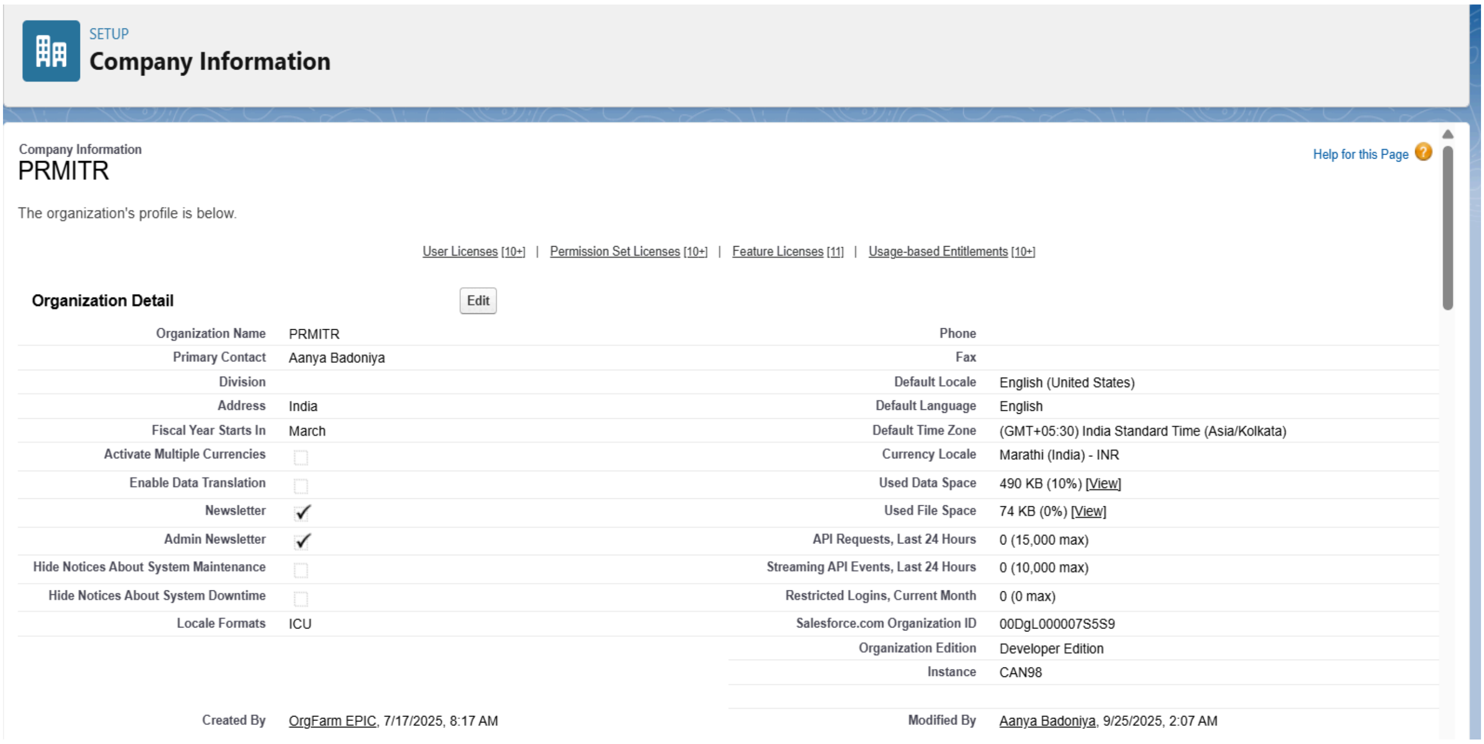
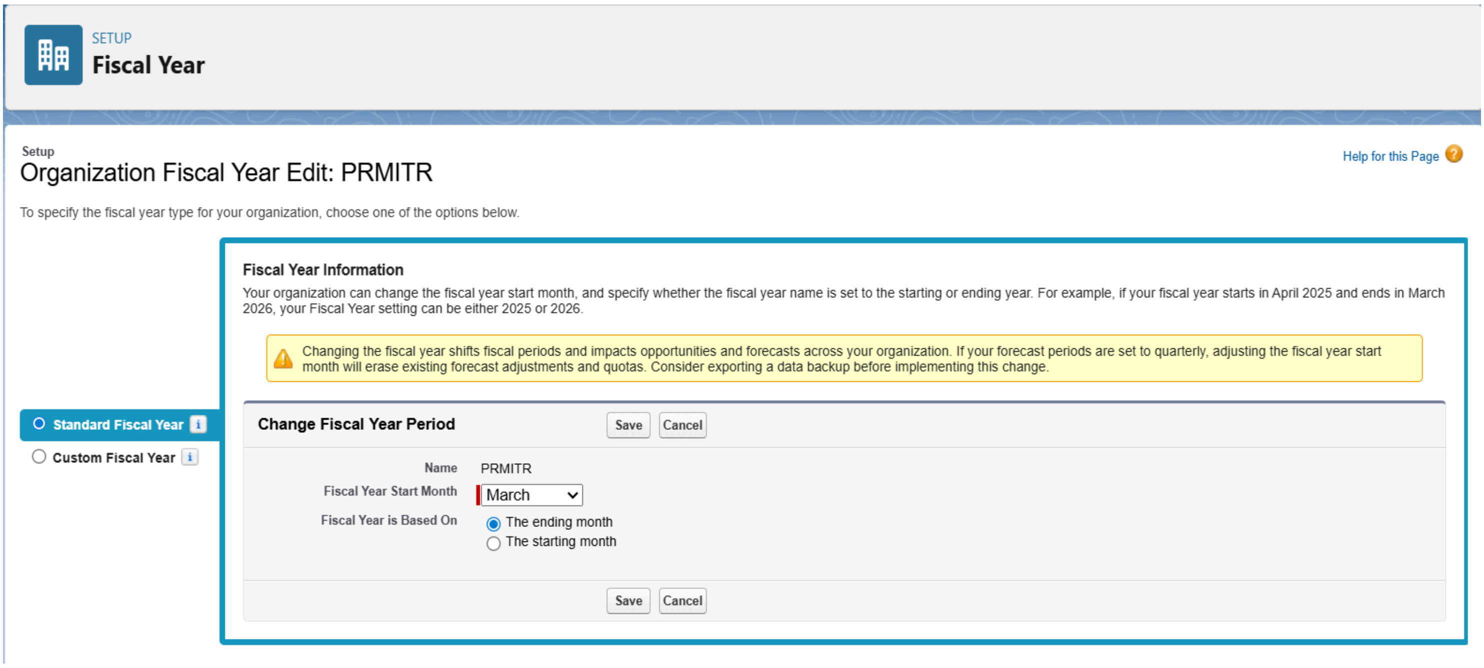
Phase 2 – Org Setup & Configuration

