**CG Sales & Service : Salesforce Implementation for Retail & Supply Chain Optimization**

**Phase 2: Org Setup & Configuration**

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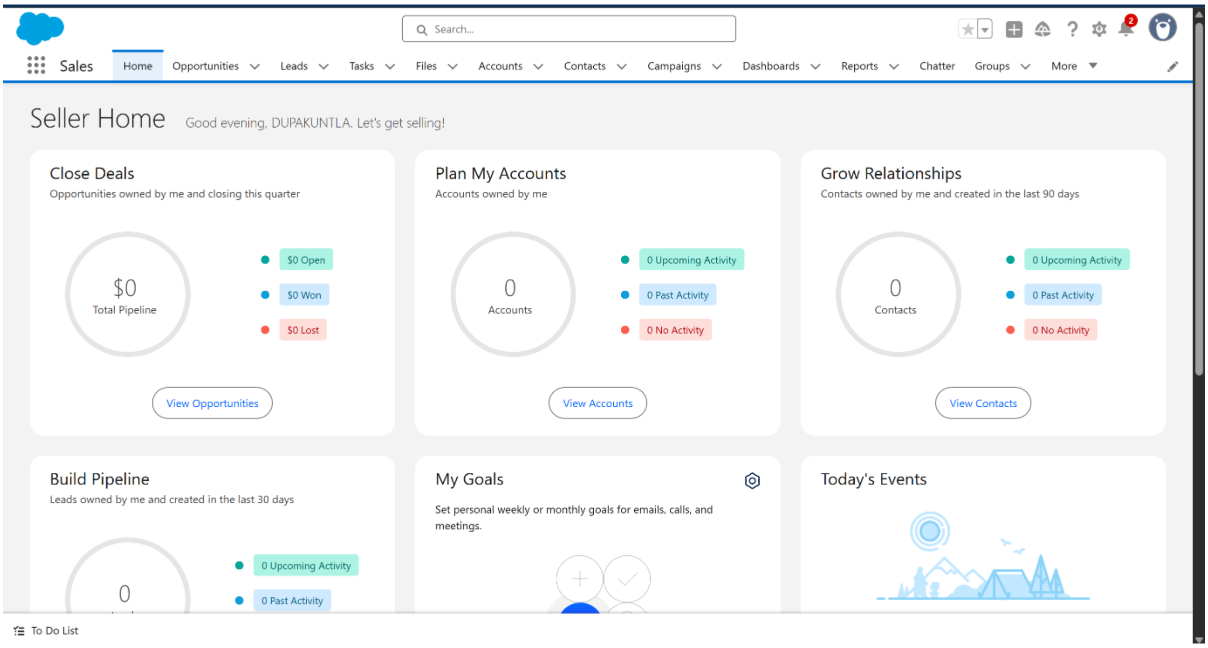
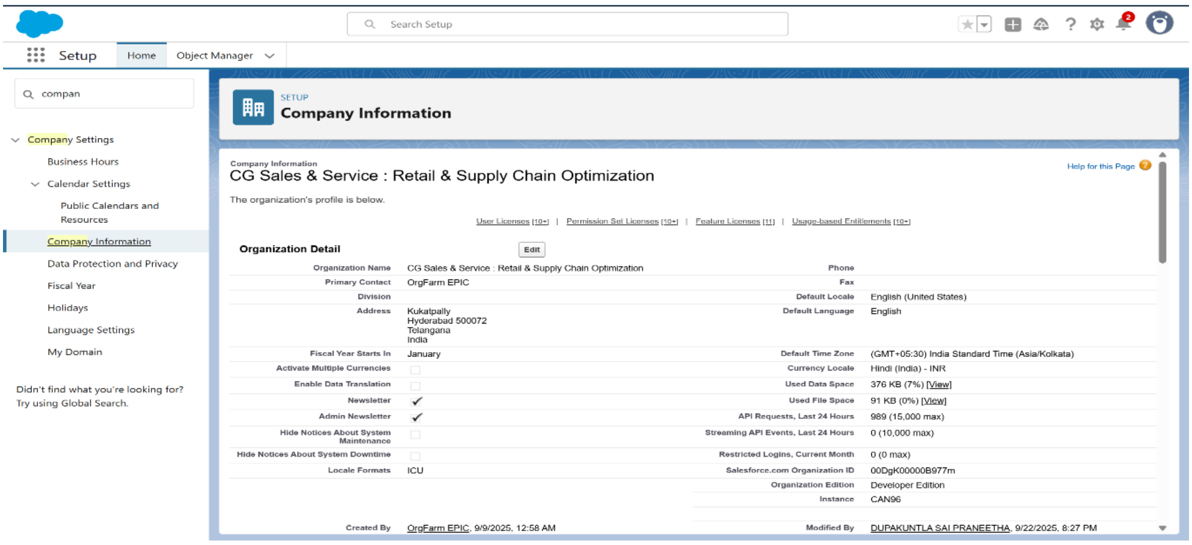
## 1. Salesforce Editions

