Phase 2 Documentation – Org Setup & Configuration

1. Salesforce Edition

- Selected **Salesforce Developer Edition** (free, for project/demo).
- Verified availability of required features (Users, Profiles, Permission Sets, Reports, etc.).

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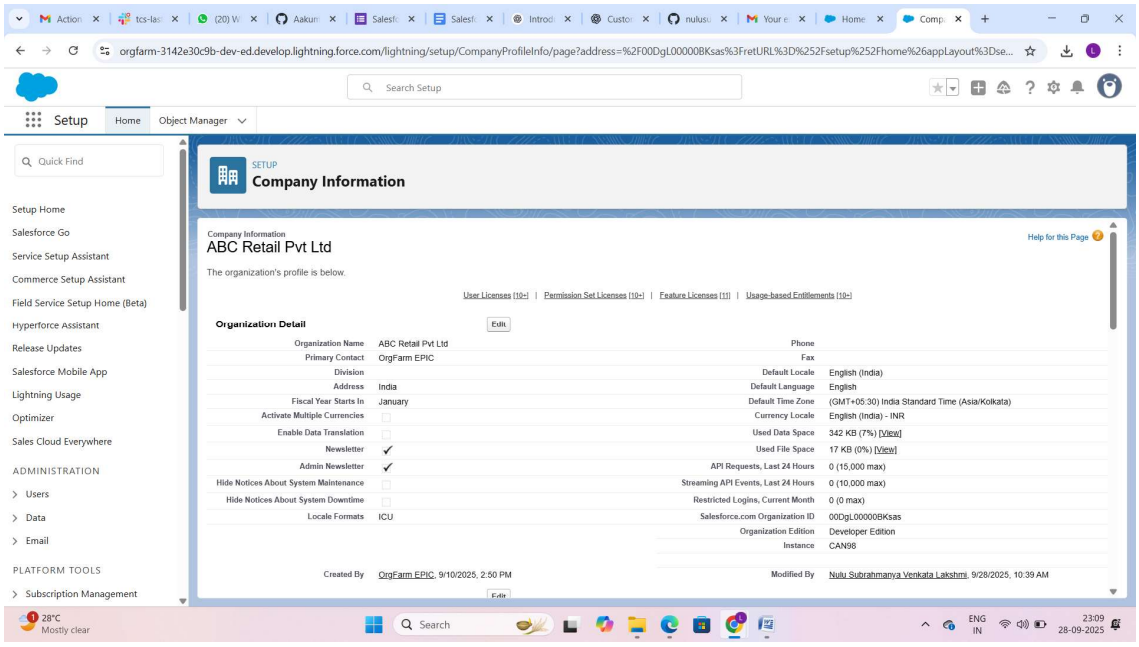
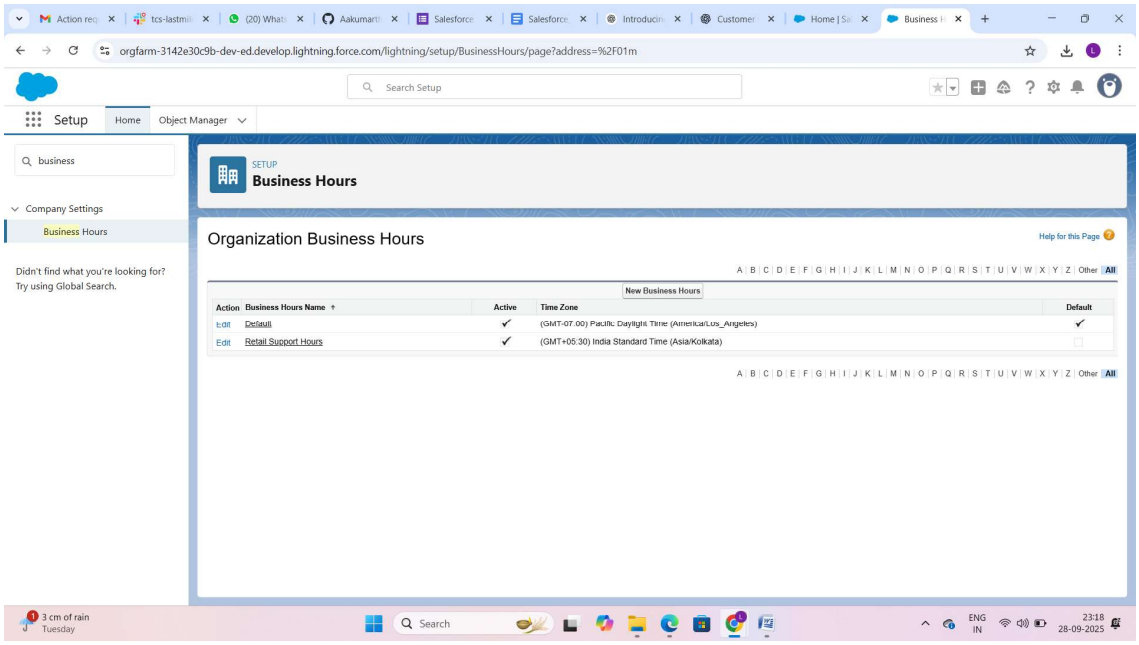
2. Company Profile Setup

