

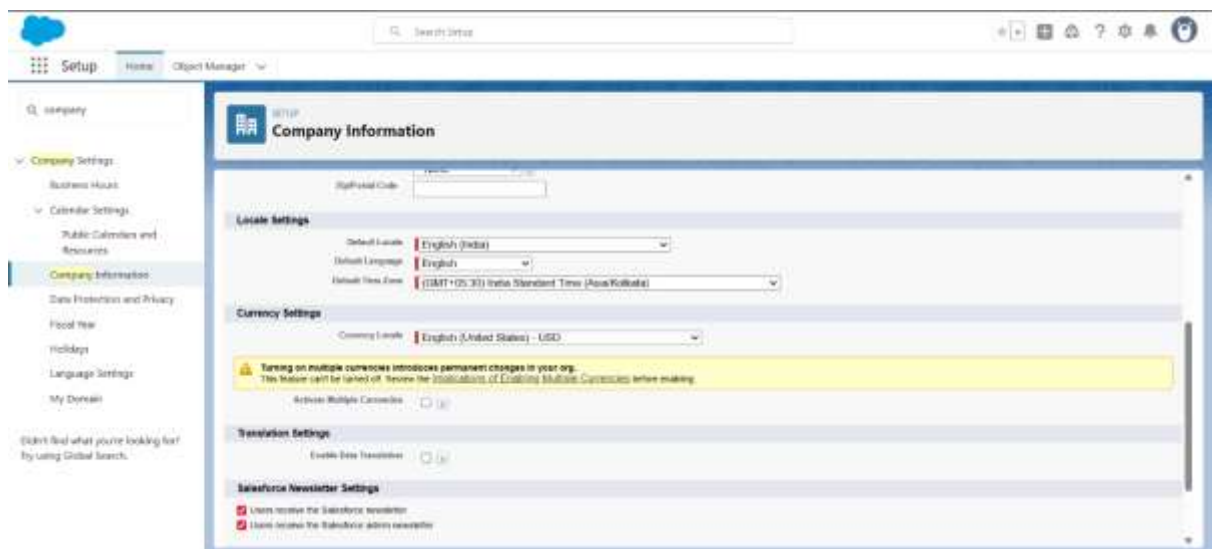
# Smart SLA Tracker: Intelligent Customer Complaint & Escalation Management

## Phase 2: Org Setup & Configuration

### 2.1 Basic Org Settings:

#### 1. Company Information

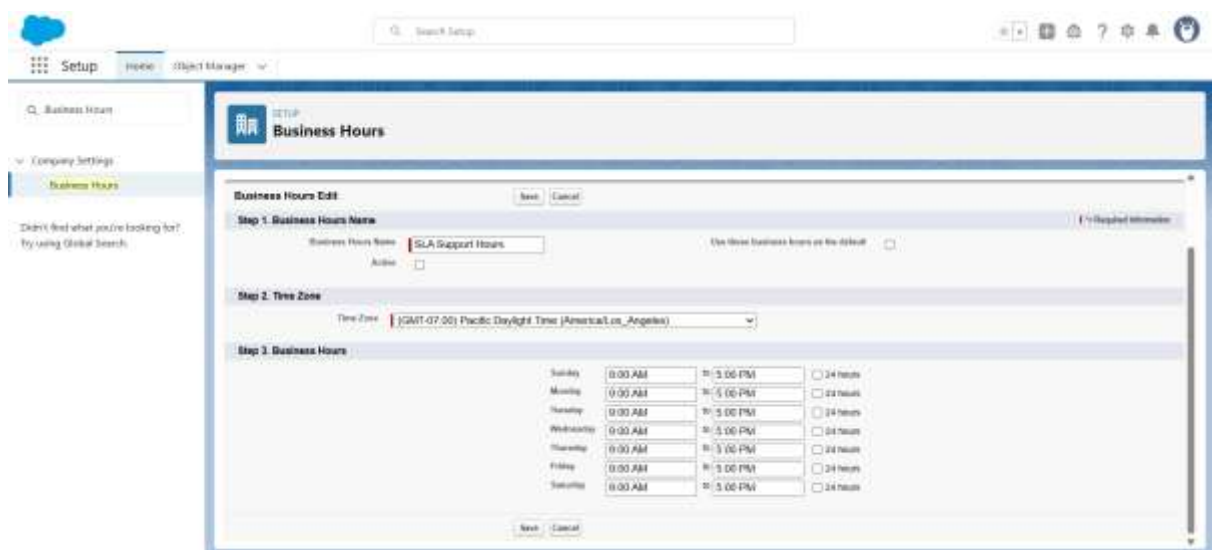
Setup → Company Settings → Company Information → update Default Locale, Time Zone, Default Currency.



