

# Salesforce Project Implementation Phases with Concepts (Admin + Developer)

**Project Title:** Manufacturing After-Sales & Service CRM

## Phase 2: Problem Understanding & Industry Analysis

### 1. Developer Org Setup:

- Signed up for a new **Salesforce Developer Org** dedicated to the project.
- Configured **Company Profile**:
  - Organization Name: [Project Org Name]
  - Default Locale: English (India)
  - Default Time Zone: GMT+05:30
  - Currency: INR
- Defined **Business Hours**: Mon–Sat, 9:00 AM – 6:00 PM (used later for SLA monitoring).
- Configured **Fiscal Year**: Standard fiscal year (Jan–Dec).

Company Information

Satya Enterprises

The organization's profile is below.

[User Licenses \(10\)](#) | [Permission Set Licenses \(10\)](#) | [Feature Licenses \(1\)](#) | [Usage-based Entitlements \(10\)](#)

Organization Detail

Organization Name

Satya Enterprises

Primary Contact

Puneet Verma

Division

Address

IN

Fiscal Year Starts In

January

Activate Multiple Currencies

☐

Enable Data Translation

☐

Admin Newsletter

☒

Hide Notices About System Maintenance

☐

Hide Notices About System Downtime

☐

Locale Formats

ICU

Phone

Fax

Default Locale

English (India)

Default Language

English

Default Time Zone

(GMT+05:30) India Standard Time (Asia/Kolkata)

Currency Locale

English (India) - INR

Used Data Space

352 KB (7%) [View](#)

Used File Space

150 KB (1%) [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

00cdM00000d9SR

Organization Edition

Developer Edition

Instance

IND136

Created By

Puneet Verma 22/09/2025, 12:36 pm

Modified By

Puneet Verma 22/09/2025, 11:01 pm

Edit

Deactivate Org

Organization Business Hours

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.

Business Hours Edit

Step 1. Business Hours Name

Business Hours Name

Default

Active

☒

Use these business hours as the default

☒

Step 2. Time Zone

Time Zone

(GMT+05:30) India Standard Time (Asia/Kolkata)

Step 3. Business Hours

Sunday	<input type="text" value="HH:MM"/>	to	<input type="text" value="HH:MM"/>	<input type="checkbox"/>	24 hours
Monday	<input type="text" value="9:00 am"/>	to	<input type="text" value="6:00 pm"/>	<input type="checkbox"/>	24 hours
Tuesday	<input type="text" value="9:00 am"/>	to	<input type="text" value="6:00 pm"/>	<input type="checkbox"/>	24 hours
Wednesday	<input type="text" value="9:00 am"/>	to	<input type="text" value="6:00 pm"/>	<input type="checkbox"/>	24 hours
Thursday	<input type="text" value="9:00 am"/>	to	<input type="text" value="6:00 pm"/>	<input type="checkbox"/>	24 hours
Friday	<input type="text" value="9:00 am"/>	to	<input type="text" value="6:00 pm"/>	<input type="checkbox"/>	24 hours
Saturday	<input type="text" value="9:00 am"/>	to	<input type="text" value="6:00 pm"/>	<input type="checkbox"/>	24 hours

### Setup Organization Fiscal Year Edit: Satya Enterprises

To specify the fiscal year type for your organization, choose one of the options below.

Standard Fiscal Year

Custom Fiscal Year

Fiscal Year Information

Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example, if your fiscal year starts in April 2025 and ends in March 2026, your Fiscal Year setting can be either 2025 or 2026.

Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing this change.

