Phase-2: Org Setup & Configuration

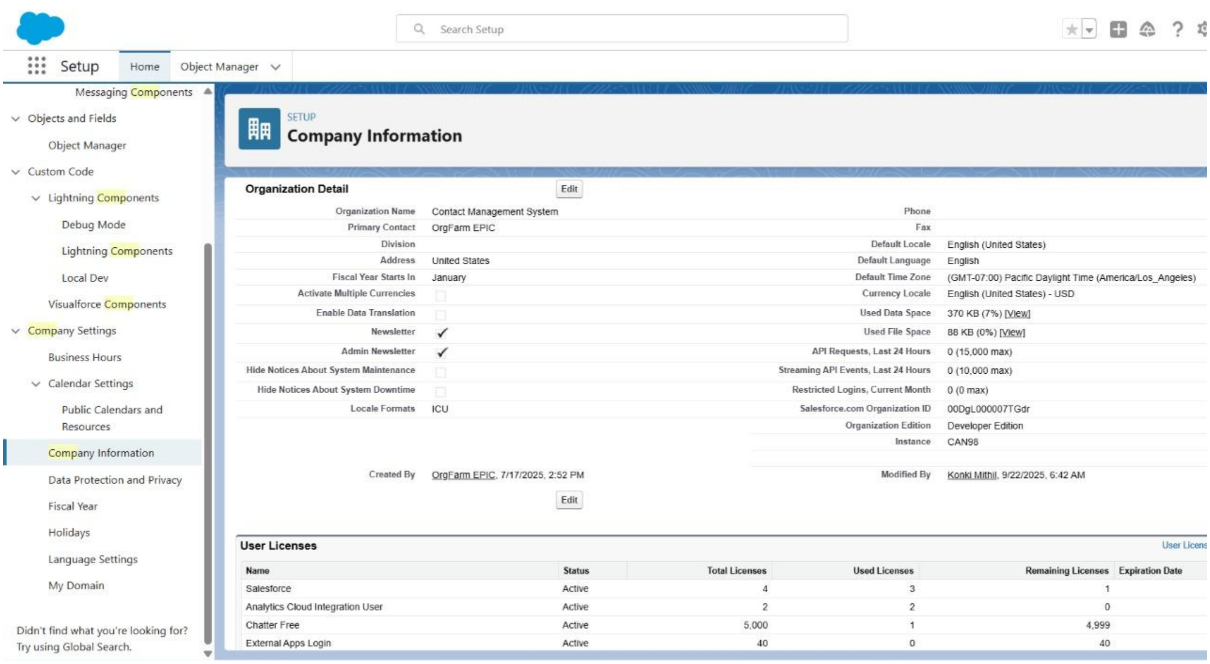
Salesforce Editions:

- Used Developer Edition Org (free).
- Includes custom objects, Flows, Apex, Approval Processes, and Lightning components.
- Sandbox not available in Developer Edition, so work is done directly in Dev O.

Company Profile Setup

Set up basic org details under **Setup → Company Information → Edit**:

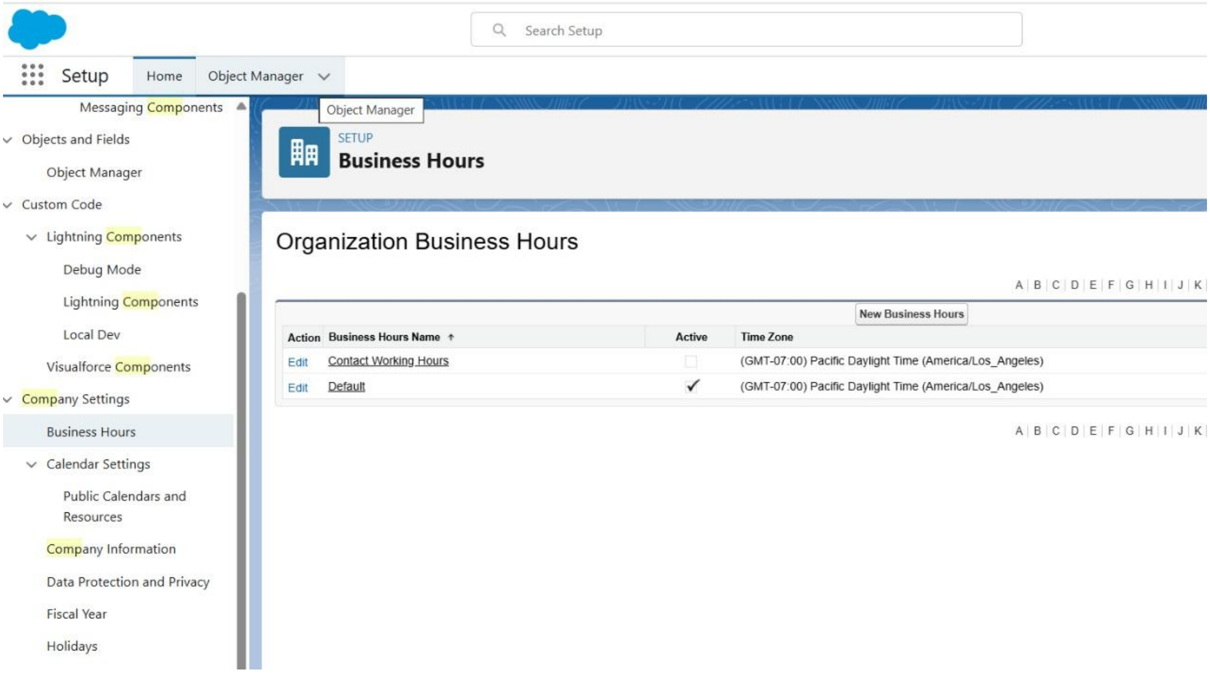
- **Name:** Contact Management System – Dev
- **Time Zone:** GMT+05:30 Asia/Kolkata
- **Locale:** English (India)
- **Language:** English
- **Currency:** INR

