Phase 2:

1. Salesforce Edition

- Using **Salesforce Developer Edition (free Dev Org)**.

- Developer org provides:

    o Standard objects (Accounts, Contacts, Leads, Opportunities).

    o Ability to create custom objects (Customer, Plan, Service Request, etc.).

    o Access to Apex, LWC, Flows for testing Admin + Dev features.

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2. Company Profile Setup

- **Setup → Company Information**.

- Enter company name: *Telecom CRM Solutions Pvt Ltd*.

- Set **Time Zone:** (GMT+5:30) India Standard Time.

- Set **Currency:** INR (₹) as primary currency.

- Fiscal year set to Standard (Jan–Dec).

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3. Business Hours & Holidays

- Defined default business hours: **Mon–Fri, 9 AM – 6 PM**.

- Created company holidays:

    o Jan 26: Republic Day

    o Aug 15: Independence Day

    o Oct 2: Gandhi Jayanti

    o Dec 25: Christmas

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4. Fiscal Year Settings

- Using **Standard Fiscal Year (Jan–Dec)**.

- Will support quarterly and annual reporting (sales, activations, revenue).

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5. User Setup & Licenses

Created test users to simulate real-world roles:

- **Ramesh Kumar – Telecom Manager**

    o License: Salesforce Platform

- **Priya Sharma – Telecom Agent**

    o   License: Salesforce Platform

- **John Smith – Telecom Agent**

    o   License: Salesforce Platform

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6. Profiles

- **Telecom Manager Profile**

    o   Full access to Customer, Plan, and Service Request objects.

    o   Can manage sharing rules, reports, and dashboards.

- **Telecom Agent Profile**

    o   Can create/edit Customers and Service Requests.

    o   Read-only access to Plans.

    o   Cannot manage sharing rules.

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7. Roles

Defined a **role hierarchy**:

CEO/Admin

└── Telecom Manager

    └── Telecom Agents

- Ensures Managers see all agent records.

- Agents only see their own records (unless sharing rules apply).

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8. Permission Sets

Created **optional access controls**:

- **Report Access Permission Set** → Allows agents to create and run reports.

- **Plan Management Permission Set** → Grants update access to Plans (for selected senior agents).

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9. Organization-Wide Defaults (OWD)

- **Customer__c:** Private → Only owner + Manager can view.

- **ServiceRequest__c:** Private → Owner + Manager only.

- **Plan__c:** Public Read Only → All agents can view plans.

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10. Sharing Rules

- Created **criteria-based sharing rule** for Customers:

    - If Region = East → Share with Role = Telecom Agents East.

- Ensures regional collaboration.

- Service Requests remain private except for Managers.

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11. Login Access Policies

- Restricted Agent login hours: **9 AM – 6 PM**.

- Block login outside business hours to prevent unauthorized access.

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12. Dev Org Setup

- Using **Developer Org** as primary sandbox environment.

- Installed required **AppExchange packages** (if needed later).

- Testing workflows, validation rules, and Apex here.

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13. Sandbox Usage (Real-World Note)

- In a real company:

    - All development & testing → Sandbox.

    - Final deployment → Production org.

- Developers/testers never work directly in Production.

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14. Deployment Basics

- Deployments are done via:

  - **Change Sets** (Admin-friendly).

  - **SFDX CLI / VS Code** (for advanced Dev projects).

- Deployment order:

  - Metadata (objects, fields, page layouts).

  - Security settings (profiles, roles, permission sets).

  - Automation (flows, triggers).

  - UI components (LWC, tabs, apps).