

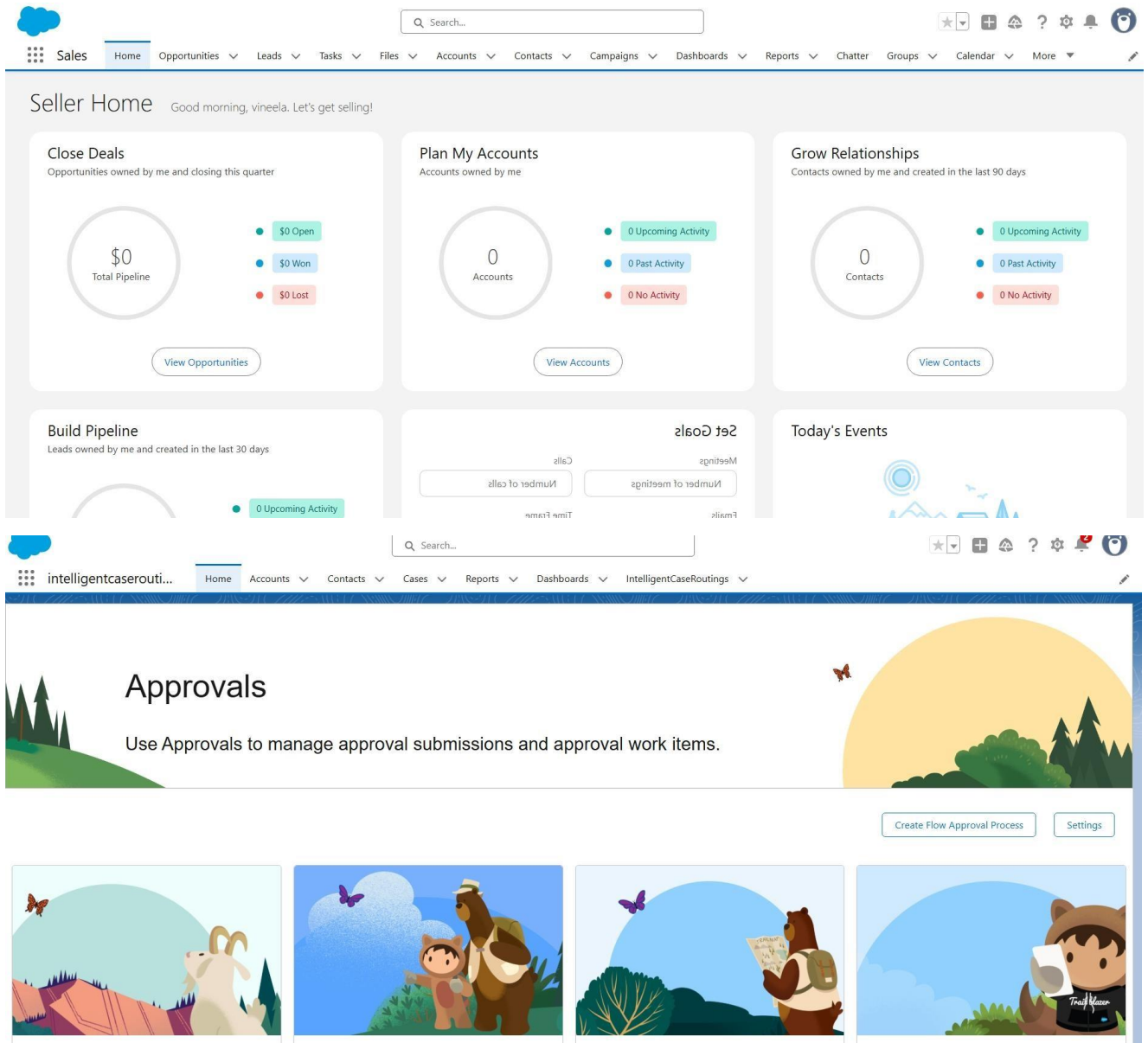
Phase 2 — Salesforce Org Setup & Configuration

Project: Intelligent Case Routing for Faster Customer Support

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 & Login

Signed up for a Salesforce Developer Edition and logged into the Lightning Experience. Confirmed access to the Setup area using the gear icon (⚙️).