- **Developer Edition** was used for the project setup and proof of concept.
- The chosen edition ensured access to essential capabilities such as **Accounts, Opportunities, Cases, Knowledge, Reports, Dashboards, and Automation Tools (Flows, Triggers)**.



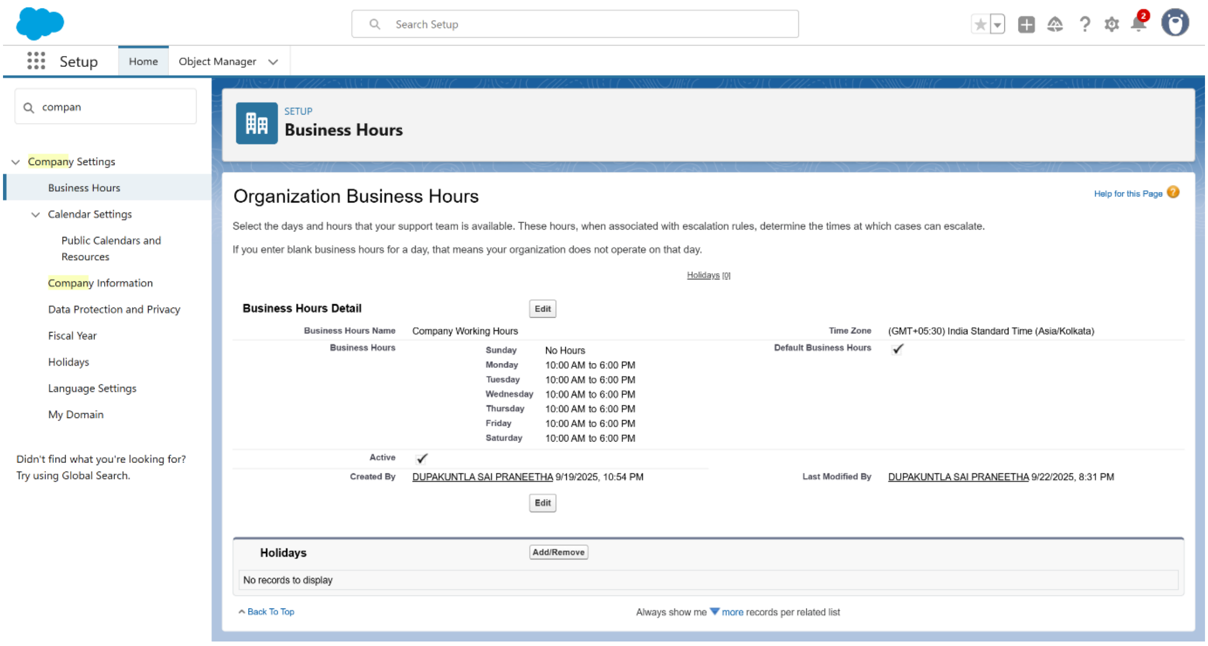

## 2. Company Profile Setup

- Defined the company profile for **CG Power and Industrial Solutions Ltd.**
- Configured **default locale, time zone, currency, and language** to match corporate standards.



### 3. Business Hours & Holidays

- Established **business hours** to match CG Power's operations: **Monday–Saturday, 10:00 AM – 6:00 PM (IST)**.
- Configured **company holidays** (national holidays, Diwali, and year-end closures).



