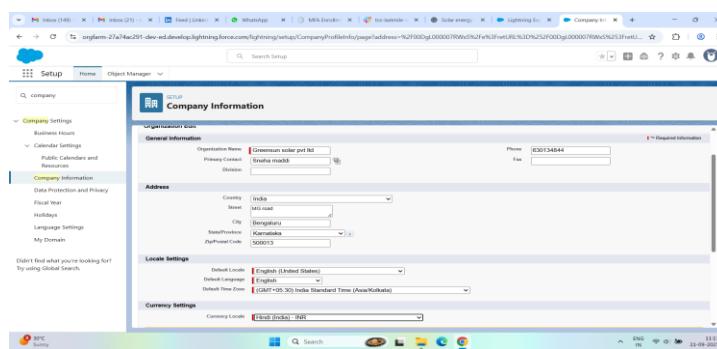


Step 1: Company Settings

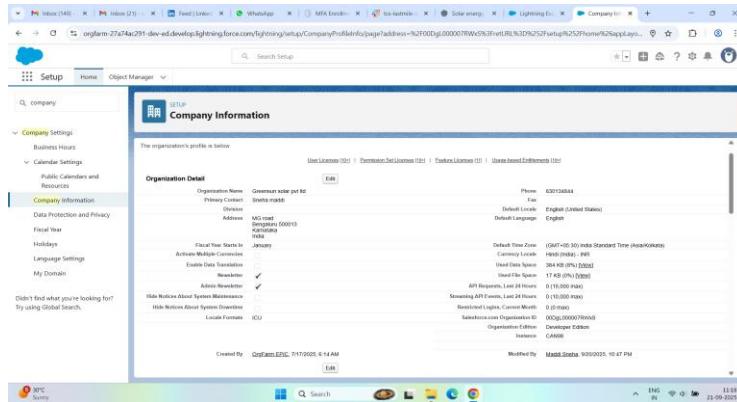
- Setup → Company Information
 - Company Name: *GreenSun Solar Energy Pvt. Ltd.*
 - Address: Bengaluru, Karnataka, India
 - Currency: INR (₹)
 - Locale: English (India)
 - Timezone: Asia/Kolkata
 - Fiscal Year: Apr–Mar
- Business Hours
 - Default: Mon–Sat, 9:00 AM – 6:00 PM
 - Support Hours (optional): 24x7 for Monitoring Team
- Holidays
 - Republic Day (26-Jan)
 - Holi (March)
 - Independence Day (15-Aug)
 - Gandhi Jayanti (2-Oct)
 - Diwali (Oct/Nov)
 - Christmas (25-Dec)



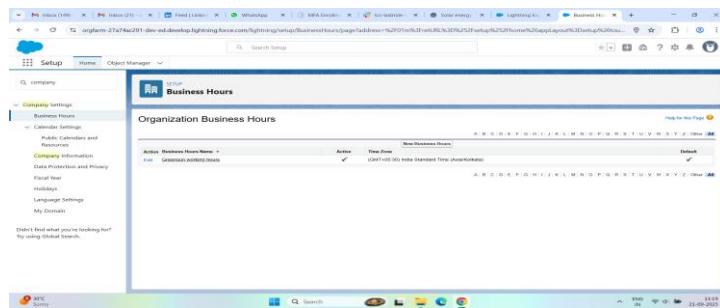
◆ Step 2: Users & Roles

- Users to Create
 - Admin (full access)

- Sales Rep (leads & opportunities)
 - Project Manager (installation projects)
 - Technician (service orders)
 - Monitoring Operator (alerts & energy tracking)
 - Finance Officer (contracts, invoices)

