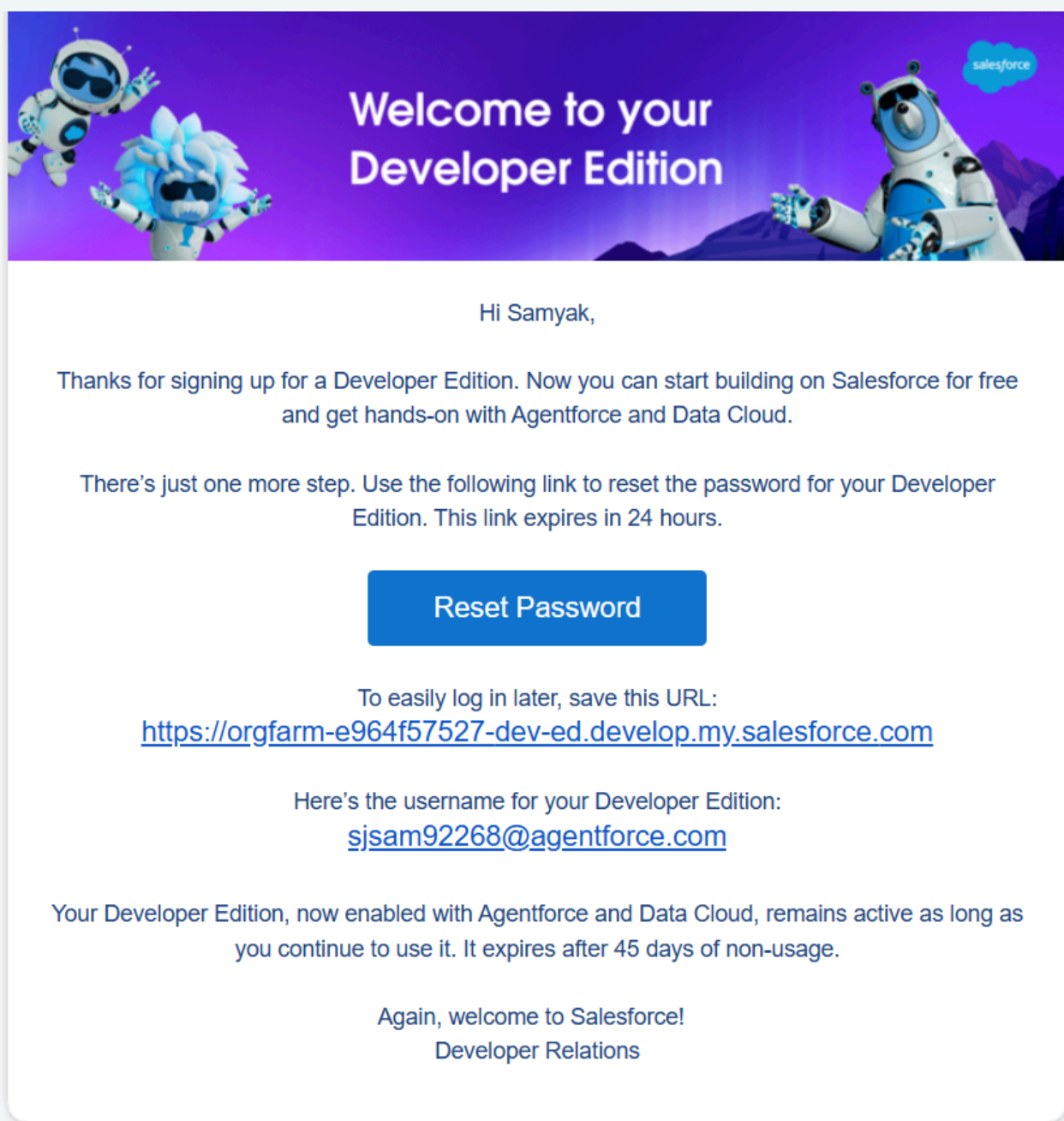


Phase 2: Org Setup & Configuration

 **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.



◆ 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.

The screenshot shows the Salesforce Setup interface for a company named "Tata Consultancy Services". The left sidebar contains navigation links for various setup areas. The main content area is titled "Company Information" and displays the organization's profile. Below the profile, there is a table for "User Licenses".