The screenshot shows the Salesforce Setup interface for Company Information. The left sidebar contains a navigation menu with options like Setup, Home, Object Manager, and Company Settings. The main content area is titled 'Company Information' and includes sections for Locale Settings, Currency Settings, Translation Settings, and Salesforce Newsletter Settings. The Locale Settings section shows Default Locale as English (India), Default Language as English, and Default Time Zone as (GMT+05:30) India Standard Time (Asia/Kolkata). The Currency Settings section shows Country Locale as English (United States) - USD. A yellow warning banner indicates that turning on multiple currencies introduces permanent changes. The Translation Settings section has an option to Enable Data Translation. The Salesforce Newsletter Settings section has checkboxes for Users receive the Salesforce newsletter and Users receive the Salesforce admin newsletter, both of which are checked.

#### 2. Business Hours

Setup → Business Hours → New → create SLA support Hours.

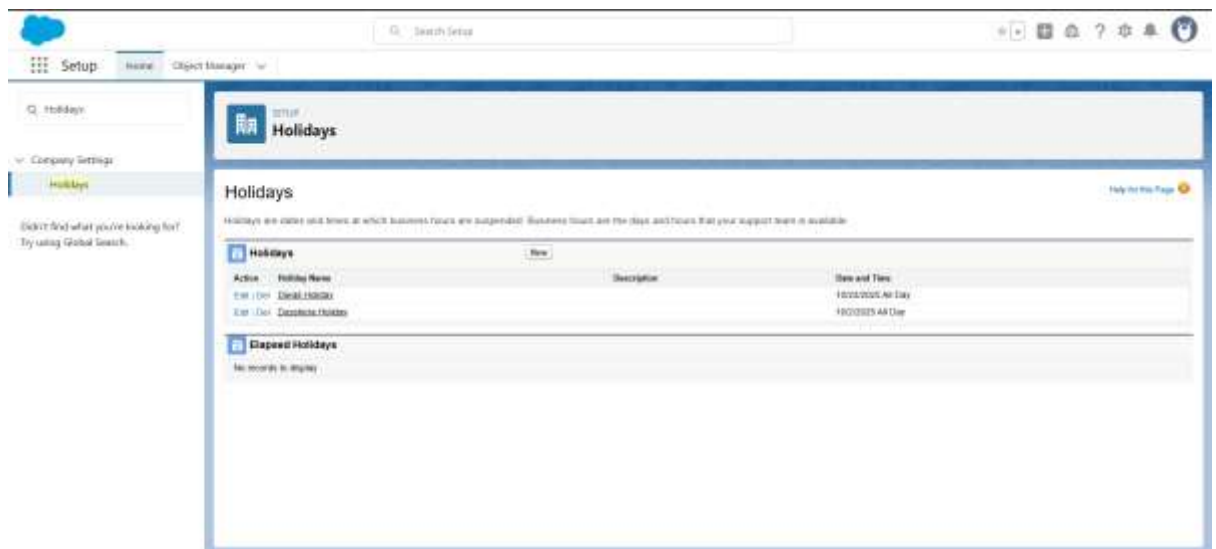


The screenshot shows the Salesforce Setup interface for Business Hours. The left sidebar contains a navigation menu with options like Setup, Home, Object Manager, and Company Settings. The main content area is titled 'Business Hours' and includes a 'Business Hours Edit' section. The 'Business Hours Edit' section has a 'Business Hours Name' field with the value 'SLA Support Hours' and an 'Active' checkbox. Below this is a 'Time Zone' dropdown menu set to '(GMT-07:00) Pacific Daylight Time (America/Los\_Angeles)'. The 'Business Hours' section shows a table with columns for Day, Start Time, End Time, and Duration. The table lists hours for Sunday through Saturday, with start times at 9:00 AM and end times at 5:00 PM, each with a 24-hour duration. The 'Save' and 'Cancel' buttons are at the bottom.

Day	Start Time	End Time	Duration
Sunday	9:00 AM	5:00 PM	24 hours
Monday	9:00 AM	5:00 PM	24 hours
Tuesday	9:00 AM	5:00 PM	24 hours
Wednesday	9:00 AM	5:00 PM	24 hours
Thursday	9:00 AM	5:00 PM	24 hours
Friday	9:00 AM	5:00 PM	24 hours
Saturday	9:00 AM	5:00 PM	24 hours

