

# Phase 2: Org Setup & Configuration

## Overview

In this phase, the Salesforce **Developer Edition** org was set up to provide the base environment for the PlayStation Gaming CRM project. The focus was on configuring only the most essential settings to keep the project simple, structured, and ready for development.

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## Activities Done

### 1. Salesforce Edition

- Selected **Developer Edition**, which provides essential CRM features such as custom objects, automation, reports, and dashboards.
- Chosen because it is free, easy to use, and suitable for student and training projects.

### 2. Company Profile Setup

- **Company Name:** Sony PlayStation CRM
- **Currency:** USD and INR
- **Locale/Time Zone:** English (United States), IST (GMT+05:30)

### 3. Business Hours & Holidays

- **Business Hours:** Configured as 24x7 (to simulate gamer support availability).
- **Holidays Added:** Christmas, New Year, Diwali.

### 4. Fiscal Year Settings

- Fiscal cycle configured as **April – March** to align with common financial reporting practices.

### 5. User Setup

- Added the following users for simulation:
  - **System Administrator** – Full access (project owner).
  - **Support Agent** – To handle gamer cases.
  - **Marketing Manager** – For campaigns and promotions.
  - **Publisher/Repair Team** – To manage game publisher/repair data.

- Assigned available licenses (limited in Developer Edition).

## 6. Profiles & Roles

- Profiles Created:** Admin, Support, Marketing, Publisher/Repair.
- Roles Defined:** CEO → Managers → Agents (basic hierarchy).

## 7. Security Settings

- OWD (Organization-Wide Defaults):** Private for sensitive data such as subscriptions.
- MFA (Multi-Factor Authentication):** Enabled for login security.

The screenshot displays the Salesforce Setup interface, specifically the 'Roles' and 'Users' sections. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar shows a search bar and a list of setup categories: Users, Roles, Feature Settings, Sales, Service, Case Teams, and Data.com. The main content area is divided into two sections: 'Roles' and 'Users'.

**Roles Section:** The 'Roles' page is titled 'Creating the Role Hierarchy'. It shows a tree view of the organization's role hierarchy for 'Sony PlayStation CRM'. The hierarchy starts with 'CEO' at the top, followed by 'Managers', and then 'SVP, Customer Service & Support' and 'SVP, Sales & Marketing'. Each role has an 'Add Role' button next to it. The page also includes a search bar and a 'Show in tree view' dropdown.

**Users Section:** The 'Users' page is titled 'Active Users'. It shows a list of active users with columns for 'Action', 'Full Name', 'Alias', 'Username', 'Role', and 'Active Profile'. The list includes users like 'Admin\_Himanshu', 'Chatter Expert', 'EPIC\_OrgFarm', 'Kumar\_Himanshu', 'Marketing\_Sarah', 'Support\_Alex', 'User\_Integration', and 'User\_Security'. Each user has an 'Edit' button next to it. The page also includes a search bar and a 'View: Active Users' dropdown.

