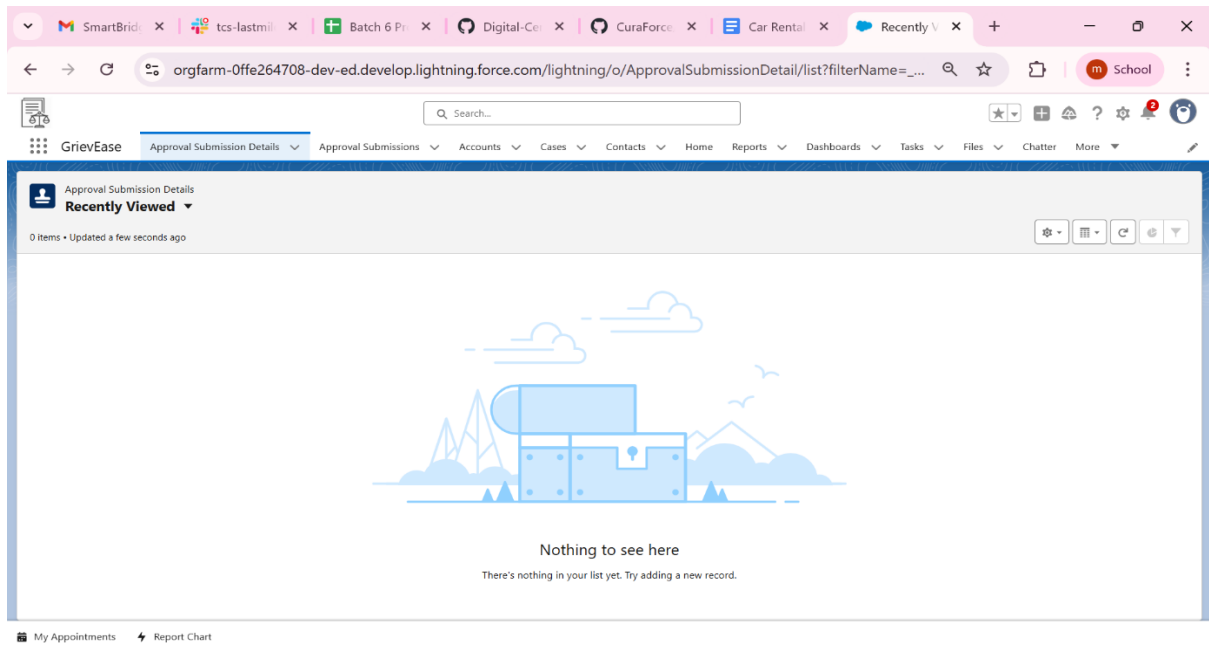


Phase 2: Org Setup & Configuration

1. Salesforce Edition:

Used Salesforce Developer Edition (Free Dev Org) got design , testing and prototyping.



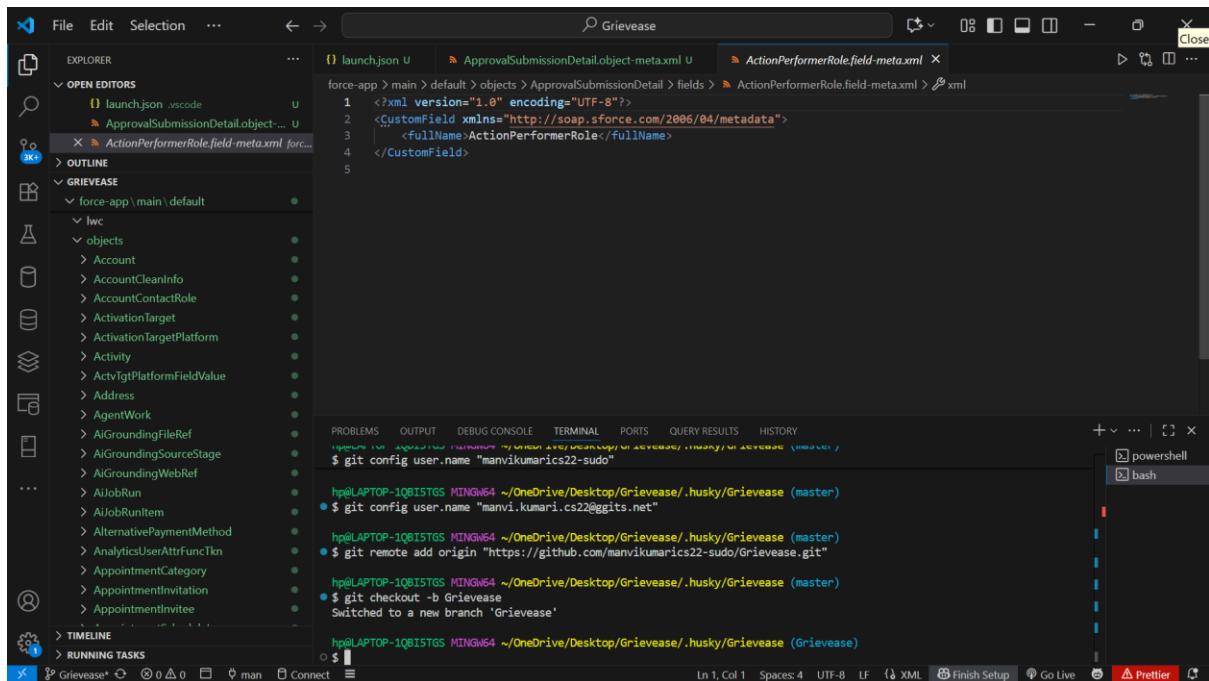
Connecting VS Code and Salesforce Edition Org:

Visual Studio Code (VS Code) is used as a local development workspace.

Salesforce Org is the cloud environment where GrievEase runs.

They connect via **Salesforce CLI (sfdx)** for code and metadata deployment.

Developers build in VS Code and push changes to the Org for testing and use.



2. Company Settings:

1. Company Information Setup:

- **Updated Organization Name** to *Grievease – Citizen Grievance Management*.
- **Set Default Time Zone** to *Asia/Kolkata*.
- **Configured Default Currency** as *INR – Indian Rupee*.
- This ensures the Salesforce org reflects the **public service identity** and operates in the **correct regional governance context**.

The screenshot shows the Salesforce Setup interface for 'Company Information'. The left sidebar lists various setup categories, with 'Company Information' selected. The main content area displays the 'Grievase - Citizen Grievance System' profile. It includes fields for Organization Name, Primary Contact, Division, Address, and Phone. A table lists various system settings like Default Locale, Default Language, Default Time Zone, Currency Locale, and File Space. The bottom of the page shows the 'Created By' and 'Modified By' information.

Organization Detail	
Organization Name	Grievase - Citizen Grievance System
Primary Contact	Manvi Kumari
Division	
Address	United States
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	Hindi (India) - INR
Used Data Space	342 KB (7%) [View]
Used File Space	31 KB (0%) [View]
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	000Gg100000BmrJp
Organization Edition	Developer Edition
Instance	CAN98

Created By: OrgEarm EPIC, 9/15/2025, 10:43 AM
Modified By: Manvi Kumari, 9/22/2025, 10:13 PM

2. Business Hours & Holidays:

- **Defined GrievEase Support Hours** (Monday–Saturday, 9:00 AM – 6:00 PM).
- Added **Durga Pooja**, **Gandhi Jayanti** and **Diwali** as public holidays.
- These configurations ensure that **grievance handling processes and SLAs** align with actual **government working hours**.

The screenshot shows the Salesforce Setup interface for 'Business Hours'. The left sidebar lists various setup categories, with 'Business Hours' selected. The main content area displays the 'Business Hours Detail' for 'Grievase - Citizen Support Hours'. It includes a table for business hours by day of the week, a 'Time Zone' dropdown, and a 'Holidays' table. The bottom of the page shows the 'Created By' and 'Modified By' information.

Business Hours Detail	
Business Hours Name	Citizen Support Hours
Business Hours	
Sunday	No Hours
Monday	9:00 AM to 6:00 PM
Tuesday	9:00 AM to 6:00 PM
Wednesday	9:00 AM to 6:00 PM
Thursday	9:00 AM to 6:00 PM
Friday	9:00 AM to 6:00 PM
Saturday	9:00 AM to 6:00 PM
Active	<input checked="" type="checkbox"/>
Created By	Manvi Kumari, 9/21/2025, 1:09 PM
Last Modified By	Manvi Kumari, 9/21/2025, 1:09 PM

Holidays		
Holiday Name	Description	Date and Time
Diwali		11/4/2025 All Day
Durga Pooja		10/1/2025 All Day
Gandhi Jayanti		10/2/2025 All Day

3. Fiscal Year Settings :

- **Configured Fiscal Year** as *Standard (January – December)*.
- Ensures consistency in **reporting, SLA tracking, and performance reviews**.
- Simplifies alignment with **government reporting cycles and audits**.

4.Role Hierarchy – GrievEase

1. GrievEase Governance

- High-level authority role that defines grievance handling policies and oversees the system.
- Can access all records in the system.

