

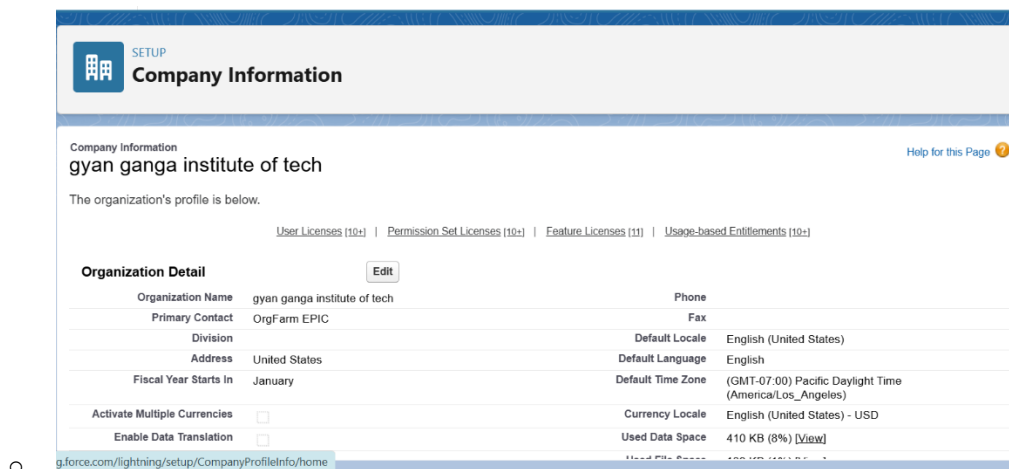
# Phase 2: Org Setup & Configuration

## Goal

The goal of this phase is to set up the Salesforce environment for the **Customer Feedback CRM**, including organization setup, users, profiles, roles, object configuration, and access rules, so Admin, Support, and Manager users can manage customer complaints, feedback, and case assignments effectively.

## Salesforce Editions – Developer Org created

- Created a free Salesforce Developer Org as the working environment.
- Verified in Setup → Company Information:
  - Organization Name: Gyan Ganga Institute of Tech
  - Organization Edition: Developer Edition
  - Instance: CAN98
  - Provides full CRM development features required for the project.



## Company Profile Setup

- Filled in **Company Information**:
  - **Organization Name**: Gyan Ganga Institute of Tech
  - **Primary Contact**: OrgFarm EPIC
  - **Default Currency**: USD
  - **Default Locale & Language**: English (United States)

- Fiscal Year Starts In: January
- Optional fields like business hours, holidays, and multiple currencies were skipped as they are not required for this project.

## Fiscal Year Settings

- Confirmed under Setup → Company Settings → Fiscal Year.
- Ensures reports, dashboards, and analytics align with the organization's fiscal calendar.

**SETUP**  
**Fiscal Year**

**Fiscal Year Information**  
Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example, if your fiscal year starts in April 2025 and ends in March 2026, your Fiscal Year setting can be either 2025 or 2026.

Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing this change.

☒ Standard Fiscal Year ⓘ  
☐ Custom Fiscal Year ⓘ

**Change Fiscal Year Period** Save Cancel

Name gyan ganga institute of tech

Fiscal Year Start Month January

Fiscal Year is Based On  
☒ The ending month  
☐ The starting month

Save Cancel

## User Setup & Licenses – Admin, Support, Manager created

- Created three users in Setup → Users → Users → New User:

Name	Username	Profile	Role
Admin	admin@yourorg.com	System Administrator	Top-level
Support	support@yourorg.com	Standard User	Support Team
Manager	manager@yourorg.com	Standard User	Manager

- Steps followed:
  1. Filled First Name, Last Name, Email, Username, Alias
  2. Assigned Role and Profile
  3. Clicked Save → Salesforce sent login credentials
- **User Purpose:**

- Admin: Full system access and configuration control
  - Support: Handles assigned cases and provides feedback
  - Manager: Supervises Support, views all cases
  - **Licenses & Permissions:**
    - User Licenses: Salesforce, Analytics Cloud Integration, Chatter Free, External Apps Login, Salesforce Platform, etc.
    - Permission Set Licenses and Feature Licenses configured as required for CRM usage
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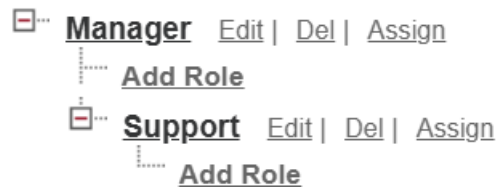
## Profiles

- Verified in **Setup → Users → Profiles**
  - Profiles created/assigned:
    - **System Administrator (Admin):** Full access to all objects, fields, and CRM setup
    - **Standard User (Support):** Can view/edit only assigned Cases
    - **Standard User (Manager):** Can view/edit all Cases
  - Field-level security set for all custom fields: Complaint Type, Status, Customer Feedback, Assigned Agent
  - All fields added to Page Layouts
- 

## Roles

Created in Setup → Users → Roles → Set Up Roles

- Role hierarchy:
  - Manager → Top-level
  - Support → Reports to Manager
- Users assigned correctly:
  - Manager user → Manager role
  - Support user → Support role
- Ensures Managers can view and manage records of Support users



## OWD (Organization-Wide Defaults)

- Configured in Setup → Security → Sharing Settings
- Case object internal access: Private
- Ensures Support users see only their assigned Cases
- Managers can access broader records via sharing rules

Case	Public Read/Write/Transfer	Private	✓
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## Sharing Rules

Created **Manager Access Rule** in **Setup → Security → Sharing Settings → Case Sharing Rules → New**

- Details:
  - Rule Name: Manager Access
  - Rule Type: Based on Role
  - Shared With: **Manager role**
  - Access Level: **Read/Write**
- Optional: Support sharing based on assignment criteria
- Ensures Managers can view/edit all cases, Support sees only assigned ones

No sharing rules specified.			
<b>Case Sharing Rules</b>		New Recalculate	Case Sharing Rules Help ?
Action	Criteria	Shared With	Case
Edit   Del	Owner in Role: Customer Support, International	Role: Customer Support, International	Read Only
Edit   Del	Owner in Role: Manager	Role: Manager	Read/Write
<b>Campaign Sharing Rules</b>		New Recalculate	Campaign Sharing Rules Help ?