

## **Phase 2: Org Setup & Configuration**

**Objective:** To prepare the Salesforce environment, establish a professional development workflow, and create the necessary users for testing.

### **Key Activities & Outcomes:**

- 1. Development Environment:** A Salesforce Developer Edition org was configured as the primary development environment.
- 2. Local Development Setup:** A local project was created using VS Code and the Salesforce CLI (SFDX). A Git repository was initialized to track all source code and metadata changes.
- 3. User Creation:** Two new users were created with the Standard Platform User profile to simulate the different roles in the approval process:
  - Chris Officer (Credit Officer)
  - Mary Manager (Loan Manager)

### **Supporting Evidence: User Setup**