Name	Status	Total Licenses	Used Licenses	Remaining Licenses	Expiration Date
Salesforce	Active	4	2	2	
Analytics Cloud Integration User	Active	2	2	0	

◆ 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.

The screenshot shows the Salesforce Setup interface for configuring Business Hours. The left sidebar includes a search bar with 'bus' and a navigation menu with 'Company Settings' and 'Business Hours'. The main content area is titled 'Organization Business Hours' and includes a 'Help for this Page' link. Below the title, there is a descriptive paragraph and a note about blank business hours. The 'Business Hours Detail' section features a table for 'Standard Business Hours' with columns for 'Business Hours Name', 'Standard Business Hours', and 'Time Zone'. The table lists days from Sunday to Saturday with their respective hours. Below the table, there are fields for 'Active' (checked), 'Created By' (Samyak Jain), and 'Last Modified By' (Samyak Jain). A 'Holidays' section at the bottom shows 'No records to display' and an 'Add/Remove' button. At the very bottom, there is a 'Back To Top' link and a note about the number of records displayed.

Organization Business Hours [Help for this Page](#)

Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate.

If you enter blank business hours for a day, that means your organization does not operate on that day.

[Holidays](#)

Business Hours Detail [Edit](#)

Business Hours Name	Standard Business Hours	Time Zone
Business Hours	Sunday No Hours Monday 9:00 AM to 6:00 PM Tuesday 9:00 AM to 6:00 PM Wednesday 9:00 AM to 6:00 PM Thursday 9:00 AM to 6:00 PM Friday 9:00 AM to 6:00 PM Saturday No Hours	(GMT+05:30) India Standard Time (Asia/Kolkata)

Default Business Hours ☐

Active ☒

Created By [Samyak Jain](#) 9/25/2025, 2:25 AM

Last Modified By [Samyak Jain](#) 9/25/2025, 2:49 AM

[Edit](#)

Holidays [Add/Remove](#)

