Phase 2 – Org Setup & Configuration

Project: Smart Retail Customer Insights Tracker

Company Information

Purpose: Configure the Salesforce org to reflect the company details for accurate reporting and automation.

Details:

- Company Name: Smart Retail

- CEO: Pusarla Manaswini

- Currency: INR

- Locale: India

- Time Zone: India Standard Time

- Email Deliverability: All Email enabled

Fig : Company Information

- Proper setup ensures dashboards, reports, and automation functions correctly.
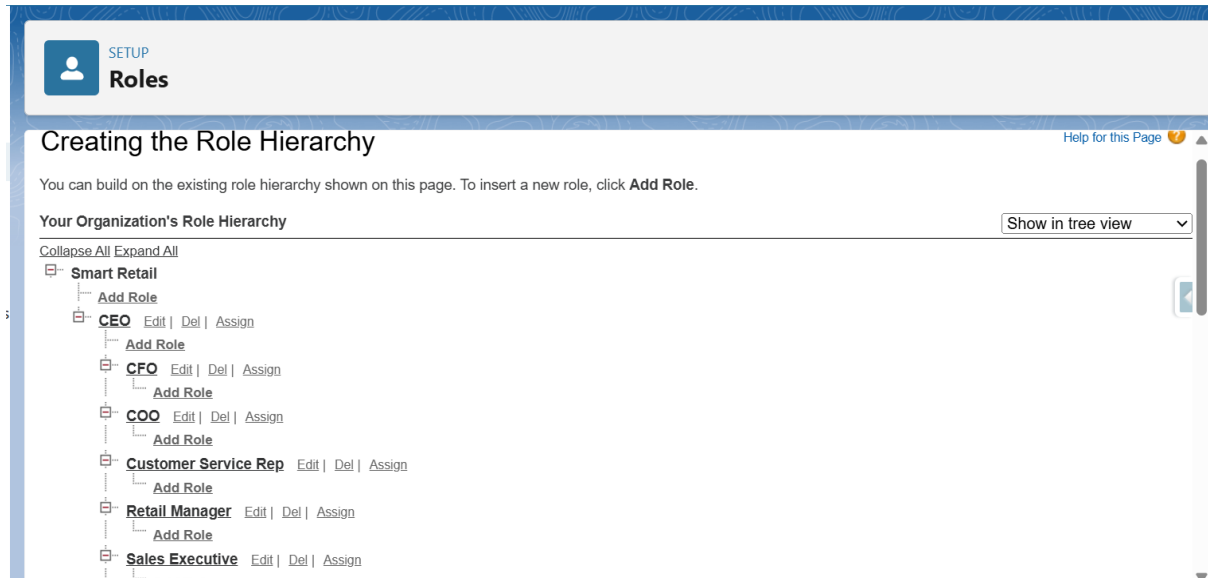
Roles

Purpose: Define hierarchy to manage user access, record visibility, and reporting structure.

Custom Roles Created:

1. **Retail Manager** – Can view dashboards/reports and oversee customer activity