### 3. Holidays

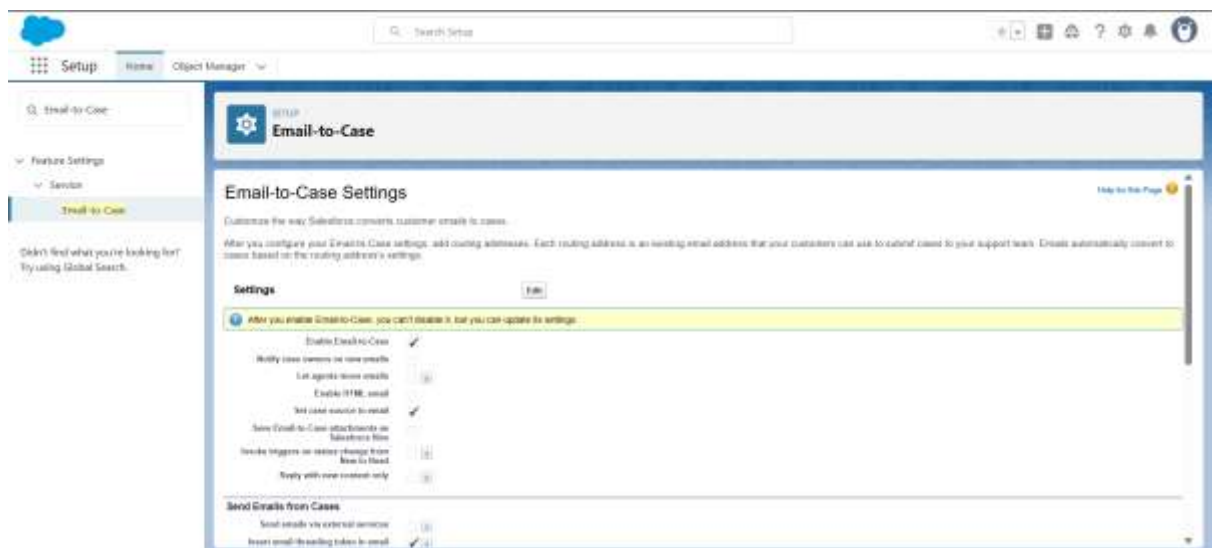
Setup → Holidays → Add Holidays



## 2.2 Enable Features:

### 1. Email-to-Case

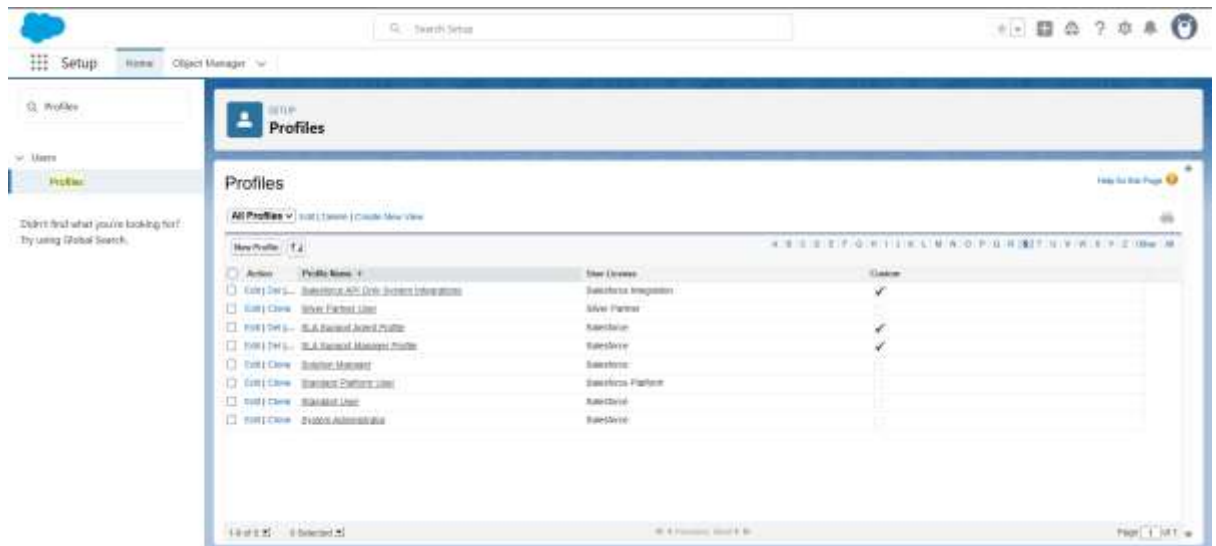
Setup → Email-to-Case → Edit → create a new email address



