

Phase 2: Org Setup & Configuration

PetCare CRM

A Salesforce-Based Pet Shop Management System for Customer Engagement and Service Automation

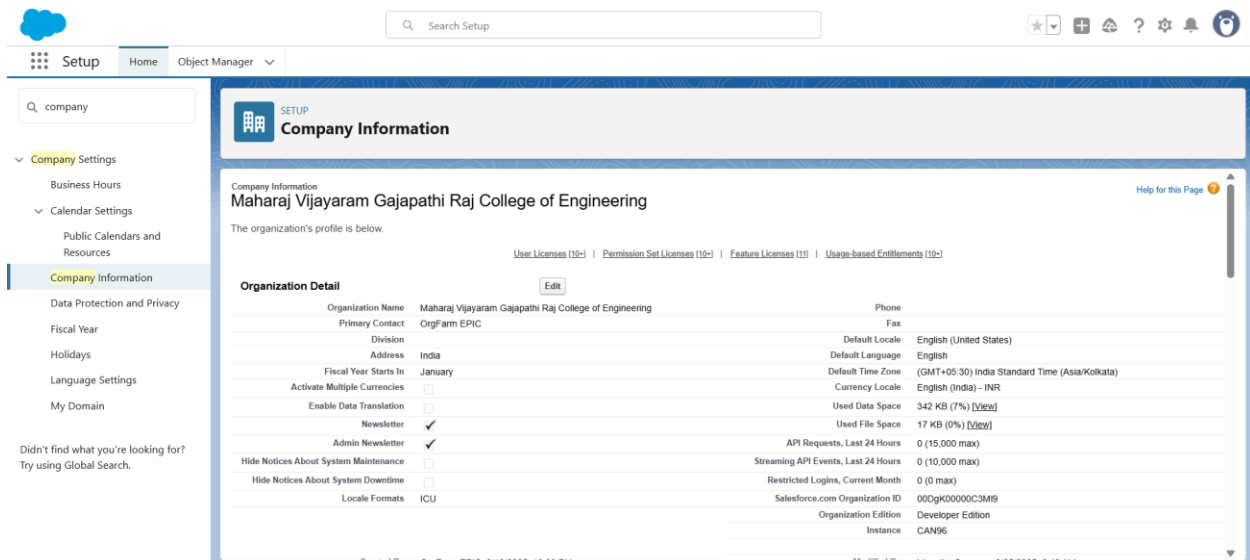
Goal: Preparing the Salesforce Environment for PetCare CRM

Salesforce Edition

A Developer Edition Org was used for this project, providing the necessary features to configure and test the PetCare CRM system.

Company Profile Setup

The company profile was updated with pet shop details such as name, address, local time zone, and currency (set to INR).