2. **Sales Executive** – Can manage customer purchases and product records

3. **Customer Service Rep** – Limited access to customer records

4. Admin user uses default **System Administrator role**
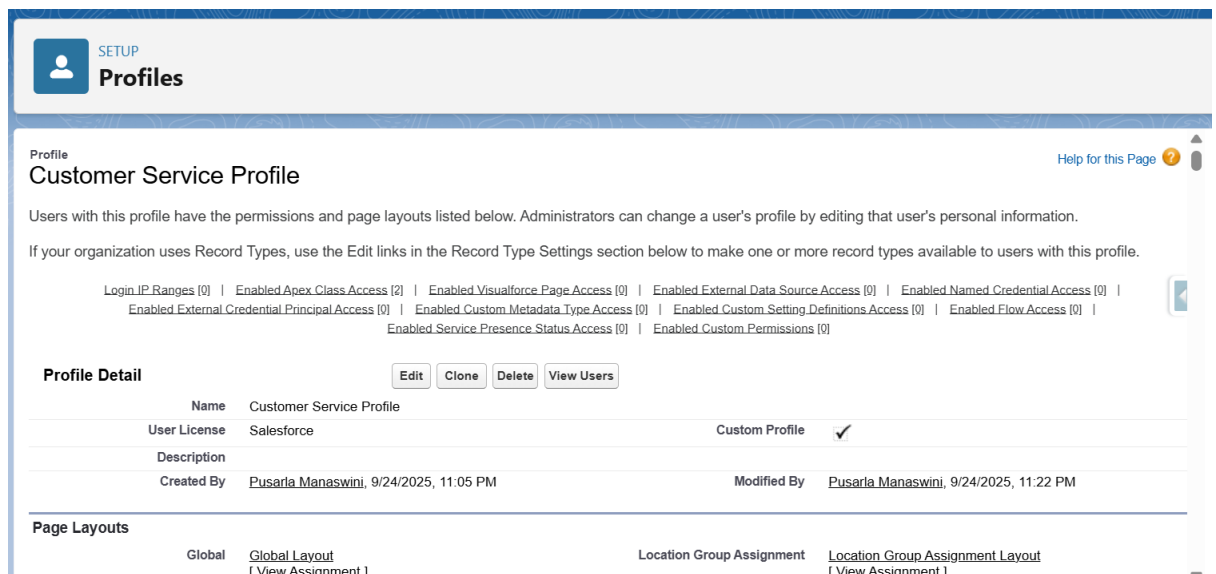
Profiles

Purpose: Assign object permissions and access levels to users based on their responsibilities.

Profiles Created:

1. **System Administrator** – Full access to all objects, settings, and features in Salesforce; can create/edit/delete records, configure flows, dashboards, and automation.

2. **Retail Manager –** Read-only access to Customer, Product, and Purchase objects; can view dashboards and reports; cannot delete records.

3. **Sales Executive** – Read/Edit access to Customer, Product, and Purchase objects; can add and update records but cannot delete; access limited to business-critical objects.

4. **Customer Service Rep** – Limited read-only or read/edit access to Customer object; cannot access Product or Purchase objects; can view dashboards relevant to customer support.

Profile

Customer Service Profile

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges [0] | Enabled Apex Class Access [2] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] |
Enabled External Credential Principal Access [0] | Enabled Custom Metadata Type Access [0] | Enabled Custom Setting Definitions Access [0] | Enabled Flow Access [0] |
Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]

Profile Detail

[Edit] [Clone] [Delete] [View Users]

Name	Customer Service Profile		
User License	Salesforce	Custom Profile	✓
Description			
Created By	Pusarla Manaswini, 9/24/2025, 11:05 PM	Modified By	Pusarla Manaswini, 9/24/2025, 11:22 PM

Page Layouts

Global	Global Layout [View Assignment]	Location Group Assignment	Location Group Assignment Layout [View Assignment]

Users

Purpose: Create users and assign roles/profiles for testing and access control.

User	Profile	Role	License
Admin/Developer	System Administrator	Default Sys Admin	Salesforce
Retail Manager	Retail Manager	Retail Manager	Salesforce

User

Pusarla Manaswini

Permission Set Assignments [0] | Permission Set Assignments: Activation Required [0] | Permission Set Group Assignments [0] | Permission Set License Assignments [0] | Personal Groups [0] |
Public Group Membership [0] | Queue Membership [0] | Team [0] | Managers in the Role Hierarchy [0] | OAuth Apps [0] | Third-Party Account Links [0] | Built-in Authenticators [0] |
Installed Mobile Apps [0] | Authentication Settings for External Systems [0] | Login History [0+] | User Provisioning Accounts [0]

User Detail

[Edit] [Sharing] [Reset Password] [Freeze] [View Summary]

Name	Pusarla Manaswini	Role	CEO
Alias	pmana	User License	Salesforce
Email	pusarlamanaswini@gmail.com [Verify]	Profile	System Administrator
Username	pusarlamanaswini1@gmail.com	Active	✓
Nickname	User17587820231426845749	Marketing User	☐
Title		Offline User	☐
Company		Knowledge User	☐
Department		Flow User	☐
Division		Service Cloud User	☐
Address		Site.com Contributor User	☐

User
Retail Manager

Permission Set Assignments [0] | Permission Set Assignments: Activation Required [0] | Permission Set Group Assignments [0] | Permission Set License Assignments [0] | Personal Groups [0] |
Public Group Membership [0] | Queue Membership [0] | Team [0] | Managers in the Role Hierarchy [1] | OAuth Apps [0] | Third-Party Account Links [0] | Built-in Authenticators [0] |
Installed Mobile Apps [0] | Authentication Settings for External Systems [0] | Login History [0+] | User Provisioning Accounts [0]

User Profile Help for this Page

User Detail

[Edit] [Sharing] [Reset Password] [Freeze] [View Summary]

Name	Retail Manager	Role	Retail Manager
Alias	rmana	User License	Salesforce
Email	retailmanager@retail.com [Verify]	Profile	Retail Manager Profile
Username	retailmanager@retail.com	Active	✓
Nickname	User17587822167989316355	Marketing User	☐
Title		Offline User	☐
Company		Knowledge User	☐
Department		Flow User	☐
Division		Service Cloud User	☐
Address		Site.com Contributor User	☐