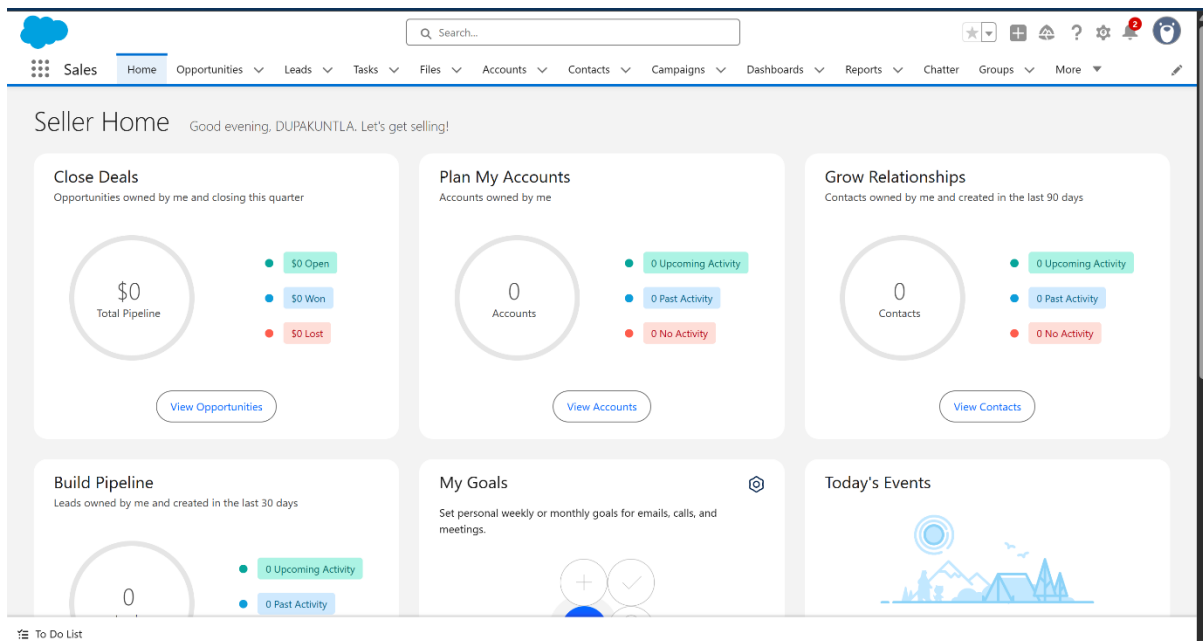


CG Sales & Service : Salesforce Implementation for Retail & Supply Chain Optimization

Phase 2: Org Setup & Configuration

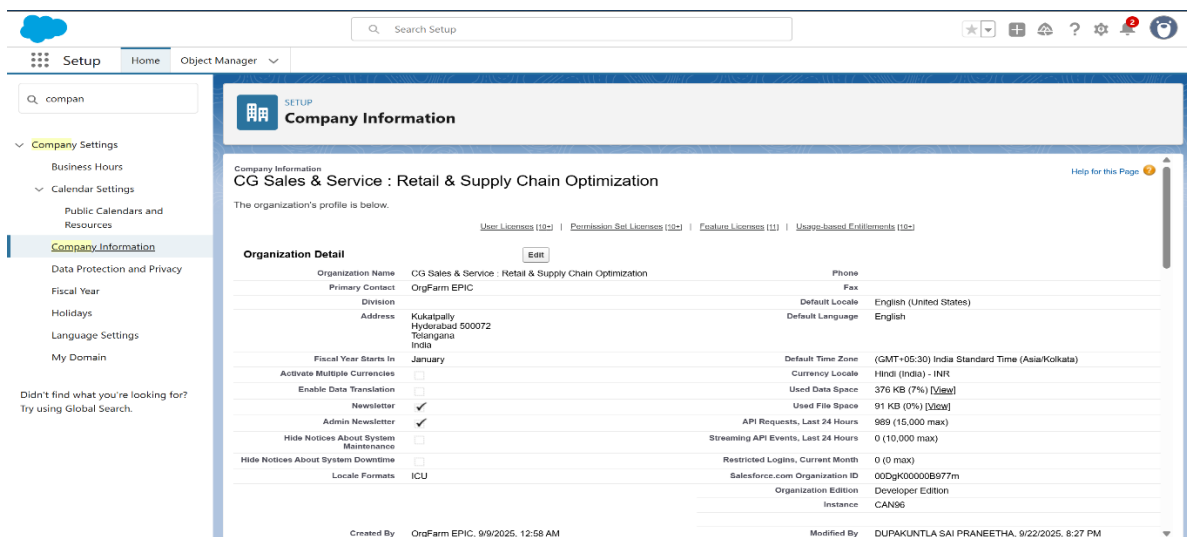
1. Salesforce Editions

- **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).