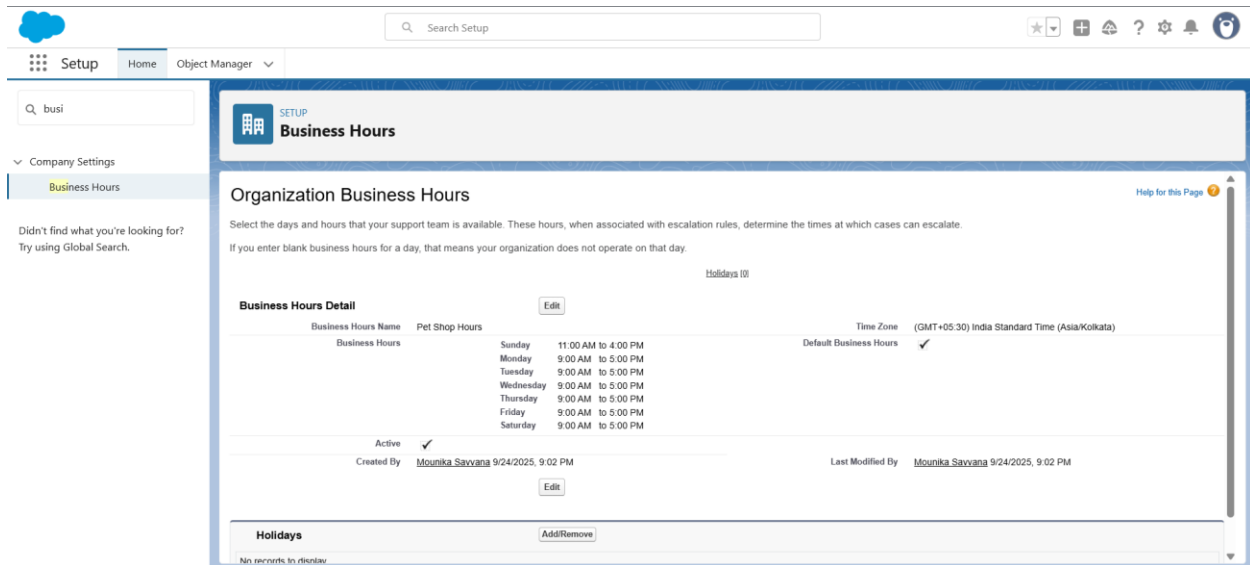


The screenshot displays the Salesforce Setup interface. The left sidebar shows the 'Setup' menu with 'Company Information' selected. The main content area is titled 'Company Information' and shows the organization's profile for 'Maharaj Vijayaram Gajapathi Raj College of Engineering'. The profile details include:

Organization Detail	
Organization Name	Maharaj Vijayaram Gajapathi Raj College of Engineering
Primary Contact	Org's arm EPIC
Division	
Address	India
Fiscal Year Starts In	January
Activate Multiple Currencies	<input type="checkbox"/>
Enable Data Translation	<input type="checkbox"/>
Newsletter	<input checked="" type="checkbox"/>
Admin Newsletter	<input checked="" type="checkbox"/>
Hide Notices About System Maintenance	<input type="checkbox"/>
Hide Notices About System Downtime	<input type="checkbox"/>
Locale Formats	ICU
Phone	
Fax	
Default Locale	English (United States)
Default Language	English
Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Currency Locale	English (India) - INR
Used Data Space	342 KB (7%) View
Used File Space	17 KB (0%) View
API Requests, Last 24 Hours	0 (15,000 max)
Streaming API Events, Last 24 Hours	0 (10,000 max)
Restricted Logins, Current Month	0 (0 max)
Salesforce.com Organization ID	00DgK00000C3M19
Organization Edition	Developer Edition
Instance	CAN96

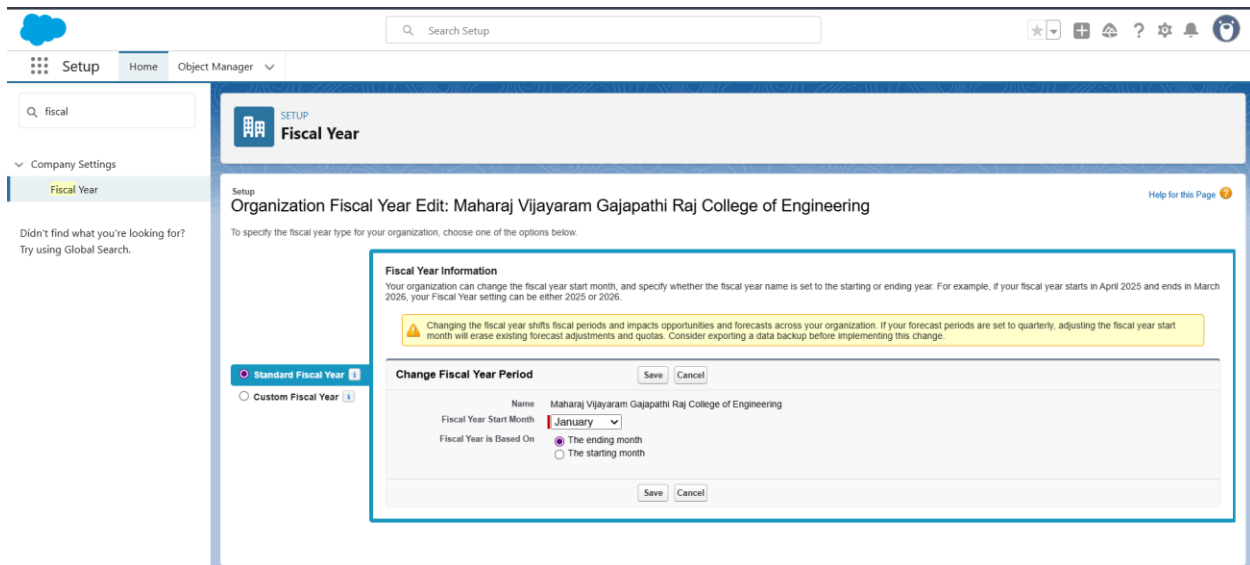
Business Hours & Holidays

Business hours were set as 9 AM to 6 PM to match pet shop operations. Public holidays were added so that no service bookings or approvals would occur on those days.



