

- Added **business hours & holidays** to ensure SLA compliance.

SETUP

Business Hours

Organization Business Hours

Help for this Page

Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate.

If you enter blank business hours for a day, that means your organization does not operate on that day.

Holidays (0)

Business Hours Detail

Edit

Business Hours Name

Lead_Scoring_System

Business Hours

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

No Hours

9:00 AM to 6:00 PM

9:00 AM to 6:00 PM

9:00 AM to 6:00 PM

9:00 AM to 6:00 PM

9:00 AM to 6:00 PM

No Hours

Time Zone

(GMT+05:30) India Standard Time (Asia/Kolkata)

Default Business Hours

☐

Active

☒

Created By

Aanya Badoniya

9/13/2025, 1:49 AM

Last Modified By

Aanya Badoniya

9/14/2025, 2:08 AM

Edit

Holidays

Add/Remove

No records to display

2. User Setup & Licenses

- Created users for different roles:
 - Sales Admin** → System configuration, automation management.
 - Sales Manager** → Lead assignment, reporting, and dashboards.
 - Sales Agent** → Day-to-day lead management and follow-ups.

SETUP

Users

All Users

Help for this Page

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View:

All Users

Edit

Create New View

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

New User

Reset Password(s)

Add Multiple Users

<input type="checkbox"/> Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Agent 1_Sales	salA1	agent_1@yourorg.com		<input checked="" type="checkbox"/>	Sales Agent
<input type="checkbox"/> Edit	Badoniya_Aanya	aan	aanyabadoniya2005873@agentforce.com	CEO	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00dgl000007s5s9uak_mcpugfq81hb@chatter.salesforce.com		<input type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	EPIC_OrgFarm	OEPIE	epic_e54f725896a1@orgfarm.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Manager_Sales	smana	sales_manager23@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Sales Manager
<input type="checkbox"/> Edit	User_Integration	integ	integration@00dgl000007s5s9uak.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00dgl000007s5s9uak.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input type="checkbox"/> Edit	user_test	testuser	sb_testuser_2004@ad.com		<input type="checkbox"/>	Sales Rep

New User

Reset Password(s)

Add Multiple Users

3. Profiles

- System Administrator → Full access to all configuration and data.
- Sales Manager Profile → Access to Leads, Reports, Dashboards; ability to view/edit all leads.

SETUP

Profiles

Profile

Sales Manager

Find Settings... Clone Delete Edit Properties

Profile: Sales Manager ~ Salesforce - Developer Edition

Profile Overview > Object Settings

All Object Settings

Object Name	Object API Name	Object Permissions	Total Fields	Tab Settings	Page Layouts
Account Brands	AccountBrand	No Access	9	Default On	Account Brand Layout
Accounts	Account	Read, Create, Edit, Delete	44	Default On	Account Layout
Activation Attribute	MktSgtActvAudAttrDef	No Access	--	--	--
Activation Contact Point	MktSgtActvCtctPtDef	No Access	--	--	--
Activation Contact Point Field	MktSgtActvCtctPtFldDef	No Access	--	--	--
Activation Contact Point Source	MktSgtActvCtctPtSrcDef	No Access	--	--	--
Activation Data Model Field	MktSgtActvDataModFldDef	No Access	--	--	--
Activation Data Source	MktSgmtActvDataSourceDef	No Access	--	--	--
Activation Definition	MarketSegmentActivationDef	No Access	--	--	--
Activation Platform Activation Attributes	ActivationPlatformActvAttr	No Access	--	--	--
Activation Platform Audience Identifiers	ActvPlatformAdncIdentifier	No Access	--	--	--
Activation Platform Data Connector for S3	ActvPfrmDataConnectorS3	No Access	--	--	--
Activation Platform Fields	ActivationPlatformField	No Access	--	--	--
Activation Platform Field Value Definitions	ActvTgtPlatFldValDef	No Access	--	--	--
Activation Platform Field Values	ActvPlatformFieldValue	No Access	--	--	--

- Sales Agent Profile → Restricted to assigned leads only, can create/edit but not delete records.