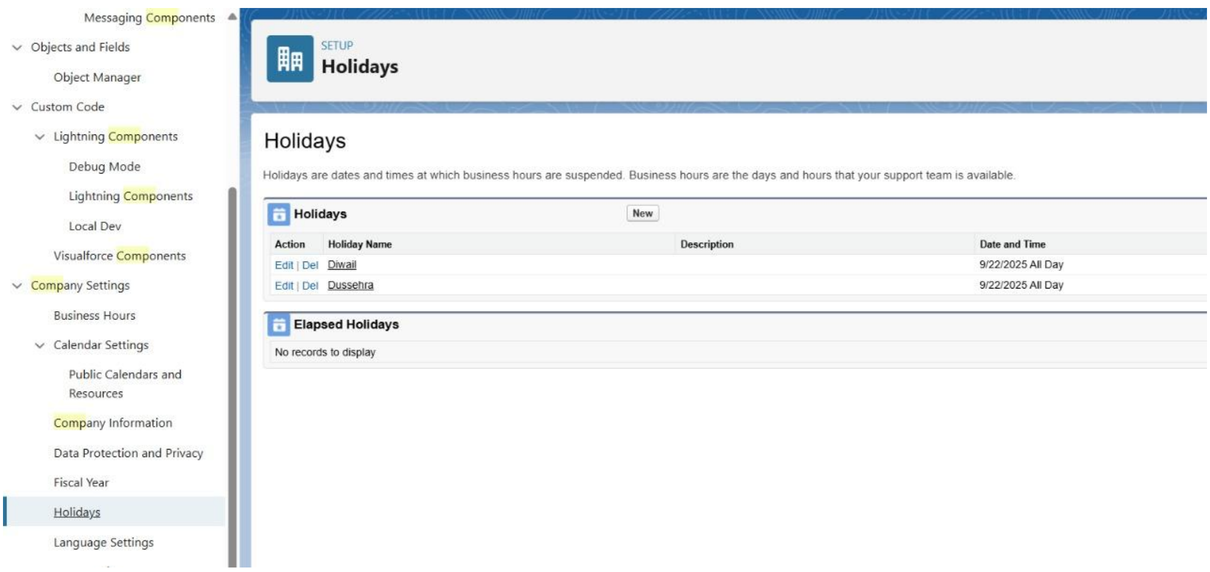


Business Hours Setup

Configure working hours for customer interaction tracking and SLA monitoring:

- **Path:** Setup → Business Hours → New
- **Name:** Standard Business Hours
- **Time Zone:** GMT+05:30 Asia/Kolkata
- **Working Hours:** Mon–Fri 9:00 AM–6:00 PM, Sat–Sun Closed
- **Save:** Apply as default business hours