Fiscal Year Settings

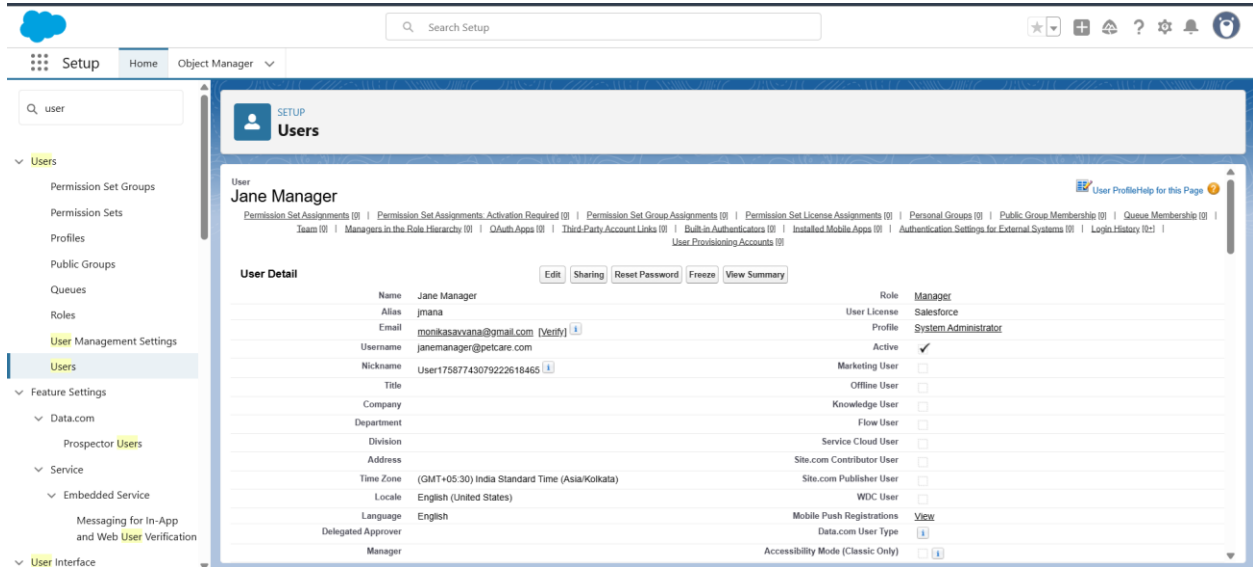
The fiscal year was configured to the standard January–December cycle to support reporting and analysis.



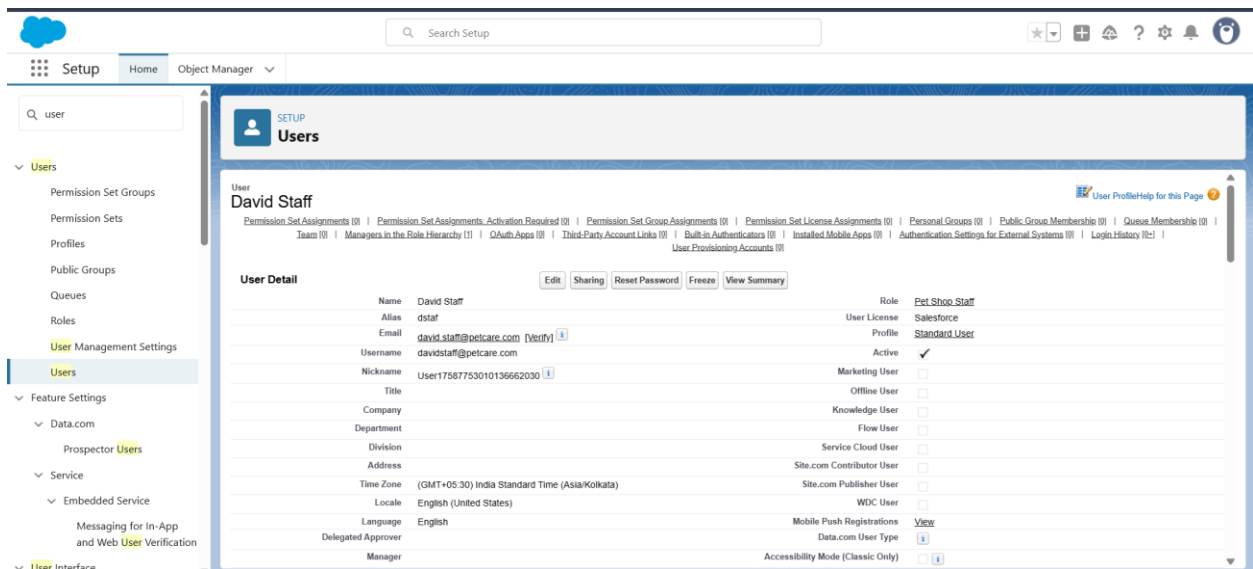
User Setup & Licenses

Two key users were created:

- *Jane Manager* – assigned the Manager role with a Salesforce license.
- *David Staff* – assigned the Pet Shop Staff role with a Salesforce license.