- **Company Information**: Entered company name (e.g., *ABC retail Pvt Ltd*), default locale, language (English India – INR).
- **Currency**: Set to INR.
- **Time Zone**: Asia/Kolkata.
- **Fiscal Year**: Chosen **Standard Fiscal Year** (Jan–Dec).



3. Business Hours & Holidays

- Configured **Business Hours**: 9:00 AM – 5:30 PM IST (Mon–Fri).
- Added **Holidays** (optional): Republic Day, Diwali, etc.



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4. Fiscal Year Settings

- Confirmed **Standard Fiscal Year** is enabled.
- No customization required for this project.

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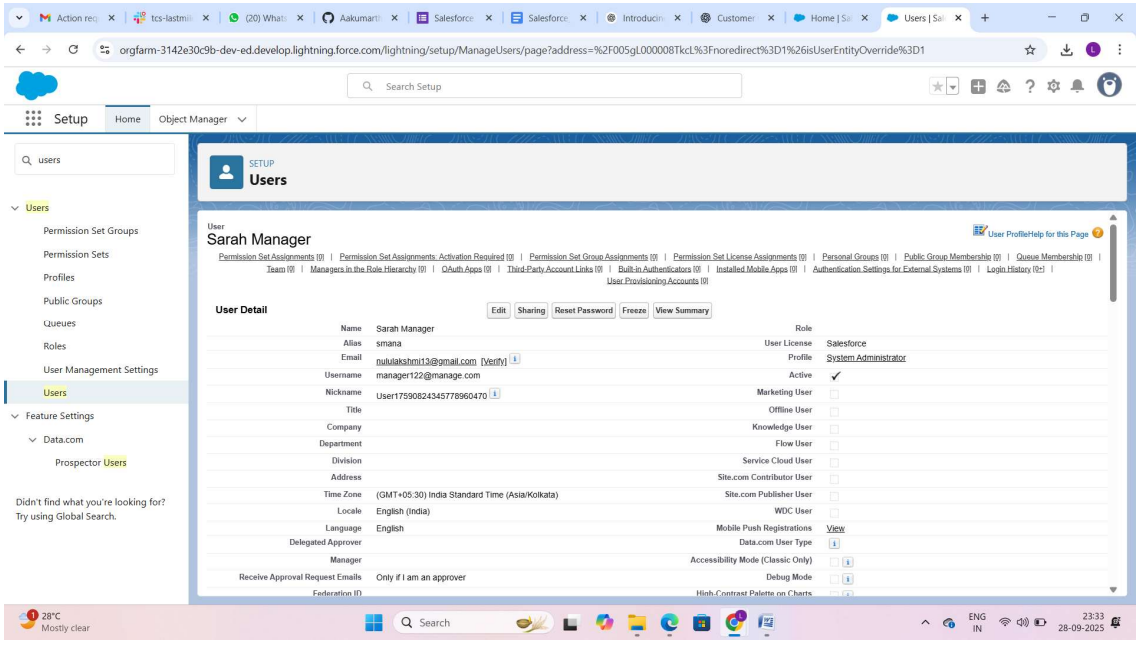
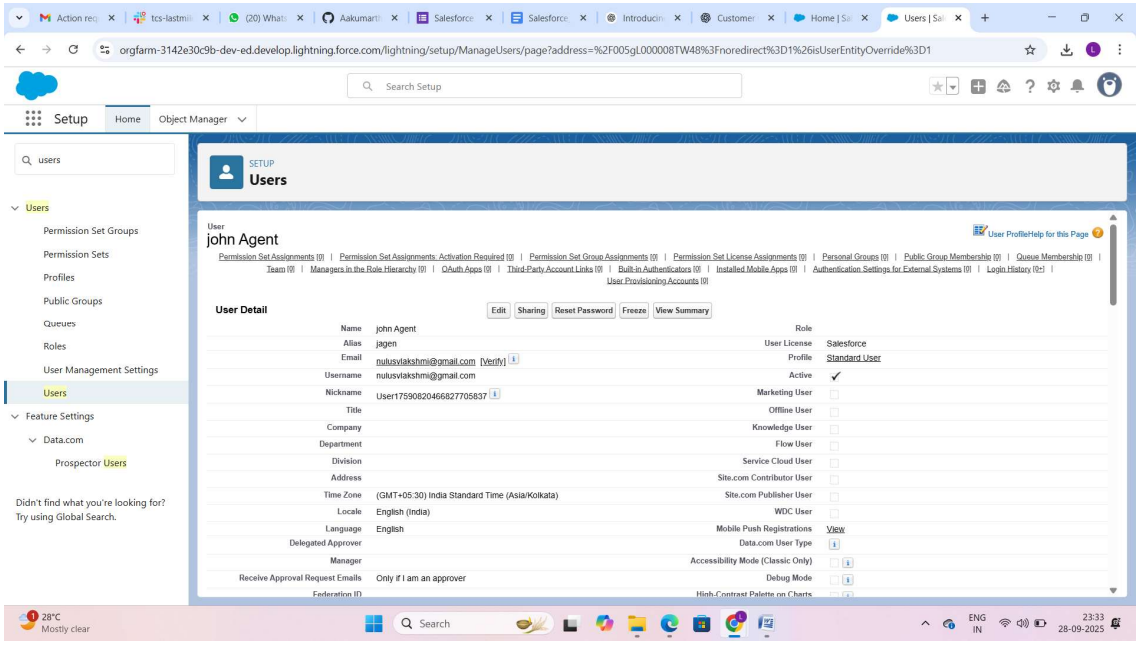
5. User Setup & Licenses

- Created sample **Users**:
  - **Admin User** – Full Access.
  - **Manager User** – Supervises complaints.
  - **Support Agent User** – Handles complaints.