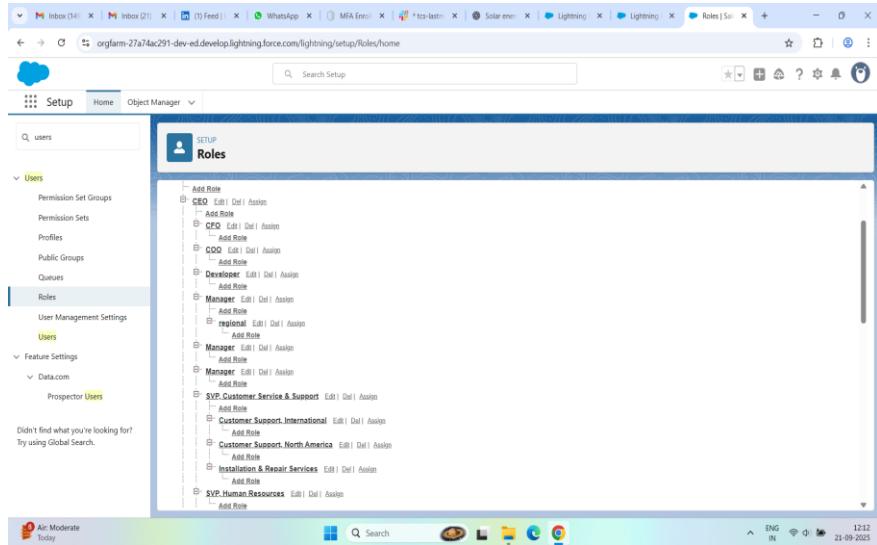


- Role Hierarchy
 - CEO
 - VP Sales → Sales Reps
 - VP Operations → Project Managers → Technicians
 - VP Monitoring → Monitoring Operators
 - VP Finance → Finance Officers



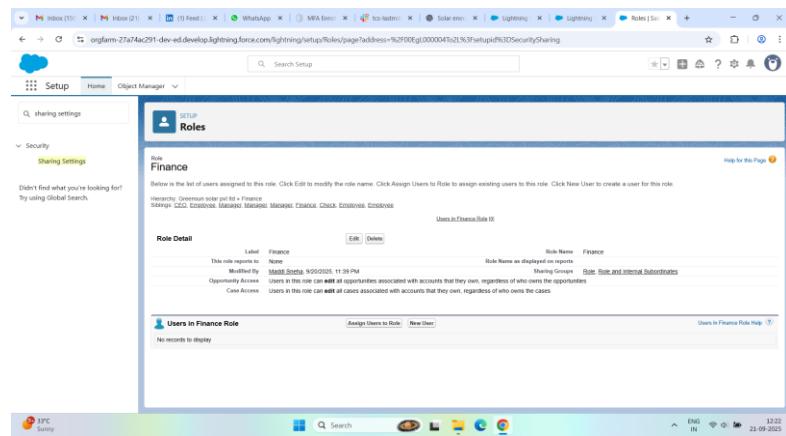
- Profiles
 - System Admin
 - Sales Profile
 - Project Manager Profile

- o Technician Profile
- o Monitoring Profile
- o Finance Profile



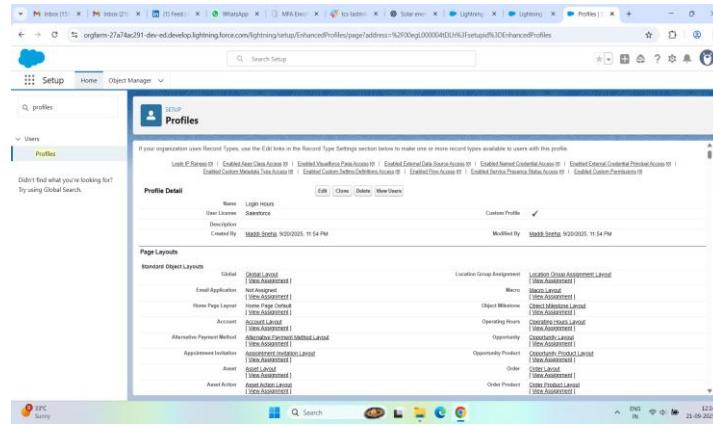
- Permission Sets
 - o Advanced Reporting
 - o Mobile Access
 - o API Integration
- ◆ Step 3: Security & Permissions
- Org-Wide Defaults (OWD)
 - o Accounts → Public Read/Write
 - o Solar Sites → Public Read Only
 - o Projects/Service Orders/Contracts → Private
 - o Energy Records → Public Read Only
- Sharing Rules
 - o Service Orders → Technician Group
 - o Monitoring Alerts → Monitoring Team
 - o Projects → Regional Managers
- Public Groups