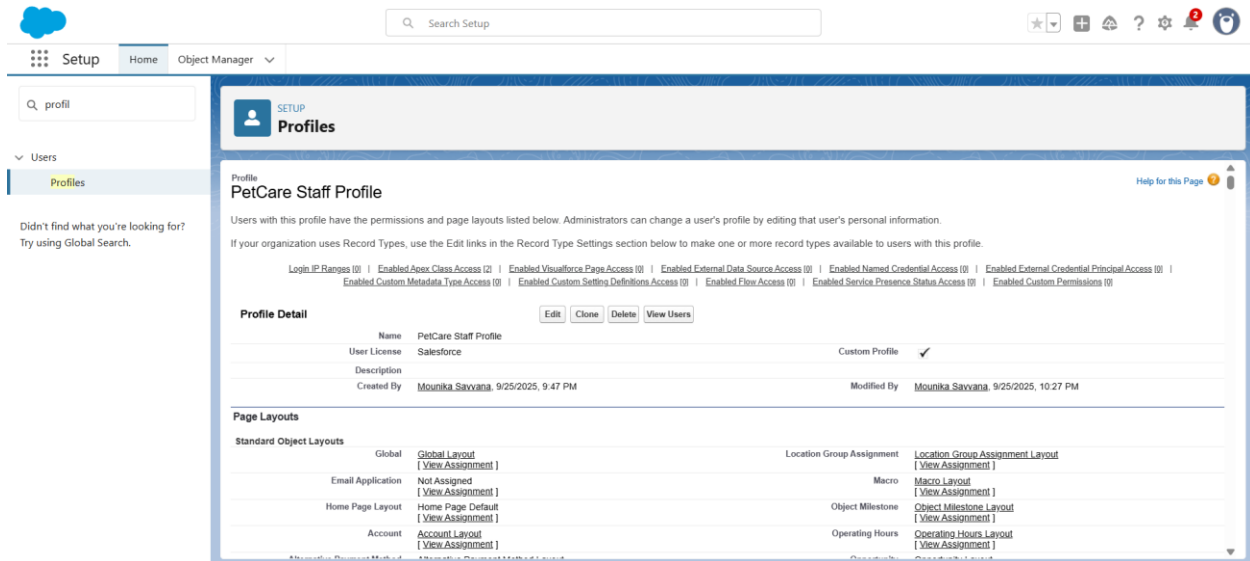
The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains a navigation menu with 'Users' selected. The main content area displays the 'User Detail' for 'Jane Manager'. The user's role is 'Manager' and their user license is 'Salesforce'. The user is active and has a profile of 'System Administrator'. The user's email is 'monikasavvana@gmail.com' and their username is 'janemanager@petcare.com'. The user's nickname is 'User1758774307922618465'. The user's title is 'Manager'. The user's company is 'Petcare'. The user's department is 'Marketing'. The user's division is 'Marketing'. The user's address is '123 Main St, San Francisco, CA 94102'. The user's time zone is '(GMT+05:30) India Standard Time (Asia/Kolkata)'. The user's locale is 'English (United States)'. The user's language is 'English'. The user's delegated approver is 'Manager'. The user's accessibility mode is 'Classic Only'.



The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains a navigation menu with 'Users' selected. The main content area displays the 'User Detail' for 'David Staff'. The user's role is 'Pet Shop Staff' and their user license is 'Salesforce'. The user is active and has a profile of 'Standard User'. The user's email is 'david.staff@petcare.com' and their username is 'davidstaff@petcare.com'. The user's nickname is 'User17587753010136662030'. The user's title is 'Pet Shop Staff'. The user's company is 'Petcare'. The user's department is 'Marketing'. The user's division is 'Marketing'. The user's address is '123 Main St, San Francisco, CA 94102'. The user's time zone is '(GMT+05:30) India Standard Time (Asia/Kolkata)'. The user's locale is 'English (United States)'. The user's language is 'English'. The user's delegated approver is 'Manager'. The user's accessibility mode is 'Classic Only'.

