

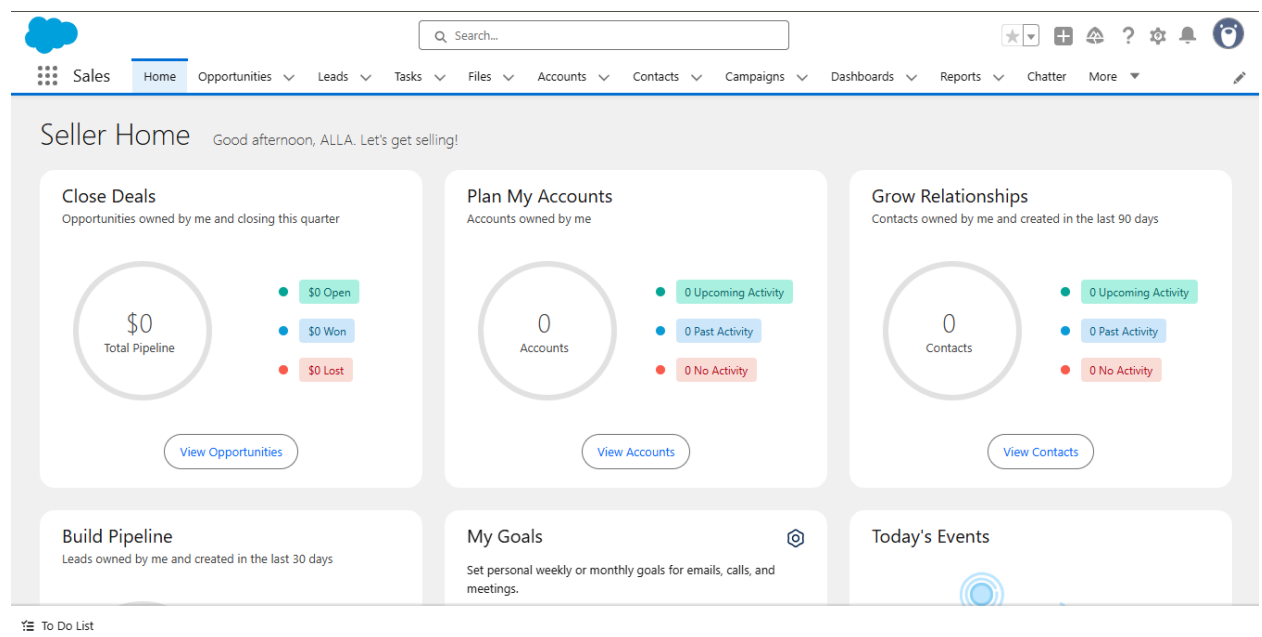
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## Salesforce Setup Guide: Phase 2 - Corporate IT Helpdesk System

This document outlines the foundational steps to configure your Salesforce org for tracking internal IT support tickets from employees.

### Step 1: Set Up Your Developer Org

- **Purpose:** To get a free, safe environment for building and testing the helpdesk system.
- **Action:**
  1. Go to [developer.salesforce.com/signup](https://developer.salesforce.com/signup).
  2. Fill out the form. Your **Username** must be unique and in an email format (e.g., `it.helpdesk@dev.com`). Your **Email** must be a real address for verification.
  3. Verify your account via the email link and log in.



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### Step 2: Configure Company Information