No records to display

[Back To Top](#) Always show me [more](#) records per related list

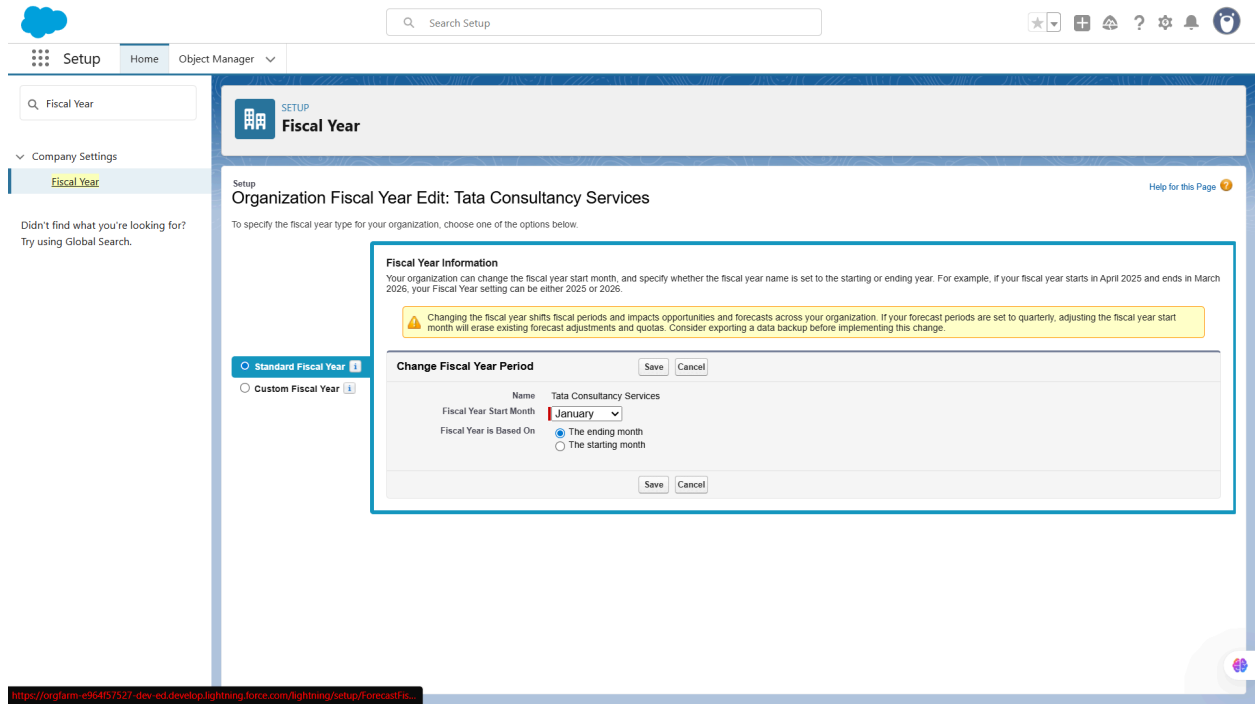
4. Fiscal Year Settings

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.



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.

The screenshot shows the Salesforce Setup interface with the 'Users' section selected. The user 'agent' is displayed with the following details:

User Detail		Role
Name	agent	Salesforce
Alias	agent	User License
Email	supportagent@gmail.com [Verify]	Profile
Username	agent1@dev.com	Minimum Access - Salesforce
Nickname	agent	Active
Title		Marketing User
Company		Offline User
Department		Knowledge User
Division		Flow User
Address		Service Cloud User
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Contributor User
Locale	English (United States)	Site.com Publisher User
Language	English	WDC User
Delegated Approver		Mobile Push Registrations
Manager		Data.com User Type
Receive Approval Request Emails	Only if I am an approver	Accessibility Mode (Classic Only)
Federation ID		Debug Mode
App Registration: One-Time Password Authenticator		High-Contrast Palette on Charts
App Registration: Salesforce Authenticator		Load Lightning Pages While Scrolling
Security Key (U2F or WebAuthn)		Salesforce CRM Content User
Lightning Login		Receive Salesforce CRM Content Email Alerts
		Receive Salesforce CRM Content Alerts as Daily Digest

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

The screenshot shows the Salesforce Setup interface with the 'Users' section selected. The user 'Manager' is displayed with the following details:

User Detail		Role
Name	Manager	Salesforce
Alias	manager	User License
Email	manager@dev.com [Verify]	Profile
Username	manager123@dev.com	Solution Manager
Nickname	manager	Active
Title		Marketing User
Company		Offline User
Department		Knowledge User
Division		Flow User
Address		Service Cloud User
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Contributor User
Locale	English (United States)	Site.com Publisher User
Language	English	WDC User
Delegated Approver		Mobile Push Registrations
Manager		Data.com User Type
Receive Approval Request Emails	Only if I am an approver	Accessibility Mode (Classic Only)
Federation ID		Debug Mode
App Registration: One-Time Password Authenticator		High-Contrast Palette on Charts
App Registration: Salesforce Authenticator		Load Lightning Pages While Scrolling
Security Key (U2F or WebAuthn)		Salesforce CRM Content User
Lightning Login		Receive Salesforce CRM Content Email Alerts
		Receive Salesforce CRM Content Alerts as Daily Digest

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.