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Setup, Home, Object Manager, and a search bar. Under 'Company Settings', 'Business Hours' is selected. The main content area is titled 'Organization Business Hours' and includes a description: 'Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate. If you enter blank business hours for a day, that means your organization does not operate on that day.' Below this is the 'Business Hours Detail' section, which includes a table for 'Company Working Hours' and a 'Time Zone' dropdown set to '(GMT+05:30) India Standard Time (Asia/Kolkata)'. The table shows business hours for Sunday through Saturday, all set to '10:00 AM to 6:00 PM'. The 'Default Business Hours' checkbox is checked. Below the table, the 'Active' checkbox is checked, and the 'Created By' field shows 'DUPAKUNTALA SAI PRANEETHA' with a timestamp of '9/19/2025, 10:54 PM'. The 'Last Modified By' field also shows 'DUPAKUNTALA SAI PRANEETHA' with a timestamp of '9/22/2025, 8:31 PM'. At the bottom, there is a 'Holidays' section with an 'Add/Remove' button and a message 'No records to display'. A 'Back To Top' link is at the bottom left, and a note 'Always show me more records per related list' is at the bottom right.

Business Hours Name	Company Working Hours	Time Zone
Business Hours	Sunday: No Hours	(GMT+05:30) India Standard Time (Asia/Kolkata)
	Monday: 10:00 AM to 6:00 PM	Default Business Hours
	Tuesday: 10:00 AM to 6:00 PM	✓
	Wednesday: 10:00 AM to 6:00 PM	
	Thursday: 10:00 AM to 6:00 PM	
	Friday: 10:00 AM to 6:00 PM	
	Saturday: 10:00 AM to 6:00 PM	

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

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation options: Setup, Home, Object Manager, and a search bar. The main content area is titled 'Users' and 'All Users'. It includes a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several users, including Chatter Expert, EPIC_OrgFarm, m_Prasanthi, Parker_John, Pote_Michael, SAI PRANEETHA DUPAKUNTLA, User_Integration, and User_Security. The bottom of the page shows pagination information: 1-8 of 8, 0 Selected, and Page 1 of 1.

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.

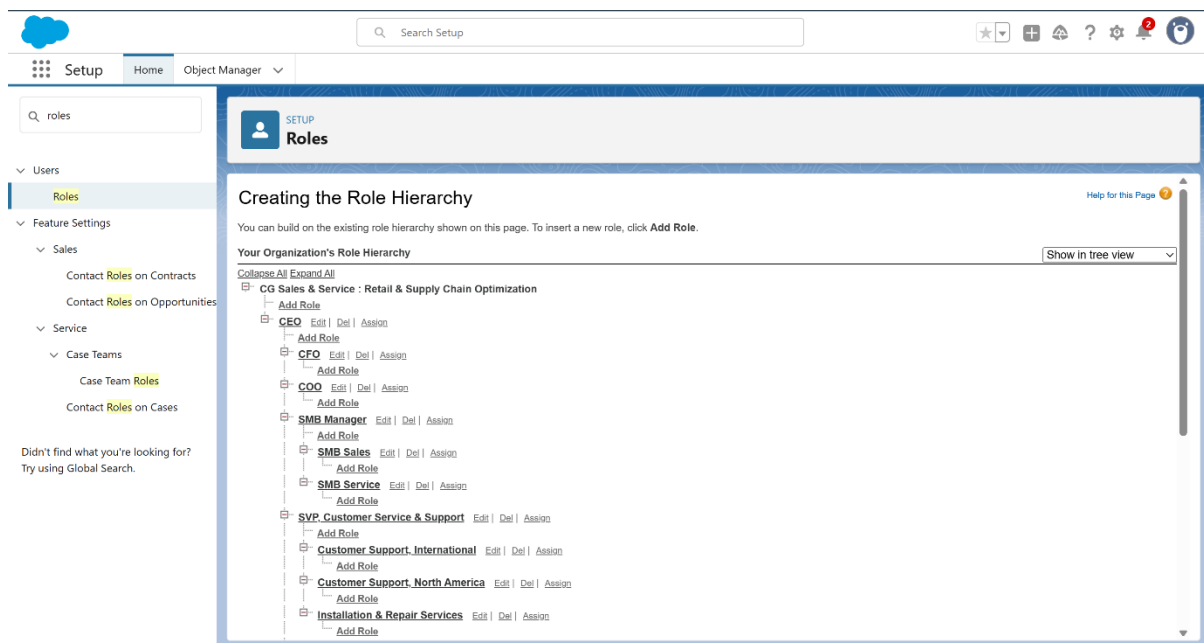
The screenshot shows the Salesforce Setup interface for Profiles. The left sidebar contains navigation options: Setup, Home, Object Manager, and a search bar. The main content area is titled 'Profiles' and 'All Profiles'. It includes a table of profiles with columns for Action, Profile Name, User License, and Custom. The table lists several profiles, including Salesforce API Only System Integrations, Silver Partner User, SMB Sales Profile, SMB Service Profile, Solution Manager, Standard Platform User, Standard User, and System Administrator. The bottom of the page shows pagination information: 1-8 of 8, 0 Selected, and Page 1 of 1.

