

Warranty & Service Tracker – Phase 2

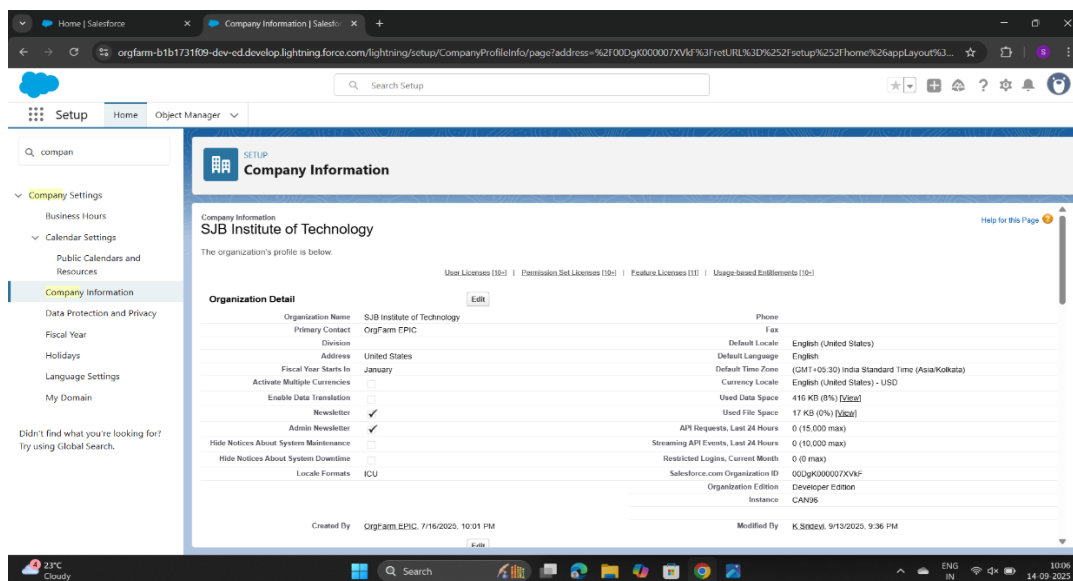
Org Setup & Configuration

1. Salesforce Editions

- Using **Salesforce Developer Edition Org**.
- Developer Edition provides Enterprise-level features free with limited licenses and storage.
- Suitable for student projects and practice.