1. Company Profile Setup

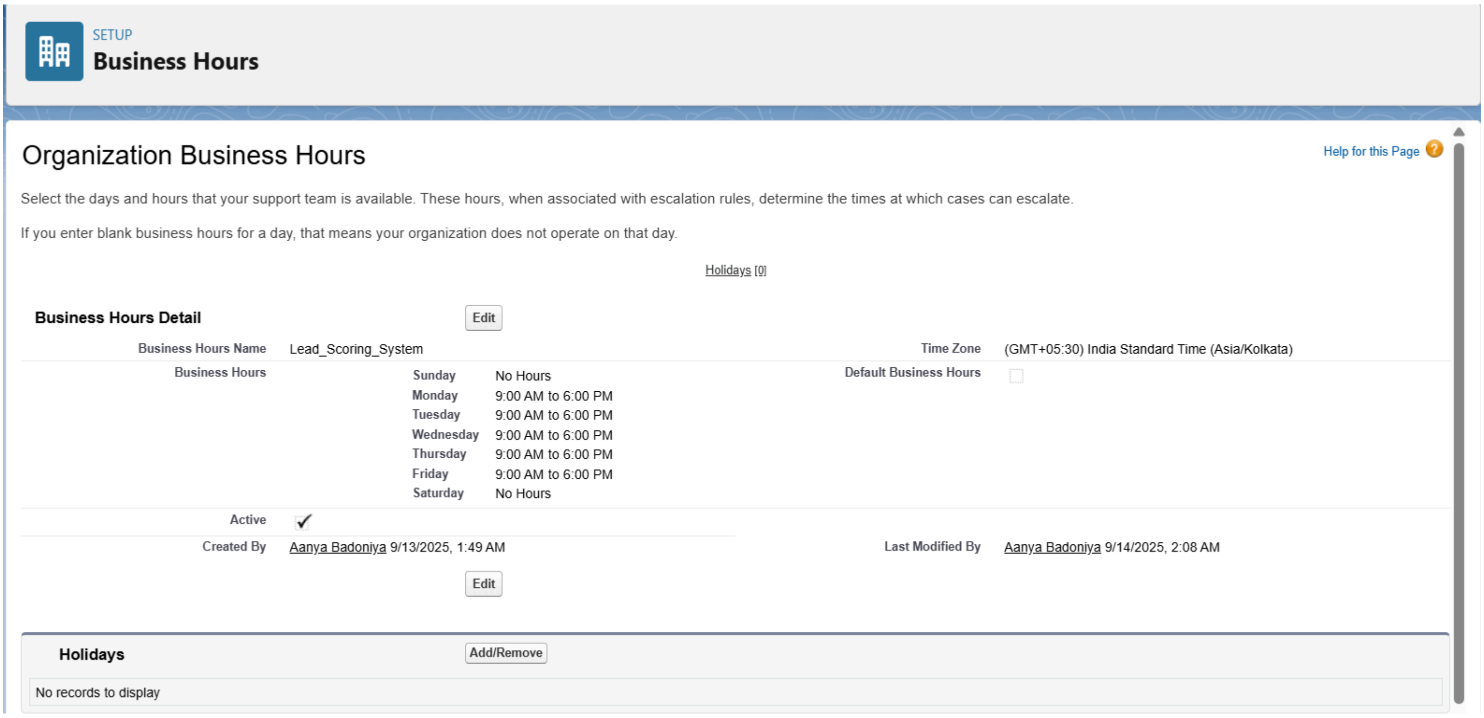
- Configured **Company Information** with details like organization name, default currency, time zone, and locale.