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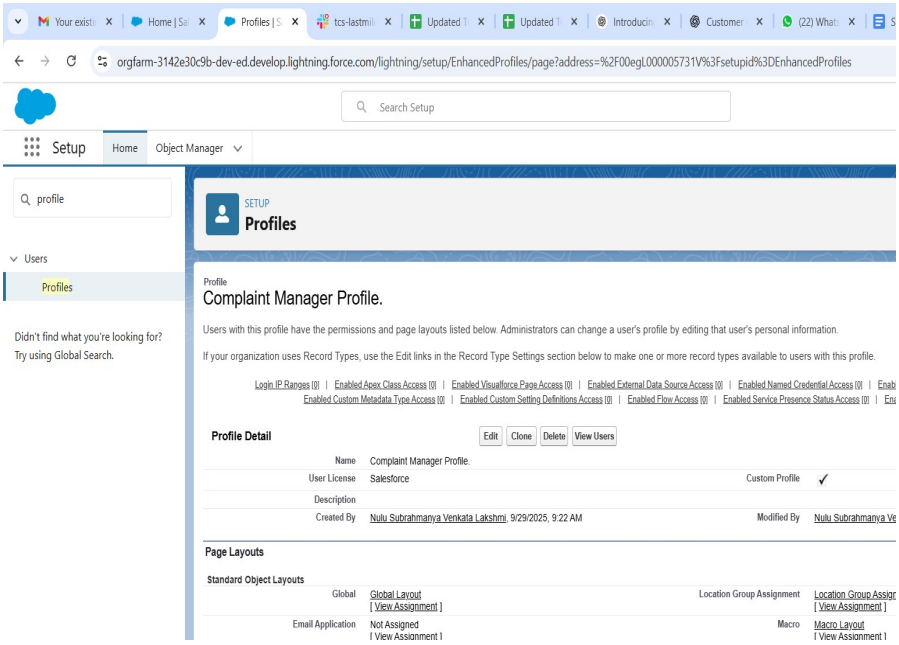
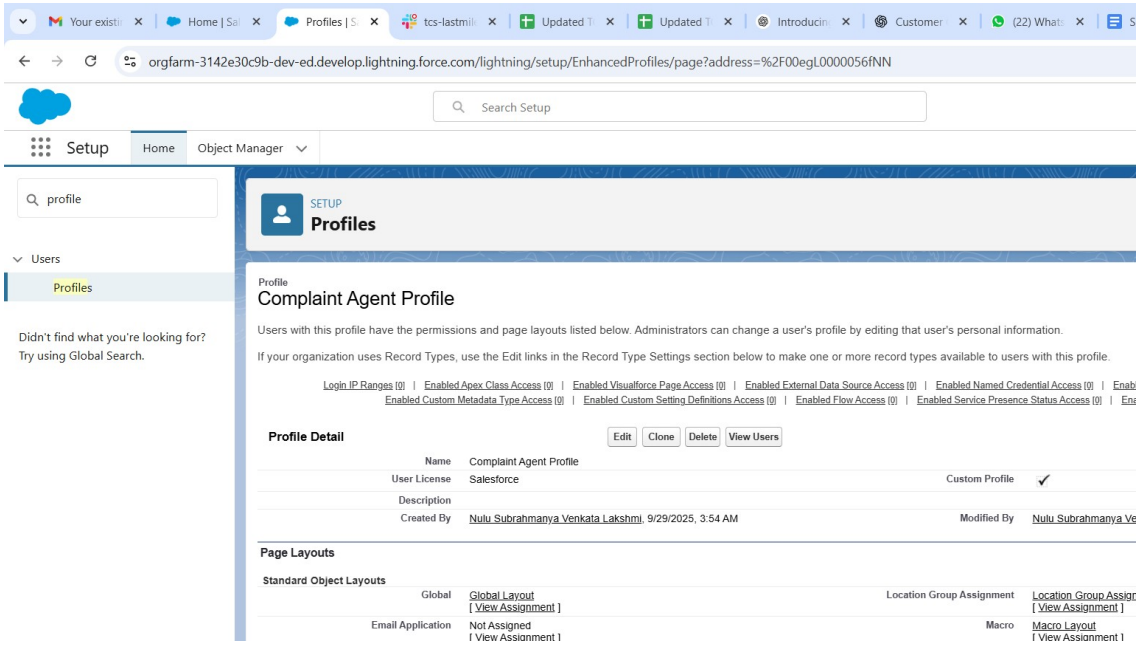
6. Profiles

- Configured **Profiles** for baseline access:
  - **System Administrator** (default, full rights).
  - **Complaint Manager Profile** (Read/Write on Complaint & Customer objects).
  - **Complaint Agent Profile** (Read/Write complaints assigned to them).





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7. Permission Sets

- Created **extra access layers**:
  - **Complaint Manager Access** → Manage all complaints/customers + reports.
  - **Complaint Viewer Access** → Read-only on complaints/customers.
  - **Reports Access** → Run & export reports.
- Assigned to users based on roles.