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.

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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.

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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."

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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**

   o Username: manager1@telecomhub.com

   o Role: Service Manager

   o License: Salesforce

2. **Agent User**

   o Username: agent1@telecomhub.com

   o Role: Customer Support Agent

   o License: Salesforce

"Manager and Agent users created with Salesforce licenses."

Roles	Edit	EPIC, OrgFarm	OEPIC	epic.ec40c284a3a3@orgfarm.salesforce.com	✓	System Administrator
	Edit	koparde, savitri	sav	savitrimkoparde116@agentforce.com	✓	System Administrator
User Management Settings	Edit	Telecom, Agent1	agent1	agent1@telecomhub.com	Customer support Agent	✓ Telcom Agent Profile
Users	Edit	Telecom, Manager	mtele	manager1@telecomhub.com	Service manager	✓ Telcom Manager Profile

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6. Profiles

Profiles were created to define object-level permissions:

- **Telecom Agent Profile**

   o Access: Create/Edit Service Requests, Read-only on Customers & Plans.

- **Telecom Manager Profile**

   o Full Access to all objects (Customers, Plans, Service Requests).

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7. Roles

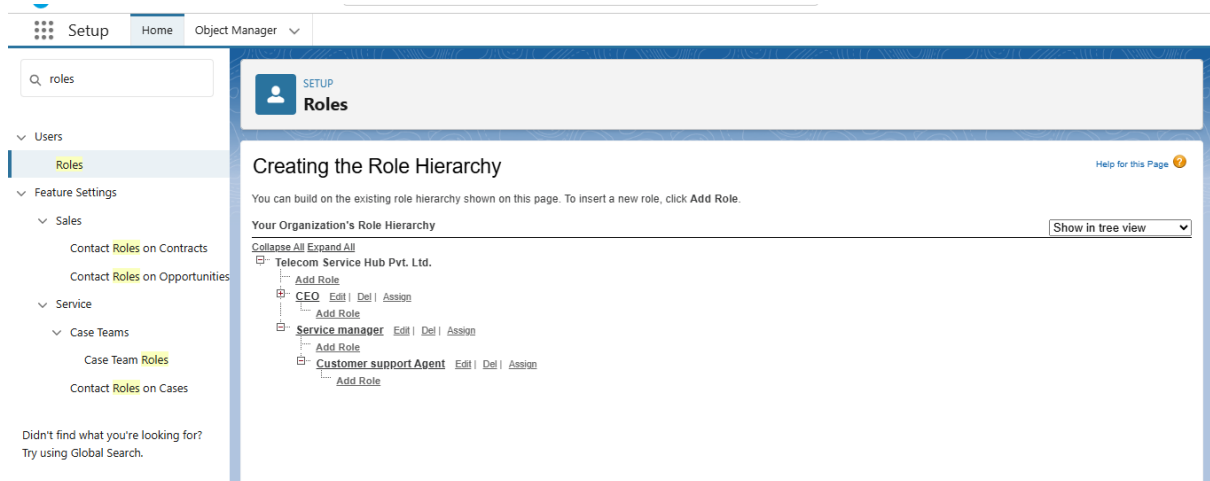Role hierarchy created to manage record-level visibility:

- **Service Manager** (Top role)
  - o **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."

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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.