

## Phase 2: Org Setup & Configuration

### Goal of Phase 2

Prepare the Salesforce environment with company setup, users, roles, profiles, and security model so that development can begin smoothly.

### 1. Salesforce Edition

- **Developer Edition Org** (free) is used.
- This org acts as both development and testing environment.
- In real companies, Sandboxes are used, but for this project, Dev Org serves the purpose.

### 2. Company Profile Setup

- **Company Name:** Telecom Service Hub Pvt. Ltd.
- **Time Zone:** (GMT+05:30) Asia/Kolkata
- **Currency:** INR (₹)
- **Locale:** English (India)

“Company Profile setup with org information, timezone, and currency.”

The screenshot displays the Salesforce Setup interface. On the left, a navigation menu lists various setup areas, with 'Company Information' highlighted. The main content area, titled 'Company Information', shows the profile for 'Telecom Service Hub Pvt. Ltd.'. It includes a table of organization details and a list of system settings.

Organization Detail	
Organization Name	Telecom Service Hub Pvt. Ltd.
Primary Contact	OrgFarm EPIC
Division	
Address	Belagavi Ghataprabha 591306 India
Fiscal Year Starts In	January
Activate Multiple Currencies	<input type="checkbox"/>
Enable Data Translation	<input type="checkbox"/>
Newsletter	<input checked="" type="checkbox"/>
Admin Newsletter	<input checked="" type="checkbox"/>
Hide Notices About System Maintenance	<input type="checkbox"/>
Phone	(776) 048-5975
Fax	
Default Locale	English (India)
Default Language	English
Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Currency Locale	English (India) - INR
Used Data Space	342 KB (7%) <a href="#">View</a>
Used File Space	17 KB (0%) <a href="#">View</a>
API Requests, Last 24 Hours	0 (15,000 max)
Streaming API Events, Last 24 Hours	0 (10,000 max)

### 3. Business Hours & Holidays

- **Standard Business Hours:** Monday–Friday, 9 AM – 6 PM.
- **Holiday Added:** Independence Day (Aug 15).
- **Purpose:** Ensures service requests and escalations only occur during working hours.

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#### 4. Fiscal Year Settings

- Chosen: **Standard Fiscal Year (Jan–Dec)**.
  - Note: Can be changed to Apr–Mar if required for Indian telecom companies.
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#### 5. User Setup & Licenses

Created two sample users to simulate real-world roles:

##### 1. Manager User

- Username: [manager1@telecomhub.com](mailto:manager1@telecomhub.com)
- Role: Service Manager
- License: Salesforce

##### 2. Agent User

- Username: [agent1@telecomhub.com](mailto:agent1@telecomhub.com)
- Role: Customer Support Agent
- License: Salesforce

**“Manager and Agent users created with Salesforce licenses.”**



The screenshot shows the 'Users' tab in Salesforce User Management Settings. The table lists four users with their details and assigned profiles.

Roles	<input type="checkbox"/> Edit	EPIC, OrgFarm	OEPIK	<a href="mailto:epic.ec40c284a3a3@orgfarm.salesforce.com">epic.ec40c284a3a3@orgfarm.salesforce.com</a>	✓	System Administrator
User Management Settings	<input type="checkbox"/> Edit	koparde, savitri	sav	<a href="mailto:savitrinikoparde116@agentforce.com">savitrinikoparde116@agentforce.com</a>	✓	System Administrator
Users	<input type="checkbox"/> Edit	Telecom, Agent1	agent1	<a href="mailto:agent1@telecomhub.com">agent1@telecomhub.com</a>	Customer support Agent	✓ Telecom Agent Profile
	<input type="checkbox"/> Edit	Telecom, Manager	mtele	<a href="mailto:manager1@telecomhub.com">manager1@telecomhub.com</a>	Service manager	✓ Telecom Manager Profile

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#### 6. Profiles

Profiles were created to define object-level permissions:

- **Telecom Agent Profile**
    - Access: Create/Edit Service Requests, Read-only on Customers & Plans.
  - **Telecom Manager Profile**
    - Full Access to all objects (Customers, Plans, Service Requests).
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#### 7. Roles

Role hierarchy created to manage record-level visibility:

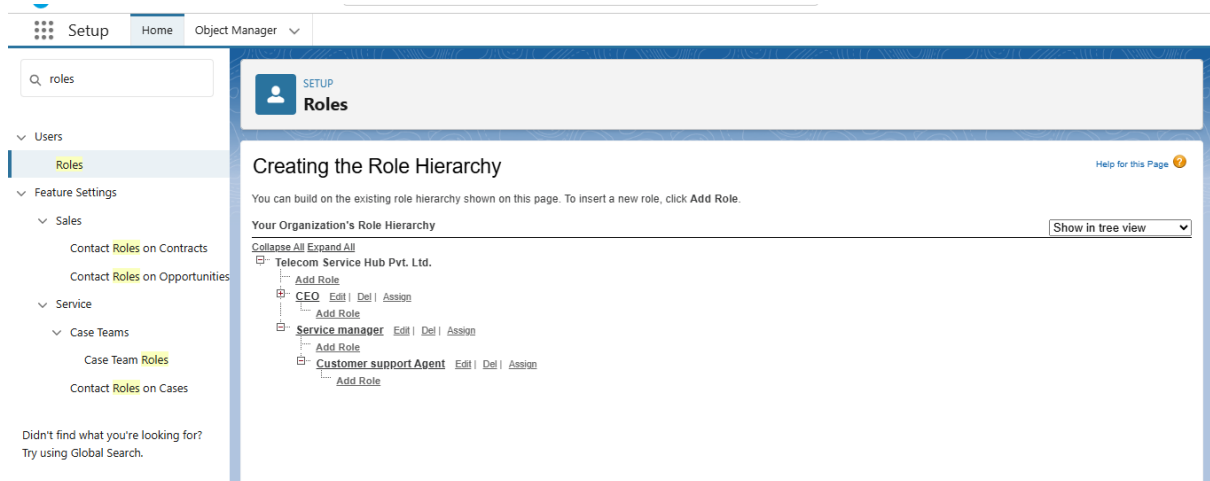
- **Service Manager** (Top role)
  - **Customer Support Agent** (Child role)

Assignments:

- Manager User → Service Manager
- Agent User → Customer Support Agent

Effect: Manager can see all records; Agent can only see their own.

**“Role hierarchy created for Service Manager and Agents.”**



The screenshot shows the Salesforce Setup interface for Roles. The left sidebar contains navigation links for Users, Roles, Feature Settings, Sales, Service, and Case Teams. The main content area is titled 'Creating the Role Hierarchy' and displays a tree view of the organization's role hierarchy for 'Telecom Service Hub Pvt. Ltd.'.

```

graph TD
    Root[Telecom Service Hub Pvt. Ltd.] --> CEO[CEO]
    Root --> ServiceManager[Service manager]
    Root --> CustomerSupportAgent[Customer support Agent]
    CEO --> AddRole1[Add Role]
    ServiceManager --> AddRole2[Add Role]
    CustomerSupportAgent --> AddRole3[Add Role]
  
```

The hierarchy shows 'Service manager' as a child role of the root, and 'Customer support Agent' as a child role of 'Service manager'. Each role has an 'Add Role' link below it.

## 8. Org-Wide Defaults (OWD)

Defined baseline data visibility:

- **Customer\_\_c** → Public Read Only
- **Plan\_\_c** → Public Read Only
- **ServiceRequest\_\_c** → Private

This ensures sensitive service requests are only visible to the owner and their manager.