Phase 2: Org Setup & Configuration

PetCare CRM

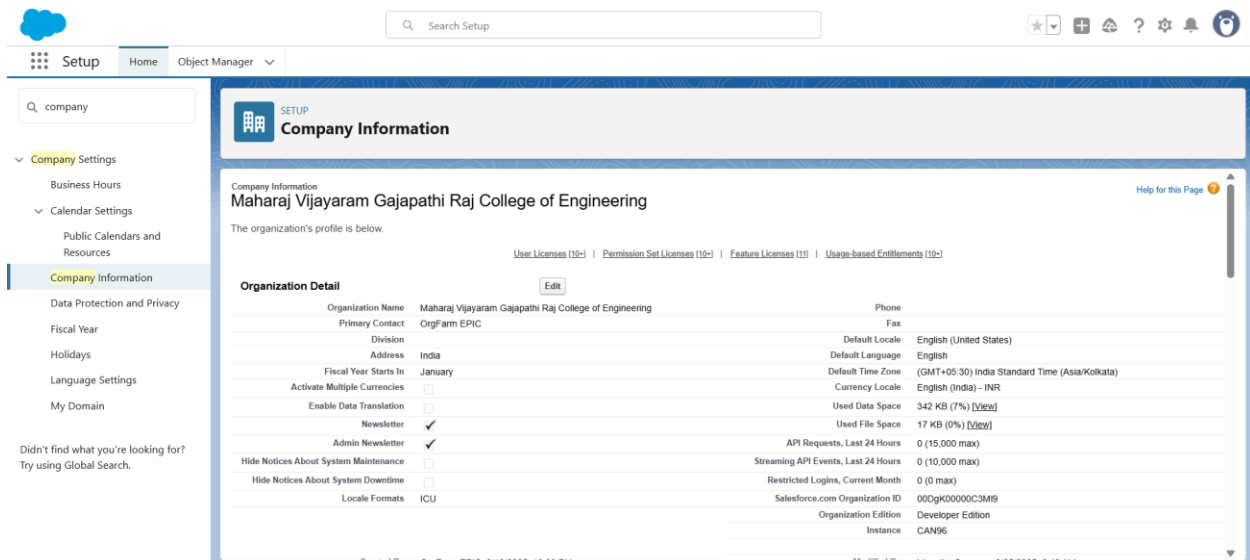## A Salesforce-Based Pet Shop Management System for Customer Engagement and Service Automation