2. Company Profile Setup

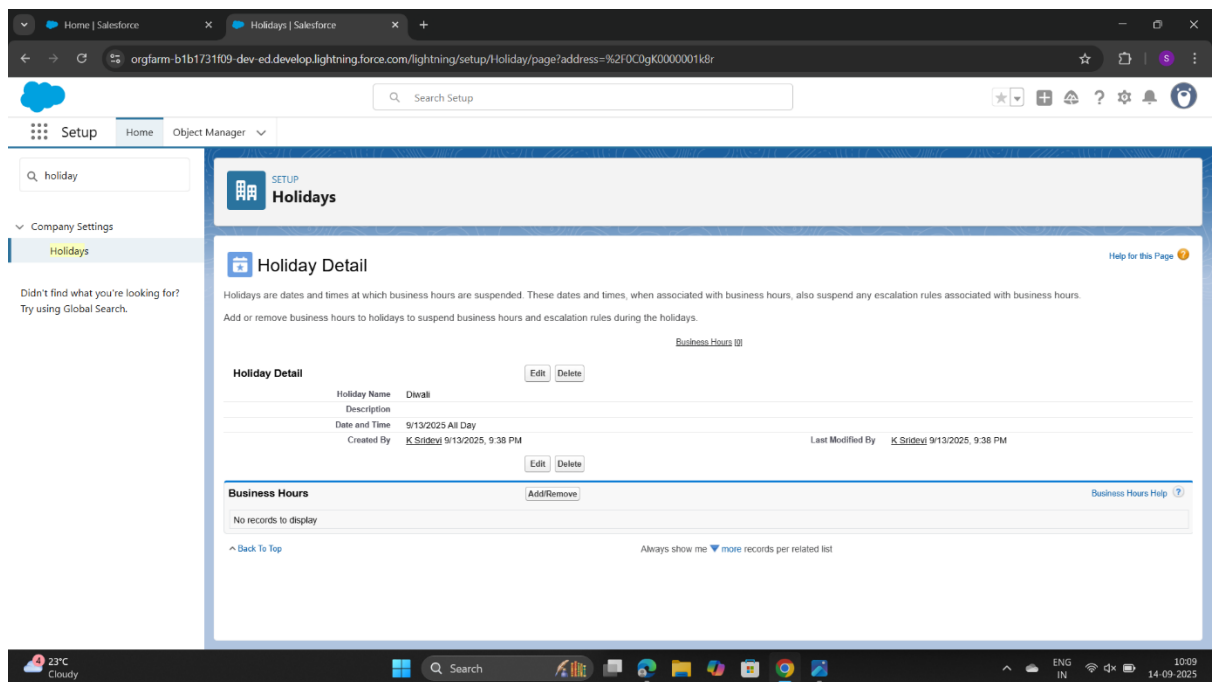
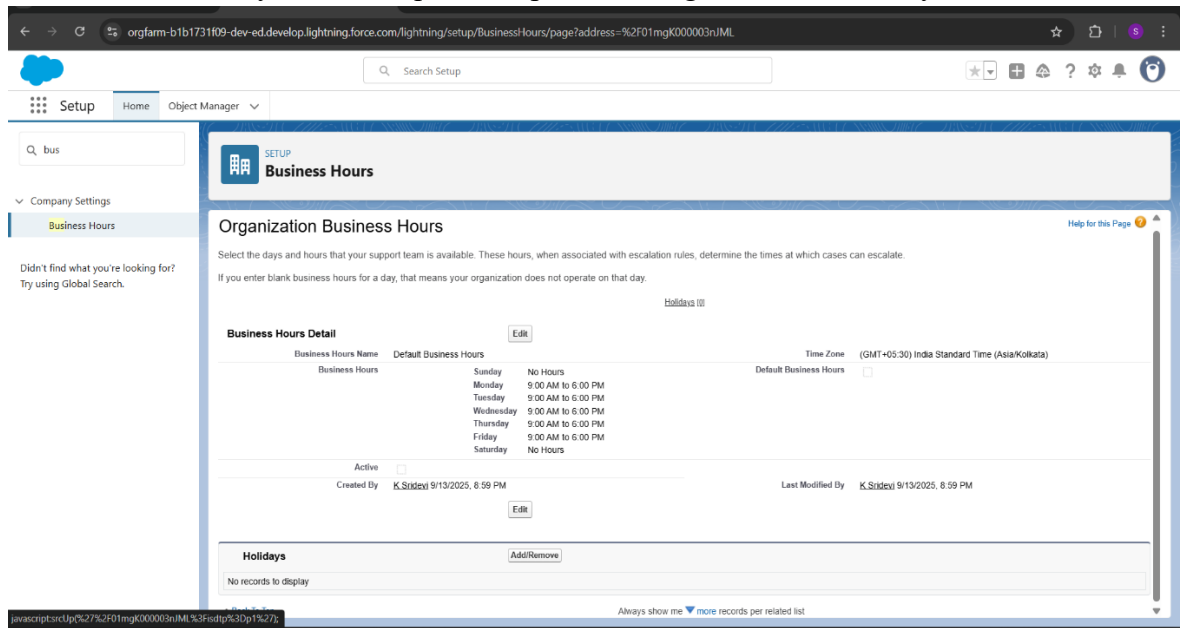
- Company Name: **SJB**
- Time Zone: **Asia/Kolkata**
- Locale: **English (India)**
- Ensures correct organization details and local time display.



