

Phase 2: Org Setup & Configuration

Project : GoldenEra Enterprises CRM

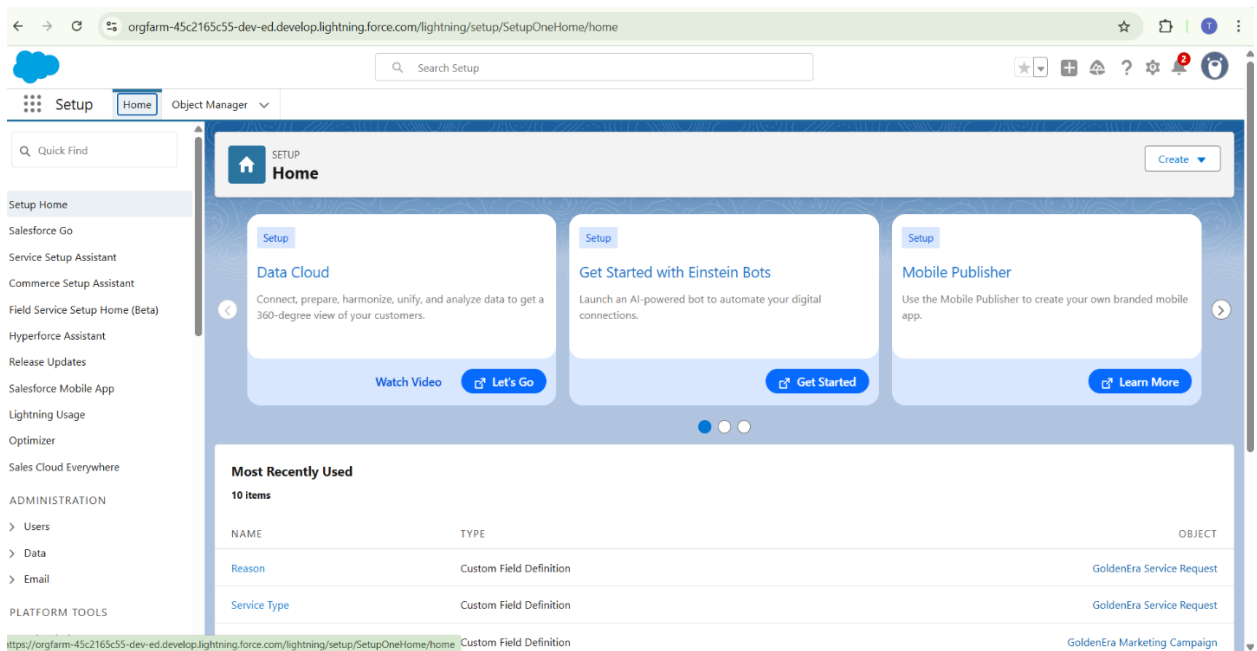
This document summarizes the work performed in **Phase 2** of the capstone: setting up the Salesforce Developer Org and configuring the resources required for the Intelligent Case Routing project. It includes step-by-step actions completed and a screenshot of the custom object & fields created for routing configuration.

Step 1- Sign up

sign up for your developer edition

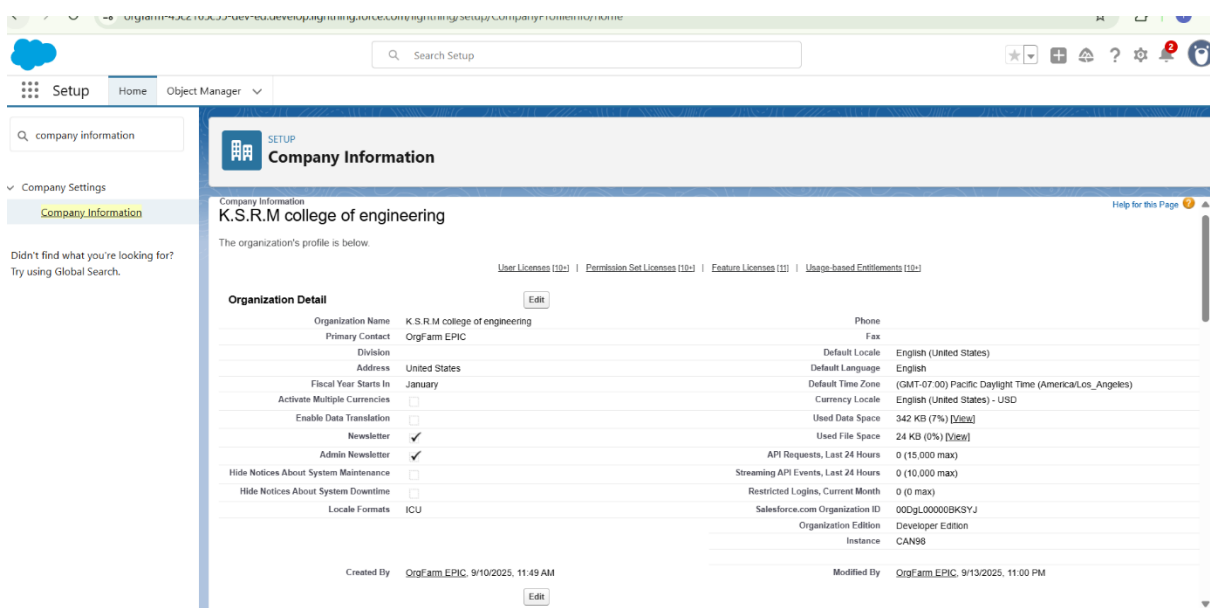
Step 2: Open Setup

1. Login to Salesforce Lightning.
2. Click the **Gear icon** in the top-right → select **Setup**.



Step 3: Update Company Information

1. In Setup, use **Quick Find** → type **Company Information** → open it.
2. Click **Edit**.
3. Update:
 - **Organization Name:** KSRM College of Engineering
 - **Default Time Zone:** (09:00 – 18:00)
4. Click **Save**.



Step 4: Set Business Hours

1. Quick Find → **Business Hours** → click **New**.

2. Fill in:

Name: Default Hours

Hours: 09:00 – 18:00 (or your actual business hours)

3. Click **Save**.

Why: Defines working hours for workflows, notifications, and approval processes

Step 5: Profiles

Profiles define what users **can do**. For Golden Era Enterprises, you'd create these Salesforce profiles:

a) System Administrator

- Full access to all standard/custom objects, settings, and configuration.
- Used by IT/Admins

Step 6: Standard and Custom Objects

1. **GoldenEra Customer**
 - Stores all customer information (profiles, preferences, history).
 - Central object for connecting orders, service requests, and campaigns.
2. **GoldenEra Orders**
 - Tracks all jewelry purchases made by customers.
 - Connects with products and updates inventory.
3. **GoldenEra Products**
 - Holds product catalog details (rings, necklaces, bridal sets, etc.).
 - Links with inventory and orders.
4. **GoldenEra Inventory**
 - Manages stock availability and locations.
 - Supports reorder alerts and stock insights.
5. **GoldenEra Marketing Campaign**
 - Manages campaigns (festive sales, offers, events).
 - Tracks customer engagement and ROI.
6. **GoldenEra Service Request**
 - Handles after-sales services (repairs, resizing, cleaning).
 - Connects with customers and their orders.