## 2.3 Users, Profiles, and Roles:

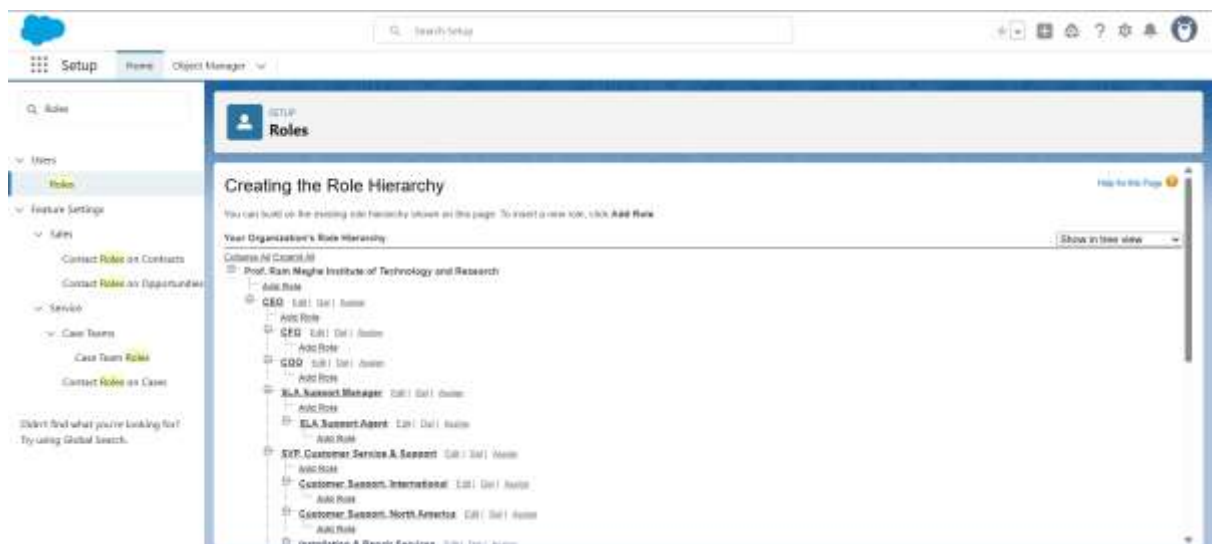
### 1. Create Custom Profiles

Setup → Profiles → Clone → SLA Support Agent Profile & SLA Support Manager Profile