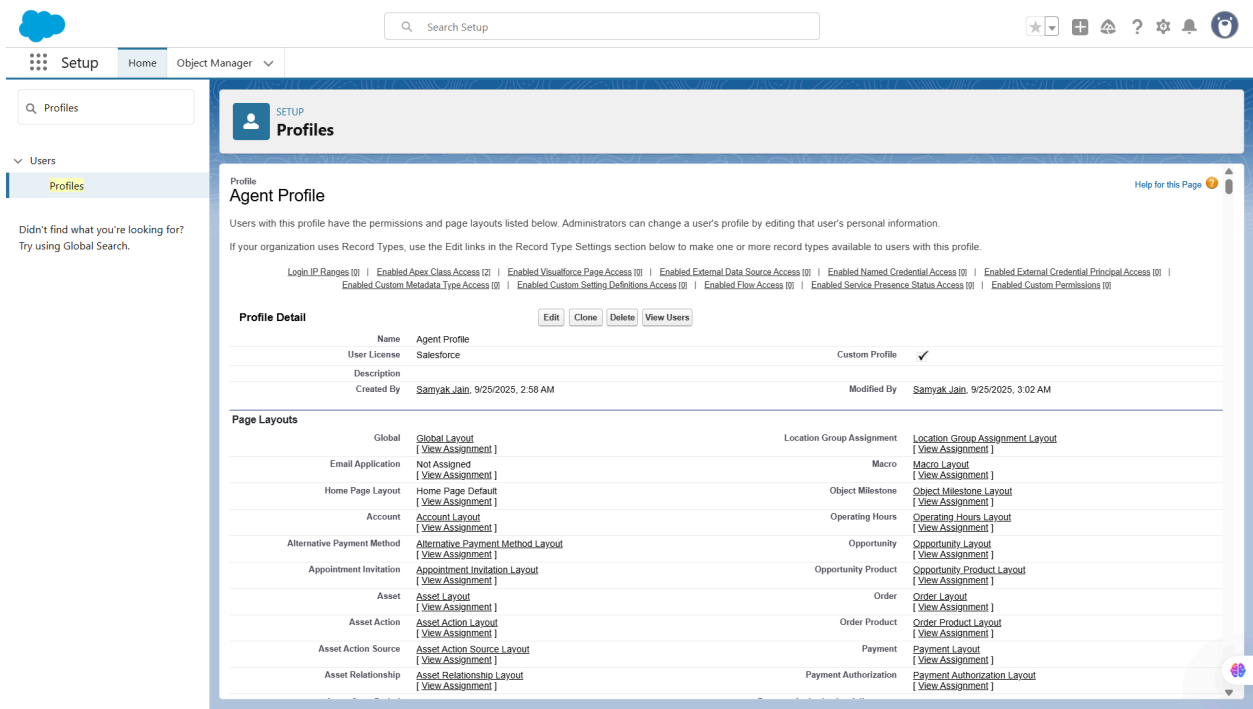
6. Login Access Policies

Use Case:

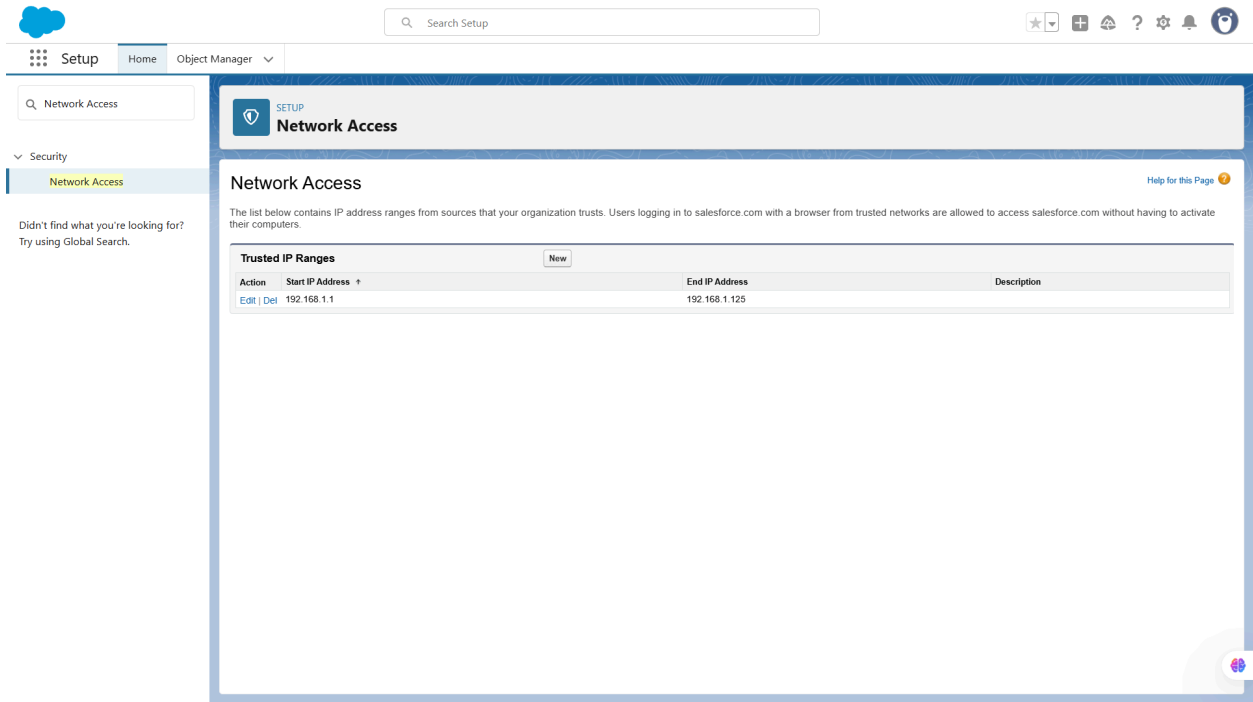
- Restrict login access by **IP ranges or business hours** to ensure users can access Salesforce only when permitted.