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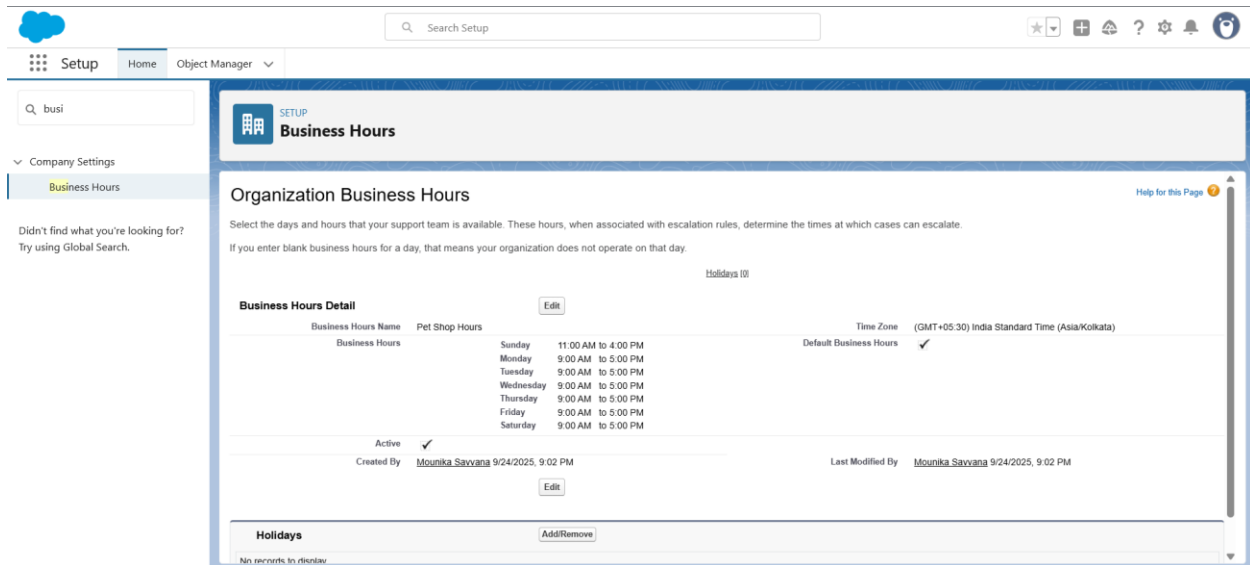The company profile was updated with pet shop details such as name, address, local time zone, and currency (set to INR).
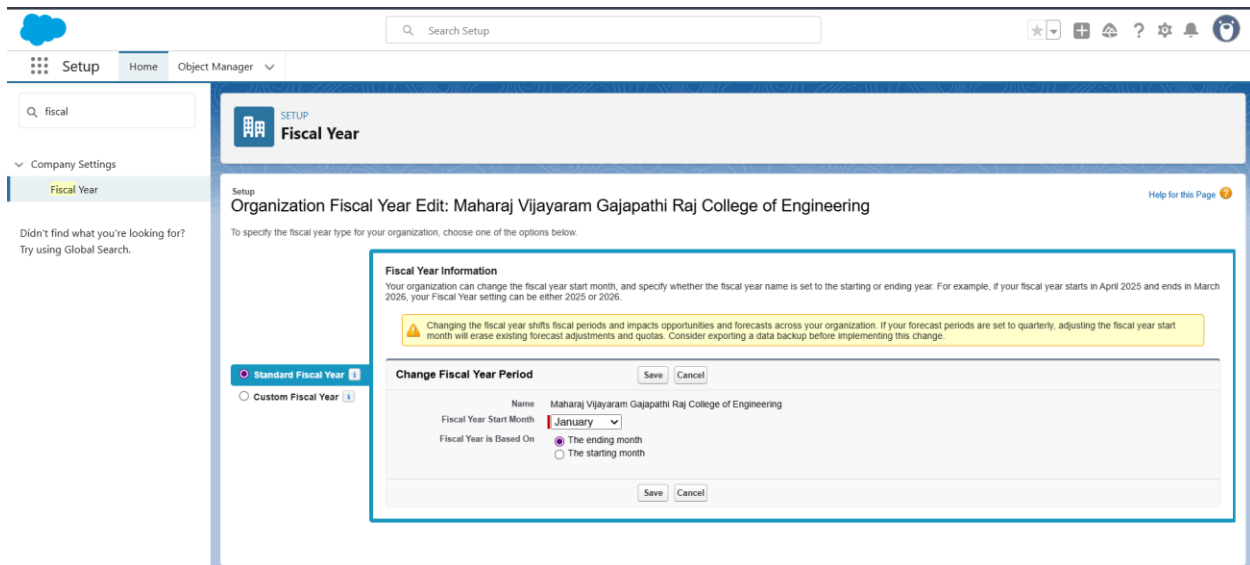

Business Hours & Holidays
Business hours were set as 9 AM to 6 PM to match pet shop operations. Public holidays were added so that no service bookings or approvals would occur on those days.
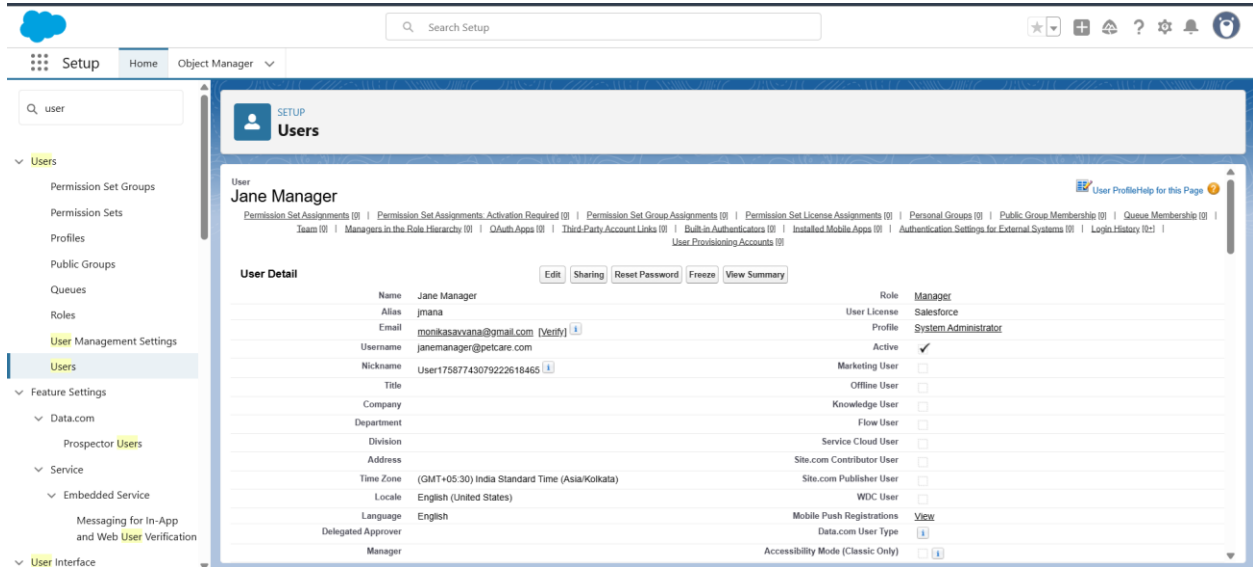
Fiscal Year Settings