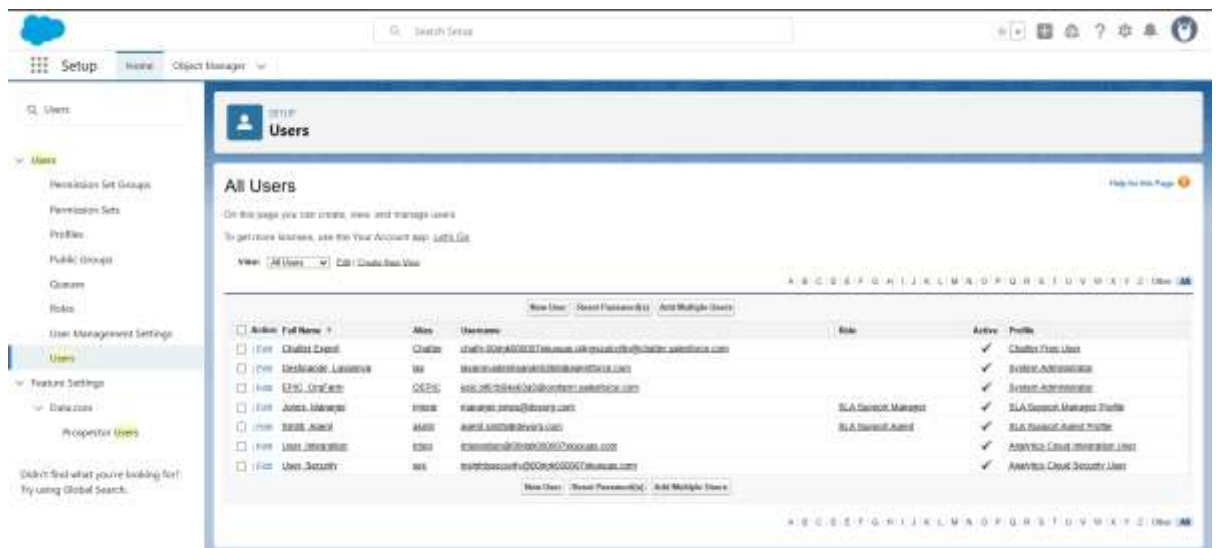
### 2. Create a Role Hierarchy

Setup → Roles → Set Up Roles → Create a new role → SLA Support Manager and a subordinate role for SLA Support Agent.