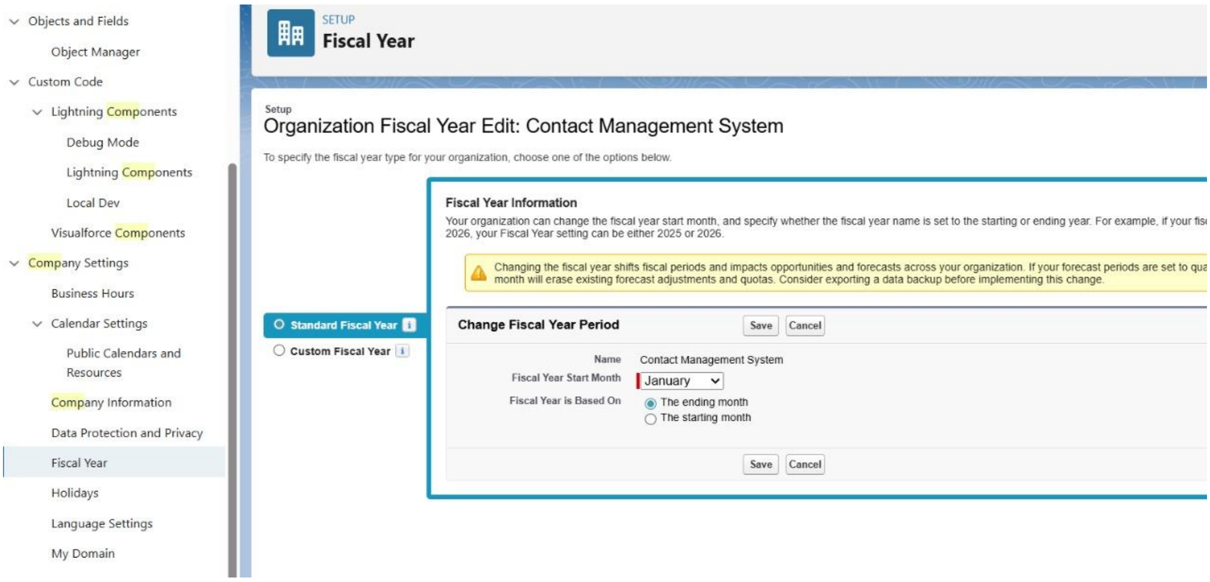




Fiscal Year Setup

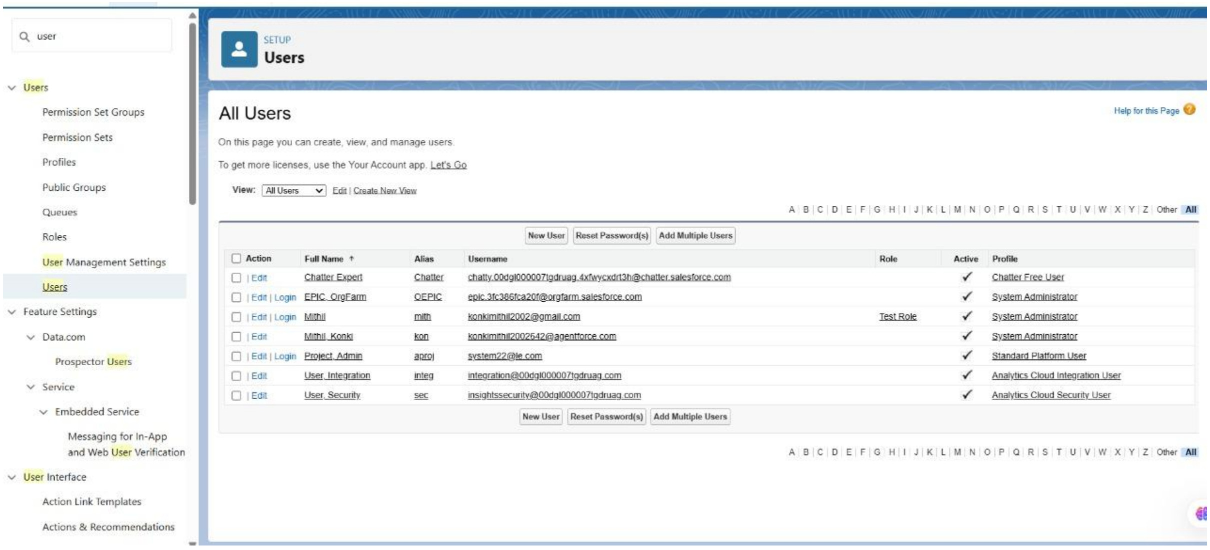
Defines reporting periods for contact engagement analysis:

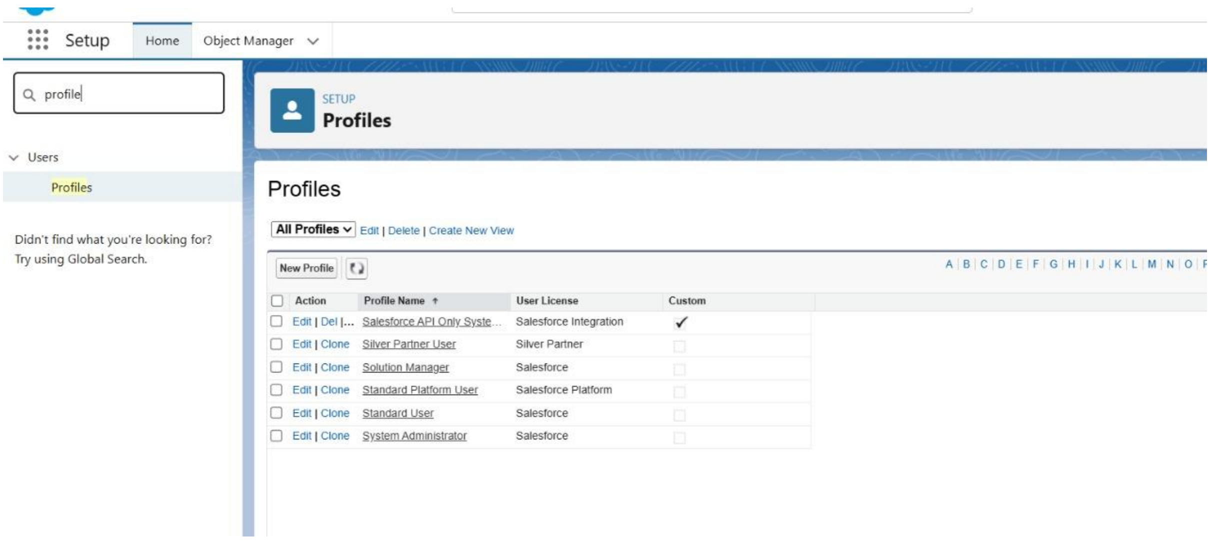
- **Path:** Setup → Fiscal Year
- **Type:** Standard Fiscal Year (Jan–Dec)
- **Configuration:** Start Month = January
- **Save:** Apply settings



User Setup (Profiles, Roles, Permission Sets, Users)

- **Profiles:** Clone standard profiles to create custom ones for baseline access.
  - **Sales_Rep_Profile** – For sales reps managing contacts and logging interactions
  - **Sales_Manager_Profile** – For managers reviewing team performance
  - **Executive_Profile** – For CEO/executive, full visibility
- **Roles:** Define role hierarchy for record visibility.
  - CEO → Sales Manager → Sales Rep
- **Permission Sets:** Create **Interaction_Access_PS** to grant extra access to Interaction History object.
- **Users:** Add sample users with respective profiles and roles:
  - sales1 → Sales_Rep_Profile, Role: Sales Rep
  - manager1 → Sales_Manager_Profile, Role: Sales Manager
  - ceo1 → Executive_Profile, Role: CEO





Role Hierarchy Setup

Defines data visibility within the org:

- **Path:** Setup → Roles → Set Up Roles
- **Top-Level Role:** CEO
- **Manager Role:** Child of CEO
- **Sales Rep Role:** Child of Manager

Resulting Hierarchy (example):
CEO → Sales Manager → Sales Rep

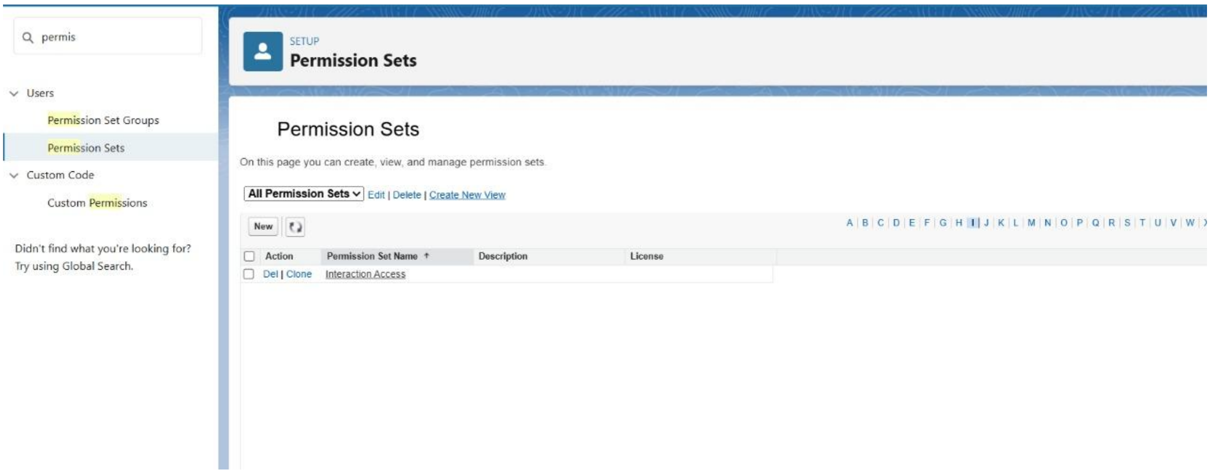
OWD (Org Wide Default)

This will be configured in **Phase 3**, since objects (like Interaction History) will be implemented then.

Assign Permission Set(s)

After creating users, assign the **Interaction_Access_PS** to sales reps as needed:

- **Path:** Setup → Users → Select Sales User → Permission Set Assignments → Edit Assignments → Add Interaction_Access_PS → Save



12. Dev Org Setup

13. Sandbox Usage

14. Deployment Basics