

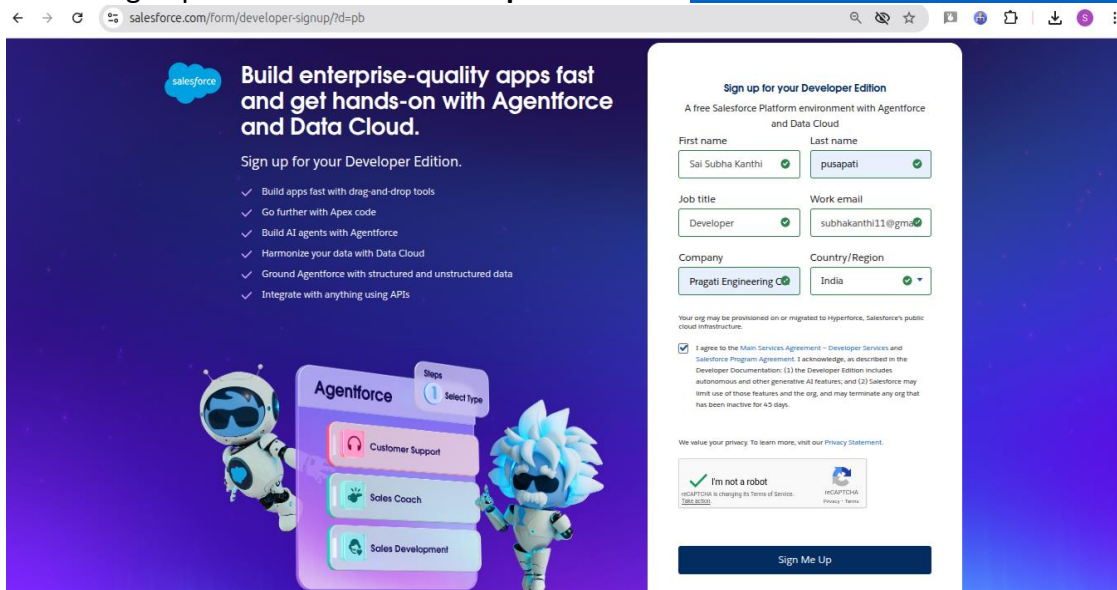
Phase 2: Org Setup & Configuration

Project: Customer Support Ticket Management System

This document summarizes the work performed in **Phase 2** of the capstone project: setting up the Salesforce Developer Org and configuring the resources required for the **Customer Support Ticket Management System**. It includes **step-by-step actions and screenshots of the custom objects and fields created**.

Step 1: Sign Up

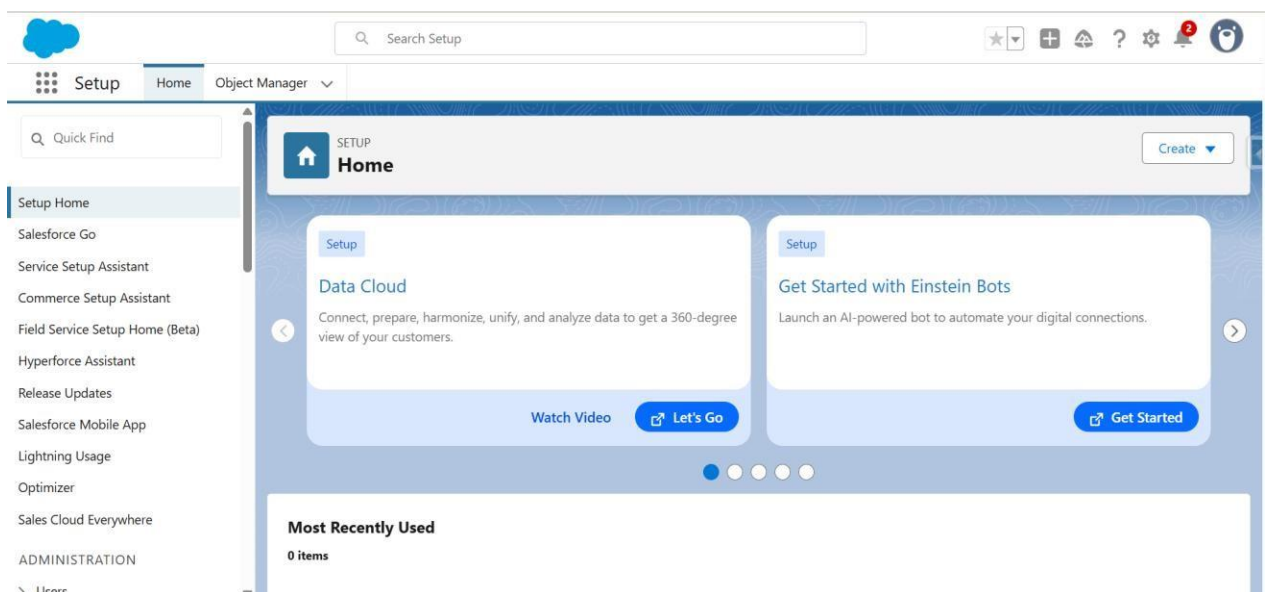
- Sign up for a **Salesforce Developer Edition** at <https://developer.salesforce.com/signup>.