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.



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

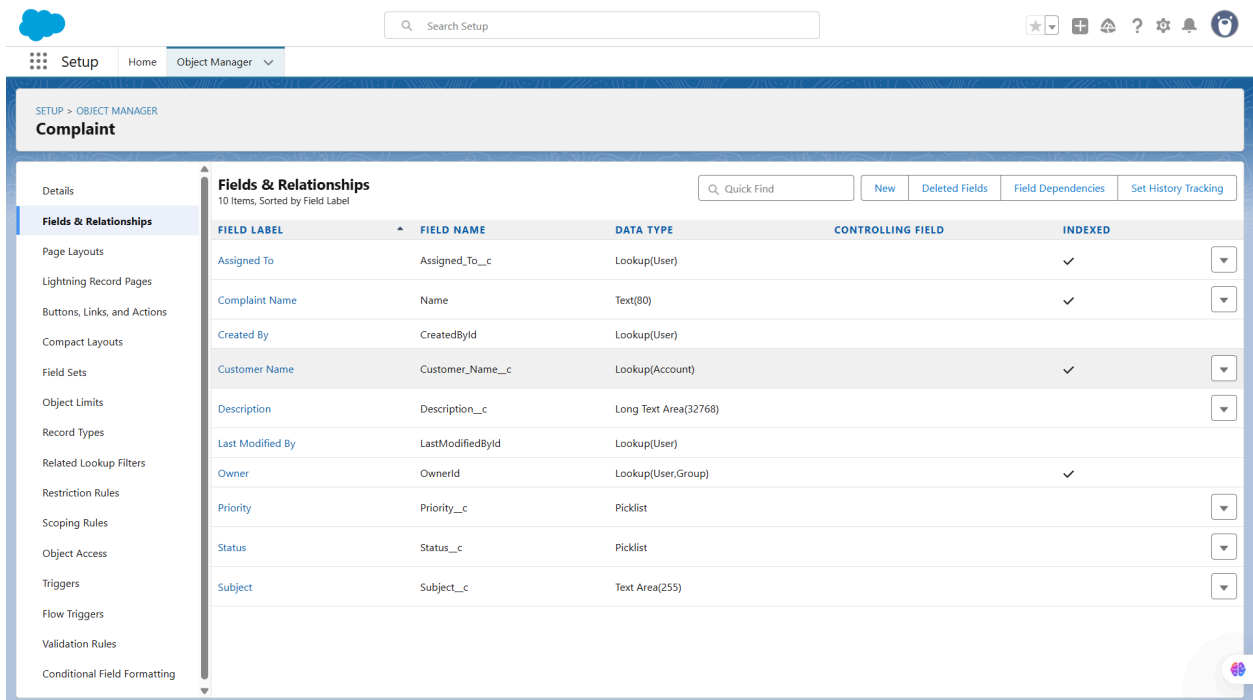
1. Click the **Gear Icon (⚙️)** → **Setup**.
2. You are now in **Setup**, where you can configure:
 - **Objects** (e.g., Cases, Accounts)

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)