2. GrievEase Governance Office

- Operational body under Governance.
- Manages the Chief Officer and ensures governance rules are followed.

3. Chief Grievance Officer

- Responsible for supervising all citizen grievances across departments.
- Escalation point for unresolved or critical complaints.

4. Department Manager

- Mid-level managers assigned to each department.
- Oversee department agents and monitor department-specific grievances.
- **Department Manager – Electricity**
- **Department Manager – Sanitation**
- **Department Manager – Water**

5. Installation & Repair Services

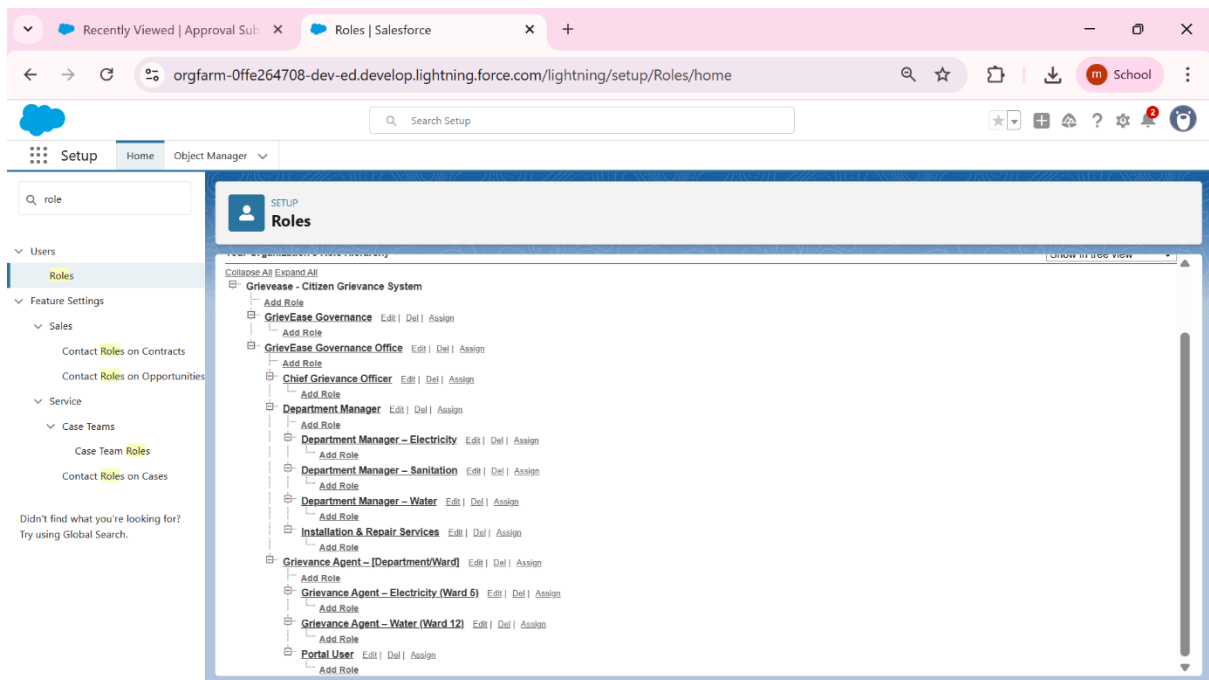
- Special operational team for resolving technical/field issues.
- Works closely with Agents under each department.

6. Grievance Agent – [Department/Ward]

- Frontline officers handling cases raised by citizens.

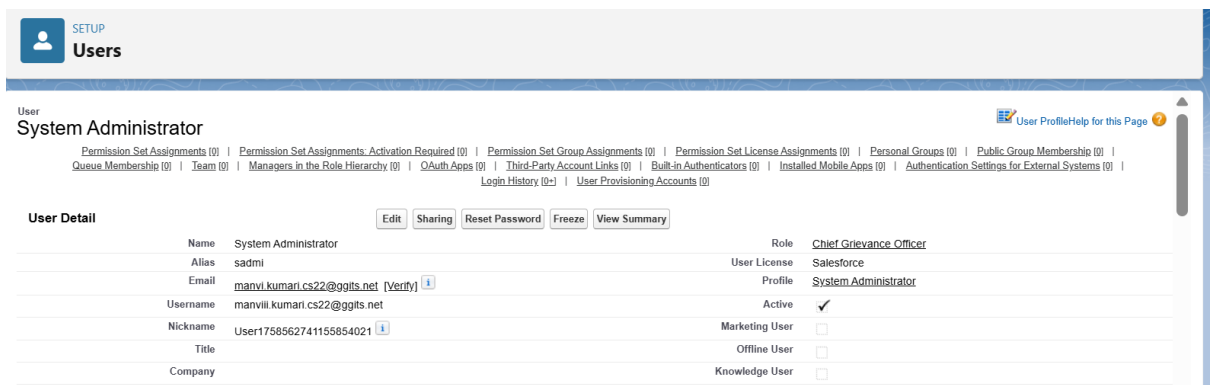
7. Portal User

- External role for citizens logging grievances via portal.