3. Business Hours & Holidays

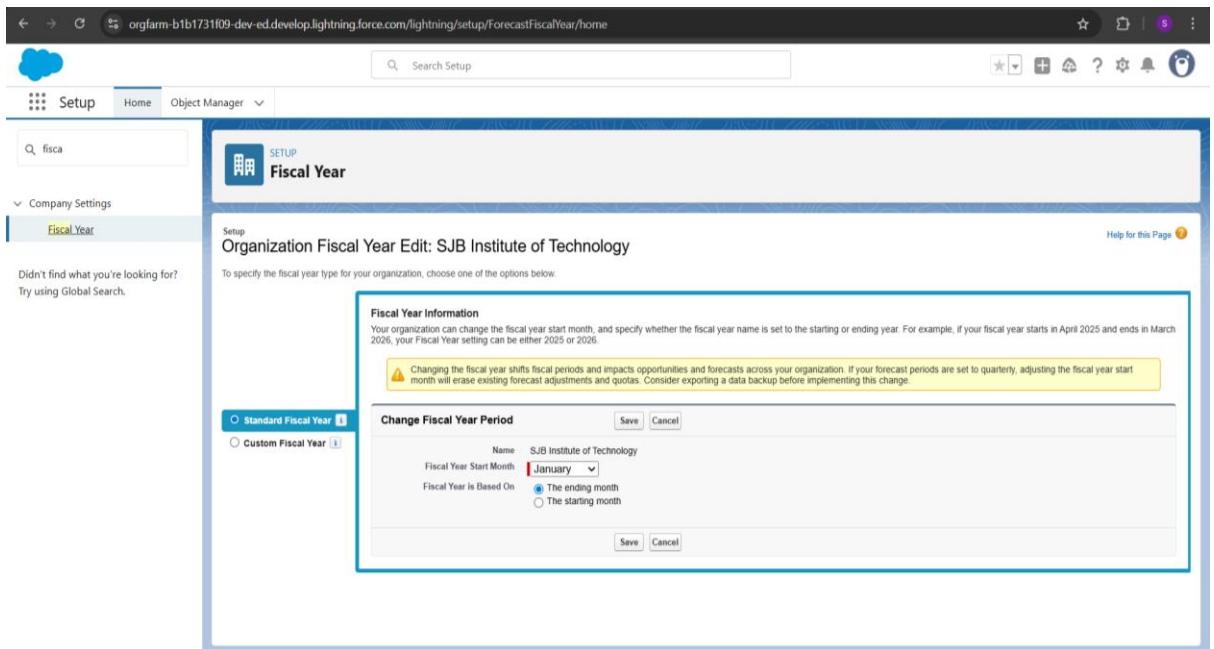
- Business Hours: **Mon–Fri, 9:00 AM – 6:00 PM IST (active)**.
- Holiday Created: **Diwali, 13-Sep-2025 (All Day)**.

- Guarantees warranty/service requests respect working hours and holidays.



