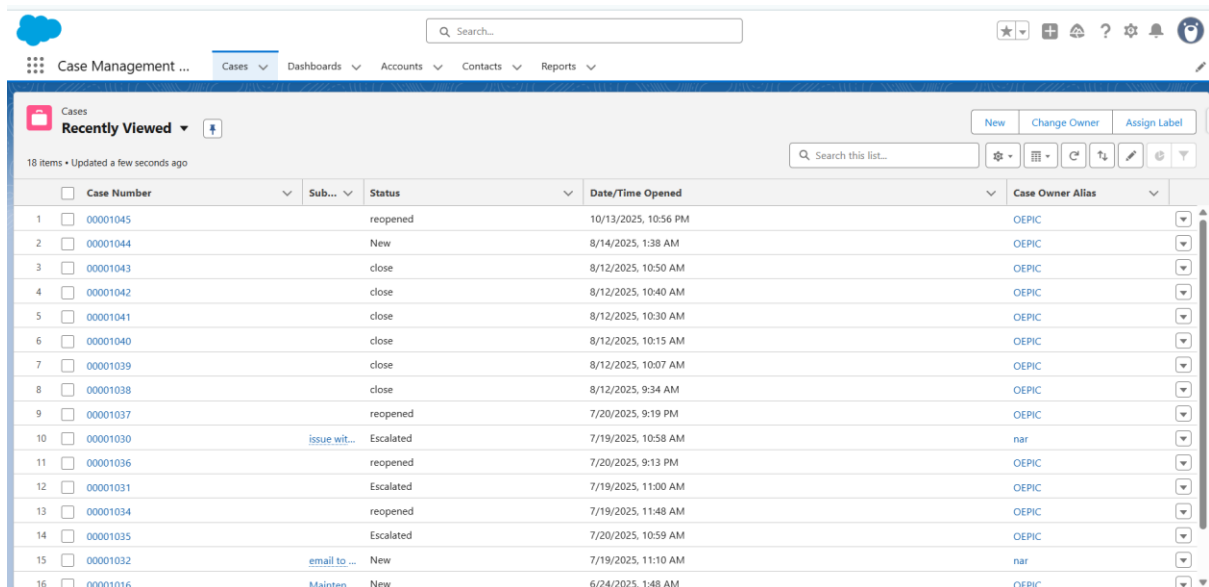


Phase 2: Org Setup & Configuration

1. Salesforce Org Setup

- Created a Salesforce Developer Edition Org for project development.
- Set up a custom App: Case Management System with navigation tabs for for:
 - Cases
 - Accounts
 - Contacts
 - Reports & Dashboards



The screenshot displays the Salesforce Case Management System interface. At the top, there is a navigation bar with tabs for 'Cases', 'Dashboards', 'Accounts', 'Contacts', and 'Reports'. Below the navigation bar, the 'Cases' tab is active, showing a list of 18 items. The list is titled 'Recently Viewed' and includes a search bar and action buttons like 'New', 'Change Owner', and 'Assign Label'. The table columns are 'Case Number', 'Sub...', 'Status', 'Date/Time Opened', and 'Case Owner Alias'. The table contains 18 rows of case data, including case numbers, statuses (e.g., reopened, New, close, Escalated), and dates/times.

	Case Number	Sub...	Status	Date/Time Opened	Case Owner Alias
1	00001045		reopened	10/13/2025, 10:56 PM	OEPIK
2	00001044		New	8/14/2025, 1:38 AM	OEPIK
3	00001043		close	8/12/2025, 10:50 AM	OEPIK
4	00001042		close	8/12/2025, 10:40 AM	OEPIK
5	00001041		close	8/12/2025, 10:30 AM	OEPIK
6	00001040		close	8/12/2025, 10:15 AM	OEPIK
7	00001039		close	8/12/2025, 10:07 AM	OEPIK
8	00001038		close	8/12/2025, 9:34 AM	OEPIK
9	00001037		reopened	7/20/2025, 9:19 PM	OEPIK
10	00001030	issue wit...	Escalated	7/19/2025, 10:58 AM	nar
11	00001036		reopened	7/20/2025, 9:13 PM	OEPIK
12	00001031		Escalated	7/19/2025, 11:00 AM	OEPIK
13	00001034		reopened	7/19/2025, 11:48 AM	OEPIK
14	00001035		Escalated	7/20/2025, 10:59 AM	OEPIK
15	00001032	email to ...	New	7/19/2025, 11:10 AM	nar
16	00001016	Mainten...	New	6/24/2025, 1:48 AM	OEPIK

2. User Roles & Profiles

Defined three custom roles with controlled access to ensure security and proper workflow:

- **System Administrator**
 - Full access to all objects, tabs, and configurations.
 - Responsible for overall setup, automation, and reporting.
- **Support Manager**
 - Access to Cases, Accounts, and Reports.
 - Can create, read, edit, and generate reports on case records.
 - Restricted from sensitive system configurations.