5. User Creation –

- Created a **Chief Grievance Officer (Manager User)** with a Salesforce license and **System Administrator** profile to oversee all grievance operations.
- Created **Grievance Agent Users** with Salesforce licenses and assigned to the **Agent roles** (e.g., Electricity Agent – Ward 5, Water Agent – Ward 12) for direct grievance handling.
- Created **Portal Users (Citizens)** using the **Customer Community / Experience Cloud** license to allow citizens to log in, raise complaints, and track their grievance status.
- Unique **usernames in email format** were used, and **activation emails** were sent to valid accounts for login access.
- This setup ensures **role-based access control** across **managers, agents, and citizens**, simulating a real-world grievance redressal system.



User
Grievance Agent

[Permission Set Assignments \(0\)](#) |
 [Permission Set Assignments: Activation Required \(1\)](#) |
 [Permission Set Group Assignments \(0\)](#) |
 [Permission Set License Assignments \(0\)](#) |
 [Personal Groups \(0\)](#) |
 [Public Group Membership \(0\)](#) |
 [Queue Membership \(0\)](#) |
 [Team \(0\)](#) |
 [Managers in the Role Hierarchy \(0\)](#) |
 [OAuth Apps \(0\)](#) |
 [Third-Party Account Links \(0\)](#) |
 [Built-in Authenticators \(0\)](#) |
 [Installed Mobile Apps \(0\)](#) |
 [Authentication Settings for External Systems \(0\)](#) |
 [Login History \(0+\)](#) |
 [User Provisioning Accounts \(0\)](#)

User Detail [Edit](#) [Sharing](#) [Reset Password](#) [Freeze](#) [View Summary](#)

Name	Grievance Agent	Role	Grievance Agent – (Department/Ward)
Alias	gagen	User License	Salesforce
Email	manvi.kumari.cs22@ggits.net Verify	Profile	Standard User
Username	manvi.kumari.cs22@ggits.net22	Active	<input checked="" type="checkbox"/>
Nickname	User17584863877007011120 i	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"/>

User
Portal User

[Permission Set Assignments \(0\)](#) |
 [Permission Set Assignments: Activation Required \(1\)](#) |
 [Permission Set Group Assignments \(0\)](#) |
 [Permission Set License Assignments \(0\)](#) |
 [Personal Groups \(0\)](#) |
 [Public Group Membership \(0\)](#) |
 [Queue Membership \(0\)](#) |
 [Team \(0\)](#) |
 [Managers in the Role Hierarchy \(1\)](#) |
 [OAuth Apps \(0\)](#) |
 [Third-Party Account Links \(0\)](#) |
 [Built-in Authenticators \(0\)](#) |
 [Installed Mobile Apps \(0\)](#) |
 [Authentication Settings for External Systems \(0\)](#) |
 [Login History \(0+\)](#) |
 [User Provisioning Accounts \(0\)](#)

User Detail [Edit](#) [Sharing](#) [Reset Password](#) [Freeze](#) [View Summary](#)