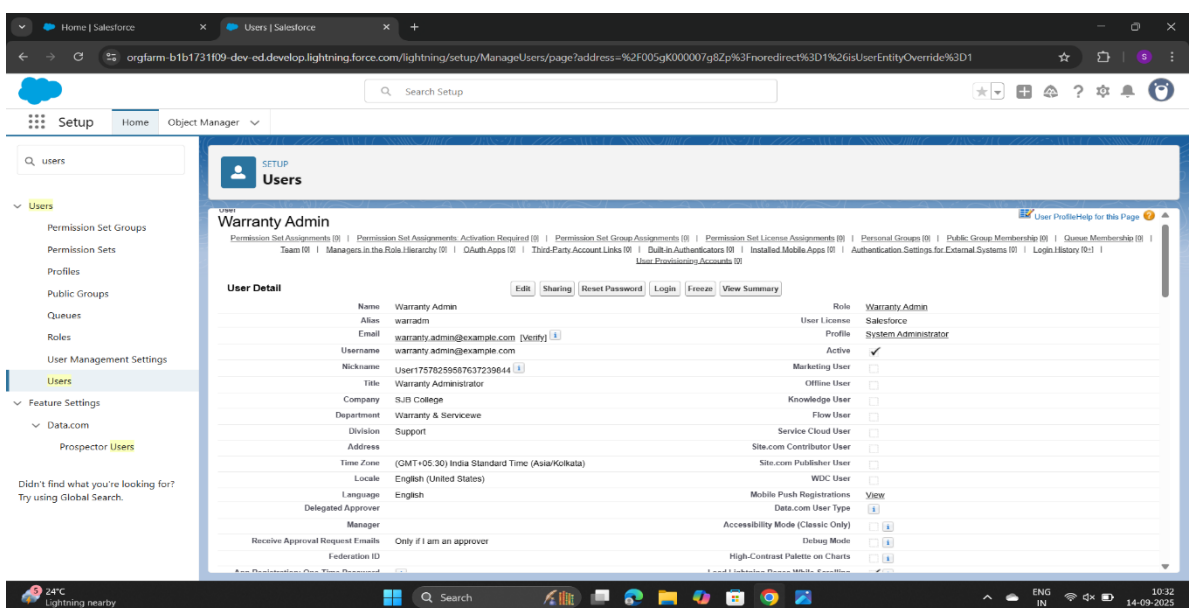
4. Fiscal Year Settings

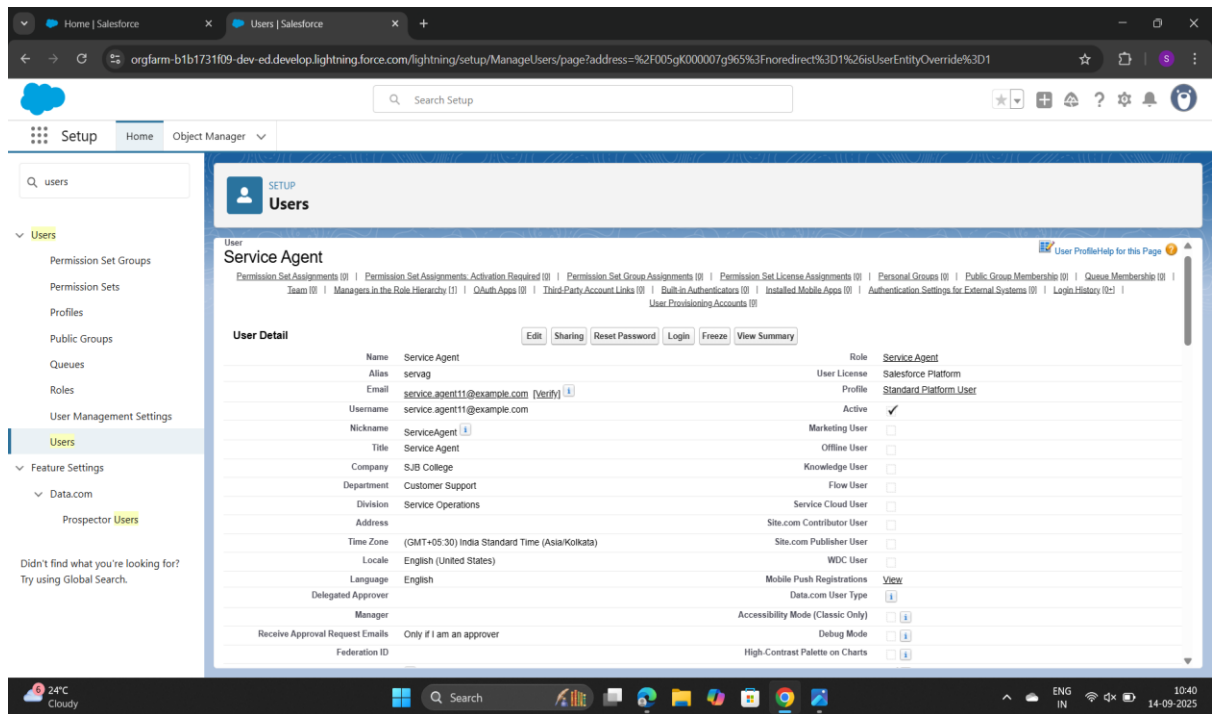
- Fiscal Year: **Standard (January–December)**.
- Custom Fiscal Year not enabled (not needed for this project).



5. User Setup & Licenses

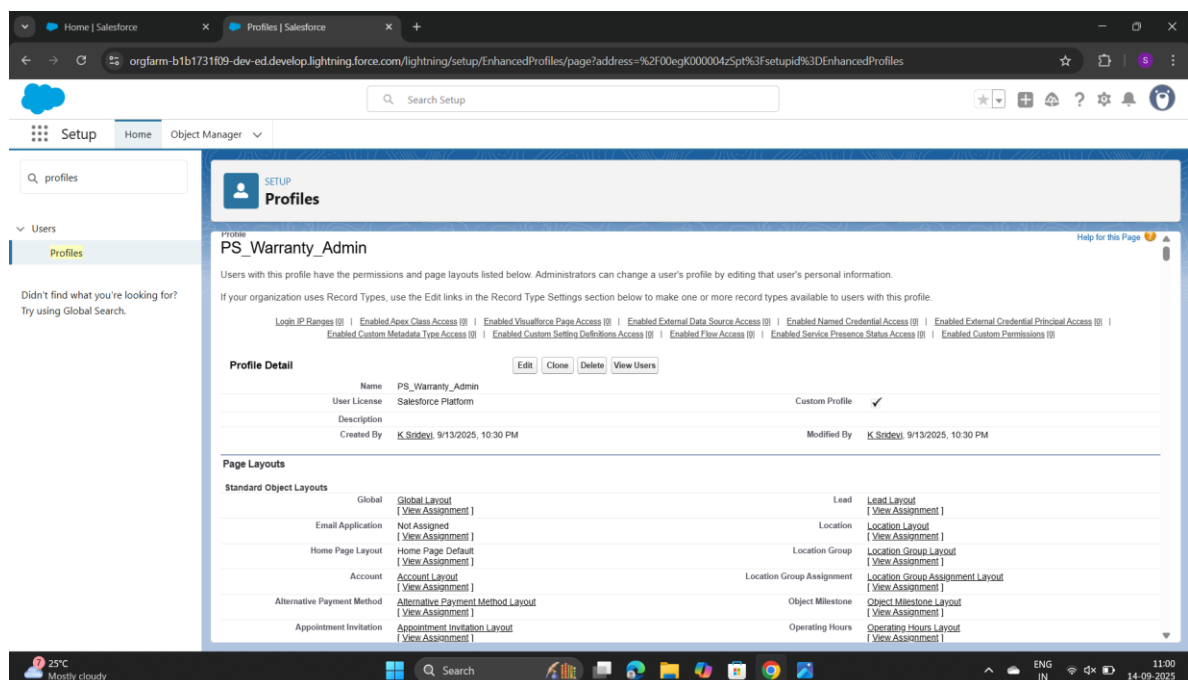
- Created 3 test users:
 - Warranty Admin** – manages warranties.
 - Service Agent** – handles service requests.
 - Manager** – supervises and monitors reports.
- Used **Salesforce Platform licenses** (since only 1 full Salesforce license available).