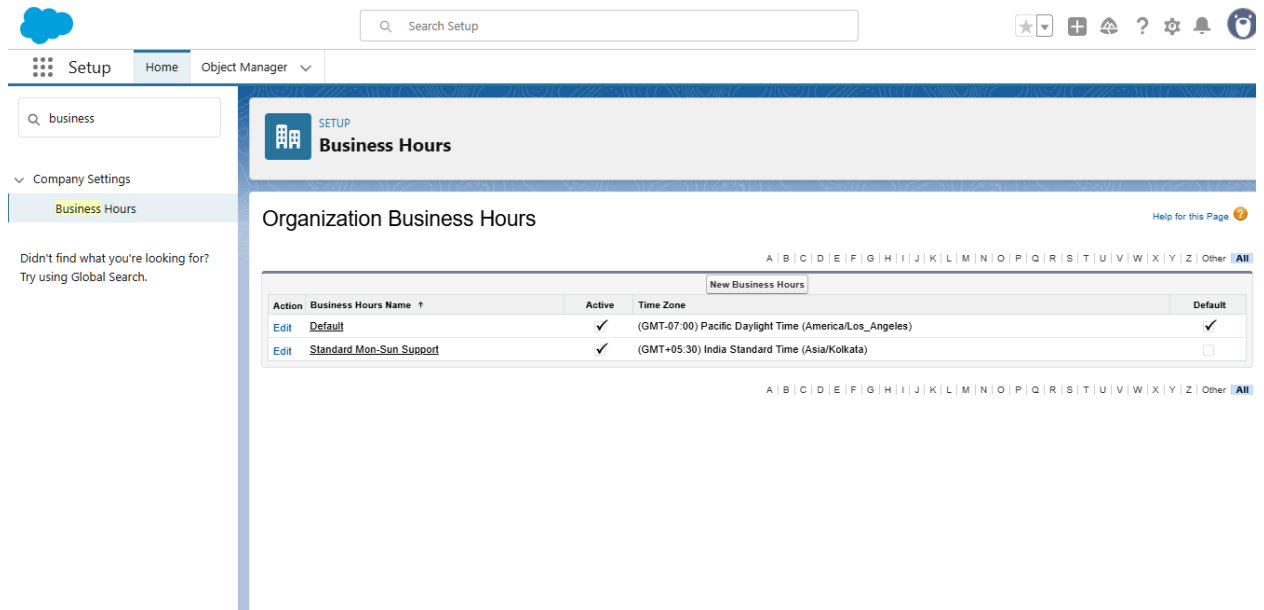
- **Purpose:** To set the correct time zone and currency, which is crucial for tracking ticket resolution times and any potential hardware/software costs.
- **Action:**
  1. Go to **Setup > Company Information**.
  2. Click **Edit**.
  3. Set your **Default Time Zone** and **Default Currency**.
  4. Click **Save**.

The screenshot shows the Salesforce Setup interface. On the left, a sidebar contains a search bar with 'company' and a list of settings categories: Company Settings, Calendar Settings, Company Information (highlighted), Data Protection and Privacy, Fiscal Year, Holidays, Language Settings, and My Domain. The main content area is titled 'Company Information' and displays details for 'Corporate IT Helpdesk System'. It includes links for User Licenses, Permission Set Licenses, Feature Licenses, and Usage-based Entitlements. Below these links is an 'Organization Detail' table with an 'Edit' button.

Organization Detail	
Organization Name	Corporate IT Helpdesk System
Primary Contact	OrgFarm EPIC
Division	
Address	India
Fiscal Year Starts In	January
Activate Multiple Currencies	<input type="checkbox"/>
Enable Data Translation	<input type="checkbox"/>
Newsletter	<input checked="" type="checkbox"/>
Admin Newsletter	<input checked="" type="checkbox"/>
Hide Notices About System Maintenance	<input type="checkbox"/>
Hide Notices About System Downtime	<input type="checkbox"/>
Locale Formats	ICU
Phone	
Fax	
Default Locale	English (United States)
Default Language	English
Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Currency Locale	Marathi (India) - INR
Used Data Space	354 KB (7%) <a href="#">View</a>
Used File Space	17 KB (0%) <a href="#">View</a>
API Requests, Last 24 Hours	0 (15,000 max)
Streaming API Events, Last 24 Hours	0 (10,000 max)
Restricted Logins, Current Month	0 (0 max)
Salesforce.com Organization ID	00DgL000006ZYTd
Organization Edition	Developer Edition
Instance	CAN98

### Step 3: Define Business Hours & Holidays

- **Purpose:** To ensure that ticket aging and Service Level Agreement (SLA) reports are calculated based on the IT team's actual working hours.
- **Action:**
  1. Go to **Setup > Business Hours > New Business Hours**.
  2. Name it "IT Support Hours", set the operational times (e.g., 8 AM to 6 PM, Monday-Friday), and **Save**.
  3. Go to **Setup > Holidays > New**.
  4. Add your company's official holidays.
  5. Return to your **Business Hours** record, **Edit** it, and add the holidays you created.

