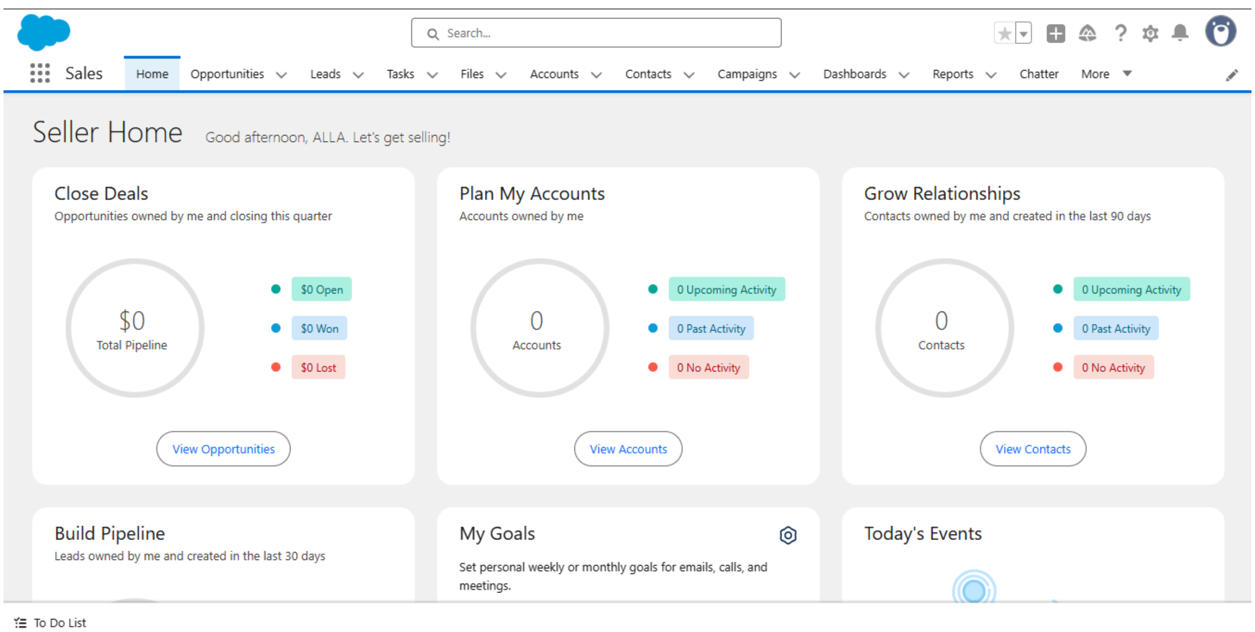
Salesforce Setup Guide: Phase 2 - Corporate IT Helpdesk System

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

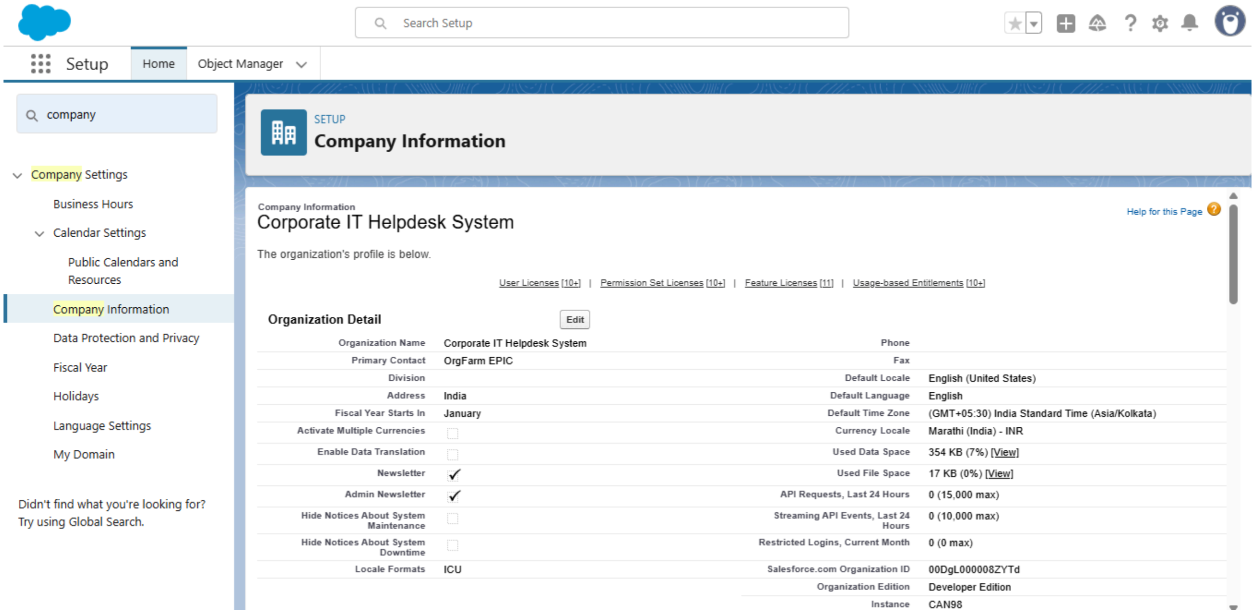
Step 1: Set Up Your Developer Org 🛠️

- **Purpose**: To get a free, safe environment for building and testing the helpdesk system.
- **Action**:
    1. Go to developer.salesforce.com/signup.
    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.