- Technician Group
- Monitoring Team
- Finance Team
- Login & Security Policies
 - Login Hours → Technicians: 7 AM – 8 PM
 - Login IPs → Restrict Finance/Admin to office IPs
 - Enable 2FA (Two-Factor Authentication)
 - Session Timeout = 30 mins

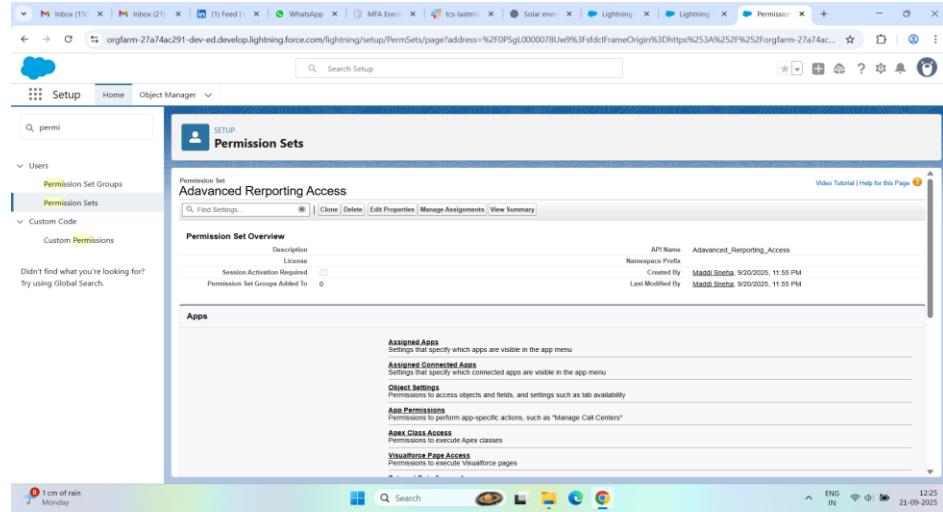


- ◆ Step 4: Custom Solar Objects & Fields
 - Objects to Create
 1. Solar Site → Capacity, Status, Commissioning Date
 2. PV Array → Panel Count, Orientation, Efficiency
 3. Inverter → Serial, Warranty, Status
 4. Battery → Capacity, Health, Install Date
 5. Installation Project → Budget, Manager, Start/End Dates
 6. Service Order → Issue, Technician, Priority, Status
 7. Energy Record → kWh Generated, Peak Power
 8. Monitoring Alert → Type, Severity, Status
 9. Contract → SLA, Payment Terms, Start/End Dates
 - Record Types

- Projects → Residential vs Commercial
- Service Orders → Preventive vs Corrective



- Page Layouts
 - Technician Layout → Issues & Checklist
 - Project Manager Layout → Budget, Timeline
 - Monitoring Layout → Alerts & Energy Records



◆ Step 5: Automation

- Queues
 - Technician Queue → For Service Orders
 - Monitoring Queue → For Alerts
- Approval Process

- Installation Projects with Budget > ₹10 Lakhs → Approval from Finance + VP Ops
- Flows
 - After commissioning → Auto-create first inspection Service Order
 - If daily energy < expected → Auto-create Monitoring Alert
- Email Alerts
 - Notifications for Approvals
 - Technician Service Assignment emails
 - Monitoring Alerts to Operators
- ◆ Step 6: Reports & Dashboards
 - Reports
 - Sales → Leads to Deals
 - Operations → Active Projects, Service Orders Aging
 - Monitoring → Energy vs Expected, Site Uptime
 - Finance → Revenue, ROI, Pending Invoices
 - Dashboards
 - Executive Dashboard → Overview
 - Operations Dashboard → Projects & Technicians
 - Monitoring Dashboard → Energy & Alerts
 - Finance Dashboard → Revenue & Invoices

