

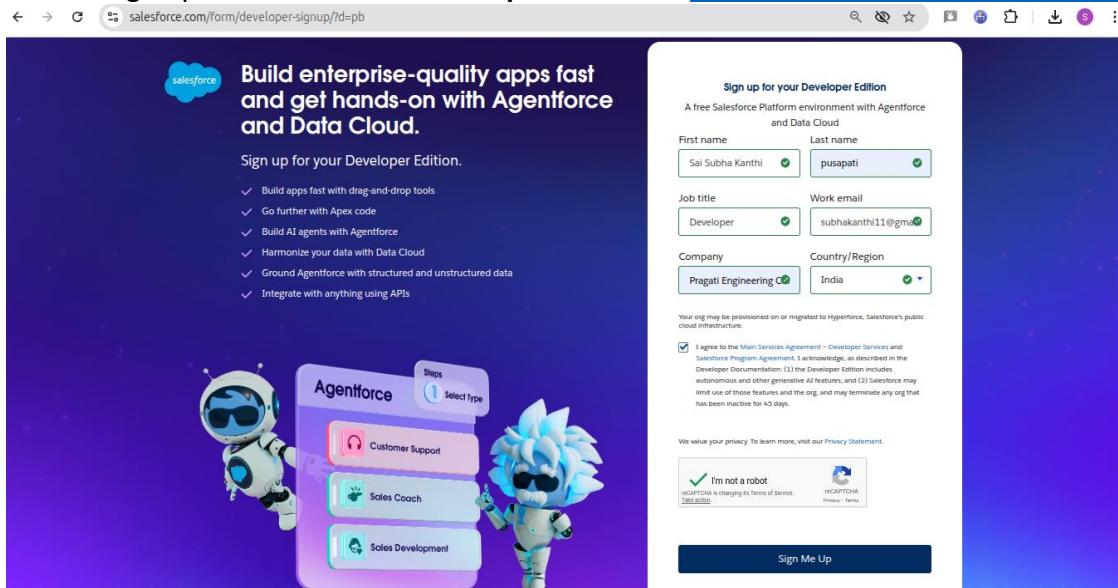
Phase 2: Org Setup & Configuration

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**.

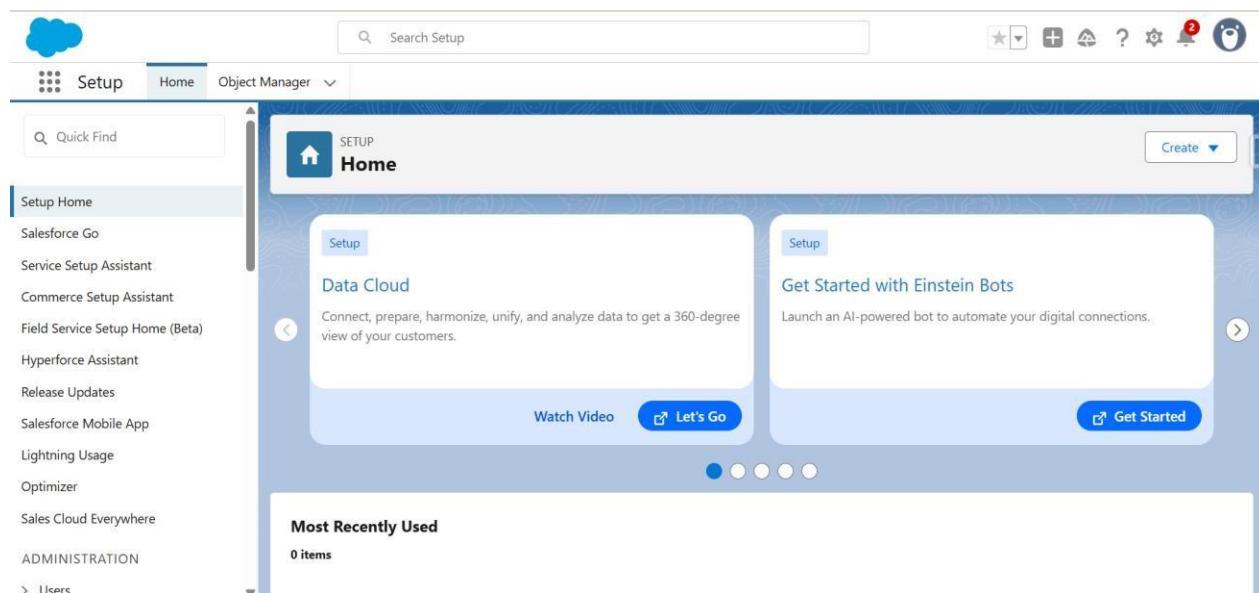
Step 1: Sign Up

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



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 Company Information page for 'PRAGATI ENGINEERING COLLEGE'. The 'Organization Detail' section includes fields such as Organization Name (PRAGATI ENGINEERING COLLEGE), Primary Contact (OrgFarm EPIC), Address (United States), and Fiscal Year Starts In (January). The 'Phone' section lists Default Locale (English (United States)), Default Language (English), and Default Time Zone (GMT-07:00 Pacific Daylight Time (America/Los_Angeles)). Other settings include Newsletter (checked) and Admin Newsletter (checked). The 'Used Data Space' is 342 KB (7%), and 'Used File Space' is 17 KB (0%). API Requests, Last 24 Hours is 84 (15,000 max). The page also shows Created By (OrgFarm EPIC, 9/19/2025, 7:45 PM) and Modified By (DEVI SRI KANAKA NANDINI YELLUGUBANTI, 9/24/2025, 1:59 PM).

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.