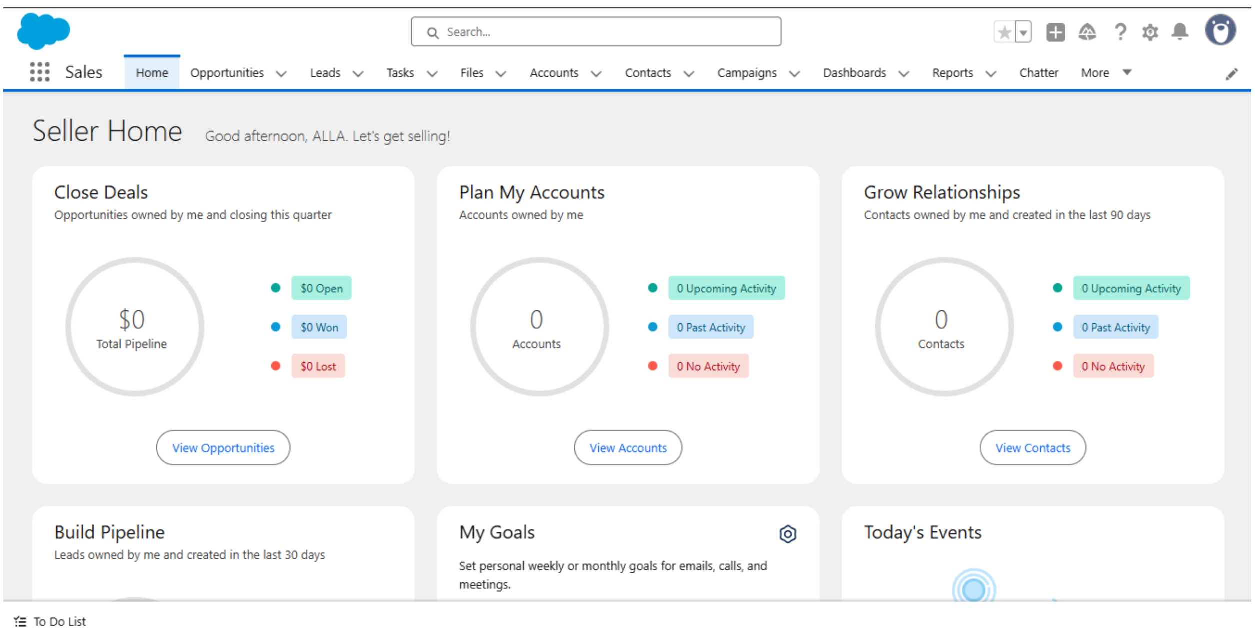
Salesforce Setup Guide: Phase 2 - Org & User Configuration

This document outlines the foundational steps to configure your Salesforce org for the Residential Maintenance Request Portal.