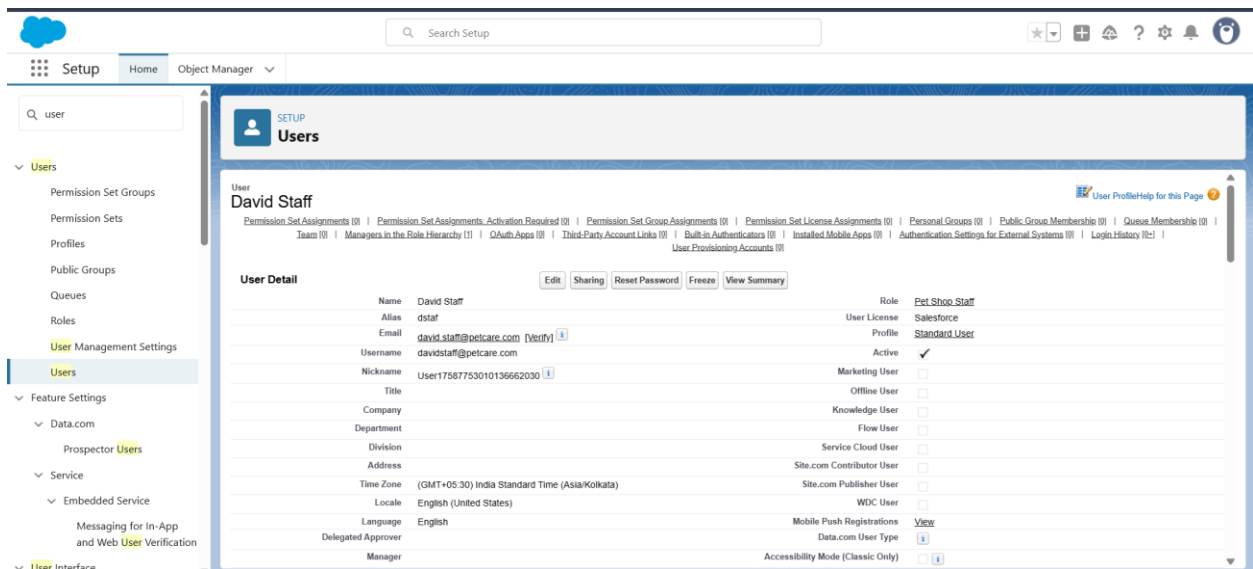The fiscal year was configured to the standard January–December cycle to support reporting and analysis.

User Setup & Licenses
Two key users were created:

- *Jane Manager* – assigned the Manager role with a Salesforce license.