- **Support Agent**

- Access to Cases only.
- Can manage case assignments, update statuses, and communicate with customers.
- Restricted from organizational and administrative data.

3. Tabs & Navigation

- Added **Custom Tabs** for Cases, Accounts, and Contacts.
- Grouped navigation items in the **App Launcher** for easy access.
- Set **Default Landing Page** to **Dashboard** for the System Administrator profile.

4. Page Layouts & Record Types

Configured record types and layouts for usability and clarity:

- **Case Object**

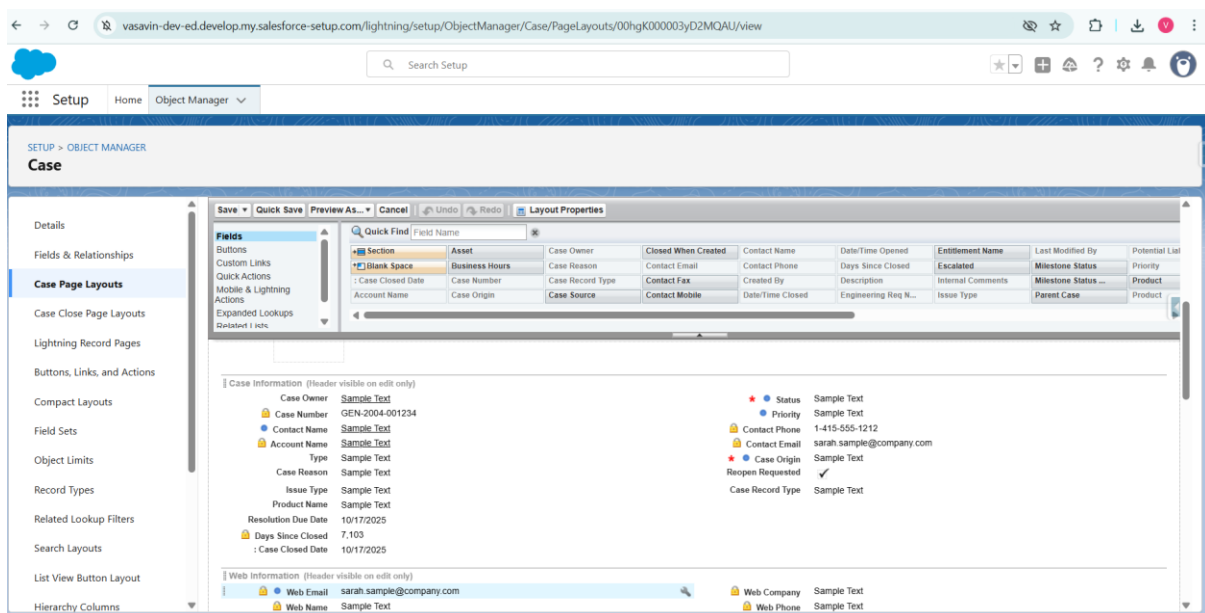
Customized existing Salesforce page layouts to fit project requirements

- **Account Object**

Single layout including account details (name, industry, contact info).

- **Contact Object**

Single layout for managing customer contacts and communication history.



5. Security & Access Control

- **Profiles & Field-Level Security (FLS)** applied:
 - Sensitive fields (e.g., customer phone, email) restricted to System Administrator & Support Manager.
 - Case details visible to assigned agents only.
- **Tab Visibility customized:**
 - Support Manager sees Cases, Accounts, Contacts, and Reports.
 - Support Agent sees Cases only.

6. Branding & Customization

- Customized the **app name and icon** to **Case Management System**.
- Set **Lightning App Theme** with corporate branding colors.
- Assigned **Default Home Page** with a **Dashboard** component to track case performance.

7. Outcome of Phase 2

At the end of this phase, the Salesforce Org was fully prepared with:

- A **working app structure** (objects, tabs, record types, layouts).
- Clearly defined **roles and permissions** for security and workflow.
- **Secure access and navigation** for different user types.
- A **branded and user-friendly interface** ready for case management operations.