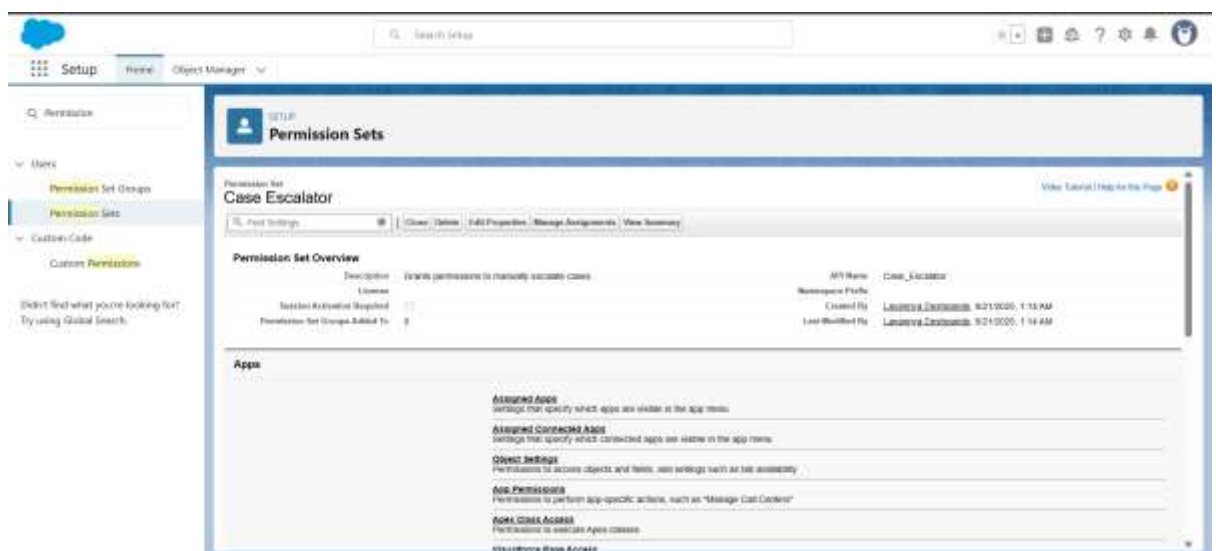
### 3. Create Users

Setup → Users → New User → Create a test user for each role.



### 4. Create a Permission Set

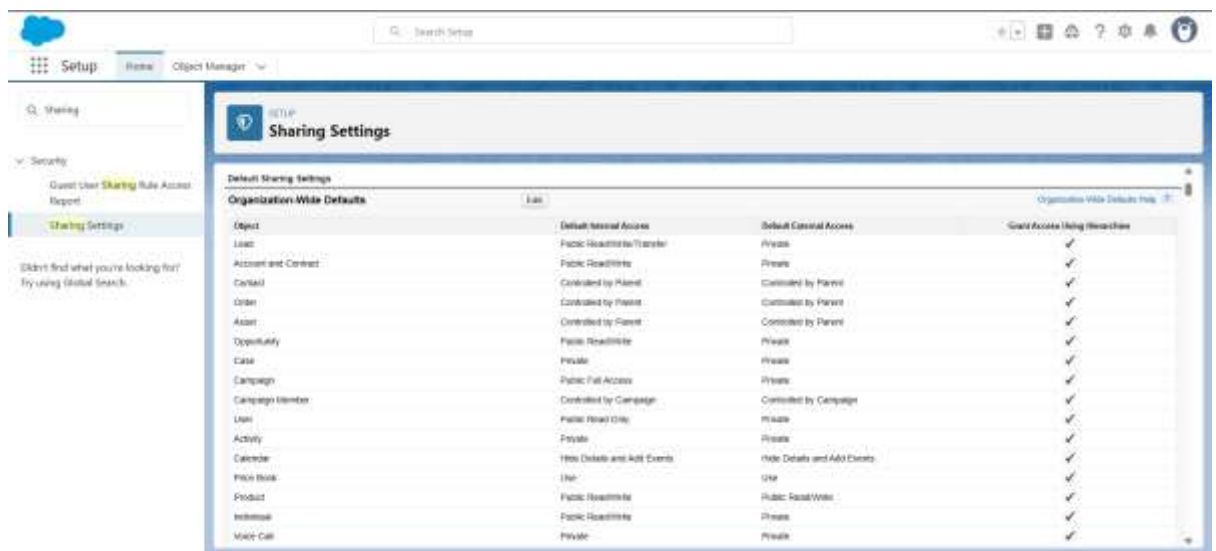
Setup → Permission Sets → New → Case Escalator



## 2.4 Security, OWD, and Sharing:

### 1. Set Organization-Wide Defaults (OWD)

Setup → Sharing Settings → Edit → Set Default Internal Access for the Case object to Private



## 2.5 VS Code – Setup:

- Project Setup
  - Open VS Code > Open the Command Palette > SFDX: Create Project with Manifest > Enter a project name > Smart SLA Project.
- Org Authorization & Retrieval
  - Open the Command Palette > SFDX: Authorize an Org > Select Project Default > Enter alias (SLA\_Dev\_Org) > Log in to your Salesforce org in the browser window.
  - Open the Command Palette (Ctrl+Shift-P) > SFDX: Retrieve Source in Manifest from Org.