Profiles

Profiles were configured to control permissions. Pet Shop Staff profiles were given access to create and manage Pet and Service Booking records but restricted from modifying sharing rules. The Manager profile was given full access to all custom objects, including Service Provider records.



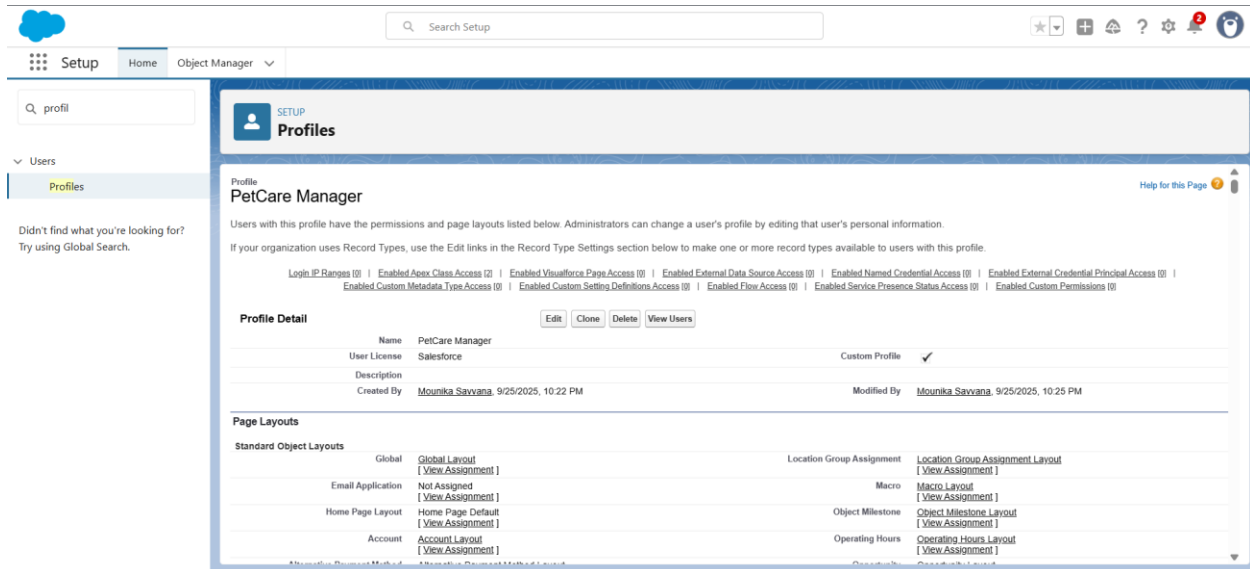
The screenshot shows the Salesforce Setup interface for the 'PetCare Staff Profile'. The left sidebar includes a search bar with 'profil' and a 'Users' section with a 'Profiles' link. The main content area is titled 'Profiles' and shows the 'PetCare Staff Profile' details. The profile is a Custom Profile created by Mounika Savvana on 9/25/2025 at 9:47 PM. The 'Page Layouts' section lists various layouts assigned to the profile, including Global, Email Application, Home Page Layout, Account, Location Group Assignment, Macro, Object Milestone, and Operating Hours.

Profile Detail

Name	PetCare Staff Profile
User License	Salesforce
Description	Not Assigned
Created By	Mounika Savvana, 9/25/2025, 9:47 PM
Modified By	Mounika Savvana, 9/25/2025, 10:27 PM

Page Layouts

Standard Object Layouts	Global	Global Layout [View Assignment]	Location Group Assignment	Location Group Assignment Layout [View Assignment]
Email Application	Not Assigned	[View Assignment]	Macro	Macro Layout [View Assignment]
Home Page Layout	Home Page Default	[View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Account	Account Layout	[View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]



The screenshot shows the Salesforce Setup interface for the 'PetCare Manager' profile. The left sidebar includes a search bar with 'profil' and a 'Users' section with a 'Profiles' link. The main content area is titled 'Profiles' and shows the 'PetCare Manager' details. The profile is a Custom Profile created by Mounika Savvana on 9/25/2025 at 10:22 PM. The 'Page Layouts' section lists various layouts assigned to the profile, including Global, Email Application, Home Page Layout, Account, Location Group Assignment, Macro, Object Milestone, and Operating Hours.