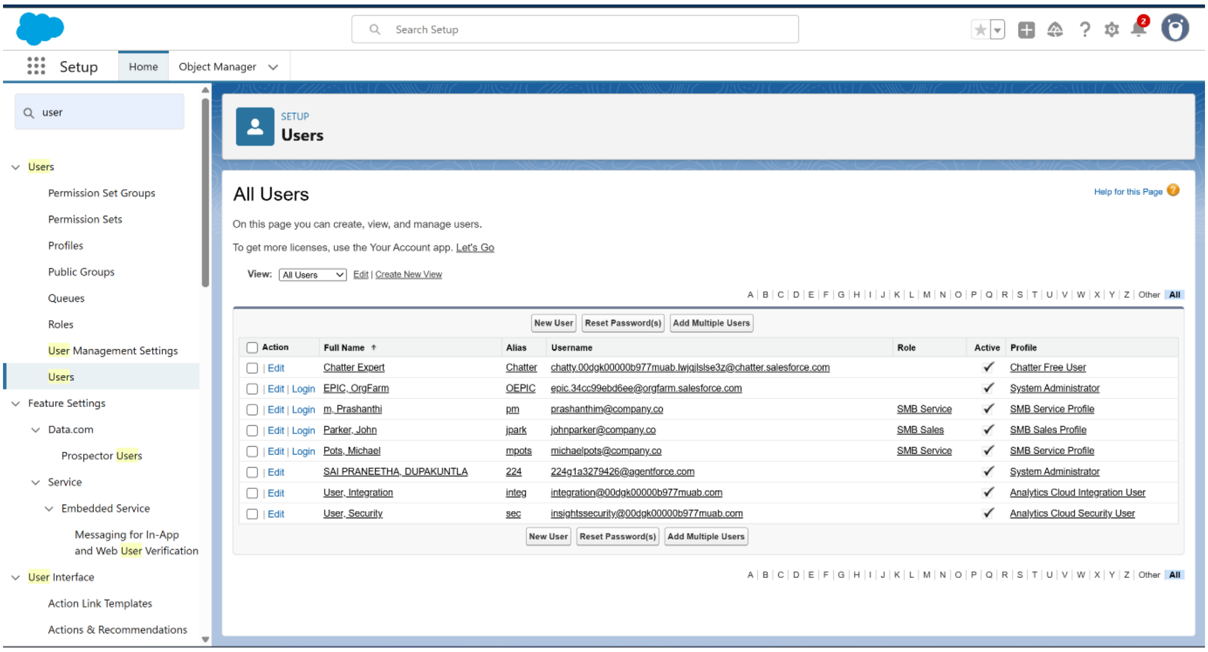

### 4.User Setup & Licenses

### User Setup & Licenses

- Created user accounts for:
    - Sales Executives
    - Service Agents
- Assigned Salesforce licenses based on job roles:
    - **Sales Cloud** → Sales Executives, Sales Managers

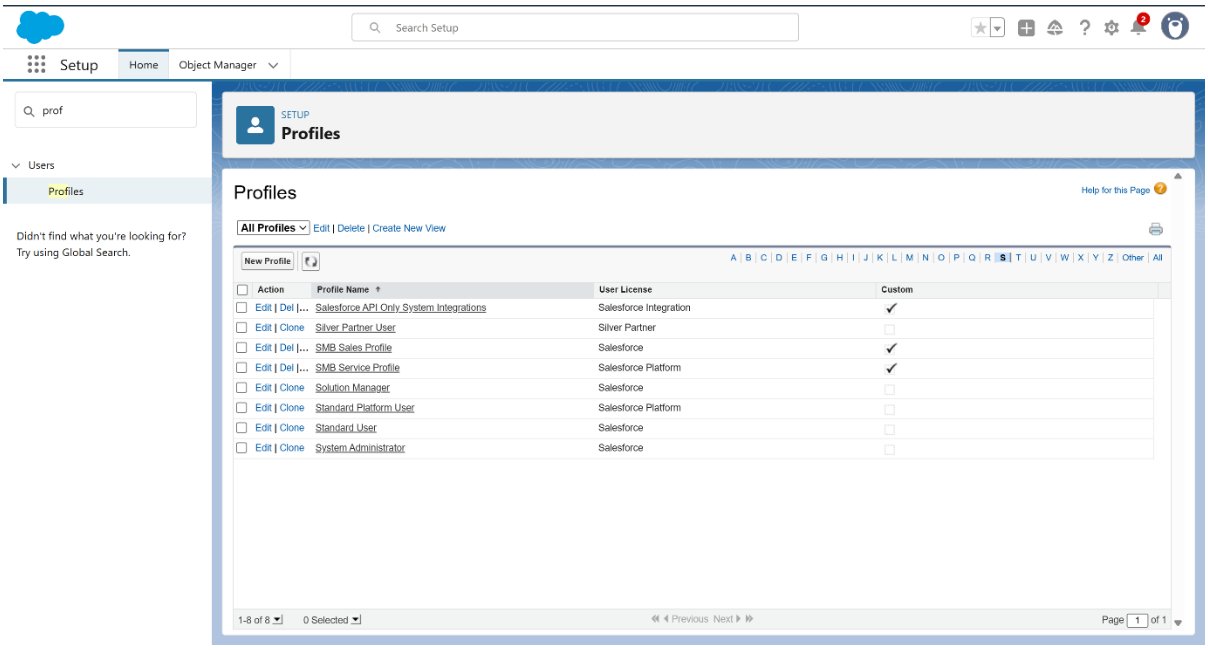
      **--** assigned to john parker
    - **Service Cloud** → Service Agents, Service Managers