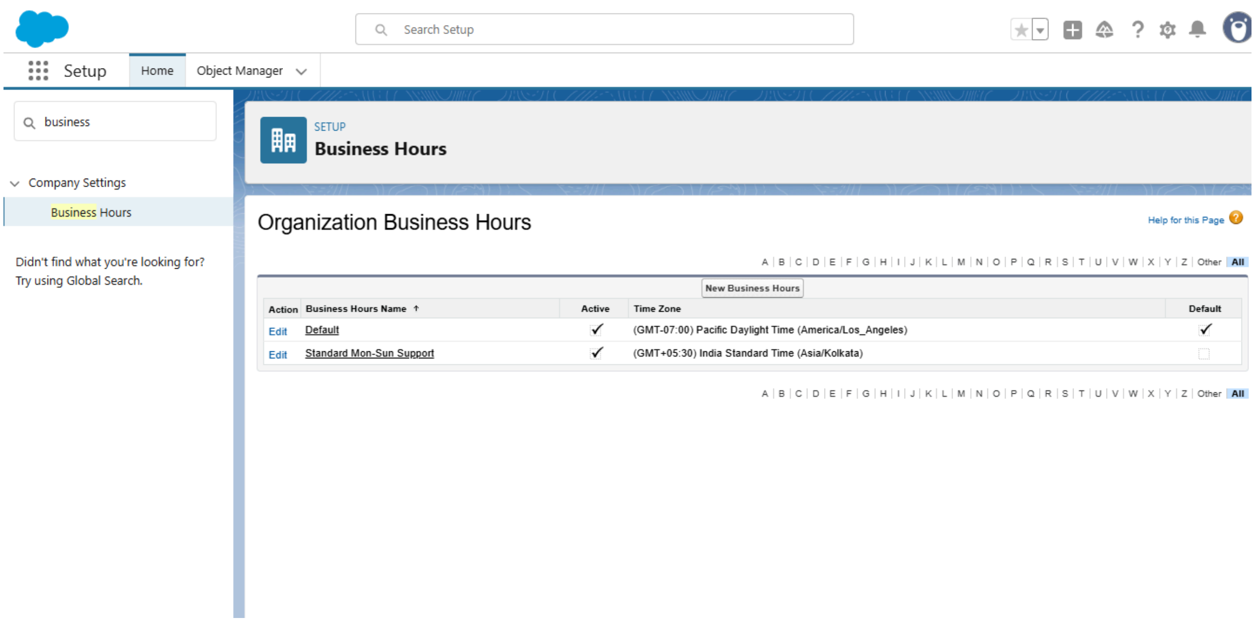
Step 2: Configure Company Information 🏢

- **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**.



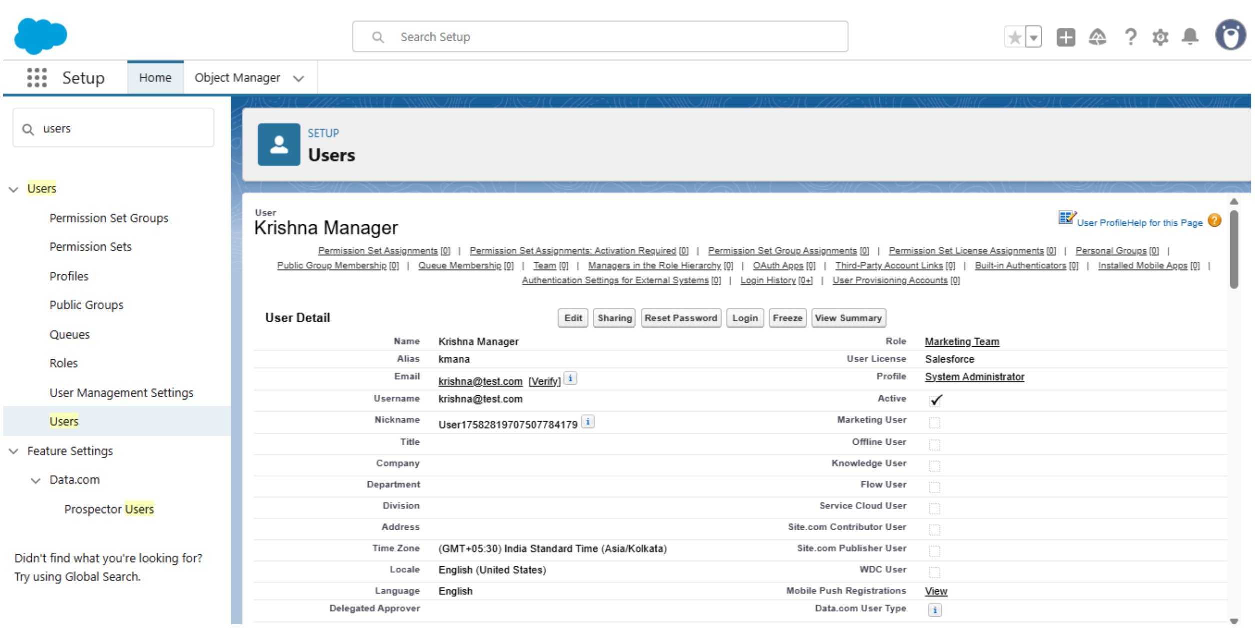
Step 3: Define Business Hours & Holidays 🕒

- **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.



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.*



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.

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.

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**.