- Defined **fiscal year settings** aligned to the real estate business cycle (March-April).



- 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	Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Business Hours	Sunday: No Hours Monday: 9:00 AM to 6:00 PM Tuesday: 9:00 AM to 6:00 PM Wednesday: 9:00 AM to 6:00 PM Thursday: 9:00 AM to 6:00 PM Friday: 9:00 AM to 6:00 PM Saturday: No Hours	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

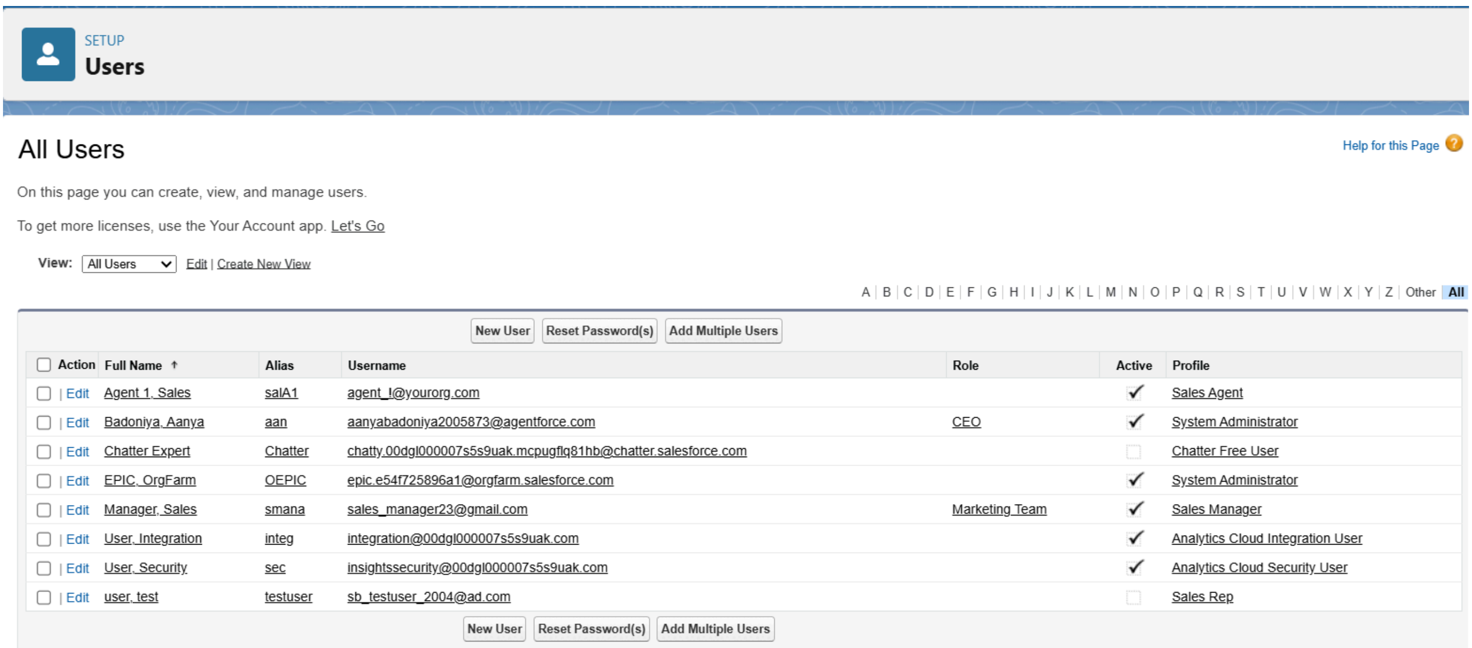
Edit

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

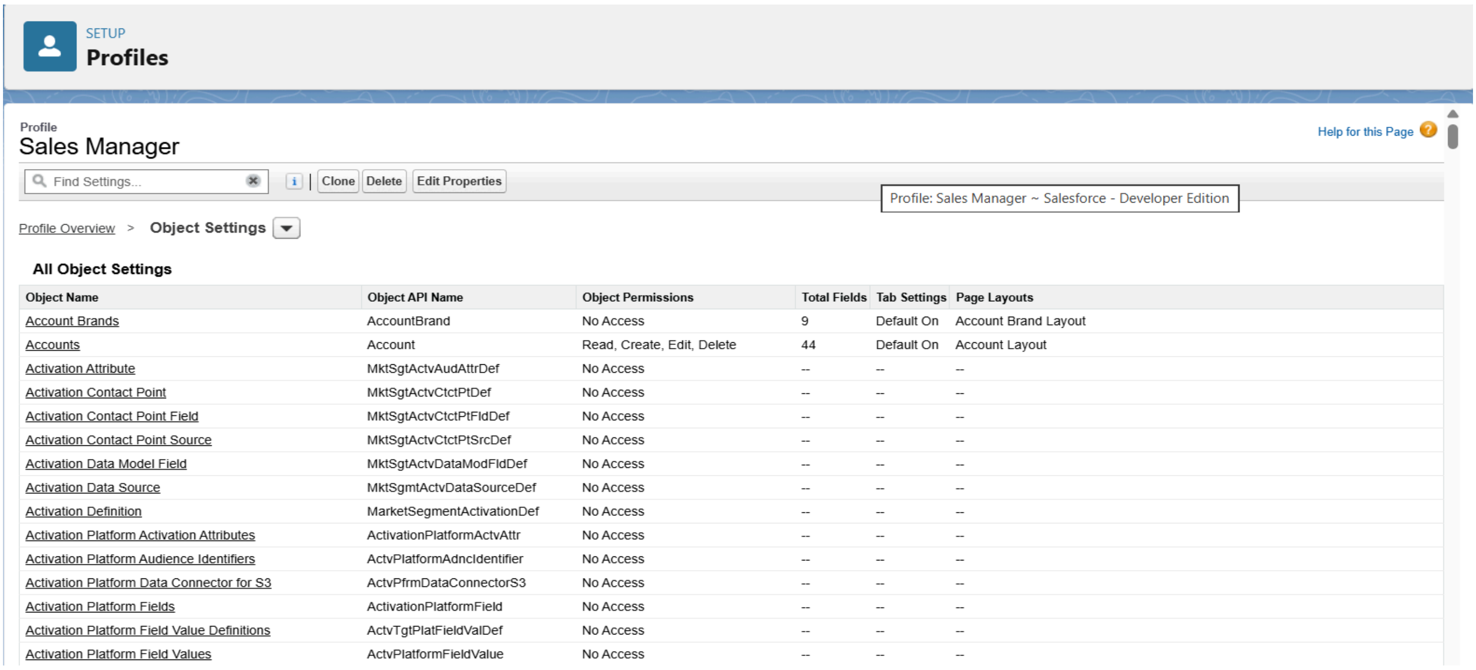
Action	Full Name ↑	Alias	Username	Role	Active	Profile
Edit	Agent 1, Sales	salA1	agent_!@yourorg.com		✓	Sales Agent
Edit	Badoniya, Aanya	aan	aanyabadoniya2005873@agentforce.com	CEO	✓	System Administrator
Edit	Chatter Expert	Chatter	chatty.00dgl000007s5s9uak.mcpugflq81hb@chatter.salesforce.com			Chatter Free User
Edit	EPIC, OrgFarm	OEPIC	epic.e54f725896a1@orgfarm.salesforce.com		✓	System Administrator
Edit	Manager, Sales	smana	sales_manager23@gmail.com	Marketing Team	✓	Sales Manager
Edit	User, Integration	integ	integration@00dgl000007s5s9uak.com		✓	Analytics Cloud Integration User
Edit	User, Security	sec	insightssecurity@00dgl000007s5s9uak.com		✓	Analytics Cloud Security User
Edit	user, test	testuser	sb_testuser_2004@ad.com			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