Step 2 — Open Setup & Object Manager

From Setup, opened **Object Manager** to create and manage custom objects. This is where the custom object for routing configuration was created.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main header displays 'SETUP > OBJECT MANAGER' and 'IntelligentCaseRouting'. A left sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Restriction Rules. The 'Details' section is active, showing the object's description: 'Stores project / routing config and tracking info related to case routing'. It also lists the API Name as 'Intelligent_Case_Routing__c', the Custom checkbox as checked, and the Singular Label as 'IntelligentCaseRouting'. On the right, a list of settings includes 'Enable Reports' (checked), 'Track Activities' (checked), 'Track Field History' (checked), 'Deployment Status' (Deployed), 'Help Settings' (Standard salesforce.com Help Window), and 'Standard salesforce.com Help Window'.

Step 3 — Create Custom Object

Created a custom object to hold routing configurations. Object name shown in Object Manager: **IntelligentCaseRouting** (API name: Intelligent_Case_Routing__c). Enabled 'Allow Reports' and configured record name and description.

The screenshot shows the Salesforce Object Manager table. The table has columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The 'IntelligentCaseRouting' object is highlighted in blue. The table lists 12 items, sorted by label.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Appointment Category	AppointmentCategory	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Contact Point Address	ContactPointAddress	Standard Object			
Contact Point Consent	ContactPointConsent	Standard Object			
Contact Point Email	ContactPointEmail	Standard Object			
Contact Point Phone	ContactPointPhone	Standard Object			
Contact Point Type Consent	ContactPointTypeConsent	Standard Object			
IntelligentCaseRouting	Intelligent_Case_Routing__c	Custom Object	Stores project / routing config and tracking info related to case routing	9/14/2025	✓
Service Appointment	ServiceAppointment	Standard Object			

Step 4 — Add Fields & Relationships (Key fields added)

Added the most important fields required for intelligent routing and project tracking. The fields created include Project/record identifiers, routing controls, and ownership fields. See the screenshot below showing the Fields & Relationships list for the object.

Screenshot — Object: Fields & Relationships

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

IntelligentCaseRouting

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Fields & Relationships

14 Items, Sorted by Field Label

Q, Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

Intelligent Case Routing	Intelligent_Case_Routing__c	Text(255)	
Intelligent Case Routing Name	Name	Text(80)	✓
Last Modified By	LastModifiedById	Lookup(User)	
Owner	OwnerId	Lookup(User,Group)	✓
Priority	Priority__c	Picklist	
Routing Model	Routing_Model__c	Picklist	
SLA Target (Hours)	SLA_Target_Hours__c	Number(18, 0)	
Start Date	Start_Date__c	Date	
Status	Status__c	Picklist	
User	User__c	Lookup(User)	✓

Summary of Important Fields Created (from screenshot)

Field Label	API Name	Type
Intelligent Case Routing	Intelligent_Case_Routing__c	Text (255)
Intelligent Case Routing Name	Name	Text (80)
Last Modified By	LastModifiedById	Lookup(User)
Owner	OwnerId	Lookup(User,Group)
Priority	Priority__c	Picklist
Routing Model	Routing_Model__c	Picklist
SLA Target (Hours)	SLA_Target_Hours__c	Number
Start Date	Start_Date__c	Date
Status	Status__c	Picklist
User	User__c	Lookup(User)

Step 5 — Create Custom Tab

Created a Custom Object Tab for the 'Project Details' / 'IntelligentCaseRouting' object so it appears in the App navigation. Selected a tab icon and set default visibility for required profiles.

Q tabs

User Interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for?

Try using Global Search.

SETUP

Tabs

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

New

What Is This?

Action	Label	Tab Style	Description
<div>Edit</div> <div>Del</div>	IntelligentCaseRoutings	<div>Flag</div>	

Web Tabs

New

What Is This?

No Web Tabs have been defined

Visualforce Tabs

New

What Is This?

No Visualforce Tabs have been defined

Step 6 — Add Tab to Lightning App

Opened App Manager → Edit the Lightning App → Navigation Items and added the custom object tab to the selected items so users can access it from the app navigation bar.

Step 7 — Field Level Security & Page Layouts

Configured Field-Level Security for relevant profiles and added fields to the page layout. Ensured managers and admins have visibility and edit rights as needed.

Step 8 — Profiles & Permission Sets

Assigned access to System Administrator and created/used custom profiles or permission sets to grant the required object permissions (Read/Create/Edit). Recommended creating a Support Manager profile or a permission set for managers.

Step 9 — Validation & Testing

Added validation rules and tested record creation. Created sample records to confirm the fields, lookups, and related lists are working as intended.