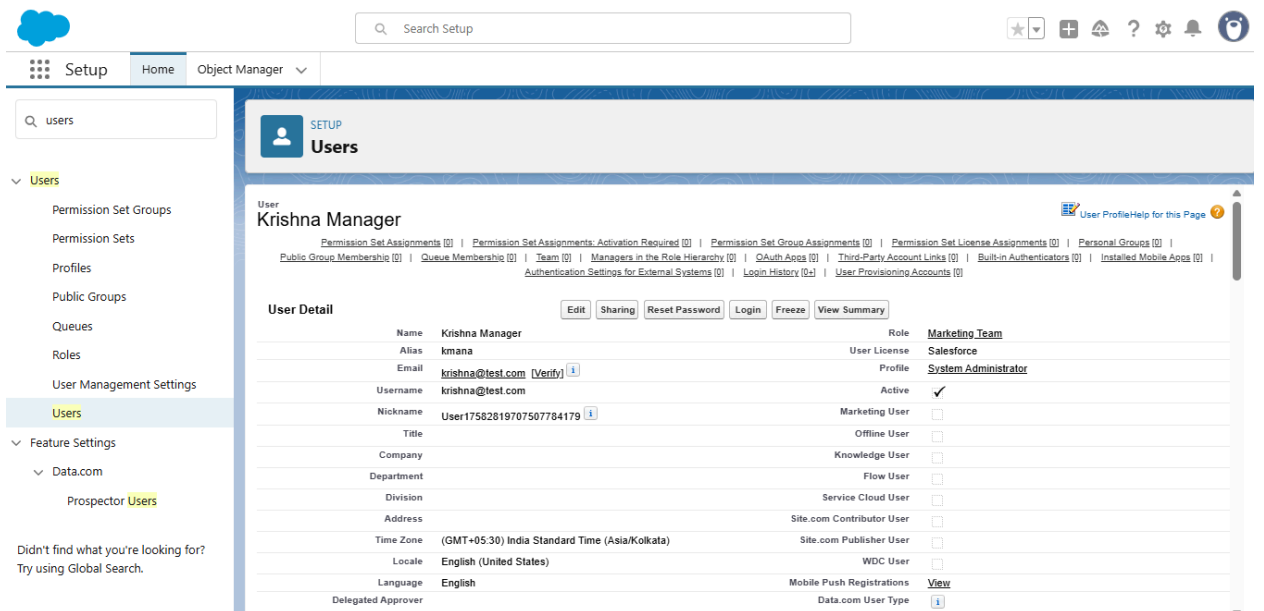


The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "business" entered. Below it, "Company Settings" is expanded, and "Business Hours" is selected. The main content area is titled "Organization Business Hours" and contains a table of business hours configurations.

Action	Business Hours Name	Active	Time Zone	Default
<a href="#">Edit</a>	Default	✓	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	✓
<a href="#">Edit</a>	Standard Mon-Sun Support	✓	(GMT+05:30) India Standard Time (Asia/Kolkata)	<input type="checkbox"/>

## Step 4: Create Users

- **Purpose:** To create accounts for the IT team who will be managing and resolving tickets.
- **Action:**
  1. Go to **Setup > Users > New User**.
  2. Create an **IT Manager** (e.g., "Divya Manager"). Assign the **System Administrator** Profile for now.
  3. Create an **IT Support Specialist** (e.g., "Raj Specialist"). Assign the **Standard User** Profile for now.
- *Ensure each user has a unique username and a real email for setup.*



The screenshot shows the Salesforce Setup interface for the "Users" section. The left sidebar has a search bar with "users" entered. Below it, "Users" is selected. The main content area is titled "Users" and shows the details for a user named "Krishna Manager".

**User Detail**

Name	Krishna Manager	Role	Marketing Team
Alias	kmana	User License	Salesforce
Email	krishna@test.com <a href="#">Verify</a>	Profile	System Administrator
Username	krishna@test.com	Active	✓
Nickname	User17582819707507784179 <a href="#">i</a>	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<a href="#">View</a>
Delegated Approver		Data.com User Type	<a href="#">i</a>

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### Step 5: Configure Custom Profiles 🧑🔧

- **Purpose:** To create specific permission sets for IT specialists and their managers.
- **Action:**
  1. Go to **Setup > Profiles**.
  2. **Clone** the "System Administrator" profile and name the new one IT Manager.
  3. **Clone** the "Standard User" profile and name the new one IT Support Specialist.
  4. Go back to **Setup > Users**.
  5. Edit Divya Manager and assign her the **IT Manager** profile.
  6. Edit Raj Specialist and assign him the **IT Support Specialist** profile.

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### Step 6: Establish the Role Hierarchy 🏛️

- **Purpose:** To allow IT managers to view, manage, and report on all tickets handled by their specialists.
- **Action:**
  1. Go to **Setup > Roles > Set Up Roles**.
  2. Under the company name, **Add Role** and name it IT Manager.
  3. Under the new "IT Manager" role, **Add Role** and name it IT Support Specialist.
  4. From the role tree, click **Assign** next to each role to assign Divya Manager and Raj Specialist accordingly.

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### Step 7: Set Org-Wide Defaults (OWD) 🔒

- **Purpose:** To ensure that IT tickets, which can contain sensitive employee information, are kept confidential.
- **Action:**
  1. Go to **Setup > Sharing Settings > Edit**.
  2. Familiarize yourself with this page. When we create our custom IT\_Ticket\_\_c object in the next phase, we will return here and set its default access to **Private**.