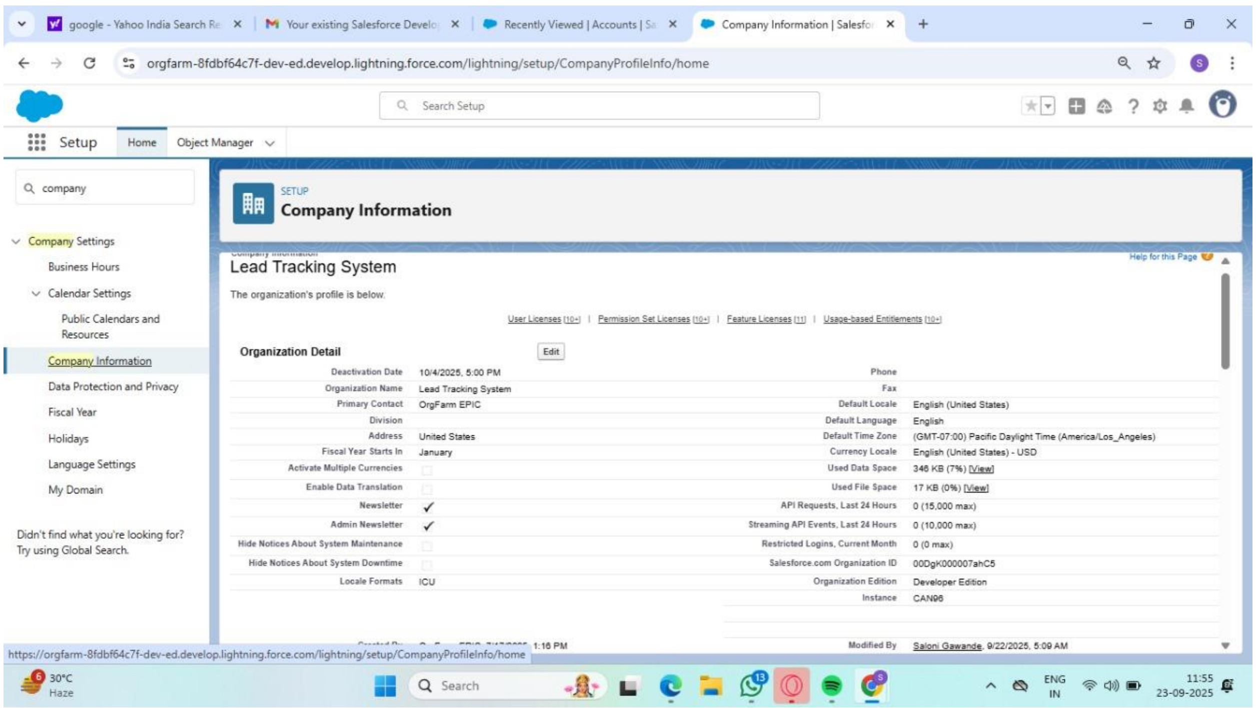
LEAD TRACKING SYSTEM

Phase 2: System Design & Architecture

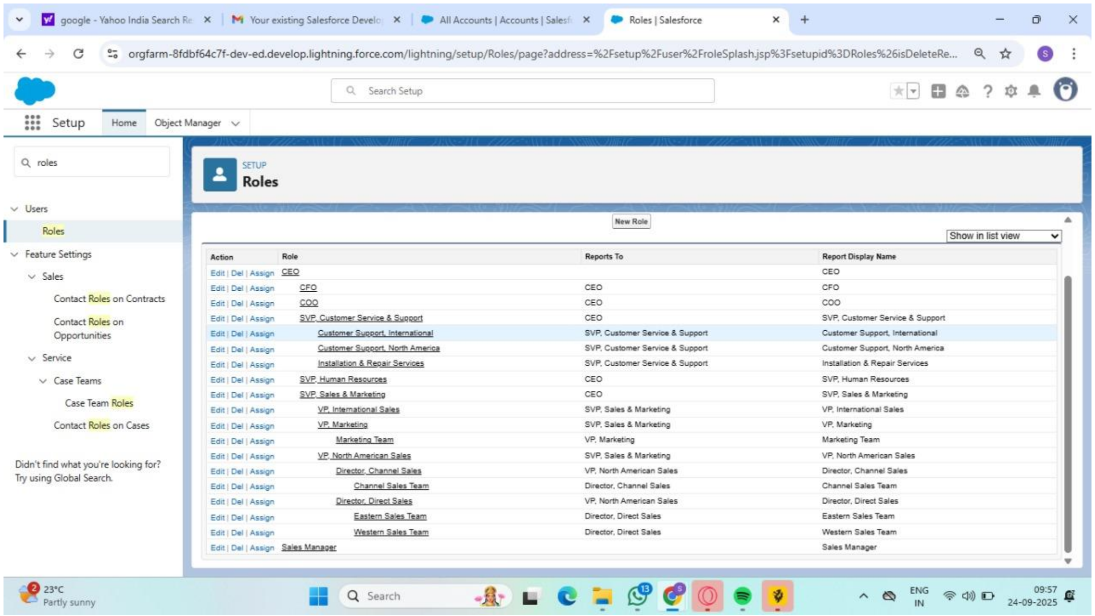
Step 1: Define Org Structure

Go to Setup (gear icon → Setup).