The screenshot shows the Salesforce Developer Edition sign-up page. On the left, there's a promotional banner for Agentforce with the text "Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud." Below this, it says "Sign up for your Developer Edition." and lists several benefits: "Build apps fast with drag-and-drop tools", "Go further with Apex code", "Build AI agents with Agentforce", "Harmonize your data with Data Cloud", "Ground Agentforce with structured and unstructured data", and "Integrate with anything using APIs". There are also two cartoon robot characters. On the right, there's a sign-up form titled "Sign up for your Developer Edition". The form includes fields for First name (Sai Subha Kanthi), Last name (pusapati), Job title (Developer), Work email (subhakanthi11@gmail.com), Company (Pragati Engineering Co), and Country/Region (India). There's a checkbox for agreeing to the terms and conditions, and a "Sign Me Up" button at the bottom.

Step 2: Open Setup

1. Log in to **Salesforce Lightning**.
2. Click the **Gear icon** in the top-right → select **Setup**.



Step 3: Update Company Information

1. In Setup, use **Quick Find → Company Information →** open it.
2. Click **Edit**.
3. Update the following:
 - **Organization Name:** Pragati Engineering College
 - **Default Time Zone:** 12.00 – 12.00
4. Click **Save**.

The screenshot shows the Salesforce Setup page for Company Information. The organization name is 'PRAGATI ENGINEERING COLLEGE'. The page is divided into sections: Organization Detail, Organization Information, and Organization Settings. The Organization Detail section is expanded, showing fields like Organization Name, Primary Contact, Division, Address, Fiscal Year Starts In, Activate Multiple Currencies, Enable Data Translation, Newsletter, Admin Newsletter, Hide Notices About System Maintenance, Hide Notices About System Downtime, Locale Formats, Phone, Fax, Default Locale, Default Language, Default Time Zone, Currency Locale, Used Data Space, Used File Space, API Requests, Last 24 Hours, Streaming API Events, Last 24 Hours, Restricted Logins, Current Month, Salesforce.com Organization ID, Organization Edition, and Instance.

Step 4: Set Business Hours

- ❖ **Why:** Defines working hours for ticket resolution, escalation, and SLAs.

1. Quick Find → **Business Hours** → click **New**.
2. Fill in:
 - Name: Support Business Hours
 - Hours: 9:00 AM – 6:00 PM
3. Click **Save**

Step 5: Profiles

Profiles define what users can do in Salesforce. For Employee Leave Management System, recommended profiles are:

a) System Administrator

- Full access to all objects, flows, and settings.
- Used by HR/Admins for configuration.

b) Support Agent

- Can view and update assigned tickets
- Can view team leave dashboards.

c) Support Manager

- Can view all tickets and dashboards.

Step 6: Standard and Custom Objects

Create the following **custom objects** to manage leave processes:

1. Customer__c

- Stores customer details such as name, email, phone number, and account type.
- Acts as the central object connecting customers to their support tickets.

2. Support_Ticket__c

- Tracks all customer support tickets raised in the system.
- Key fields: Customer (Lookup), Ticket Category, Priority, Status, Description, Created Date

3. Ticket_Category__c

- Stores different types of support issues such as Technical Issue, Billing Issue, and General Query.
- Helps in categorizing tickets and enabling efficient assignment and reporting.

Step 7: Fields & Relationships

- **Customer Lookup in Support_Ticket__c** → Connects support tickets to the respective customer records.
- **Picklist Fields in Support_Ticket__c** → Calculates Priority and Status
- **Text / Long Text Field** → Description field to capture detailed customer issues.