Help for this Page

Find Settings... | Clone | Delete | Edit Properties

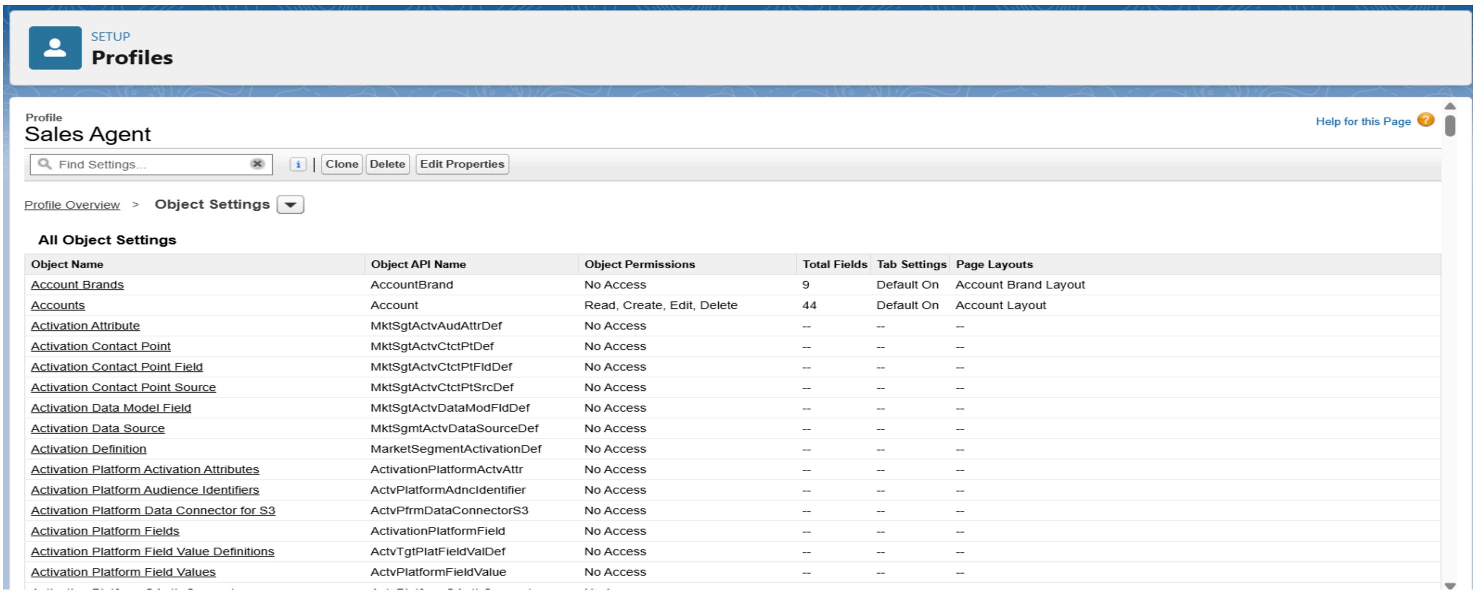
Profile: Sales Manager ~ Salesforce - Developer Edition

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	ActvTgtPlatFieldValDef	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