Change Fiscal Year Period

Name

Satya Enterprises

Fiscal Year Start Month

January

Fiscal Year is Based On

☒ The ending month

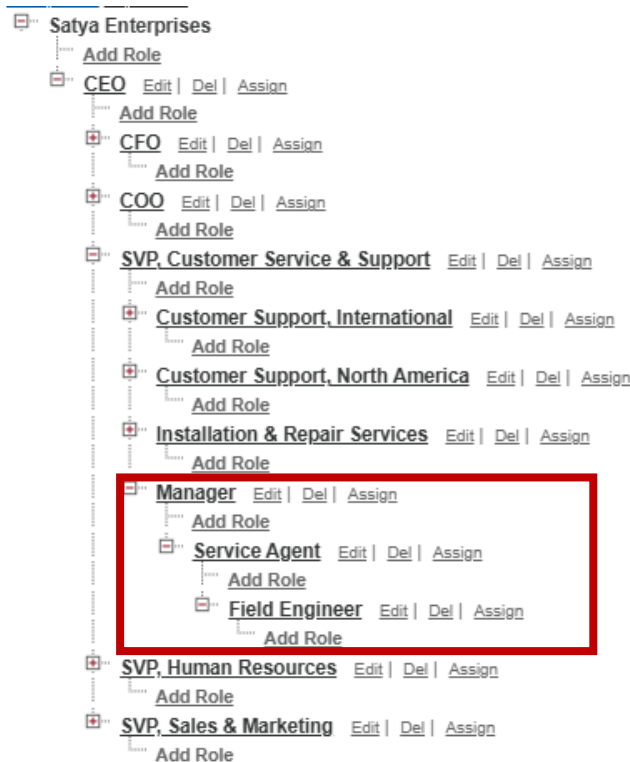
☐ The starting month

Save

Cancel

## 2. Role Hierarchy:

- Designed a simplified internal role hierarchy to control record visibility:
  - Manager** → top-level role
  - Service Agent** → reports to Manager
  - Field Engineer** → reports to Service Agent
- Customer role was not created**, since customers are external users managed via **Experience Cloud licenses** and do not participate in the internal role hierarchy.



## 3. Profiles:

Created custom profiles by cloning the **Standard User** profile:

- Customer Profile**
  - Assigned to external users (Customer Community Login license).
  - Read-only access to their own Cases and Products (via Sharing Sets later).

Profile Help for this Page

### Customer 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 [0] | 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 Profile
User License	Customer Community Login
Description	
Created By	Puneet Verma, 22/09/2025, 10:49 pm
Modified By	Puneet Verma, 22/09/2025, 11:13 pm

- **Service Agent Profile**

- Internal user.
- Read/Write access to Cases, related Products, and Feedback.
- Cannot view Engineer management objects directly.

Profile

## Service Agent Profile

[Help for this Page](#)

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](#) [0] | [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	Service Agent Profile		
User License	Salesforce Platform	Custom Profile	✓
Description			
Created By	<a href="#">Puneet Verma</a> , 22/09/2025, 10:55 pm	Modified By	<a href="#">Puneet Verma</a> , 22/09/2025, 10:55 pm

- **Field Engineer Profile**

- Internal user.
- Access to assigned Cases.
- Can update case status and service completion notes.

Profile

## Field Engineer Profile

[Help for this Page](#)

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](#) [0] | [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	Field Engineer Profile		
User License	Salesforce Platform	Custom Profile	✓
Description			
Created By	<a href="#">Puneet Verma</a> , 22/09/2025, 10:55 pm	Modified By	<a href="#">Puneet Verma</a> , 22/09/2025, 10:55 pm

- **Manager Profile**

- Internal user.
- Full access to Cases, Products, Feedback.
- Reporting and dashboard visibility enabled.

Profile

## Manager Profile

[Help for this Page](#)

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](#) [0] | [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	Manager Profile		
User License	Salesforce	Custom Profile	✓
Description			
Created By	<a href="#">Puneet Verma</a> , 22/09/2025, 4:13 pm	Modified By	<a href="#">Puneet Verma</a> , 22/09/2025, 4:13 pm

## 4. User Accounts

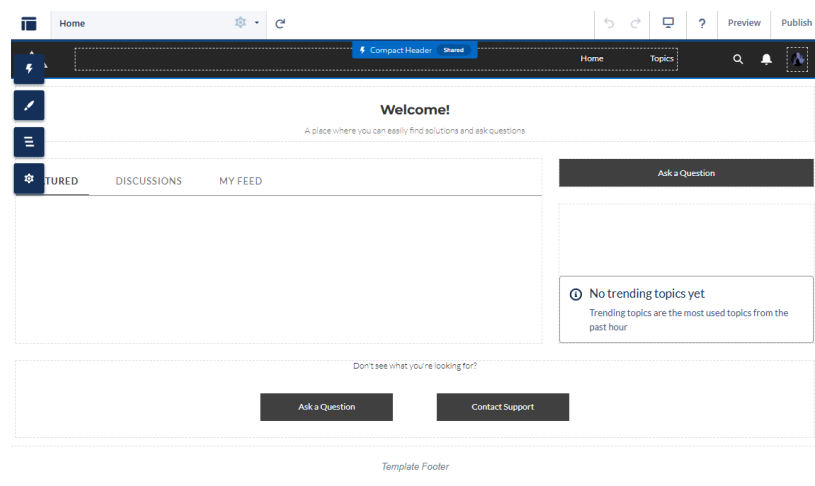
Created the following users with available licenses:

- **Manager User** – Salesforce License, Manager Profile.
- **Service Agent User** – Salesforce Platform License, Service Agent Profile.
- **Field Engineer User** – Salesforce Platform License, Field Engineer Profile.
- **Customer User** – Customer Community Login License, Customer Profile.
  - Created by enabling a Contact as a Community user after setting up Experience Cloud.
  - Linked to a published Experience Cloud site.