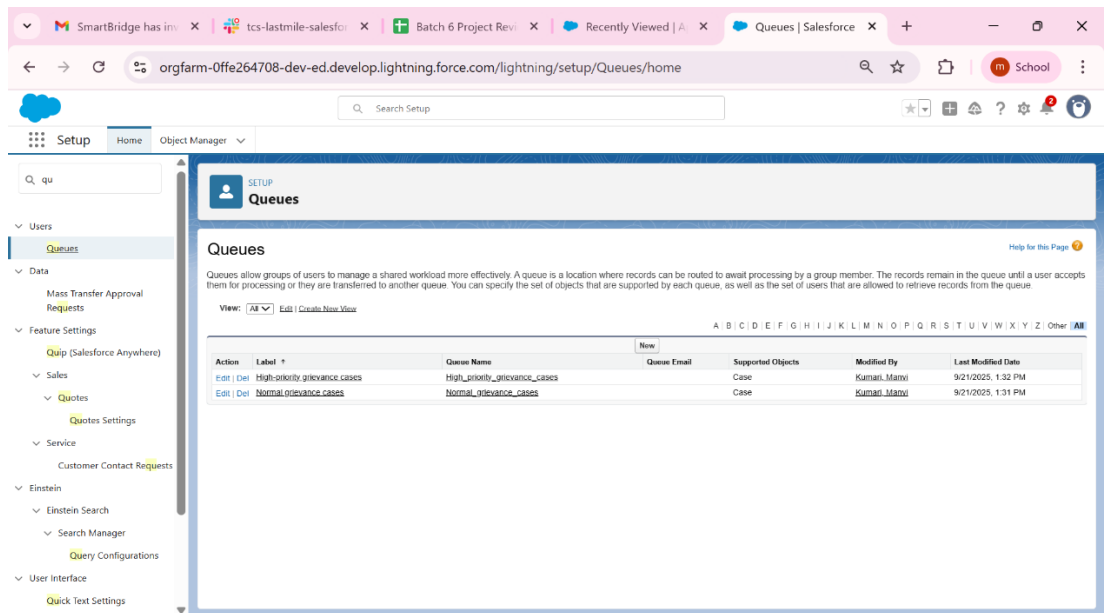
Name	Portal User	Role	Portal User
Alias	dmana	User License	Salesforce Platform
Email	manvi.kumari.cs22@ggits.net Verify	Profile	Standard Platform User
Username	manvi.kumari.cs22@ggits.net	Active	<input checked="" type="checkbox"/>
Nickname	User17584862058866663351 i	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company	Grievease	Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>

6. Organization-Wide Defaults (OWD) –

- **Set the Case object's Default Internal Access = Private** to ensure grievances are only visible to their **owner (Agent)** and the **manager** above them in the role hierarchy.
- This configuration ensures **data security, restricted visibility, and accountability**, allowing access only on a need-to-know basis within the grievance redressal system.

7. Queue Setup-

- **Normal Grievance Cases**
 - Queue Name: *Normal_grievance_cases*
 - Purpose: Handles all standard grievance cases.
 - Supported Object: **Case**
- **High-Priority Grievance Cases**
 - Queue Name: *High_priority_grievance_cases*
 - Purpose: Handles escalated or urgent grievance cases.
 - Supported Object: **Case**



8.Profiles & Permission Sets –

- **Case_Access_Agent**
 - Grants **Grievance Agents** access to the Case object.
 - Permissions: **Read, Create, Edit** (No Delete).
 - Ensures agents can manage grievance cases without administrative risks.
- **Citizen_Portal_Access**
 - Grants **Portal Users (Citizens)** access to submit and track grievances.
 - Permissions: **Read, Create** on Cases (for their own records).
 - Provides controlled, limited access so citizens can interact with the system securely.

Together, these permission sets ensure **internal agents** and **external citizens** both have the right level of access for their roles.

SETUP

Permission Sets

Permission Set

Case_Access_Agent

[Video Tutorial](#) | [Help for this Page](#)

[Clone](#)
[Edit Properties](#)
[Manage Assignments](#)
[View Summary](#)

Permission Set Overview

Description	API Name
License	Case_Access_Agent
Session Activation Required	Namespace Prefix
Permission Set Groups Added To	Created By
	Last Modified By

SmartBridge has inv x tcs-lastmile-salesfor x Batch 6 Project Revi x Recently Viewed | A x Permission Sets | Sa x

orgfarm-0ffe264708-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PSgL000... School

Search Setup

Setup Home Object Manager

per

Hyperforce Assistant

Users

Permission Set Groups

Permission Sets

Apps

Mobile Apps

Salesforce

Mobile Builder for the Seller-Focused Experience

Feature Settings

Digital Experiences

Salesforce CMS

Settings

Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

SETUP

Permission Sets

Permission Set Citizen_Portal_Access Video Tutorial | Help for this Page

Find Settings... Clone Edit Properties Manage Assignments View Summary

Permission Set Overview

Description	API Name	Citizen_Portal_Access
License	Namespace Prefix	
Session Activation Required	Created By	Mamvi Kumari 9/22/2025, 11:15 AM
Permission Set Groups Added To	Last Modified By	Mamvi Kumari 9/22/2025, 11:15 AM

Apps

Assigned Apps

Settings that specify which apps are visible in the app menu

Assigned Connected Apps

Settings that specify which connected apps are visible in the app menu

Object Settings

Permissions to access objects and fields, and settings such as tab availability

App Permissions

Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access

Permissions to execute Apex classes

Visualforce Page Access

Permissions to execute Visualforce pages

External Data Source Access