Profile Detail

Name	PetCare Manager
User License	Salesforce
Description	Not Assigned
Created By	Mounika Savvana, 9/25/2025, 10:22 PM
Modified By	Mounika Savvana, 9/25/2025, 10:25 PM

Page Layouts

Standard Object Layouts	Global	Global Layout [View Assignment]	Location Group Assignment	Location Group Assignment Layout [View Assignment]
Email Application	Not Assigned	[View Assignment]	Macro	Macro Layout [View Assignment]
Home Page Layout	Home Page Default	[View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Account	Account Layout	[View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]

Roles

A role hierarchy was set up with the Manager role above the Pet Shop Staff role. Jane was assigned the Manager role, ensuring full visibility of records created by staff, while David was assigned the Pet Shop Staff role with limited access.

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

Collapse All Expand All Show in tree view

- Maharaj Vijayaram Gajapathi Raj College of Engineering
 - Add Role
 - CEO Edit Del Assign
 - Add Role
 - CFO Edit Del Assign
 - Add Role
 - COO Edit Del Assign
 - Add Role
 - Manager Edit Del Assign
 - Add Role
 - Pet Shop Staff Edit Del Assign
 - Add Role
 - SVP, Customer Service & Support Edit Del Assign
 - Add Role
 - Customer Support International Edit Del Assign
 - Add Role
 - Customer Support North America Edit Del Assign
 - Add Role
 - Installation & Repair Services Edit Del Assign

Permission Sets

Permission sets were created to grant additional access when required. For example, David could be assigned a permission set for Reports if reporting access was needed beyond his profile permissions.

Org-Wide Defaults (OWD)

OWD settings were defined to ensure security:

- Pet* and *Service Provider* objects were set to Public Read Only so staff could view records but not alter those owned by others.
- Service Booking* was set to Private, so only the record owner (e.g., David) and the manager (Jane) could access it.

Sharing Settings

Object	Default Sharing Setting	Enable Sharing
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
Pet	Public Read Only	Public Read Only
Service Booking	Private	Private
Service Provider	Public Read Only	Public Read Only

Other Settings

Manager Groups ☐ [Help](#)

Secure guest user record access ☒ [Help](#)

Sharing Rules

Sharing rules were created to allow service bookings to be shared with other agents when cross-team collaboration was needed.

The screenshot shows the Salesforce Setup interface for configuring a Pet Sharing Rule. The left sidebar contains a search bar with 'shar' and a navigation menu with 'Security' expanded, showing 'Guest User Sharing Rule Access Report' and 'Sharing Settings' (selected). The main content area is titled 'Sharing Settings' and 'Pet Sharing Rule'. It includes instructions on using sharing rules and a four-step configuration process:

- Step 1: Rule Name** (Required Information):
 - Label: All PetCare Staff See All Pe
 - Rule Name: All_PetCare_Staff_See_All
 - Description: Allows all PetCare Staff to see and edit all pet records, regardless of ownership
- Step 2: Select your rule type**:
 - Rule Type: ☒ Based on record owner ☐ Based on criteria
- Step 3: Select which records to be shared**:
 - Pet owned by members of: Roles and Internal Subordinates | Pet Shop Staff
- Step 4: Select the users to share with**:
 - Share with: Roles and Internal Subordinates | Pet Shop Staff

Login Access Policies

Login access for staff users was restricted to business hours (9 AM–6 PM), ensuring usage aligned with shop operations.

The screenshot shows the Salesforce Setup interface for configuring Login Access Policies. The left sidebar contains a search bar with 'login' and a navigation menu with 'Identity' expanded, showing 'Login Flows' and 'Login History', and 'Security' expanded, showing 'Login Access Policies' (selected). The main content area is titled 'Login Access Policies' and includes instructions on controlling login access. It features a 'Manage Support Options' section with a table of settings:

Manage Support Options			
Setting	Enabled		
Administrators Can Log in as Any User	<input checked="" type="checkbox"/>		
Support Organization	Packages	Available to Users	Available to Administrators Only
Salesforce.com Support	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Developer Org Setup

All configurations, including custom objects (Pet, Service Provider, Service Booking), roles, and user access, were developed and tested within the Developer Org.

Sandbox Usage

For this project, the Developer Org itself functioned as the sandbox. In a real-world scenario, however, a separate Sandbox would be used for testing before deployment to Production.

Deployment Basics

Deployment practices were considered, noting that in live environments, changes would be moved from Sandbox to Production using Change Sets. For this academic project, all work was completed within the Developer Org.