Help for this Page

Find Settings... | Clone | Delete | Edit Properties

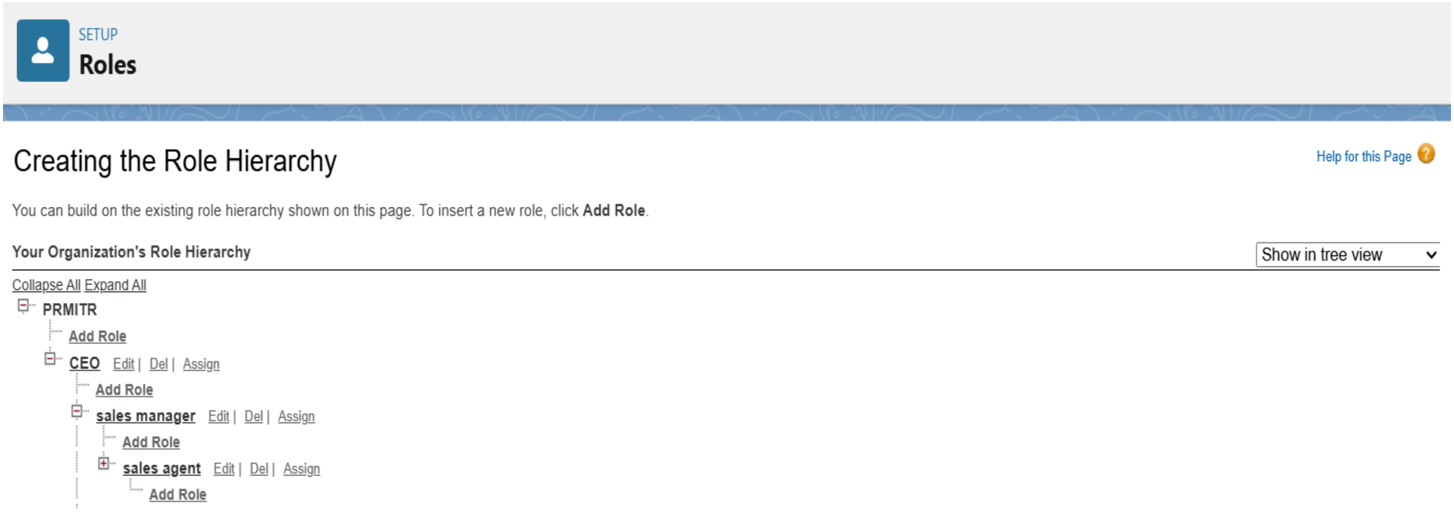
Profile Overview > Object Settings

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	ActvTgtPlatFieldValDef	No Access	--	--	--
Activation Platform Field Values	ActvPlatformFieldValue	No Access	--	--	--

