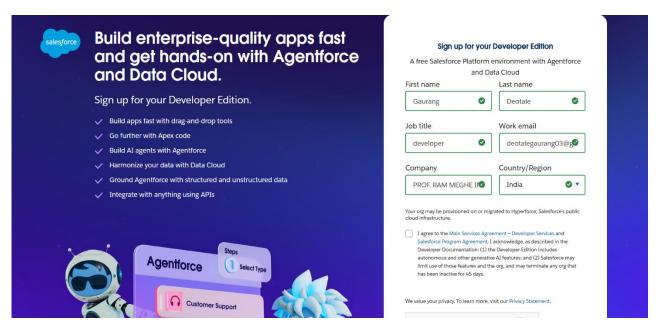
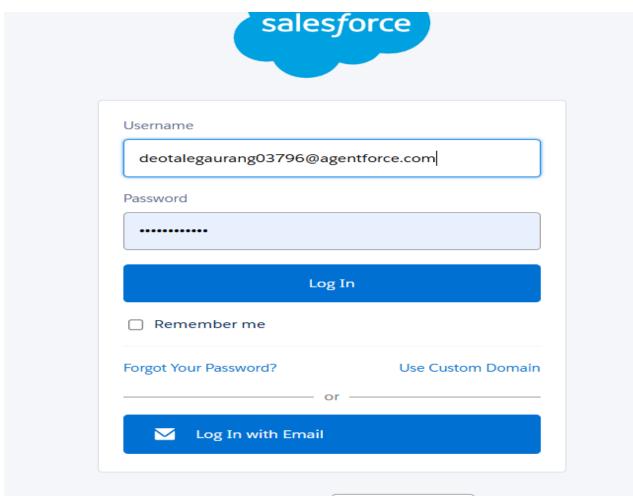
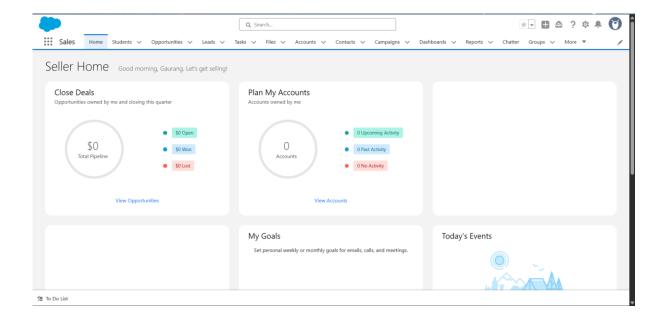
Phase 2: - Org Setup & Config

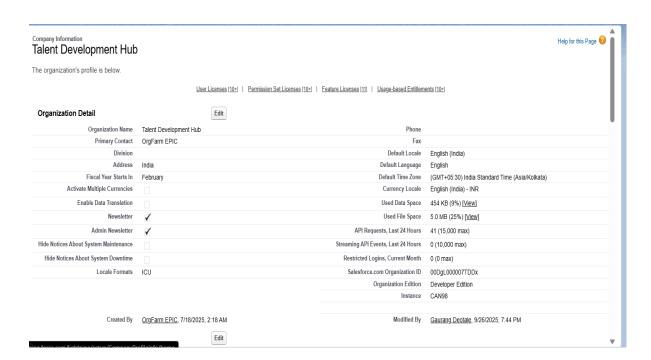
1. Salesforce Editions



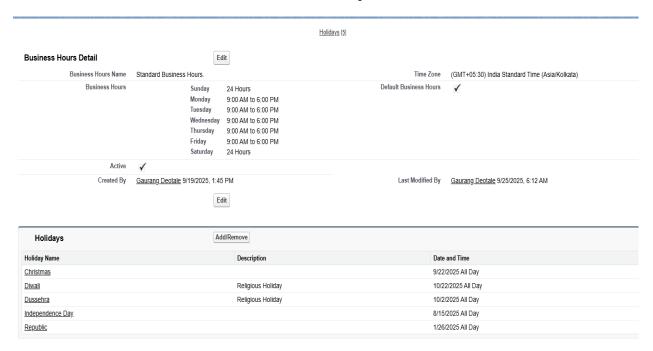




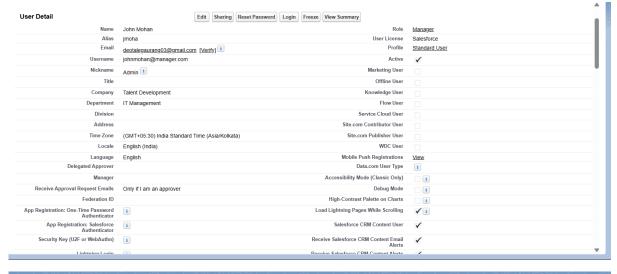
2. Company Profile Setup

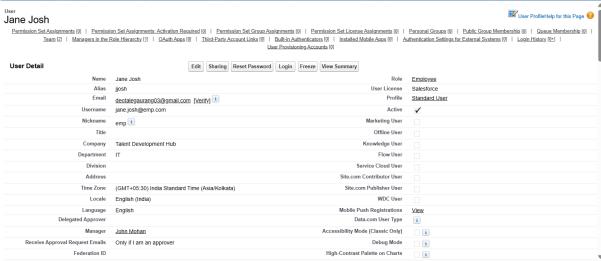


3. Business Hours & Holidays



4. User Setup & Licenses





5. Profiles

				_
New Profile	0		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 Ou	Other All
Action	Profile Name ↑	User License	Custom	
☐ Edit Del .	<u>Manager</u>	Salesforce Platform	✓	
☐ Edit Del .	Manager Profile	Salesforce	✓	
☐ Edit Clone	e <u>Marketing User</u>	Salesforce		
☐ Edit Clone	e Minimum Access - API Only Integrations	Salesforce Integration		
☐ Edit Clone	e Minimum Access - Salesforce	Salesforce		
New Des file	DI.		A DIGIDIFIF G DITTAL MINUSPECK STRUCK WALL	7 00
		Uncellingue	A D U U E F U П J K L M N U F U K 3 U V W A T	Z Othe
Action	Profile Name ↑	User License	Custom	Z Othe
Action		User License Einstein Agent		Z Othe
Action Edit Clone	Profile Name + Einstein Agent User		Custom	L Oute
Action Edit Clone Edit Del	Profile Name + Einstein Agent User	Einstein Agent	Custom	Z Office
Edit Clone Edit Del Edit Del	Profile Name + Einstein Agent User Employee	Einstein Agent Salesforce Platform	Custom ✓	L VIIIE

6. Roles



7. OWD / Sharing Rules

Shipping Configuration Set	Public Read Only	Private	✓
Streaming Channel	Public Read/Write	Private	✓
Tableau Host Mapping	Public Read Only	Private	✓
User Presence	Public Read Only	Private	✓
User Provisioning Request	Private	Private	✓
Waitlist	Private	Private	✓
Web Cart Document	Private	Private	✓
Work Order	Private	Private	✓
Work Plan	Private	Private	✓
Work Plan Template	Private	Private	✓
Work Step Template	Private	Private	✓
Work Type	Private	Private	✓
Work Type Group	Public Read/Write	Private	✓
Certification	Controlled by Parent	Controlled by Parent	
Employee	Private	Private	✓
Mentor	Public Read/Write	Private	✓
Skill	Public Read/Write	Private	✓
Student	Public Read/Write	Private	✓
Training Program	Private	Private	✓
Visitor	Public Read/Write	Private	✓