      **--**assigned to prashanthi and michael
    - **Salesforce Platform** → Limited access users




## 5. Profiles

- Designed **custom profiles** to control object/field permissions.
    - **Sales Profile:** Access to Leads, Opportunities, Accounts, Products, and Reports.
    - **Service Profile:** Access to Cases, Knowledge Base, and Entitlements.
    - **Manager Profile:** Elevated permissions with visibility across teams.
- Restricted **administrative privileges** to System Admins only.

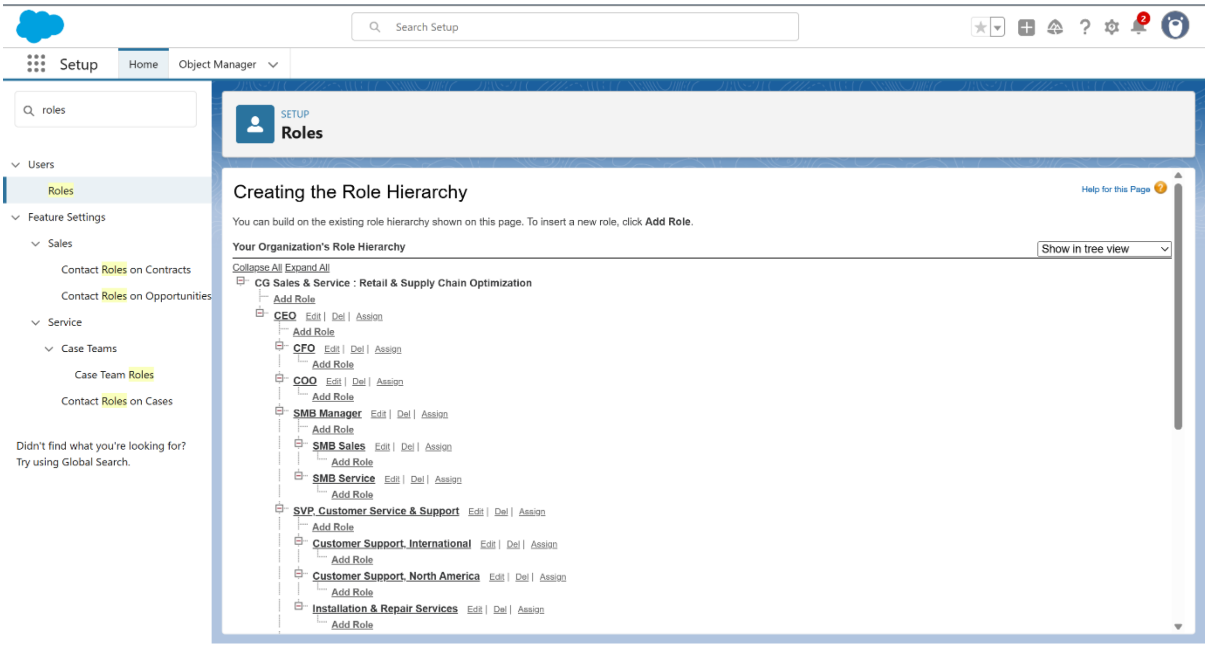


## 6. Roles – Hierarchy

The role hierarchy for CG Services has been kept simple to support SMB operations. At the top level, the **SMB Manager** oversees both the sales and service functions. Under the manager, two distinct roles have been defined:

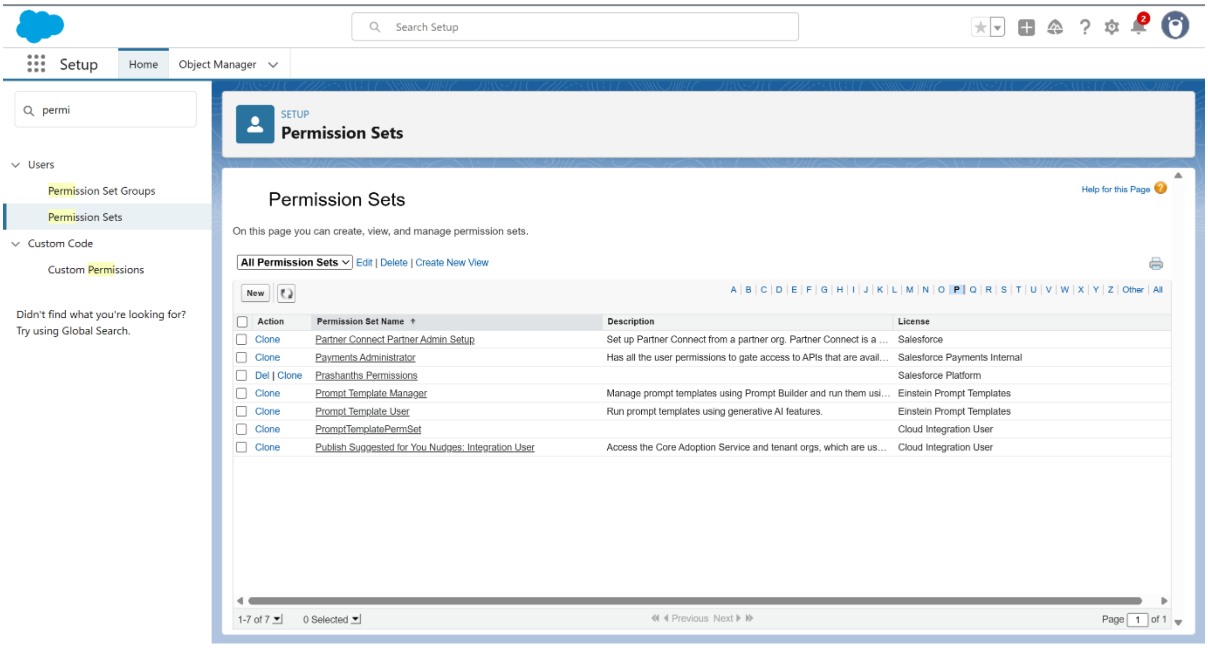
- **SMB Sales** – Responsible for managing leads, accounts, opportunities, and sales activities.
- **SMB Service** – Responsible for handling customer service requests, cases, and support operations.

This structure ensures that the **SMB Manager** has full visibility into both sales and service data, while individual teams focus only on their respective responsibilities.



