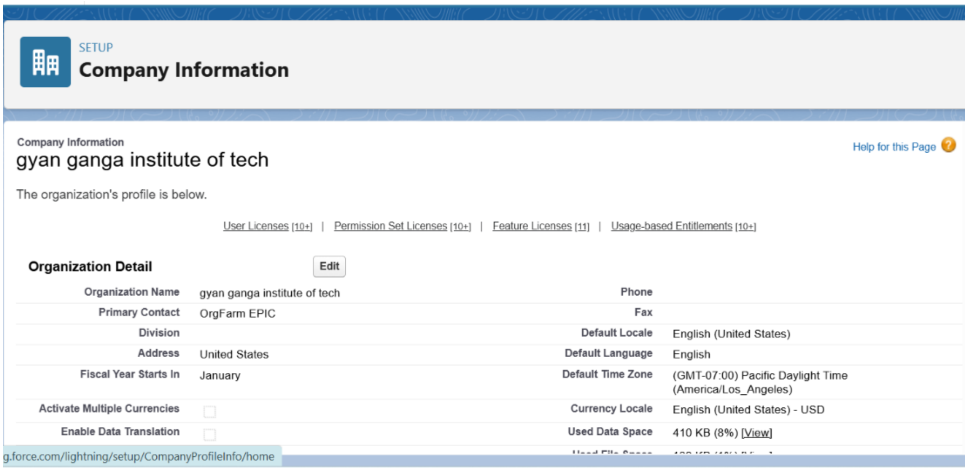
Phase 2: Org Setup & Configuration

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

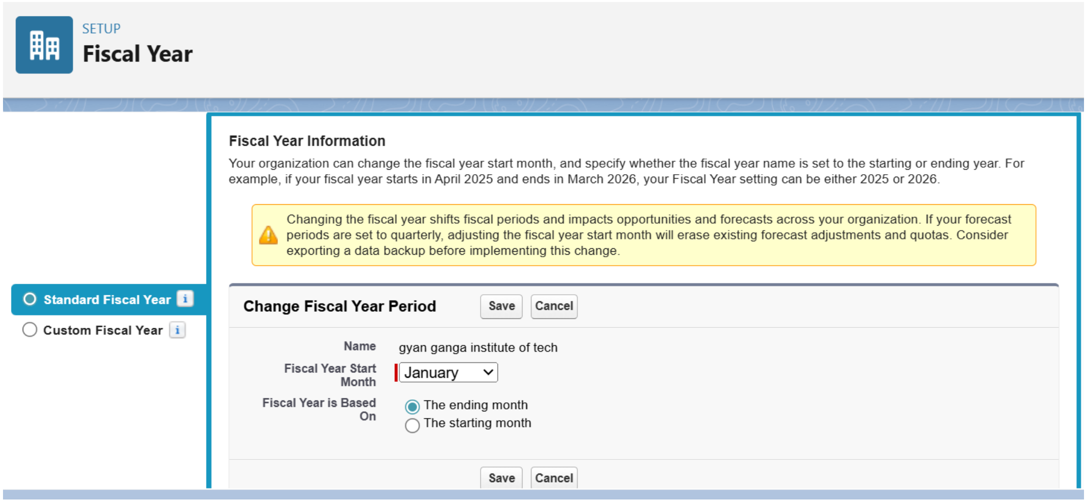
- Created a free Salesforce Developer Org as the working environment.
- Verified in Setup → Company Information:
    - Organization Name**:** Gyan Ganga Institute of Tech
    - Organization Edition: Developer Edition
    - Instance: CAN98
    - Provides full CRM development features required for the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

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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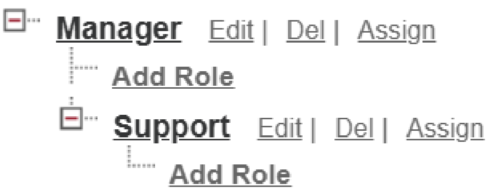
Profiles

- 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

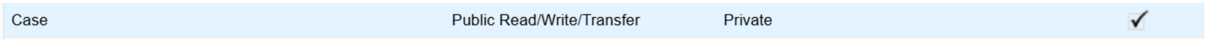
Created in Setup → Users → Roles → Set Up Roles

- 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



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