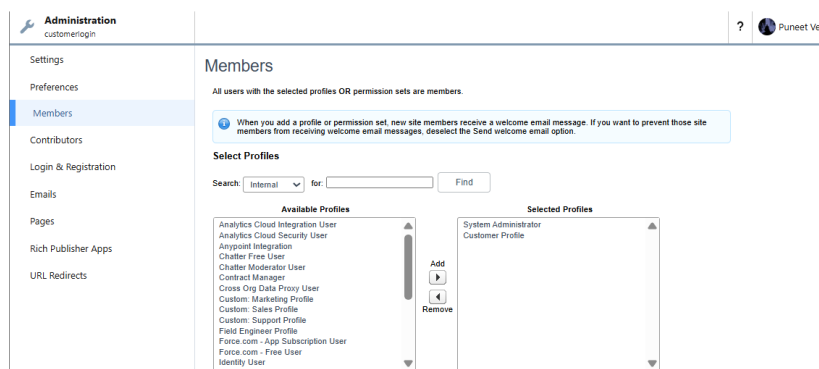
<input type="checkbox"/>	<a href="#">Edit</a>	<a href="#">TestUser_Customer</a>	<a href="#">ctest</a>	<a href="#">customertestuser@projectforce.com</a>	<input checked="" type="checkbox"/>	<a href="#">Customer Profile</a>
<input type="checkbox"/>	<a href="#">Edit</a>	<a href="#">TestUser_FieldEngineer</a>	<a href="#">fctest</a>	<a href="#">fieldengineertestuser@agentforce.com</a>	<input checked="" type="checkbox"/>	<a href="#">Field Engineer Profile</a>
<input type="checkbox"/>	<a href="#">Edit</a>	<a href="#">TestUser_Manager</a>	<a href="#">mctest</a>	<a href="#">managertestuser@agentforce.com</a>	<input checked="" type="checkbox"/>	<a href="#">Manager Profile</a>
<input type="checkbox"/>	<a href="#">Edit</a>	<a href="#">TestUser_ServiceAgent</a>	<a href="#">stest</a>	<a href="#">serviceagenttestuser@agentforce.com</a>	<input checked="" type="checkbox"/>	<a href="#">Service Agent Profile</a>

## 5. Experience Cloud Setup

- Enabled **Digital Experiences (Experience Cloud)**.
- Created and published a **minimal Customer Portal site** using the out-of-the-box “Customer Service” template.



- Added the **Customer Profile** to the site under **Workspaces → Administration → Members**.



- Created an Account and Contact, then enabled the Contact as a **Customer Community Login user**.
- Verified that the customer user can log in to the site.

## 6. Org-Wide Defaults (OWD)

Configured record-level security to enforce internal vs. external visibility:

- **Cases:**
  - Internal Access: Public Read/Write
  - External Access: Private (customers can see only their own cases)
- **Products:**
  - Internal Access: Public Read/Write
  - External Access: Read Only

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	<input checked="" type="checkbox"/>
Account and Contract	Public Read/Write	Private	<input checked="" type="checkbox"/>
Order	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Contact	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Asset	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Opportunity	Public Read/Write	Private	<input checked="" type="checkbox"/>
<b>Case</b>	<b>Public Read/Write</b>	<b>Private</b>	<input checked="" type="checkbox"/>
Campaign	Public Full Access	Private	<input checked="" type="checkbox"/>
Campaign Member	Controlled by Campaign	Controlled by Campaign	<input checked="" type="checkbox"/>
User	Public Read Only	Private	<input checked="" type="checkbox"/>
Individual	Public Read/Write	Private	<input checked="" type="checkbox"/>
Voice Call	Private	Private	<input checked="" type="checkbox"/>
Activity	Private	Private	<input checked="" type="checkbox"/>
Calendar	Hide Details and Add Events	Hide Details and Add Events	<input checked="" type="checkbox"/>
Price Book	Use	Use	<input checked="" type="checkbox"/>
<b>Product</b>	<b>Public Read Only</b>	<b>Private</b>	<input checked="" type="checkbox"/>

## 7. Key Decisions & Notes

- Chose **Customer Community Login license** for customers to support external, login-based access.
- Customers are excluded from internal role hierarchy.
- OWD configured with **Private external access** to ensure portal users only see their own records.
- Profiles were created with **minimal object access** for now; they will be updated incrementally in later phases as new objects (Dispatch, Engineer, Feedback) are introduced.