Setup > OBJECT MANAGER

Complaint

Details

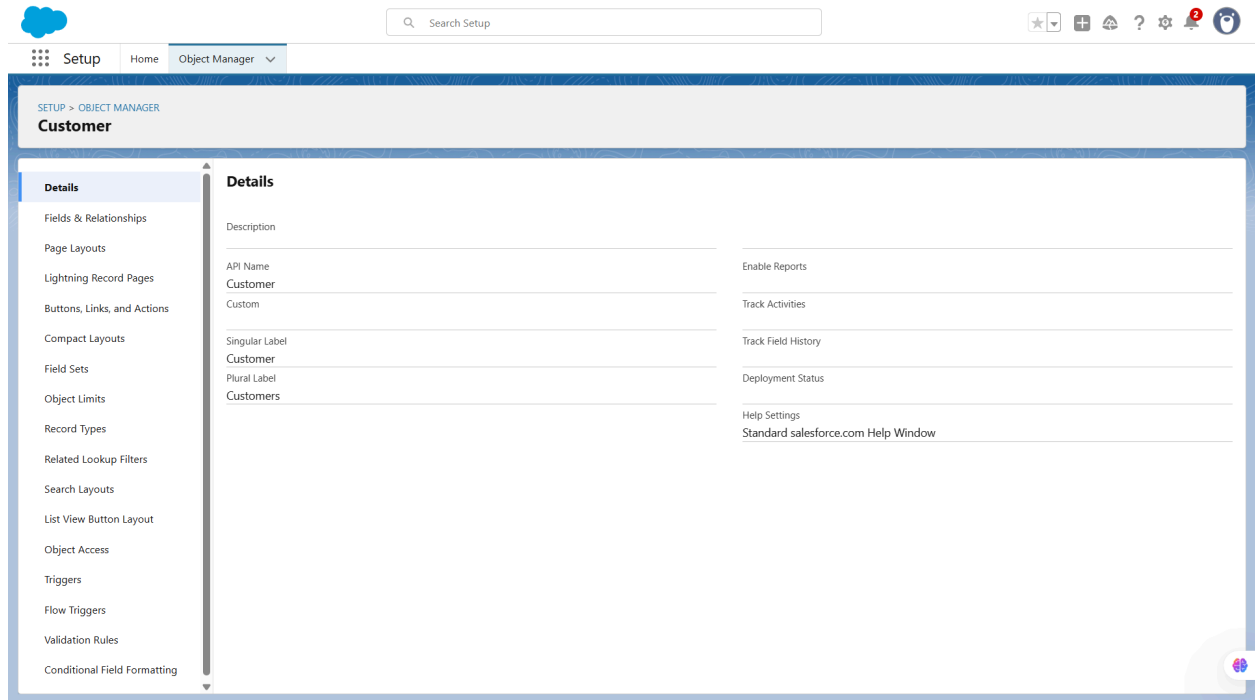
Fields & Relationships
10 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Assigned To	Assigned_To__c	Lookup(User)		✓
Complaint Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Customer Name	Customer_Name__c	Lookup(Account)		✓
Description	Description__c	Long Text Area(32768)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓
Priority	Priority__c	Picklist		
Status	Status__c	Picklist		
Subject	Subject__c	Text Area(255)		

- **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.

Setup

Home

Object Manager

Search Setup

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⚙️

🔔

👤

queue

Users

Queues

Environments

Jobs

Apex Flex Queue

Didn't find what you're looking for?
Try using Global Search.

Queues

Help for this Page

Queues allow groups of users to manage a shared workload more effectively. A queue is a location where records can be routed to await processing by a group member. The records remain in the queue until a user accepts them for processing or they are transferred to another queue. You can specify the set of objects that are supported by each queue, as well as the set of users that are allowed to retrieve records from the queue.

View: All

Edit

Create New View

A

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R

S

T

U

V

W

X

Y

Z

Other

All

Action

Label

Queue Name

Queue Email

Supported Objects

Modified By

Last Modified Date

Edit

Del

Complaints_Queue

Complaints_Queue

Complaint, Case

Jain, Samyak

9/25/2025, 5:10 AM

Edit

Del

Escalation_Queue

Escalation_Queue

Complaint, Case

Jain, Samyak

9/25/2025, 5:11 AM

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.