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.

Permission Sets

On this page you can create, view, and manage permission sets.

[All Permission Sets](#) | [Edit](#) | [Delete](#) | [Create New View](#)

Action	Permission Set Name	Description	License
<input type="checkbox"/> Clone	Partner Connect Partner Admin Setup	Set up Partner Connect from a partner org. Partner Connect is a ...	Salesforce
<input type="checkbox"/> Clone	Payments Administrator	Has all the user permissions to gate access to APIs that are avail...	Salesforce Payments Internal
<input type="checkbox"/> Del Clone	Prashantha's Permissions		Salesforce Platform
<input type="checkbox"/> Clone	Prompt Template Manager	Manage prompt templates using Prompt Builder and run them usi...	Einstein Prompt Templates
<input type="checkbox"/> Clone	Prompt Template User	Run prompt templates using generative AI features.	Einstein Prompt Templates
<input type="checkbox"/> Clone	PromptTemplatePermSet		Cloud Integration User
<input type="checkbox"/> Clone	Publish Suggested for You Nudges: Integration User	Access the Core Adoption Service and tenant orgs, which are us...	Cloud Integration User

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.

Organization-Wide Addresses

Organization-Wide Email Addresses

An org-wide email address allows each user in a user profile to send email using this address. All messages use the same display name and email address. You can also designate an org-wide email address for unmonitored mailboxes that require a verified address.

Organization-Wide Email Addresses for User Selection and Default No-Reply Use

Actions	Display Name	Email Address	Allowed Profiles	Status	Created Date	Purpose
Edit Del	CG sales&services	224g1a3279@sril.ac.in	All Profiles	Verified	9/22/2025	User Selection and Default No-Reply Address

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.

The screenshot shows the Salesforce Setup interface with the 'Sharing Settings' page selected. The left sidebar contains a search bar with 'sha' and a navigation menu with 'Security' expanded, showing 'Guest User Sharing Rule Access Report' and 'Sharing Settings'. The main content area is titled 'Sharing Settings' and displays a summary of sharing rules. It includes sections for 'Account Sharing Rules', 'Opportunity Sharing Rules', 'Case Sharing Rules', 'Campaign Sharing Rules', 'User Sharing Rules', and 'Individual Sharing Rules'. Each section has a 'New' button, a 'Recalculate' button, and a 'Help' link. The 'Account Sharing Rules' section shows a table with columns: Action, Criteria, Shared With, Account and Contract, Opportunity, and Case. The table contains one row with the following data: Action: Edit | Del, Criteria: Account: Rating EQUALS Hot, Shared With: Role: SMB Sales, Account and Contract: Read Only, Opportunity: Private, Case: Private.

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.

The screenshot shows the Salesforce Setup interface with the 'Login Access Policies' page selected. The left sidebar contains a search bar with 'logi' and a navigation menu with 'Identity' expanded, showing 'Login Flows' and 'Login History', and 'Security' expanded, showing 'Login Access Policies'. The main content area is titled 'Login Access Policies' and displays a summary of login access policies. It includes a 'Manage Support Options' section with a 'Save' button and a 'Cancel' button. Below this is a table with columns: Setting, Packages, Available to Users, and Available to Administrators Only. The table contains one row with the following data: Setting: Administrators Can Log in as Any User, Packages: Enabled, Available to Users: [checked], Available to Administrators Only: [checked].

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.

The screenshot displays the Salesforce Developer Console interface. At the top, the navigation bar includes the 'Crompton Greaves' logo, a search bar, and various utility icons. Below this, the main navigation menu shows 'CG SMB Sales Clou...' and several tabs: 'Home', 'Accounts', 'Contacts', 'Opportunities', 'Cases', 'Leads', 'Service Request Forms' (which is the active tab), 'Transactions', 'Transaction Line Items', and 'Tasks'. The 'Service Request Forms' section is titled 'Service Request Forms' and 'Recently Viewed'. It shows a list of 4 items, updated a few seconds ago. The list contains four entries, each with a checkbox, a number, and a label: 1. SRF-005, 2. SRF-003, 3. SRF-001, and 4. SRF-002. Each entry has a dropdown arrow on the right. Below the list, there is a large empty area. At the bottom of the screen, the URL is visible: https://orgfam-fea0df7385-dev-ed.develop.lightning.force.com/lightning/o/Service_Request_Form__c/home.