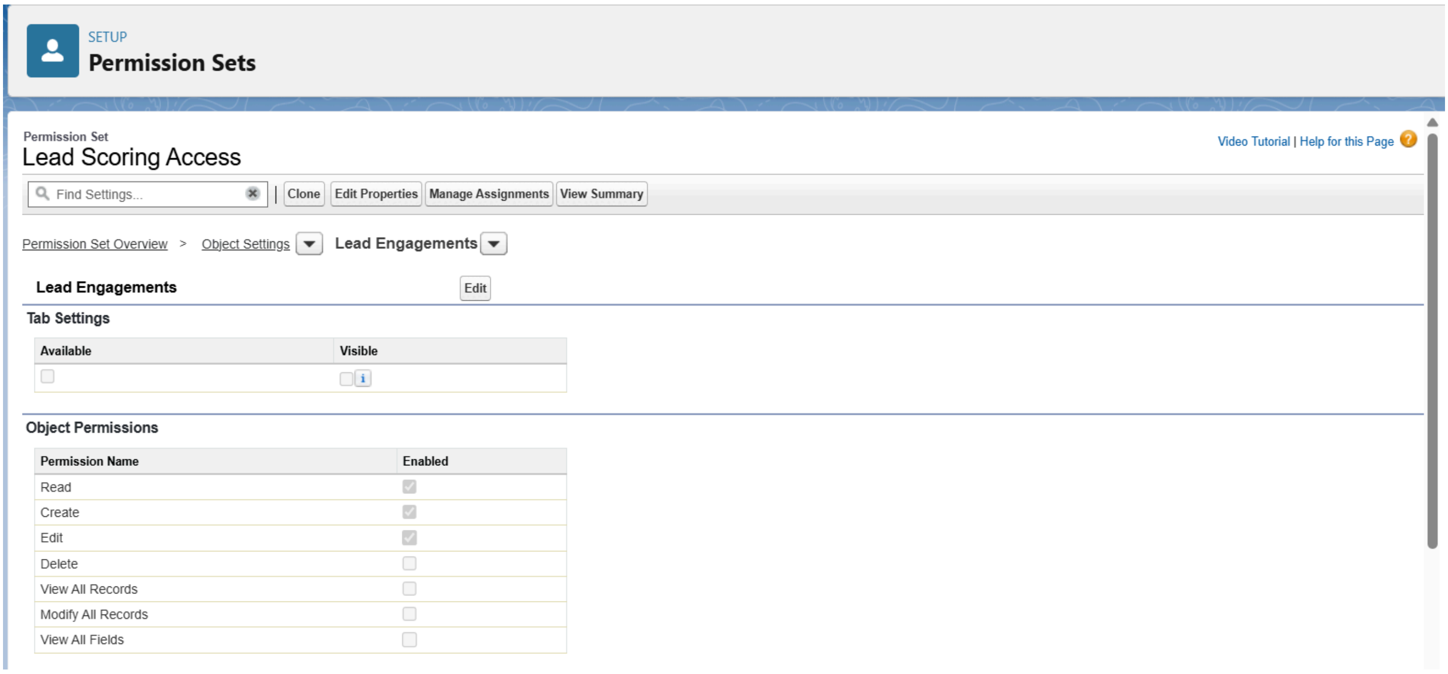
4. Roles & Role Hierarchy

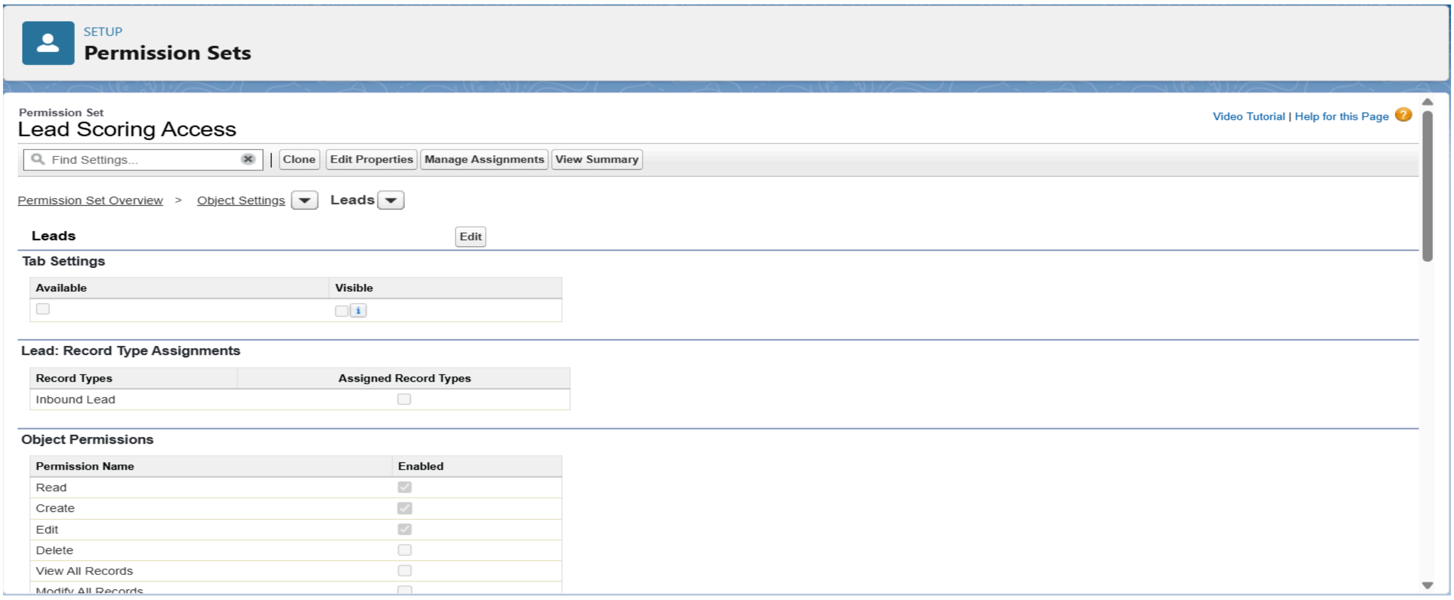
- CEO/Executive (Top) → Can see all data across the organization.
- Sales Manager → Can view all leads under their agents.
- Sales Agent → Can view and edit only leads assigned to them.