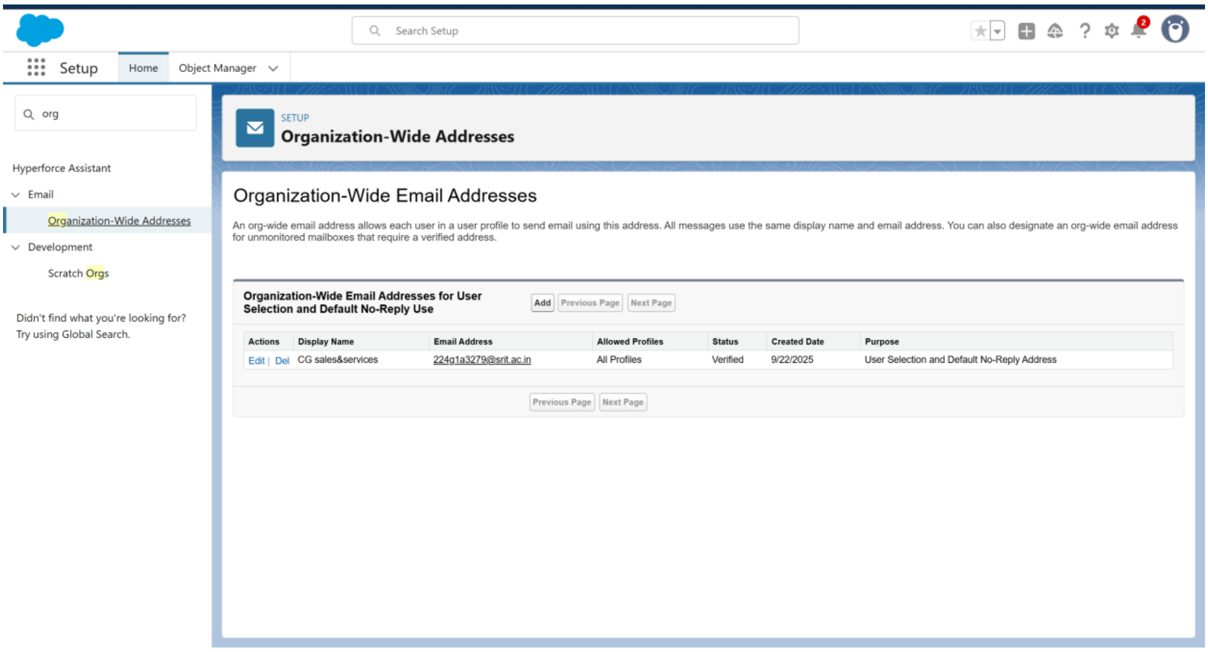

## 7. Permission Sets

- **SMB Manager** – Full access to Sales and Service objects; can view and manage team records; access to dashboards and reports.
- **SMB Sales** – Access to Leads, Accounts, Opportunities, and Campaigns; read-only access to Service objects; sales dashboards and reports.
- **SMB Service** – Access to Cases, Knowledge, and Service Contracts; read-only access to Sales objects; service dashboards and reports.




## 8. Organization-Wide Defaults (OWD)

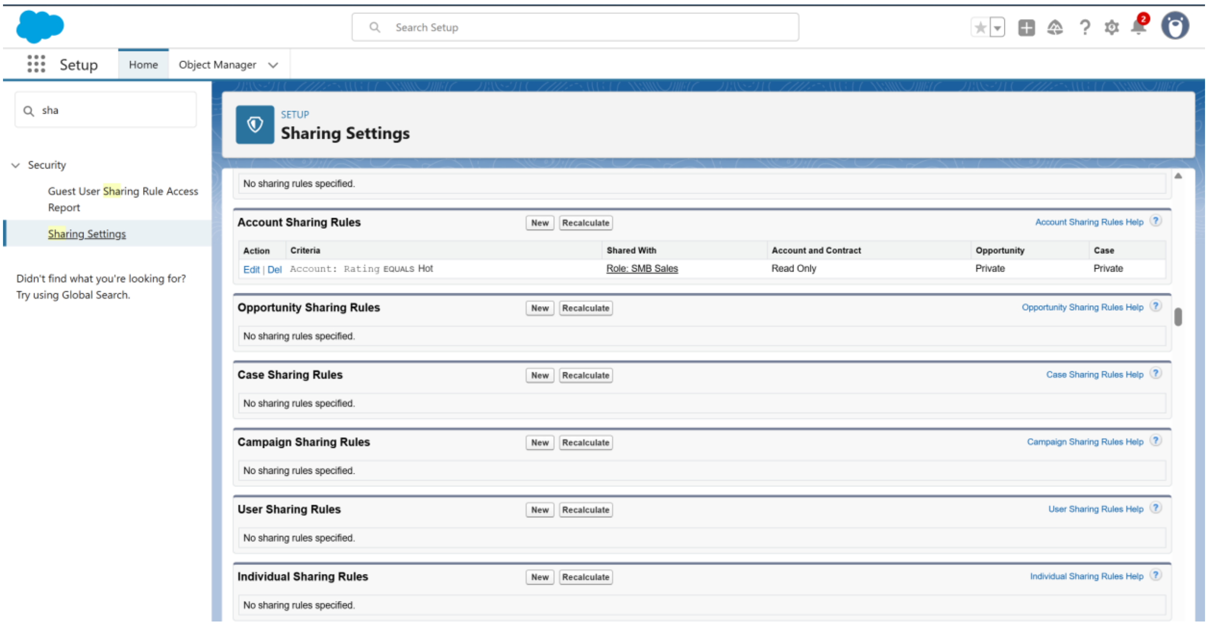
- Configured OWD to ensure data security and controlled access ,Organization-Wide Defaults (OWD) control record access in Salesforce, keeping Accounts, Opportunities, and Leads private, allowing Cases to be shared with teams, and making Knowledge Articles read-only, ensuring both data security and collaboration.