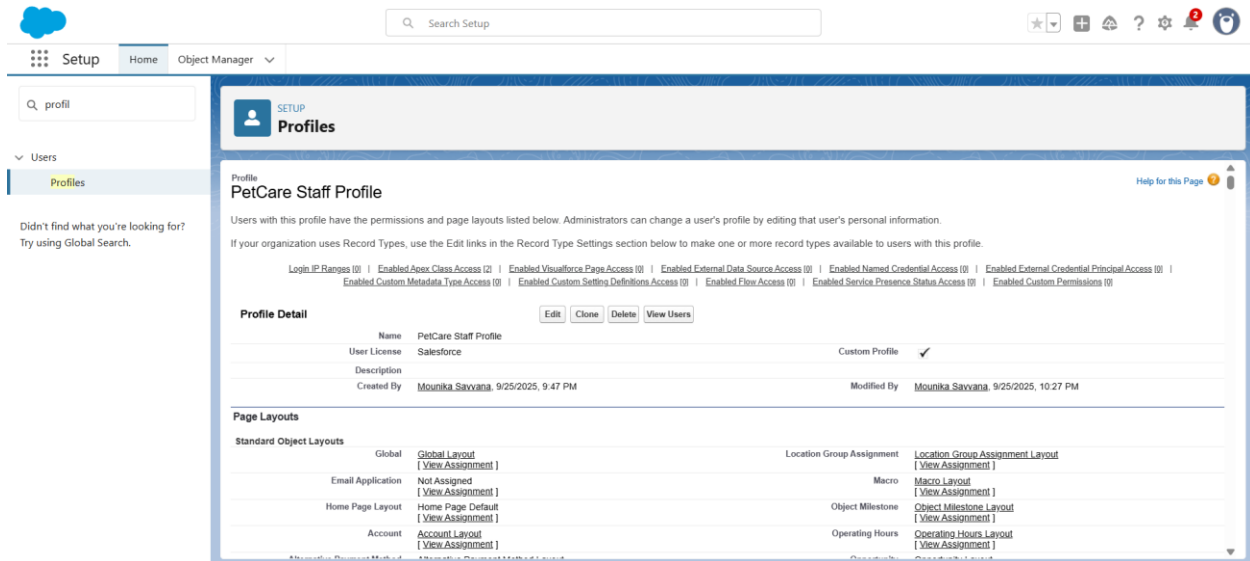- *David Staff* – assigned the Pet Shop Staff role with a Salesforce license.

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.
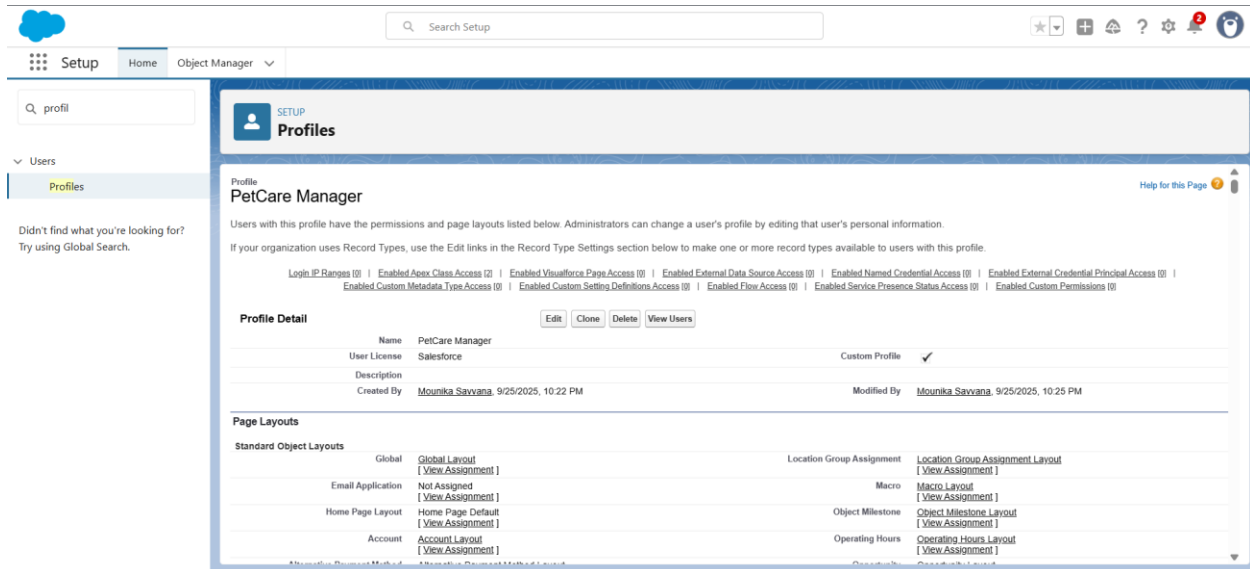

Roles

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.

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 Rules

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

Login Access Policies

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

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.