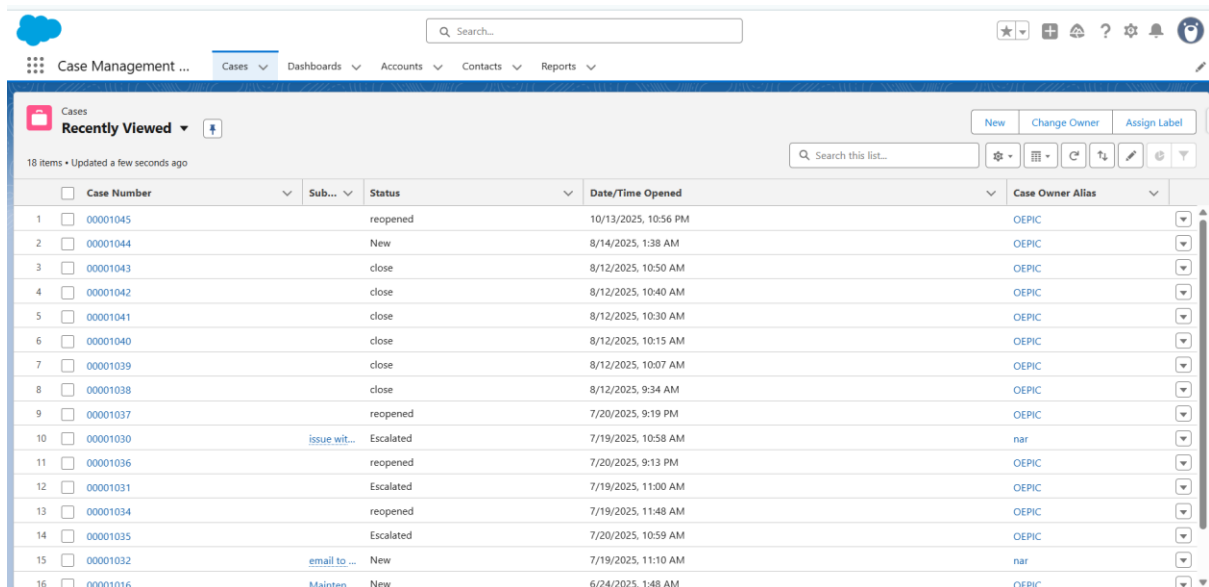# Phase 2: Org Setup & Configuration

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:

  - Cases

  - Accounts

  - Contacts

  - Reports & Dashboards

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**

    o Access to Cases only.

    o Can manage case assignments, update statuses, and communicate with customers.

    o 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:
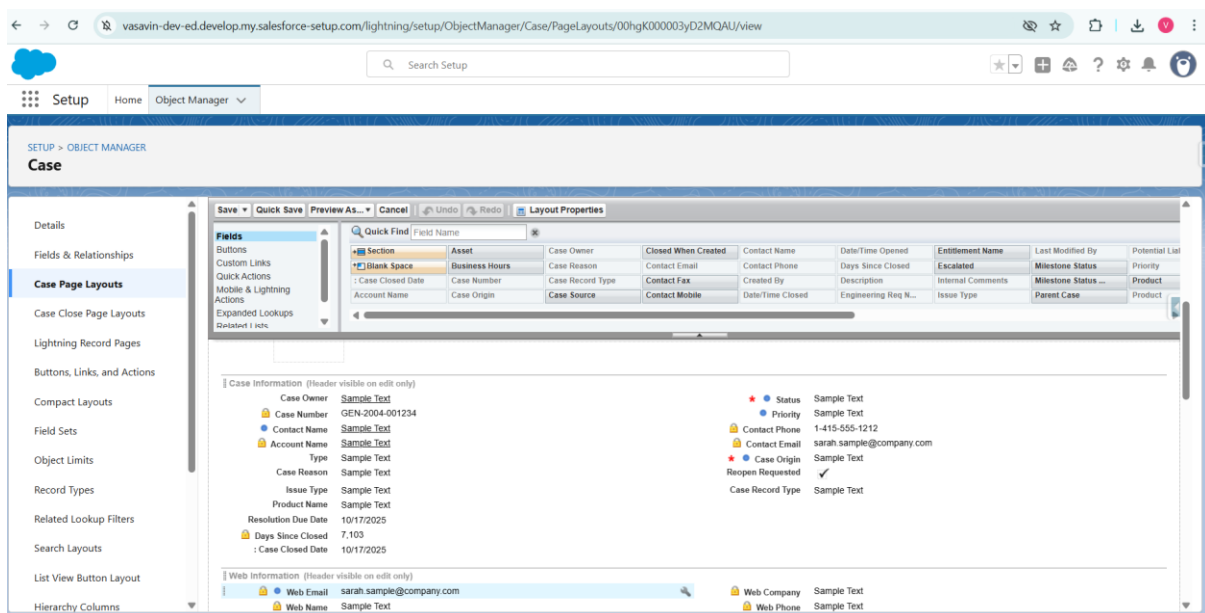
- **Case Object**

    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.