## 10. Sharing Rules

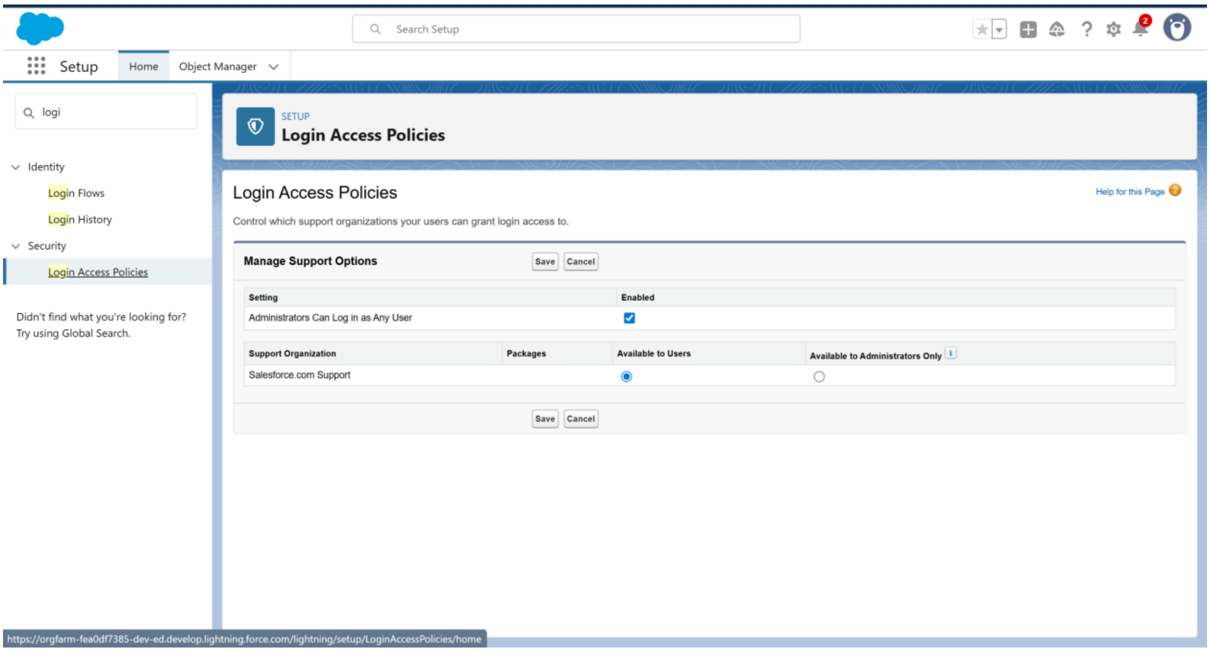
- **Sharing rules extend access beyond default settings for the SMB team.**
- **Opportunities created by SMB Sales are automatically shared with the SMB Manager.**

- **Service cases handled by SMB Service are accessible to the SMB Manager.**
- **Ensures the SMB Manager can monitor and manage team activities effectively.**



## 11. Login Access Policies

- Login access policies control when and where users can log in.
- Login hours limit access to certain times.
- IP restrictions allow access only from trusted networks.
- Helps keep data safe while allowing secure access.



12. Developer Org Setup

- **Developer Org was set up to build and test Salesforce configurations.**
- **Custom objects, fields, and automation (workflows and flows) were created.**
- **Test data was added to simulate real business scenarios.**
- **Developer Console and VS Code were used for coding and debugging.**
- **Ensures safe testing before deploying changes to production.**