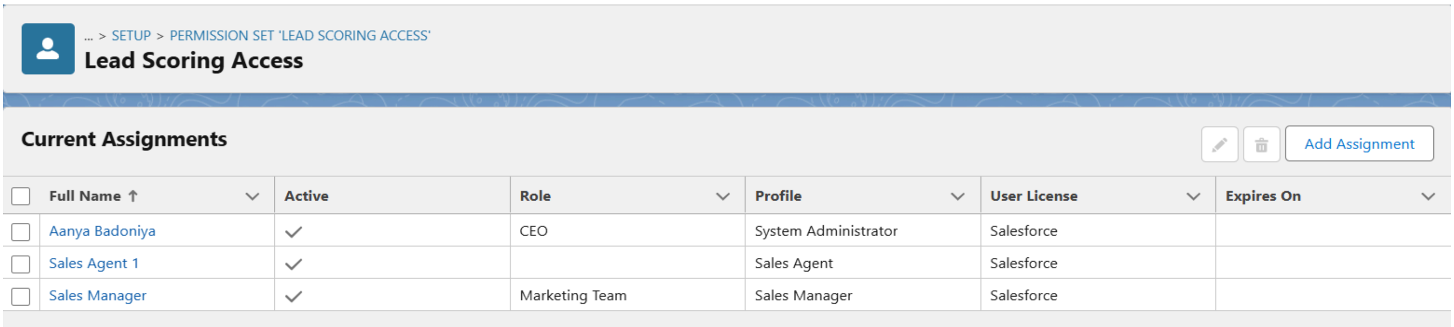
5. Permission Sets

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





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

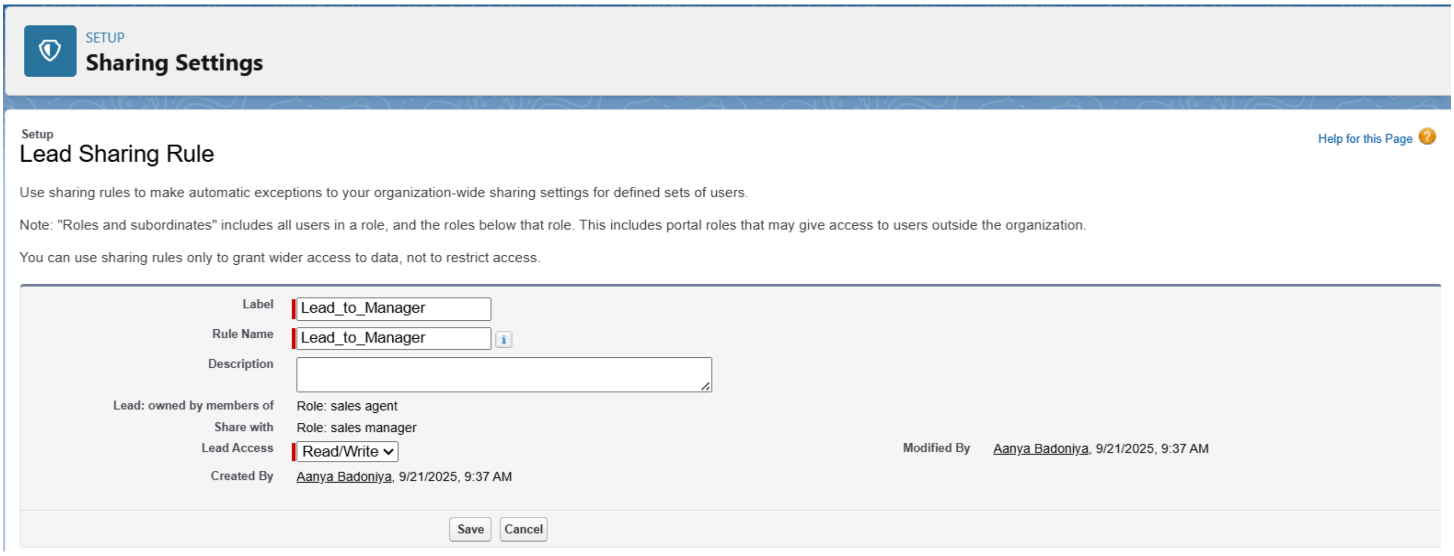


6. Organization-Wide Defaults (OWD)

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

7. Sharing Rules

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



7. Login Access & Policies

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