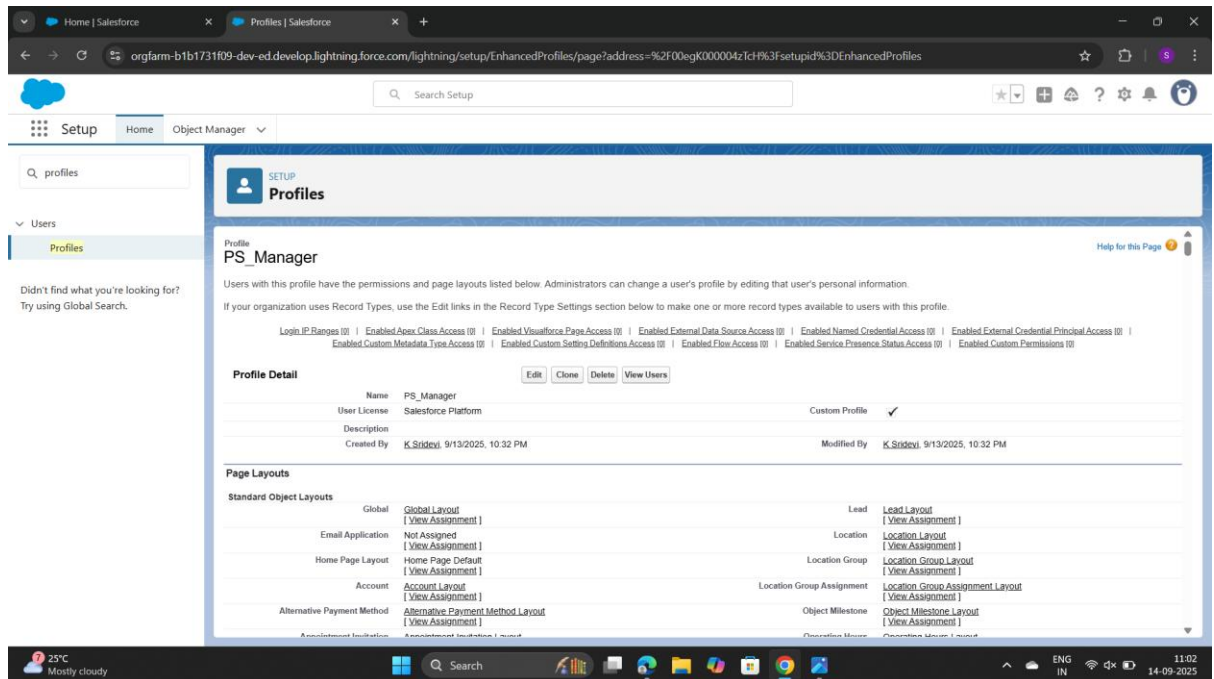
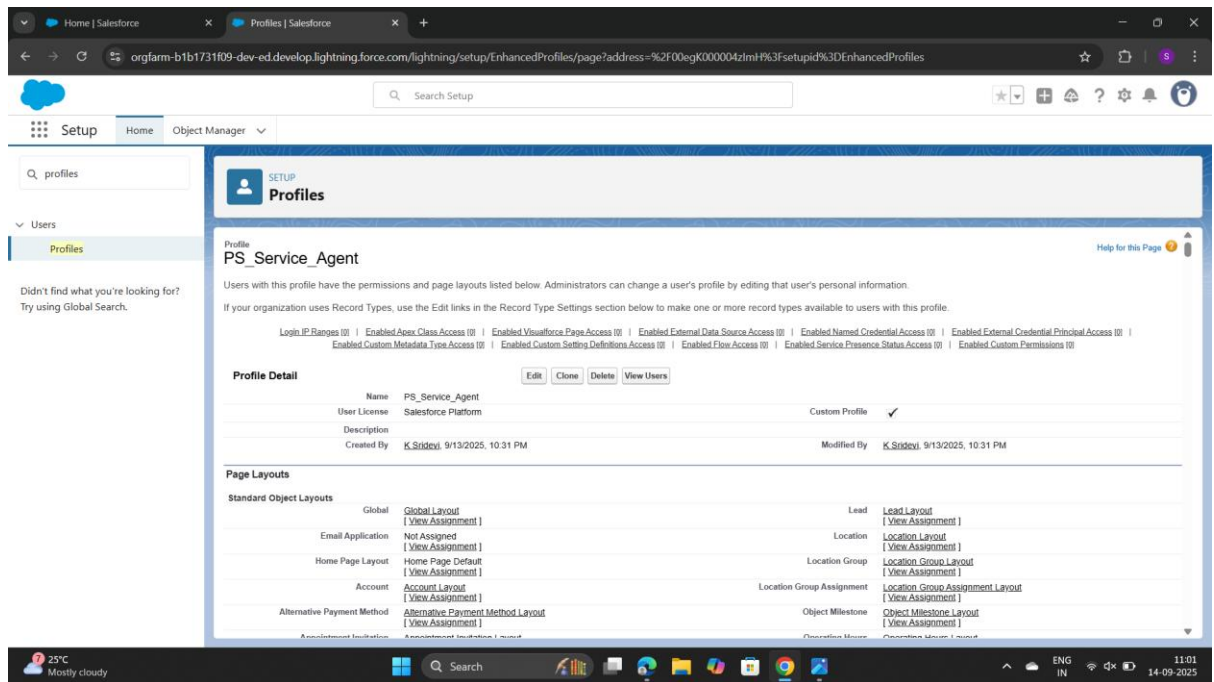




