⚙️ Phase 2: Org Setup & Configuration

Project: Customer Complaint Management System

The Org Setup & Configuration phase is a critical part of Salesforce implementation. It involves preparing the Salesforce environment to meet the business requirements, setting up the foundation for users, data security, and operational processes. A well-configured org ensures smooth workflows, proper data access, and scalability for future business needs.

🔹 1. Salesforce Editions

Salesforce provides multiple editions depending on organization needs.
Each edition includes different features, storage limits, and customization options.

Common Editions:

Edition	Description	Suitable For
Essentials	Basic CRM features for small businesses	Startups, small teams
Professional	Advanced CRM tools with automation	Medium organizations
Enterprise	Full-featured CRM with customization	Large enterprises
Unlimited	Includes all Salesforce features with extended support	Large-scale deployments
Developer Edition	Free edition for learning and testing	Students & Developers

👉 **For this project**, we use **Salesforce Developer Edition**, which is **free** and includes all features needed for app building and testing.

🔹 2. Company Profile Setup

The **Company Profile** defines the organization's basic details inside Salesforce.
It includes the company name, address, locale, language, time zone, and currency.

Steps:

1. Go to **Setup → Company Information**.
2. Enter details like:
    - Company Name: *Customer Complaint CRM Solutions*
    - Primary Contact
    - Default Locale: *English (India)*
    - Default Time Zone: *(GMT+5:30) Asia/Kolkata*
    - Default Currency: *INR – Indian Rupee*

👉 Helps personalize Salesforce for your organization's region and working style.

🔹 3. Business Hours & Holidays

Business hours determine when agents are available to handle customer complaints.
This helps Salesforce automatically calculate response and resolution times (SLA).

Steps:

1. Setup → **Business Hours** → Define working hours (e.g., 9 AM – 6 PM, Monday to Friday).
2. Setup → **Holidays** → Add holidays like *New Year's Day*, *Independence Day*, etc.

👉 Ensures that complaint resolution timelines are calculated accurately.

🔹 4. Fiscal Year Settings

The **Fiscal Year** defines the organization's financial reporting cycle.
It is used in generating financial reports or tracking service performance annually.

Steps:

1. Go to **Setup → Company Profile → Fiscal Year**.
2. Choose:
    - **Standard Fiscal Year:** January to December.
    - **Custom Fiscal Year:** April to March (used in India).

👉 Useful for aligning complaint resolution and performance reports with business reporting periods.

🔹 5. User Setup & Licenses

Users represent people who can log in and access Salesforce.

Steps:

1. Go to **Setup → Users → New User**.
2. Create users for:
    - **Admin** (Project owner)
    - **Customer Service Agent**
    - **Manager**
3. Assign appropriate **User Licenses** (Salesforce, Platform, etc.)

👉 Each user is assigned login credentials and specific permissions based on their role.

🔹 6. Profiles

Profiles control what a user can do in Salesforce — such as create, view, edit, or delete records.

Common Profiles Used:

Profile	Description
System Administrator	Full access to all objects and settings
Standard User	Access to basic CRM features

Profile	Description
Read-Only User	Can view records but not edit
Custom Profile	Designed for project-specific needs (e.g., “Complaint Agent”)

👉 Profiles ensure users only have permissions required for their job.

🔹 7. Roles

Roles define data visibility (who can see what).
It follows a **hierarchy** — users higher in the hierarchy can see records owned by those below.

Example Role Hierarchy:

CEO
└── Manager
└── Complaint Agent
└── Customer

👉 Ensures managers can see all complaints handled by their team members.

🔹 8. Permission Sets

Permission Sets provide **additional access** to specific users without changing their profile.

Example:

- Give “Export Report” permission only to selected users.
- Allow “Email Template Edit” access to a manager.

👉 Helps grant extra privileges temporarily or for special roles.

🔹 9. Organization-Wide Defaults (OWD)

OWD defines the **default level of access** to records for all users in the organization.