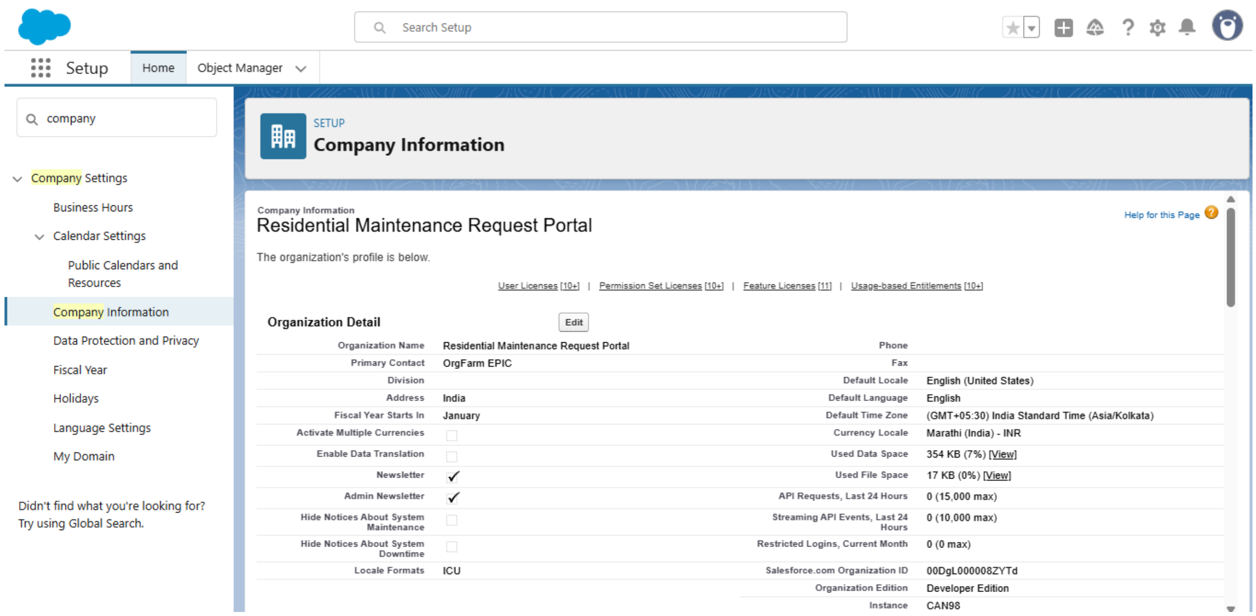
Step 1: Set Up Your Developer Org 🛠️

- **Purpose**: To get a free, safe environment for building and testing.
- **Action**:
  1. Go to developer.salesforce.com/signup.
  2. Fill out the form. Your **Username** must be unique and in an email format (e.g., myproject@dev.com). Your **Email** must be a real address for verification.
  3. Verify your account via the email link and log in.



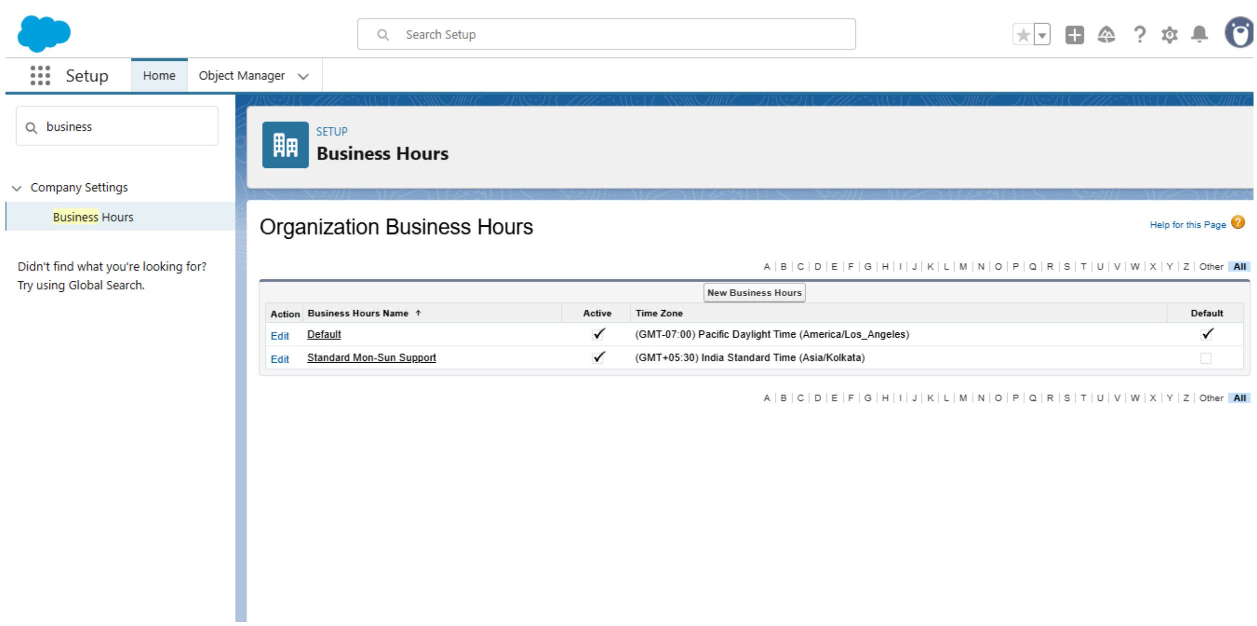
Step 2: Configure Company Information 🏢

- **Purpose**: To set the correct time zone and currency for your records.
- **Action**:
  1. Go to **Setup** > **Company Information**.
  2. Click **Edit**.
  3. Set your **Default Time Zone** and **Default Currency**.
  4. Click **Save**.