6. Profiles

- Cloned standard profile to create:
 - PS_Warranty_Admin
 - PS_Service_Agent
 - PS_Manager
- Profiles control user permissions.

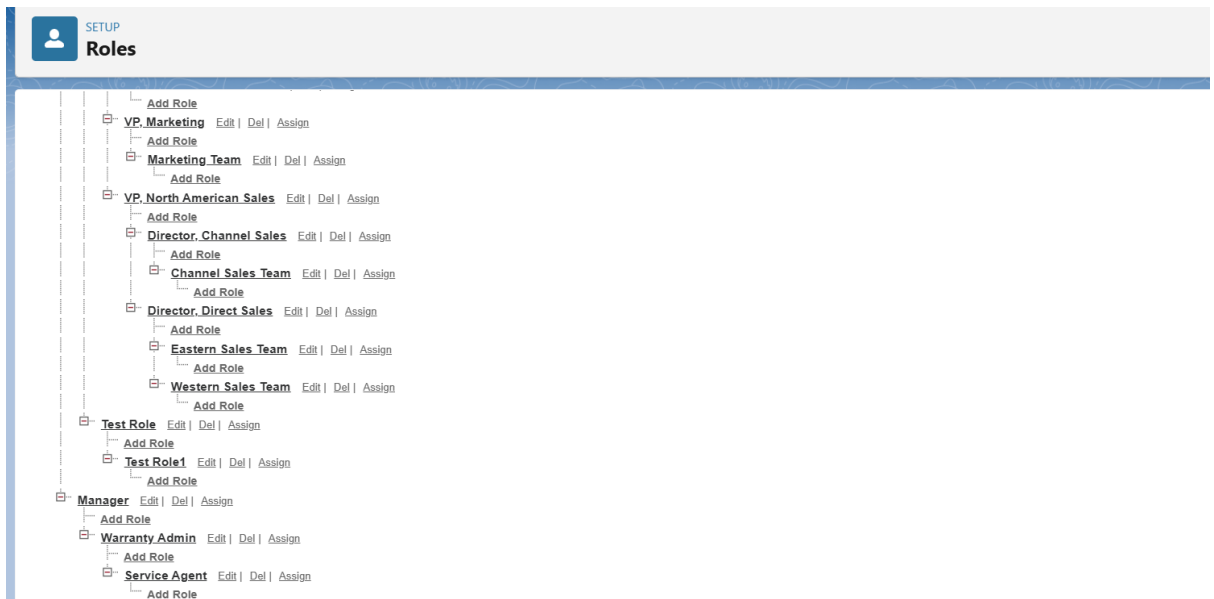




7. Roles

- Role hierarchy created:
 - Manager (top)
 - Warranty Admin

- Service Agent
- Defines data visibility (Manager can see subordinates' data).



