

## 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.

**Roles**

### Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

**Your Organization's Role Hierarchy** Show in tree view

*Collapse All Expand All*

- Sony PlayStation CRM
  - Add Role
  - CEO Edit | Del | Assign
    - Add Role
    - Managers Edit | Del | Assign
      - Add Role
      - SVP, Customer Service & Support Edit | Del | Assign
        - Add Role
        - SVP, Sales & Marketing Edit | Del | Assign
          - Add Role

**Users**

### Active Users

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

**View:** Active Users Edit Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other **All**

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> <a href="#">Edit</a> <a href="#">Login</a>	Admin, Himanshu	Owner	himanshui9981@gmail.com	CEO	✓	System Administrator
<input type="checkbox"/> <a href="#">Edit</a>	Chatter Expert	Chatter	chatty.00d0k000007bziduyay.sxxribfc03s@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> <a href="#">Edit</a> <a href="#">Login</a>	EPIC, OrgFarm	OEPIE	epic.a72ed2b33ce5@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/> <a href="#">Edit</a>	Kumar, Himanshu	him	himanshu.kumar.aim/22673@agentforce.com		✓	System Administrator
<input type="checkbox"/> <a href="#">Edit</a> <a href="#">Login</a>	Marketing, Sarah	smark	sarah.marketing@playstationcrm.com	Marketing Team	✓	Standard Platform User
<input type="checkbox"/> <a href="#">Edit</a> <a href="#">Login</a>	Support, Alex	asupp	alex.support@playstationcrm.com	Customer Support, International	✓	Custom Support Profile
<input type="checkbox"/> <a href="#">Edit</a>	User, Integration	integ	integration@00d0k000007bziduyay.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> <a href="#">Edit</a>	User, Security	sec	insightsecurity@00d0k000007bziduyay.com		✓	Analytics Cloud Security User

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