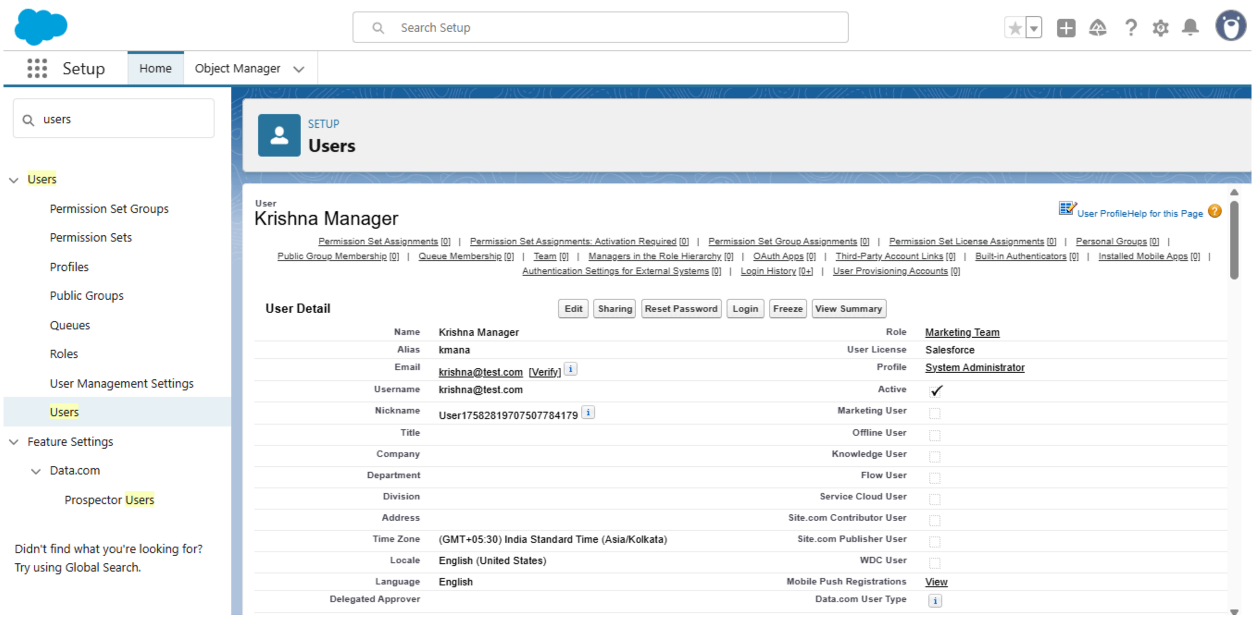
Step 3: Define Business Hours & Holidays 🕒

- **Purpose**: To ensure time-based rules (like response times) are calculated accurately.
- **Action**:
  1. Go to **Setup** > **Business Hours** > **New Business Hours**.
  2. Name it "Standard Mon-Fri Support", set the hours (e.g., 9 AM to 6 PM, Monday-Friday), and **Save**.
  3. Go to **Setup** > **Holidays** > **New**.
  4. Add a few holidays (e.g., "Independence Day").
  5. Return to your **Business Hours** record, **Edit** it, and add the holidays you created.



Step 4: Create Users 👥

- **Purpose**: To create accounts for the people who will use the system.
- **Action**:
  1. Go to **Setup** > **Users** > **New User**.
  2. Create **Priya Manager**: Use the **System Administrator** Profile.
  3. Create **Ravi Tech**: Use the **Standard User** Profile.
     - *Ensure each user has a unique username and a real email for setup.*



Step 5: Configure Custom Profiles 🎭

- **Purpose**: To create specific permission sets for each job role.
- **Action**:
  1. Go to **Setup** > **Profiles**.
  2. **Clone** the "System Administrator" profile and name the new one Property Manager.
  3. **Clone** the "Standard User" profile and name the new one Maintenance Technician.
  4. Go back to **Setup** > **Users**.
  5. Edit Priya Manager and assign her the **Property Manager** profile.
  6. Edit Ravi Tech and assign him the **Maintenance Technician** profile.

Step 6: Establish the Role Hierarchy 🏛️

- **Purpose**: To allow managers to see the records of their direct reports.
- **Action**:
  1. Go to **Setup** > **Roles** > **Set Up Roles**.
  2. Under the company name, **Add Role** and name it Property Manager.
  3. Under the new "Property Manager" role, **Add Role** and name it MaintenanceTechnician.
  4. From the role tree, click **Assign** next to each role to assign Priya Manager and Ravi