8. Permission Sets

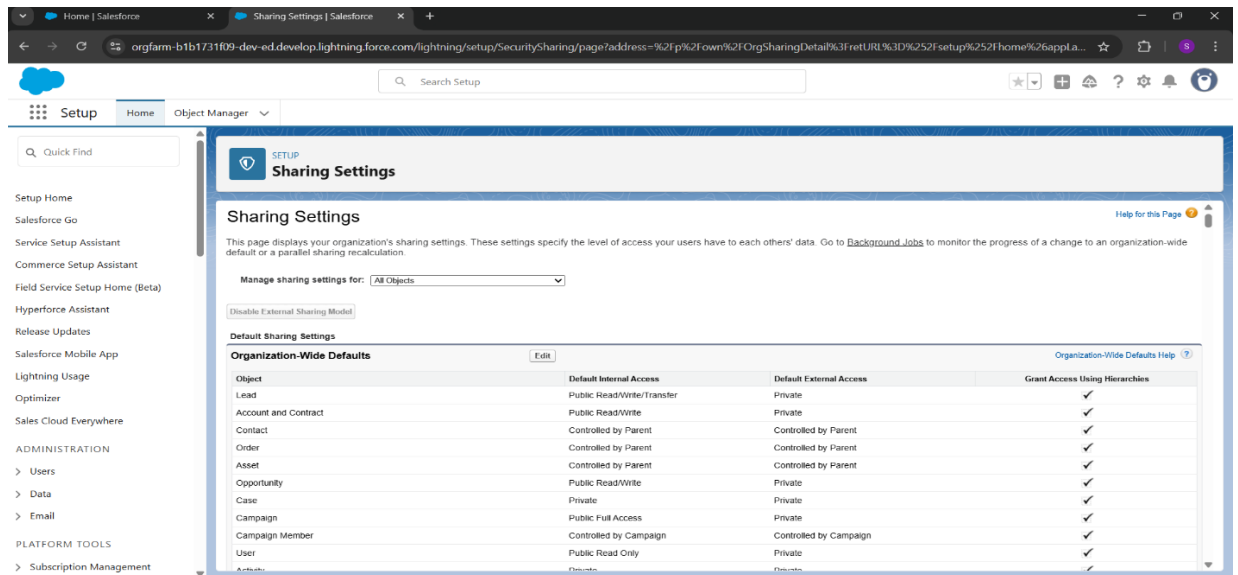
- Created Permission Set: **PS_ExportReports**.
- Enabled: **Export Reports** permission.
- Assigned to Admin user.

Action	Permission Set Name	Description	License
<input type="checkbox"/> New <input type="checkbox"/> Clone	PS_ExportReports		
<input type="checkbox"/> Clone	Partner Connect Partner Admin Setup	Set up Partner Connect from a partner org. Partner Connect is a Part...	Salesforce
<input type="checkbox"/> Clone	Payments Administrator	Has all the user permissions to gate access to APIs that are available...	Salesforce Payments Internal
<input type="checkbox"/> Clone	Prompt Template Manager	Manage prompt templates using Prompt Builder and run them using ...	Einstein Prompt Templates
<input type="checkbox"/> Clone	Prompt Template User	Run prompt templates using generative AI features.	Einstein Prompt Templates
<input type="checkbox"/> Clone	Prompt Template PermSet		Cloud Integration User
<input type="checkbox"/> Clone	Publish Suggested for You Nudges Integration User	Access the Core Adoption Service and tenant orgs, which are used to p...	Cloud Integration User

9. Organization-Wide Defaults (OWD)

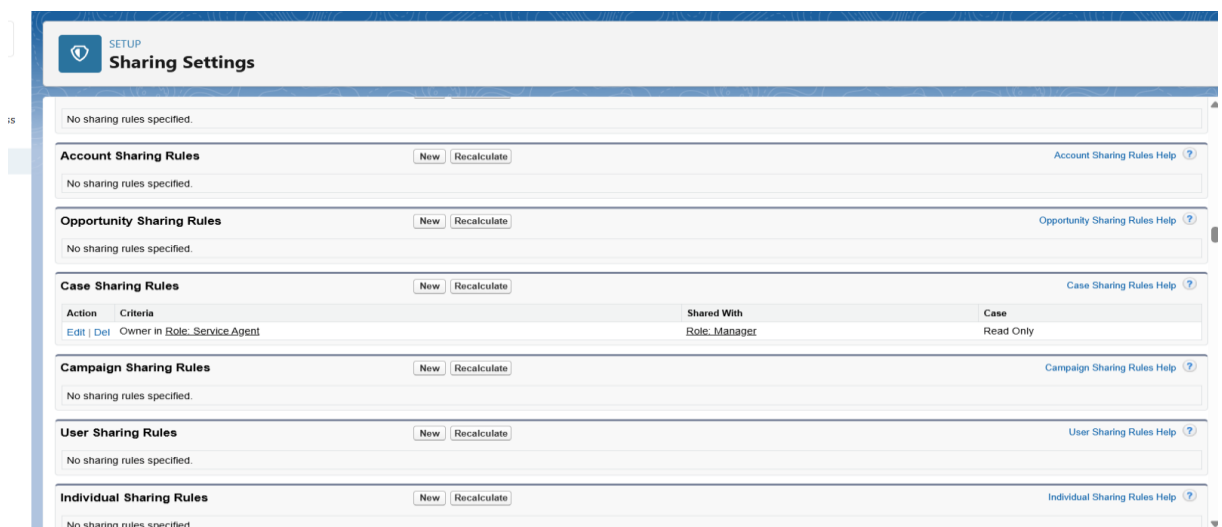
- Configured baseline data visibility:

- **Account** = Public Read/Write
- **Contact** = Controlled by Parent
- **Case** = Private
- Warranty__c and Service_Request__c will be set in Phase 3.



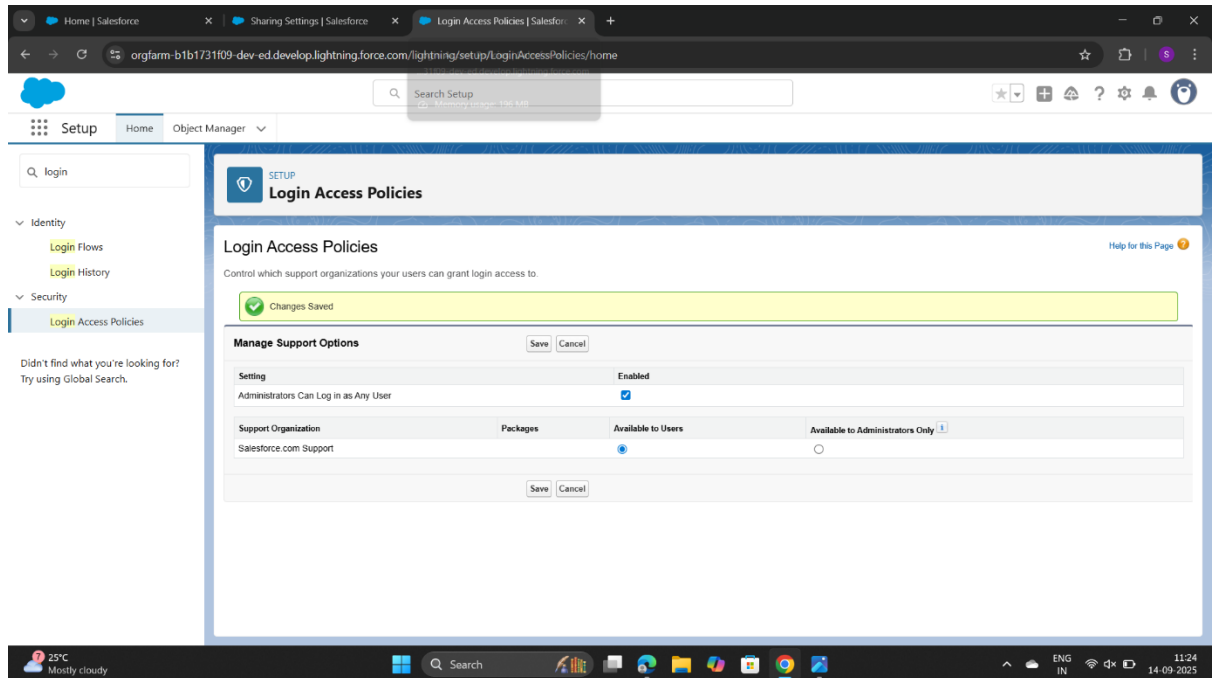
10. Sharing Rules

- Sharing Rule created for Cases:
 - Owned by = Service Agent
 - Shared with = Manager role
 - Access = Read Only
- Ensures Managers can monitor agent cases.



11. Login Access Policies

- Enabled: **Administrators Can Log in as Any User.**
- Allows admin to troubleshoot by logging in as other users.



12. Developer Org Setup

- Project built in **Salesforce Developer Edition Org.**
- Provides free Enterprise-level features for learning and development.

13. Sandbox Usage

- Sandboxes **not available in Developer Edition.**
- In real-world companies, sandboxes are used for testing and training.

14. Deployment Basics

- Deployment methods: **Change Sets** or **Salesforce CLI/VS Code.**
- Not required here since project is completed in a single Developer Org.