Example OWD Settings for the Project:

Object	Default Access	Description
Complaint	Private	Only owner and managers can view
Customer	Public Read Only	Everyone can view but not edit
Knowledge Articles	Public Read/Write	Accessible to all users

👉 This ensures data security and prevents unauthorized access.

🔹 10. Sharing Rules

Used to **open up record access** to specific users or groups based on criteria.

Example:

If a complaint belongs to the “Billing Department,” share it automatically with the “Billing Team” group.

👉 Makes collaboration easier between teams handling similar complaints.

🔹 11. Login Access Policies

Login access policies ensure **secure login behavior**.

Settings Include:

- Password policies (length, expiration, complexity).
- Login IP ranges (restrict access from unknown locations).
- Login hours (e.g., 9 AM – 7 PM).
- Multi-factor authentication (MFA).

👉 Protects the Salesforce org from unauthorized logins.

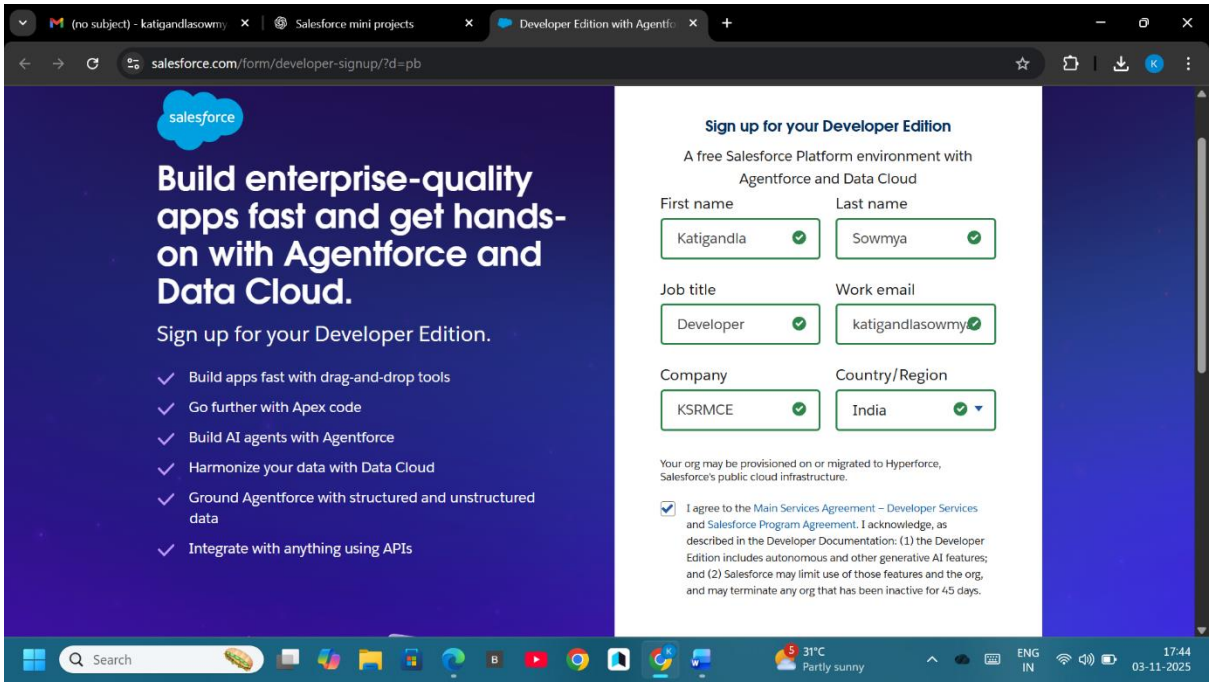
🔹 12. Developer Org Setup

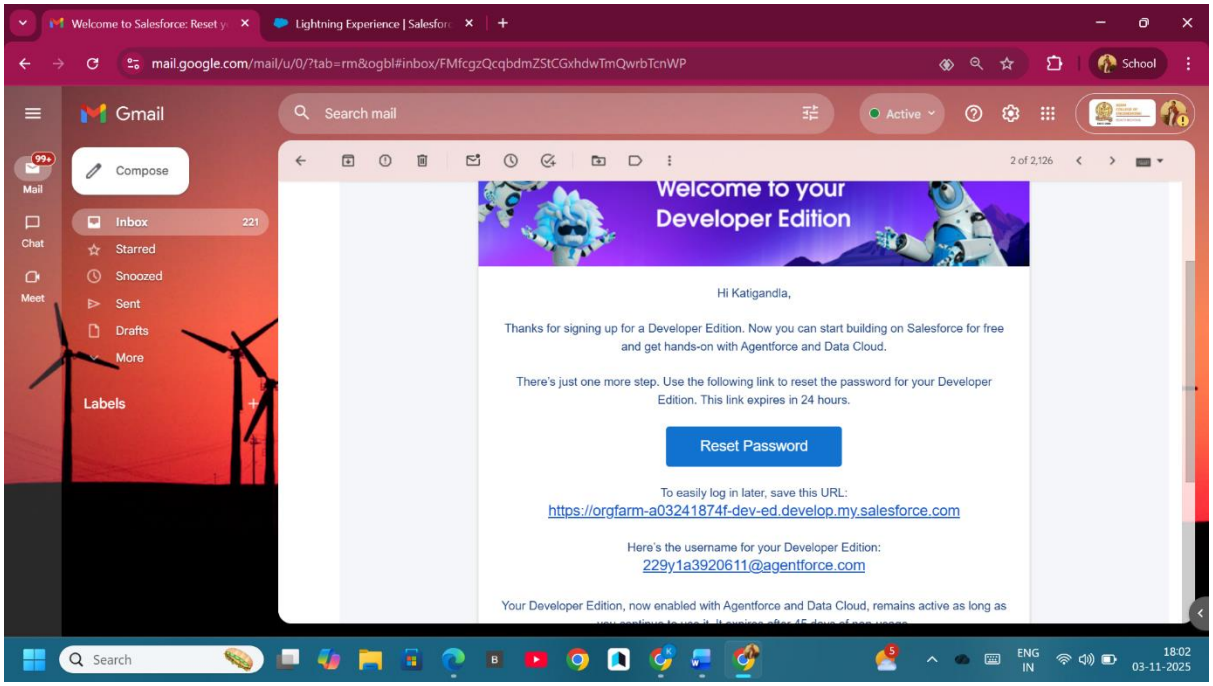
The **Developer Org** is your personal Salesforce environment for building and testing.

Steps to Create:

1. Visit https://developer.salesforce.com/signup.
2. Fill details and activate via email.
3. Log in to **https://login.salesforce.com**.
4. Customize your org name and logo if needed.

👉 This org is completely free and permanent for learning and mini-projects.





◈ 13. Sandbox Usage