SETUP

Profiles

Profile

Sales Agent

Find Settings... Clone Delete Edit Properties

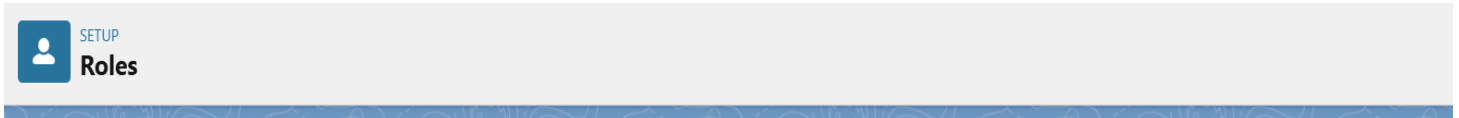
Profile Overview > Object Settings

All Object Settings

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Activation Contact Point Field	MktSgtActvCtctPtFldDef	No Access	--	--	--
Activation Contact Point Source	MktSgtActvCtctPtSrcDef	No Access	--	--	--
Activation Data Model Field	MktSgtActvDataModFldDef	No Access	--	--	--
Activation Data Source	MktSgmtActvDataSourceDef	No Access	--	--	--
Activation Definition	MarketSegmentActivationDef	No Access	--	--	--
Activation Platform Activation Attributes	ActivationPlatformActvAttr	No Access	--	--	--
Activation Platform Audience Identifiers	ActvPlatformAdncIdentifier	No Access	--	--	--
Activation Platform Data Connector for S3	ActvPfrmDataConnectorS3	No Access	--	--	--
Activation Platform Fields	ActivationPlatformField	No Access	--	--	--
Activation Platform Field Value Definitions	ActvTgtPlatFldValDef	No Access	--	--	--
Activation Platform Field Values	ActvPlatformFieldValue	No Access	--	--	--

4. Roles & Role Hierarchy

- CEO/Executive (Top) → Can see all data across the organization.
- Sales Manager → Can view all leads under their agents.
- Sales Agent → Can view and edit only leads assigned to them.



Creating the Role Hierarchy

[Help for this Page](#) ?

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

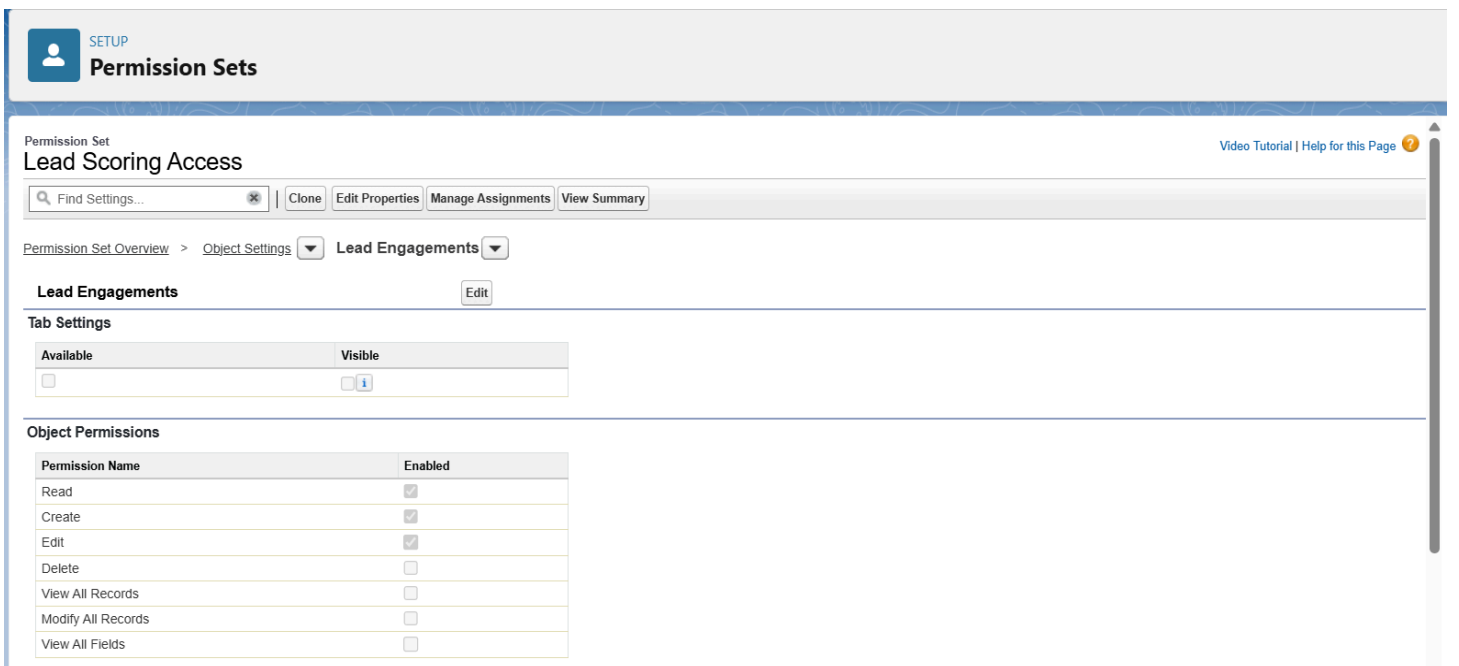
Show in tree view ▼

[Collapse All](#) [Expand All](#)



5. Permission Sets

- Created **Lead Scoring Permission Set** to allow agents to view and update custom field **Lead_Score__c**.



SETUP **Permission Sets**

Permission Set **Lead Scoring Access** [Video Tutorial](#) | [Help for this Page](#)

Find Settings... | [Clone](#) [Edit Properties](#) [Manage Assignments](#) [View Summary](#)

Permission Set Overview > Object Settings ▾ **Leads** ▾

Leads [Edit](#)

Tab Settings

Available	Visible
<input type="checkbox"/>	<input type="checkbox"/> i

Lead: Record Type Assignments

Record Types	Assigned Record Types
Inbound Lead	<input type="checkbox"/>

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input type="checkbox"/>
View All Records	<input type="checkbox"/>
Modify All Records	<input type="checkbox"/>

- Assigned the permission set to Sales Managers and Agents who need scoring access.

... > SETUP > PERMISSION SET 'LEAD SCORING ACCESS' **Lead Scoring Access**

Current Assignments [Add Assignment](#)

<input type="checkbox"/>	Full Name ↑ ▾	Active	Role ▾	Profile ▾	User License ▾	Expires On ▾
<input type="checkbox"/>	Aanya Badoniya	✓	CEO	System Administrator	Salesforce	
<input type="checkbox"/>	Sales Agent 1	✓		Sales Agent	Salesforce	
<input type="checkbox"/>	Sales Manager	✓	Marketing Team	Sales Manager	Salesforce	

6. Organization-Wide Defaults (OWD)

- Leads → **Private** (agents see only their leads).
- Reports/Dashboards → **Controlled by Parent**.

Default Sharing Settings

Organization-Wide Defaults [Edit](#) [Organization-Wide Defaults Help](#)

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Private	Private	<input checked="" type="checkbox"/>

7. Sharing Rules

- Lead Sharing Rule 1** → Share Leads owned by *Sales Agents* with *Sales Managers* (Read/Write).

Setup

Lead Sharing Rule

Help for this Page ?

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.

Note: "Roles and subordinates" includes all users in a role, and the roles below that role. This includes portal roles that may give access to users outside the organization.

You can use sharing rules only to grant wider access to data, not to restrict access.

Label

Lead_to_Manager

Rule Name

Lead_to_Manager ?

Description

Lead: owned by members of

Role: sales agent

Share with

Role: sales manager

Lead Access

Read/Write v

Created By

Aanya Badoniya, 9/21/2025, 9:37 AM

Modified By

Aanya Badoniya, 9/21/2025, 9:37 AM

Save

Cancel

7. Login Access & Policies

- Enabled **login hours** for sales agents (9 AM – 6 PM IST).

Profile

Sales Agent

Help for this Page ?

Find Settings... ? ? ?

Clone

Delete

Edit Properties

Profile Overview > Login Hours v

Login Hours Edit

Day	Start Time	End Time
Sunday	All Day	All Day
Monday	8:30 PM PDT	5:30 AM PDT
Tuesday	8:30 PM PDT	5:30 AM PDT
Wednesday	8:30 PM PDT	5:30 AM PDT
Thursday	8:30 PM PDT	5:30 AM PDT
Friday	8:30 PM PDT	5:30 AM PDT
Saturday	All Day	All Day