A **Sandbox** is a copy of your Salesforce production org used for testing changes safely.

Types:

- **Developer Sandbox:** For coding and testing.
- **Partial Copy Sandbox:** Includes sample data.
- **Full Sandbox:** Exact replica of production.

☞ In your project, use the **Developer Sandbox** for testing automation, flows, and reports before final deployment.

◈ 14. Deployment Basics

Deployment in Salesforce means **moving configurations or code** from one environment (like Sandbox or Developer Org) to another (such as Production Org).

Deployment Tools:

1. **Change Sets:**
   Used to move metadata (objects, fields, workflows, etc.) between related Salesforce orgs.
   - Outbound Change Set → Send changes from Sandbox to Production.
   - Inbound Change Set → Receive changes in target org.
2. **Salesforce CLI (SFDX):**
   A developer tool used for advanced deployments using command-line interface.

3. **ANT Migration Tool:**
   Java-based tool for automating deployments across orgs.
4. **Unmanaged Packages:**
   Used for sharing apps or components publicly (ideal for student projects).

Deployment Steps:

1. Prepare and test your app in **Developer Org / Sandbox**.
2. Create a **Change Set** with all custom objects, fields, and flows.
3. Upload the Change Set to your **Production Org**.
4. Validate and **Deploy**.
5. Test in production to ensure everything works correctly.

☞ Deployment ensures your app is safely transferred and functional in the live environment.