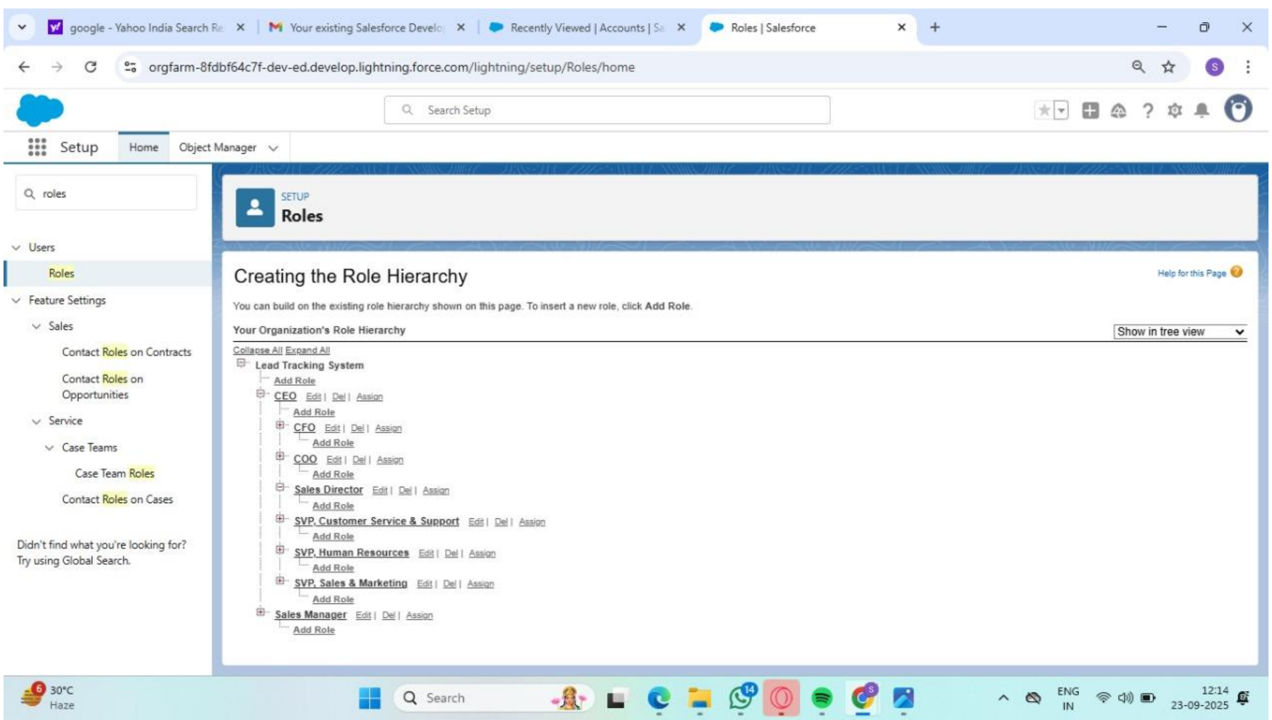
Under Company Settings → Company Information, review org limits (users, storage).



Under Users → Roles, define roles: Sales Manager



Set hierarchy → Sales Manager (top)



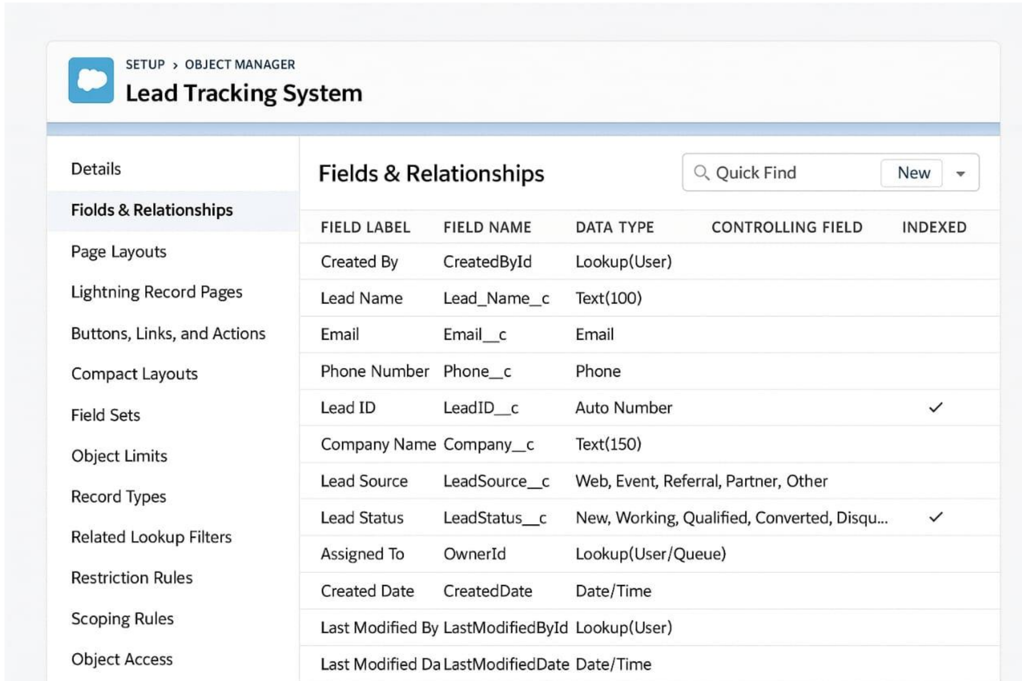
Step 2: Design Data Model (Objects & Fields)

From Setup, search Object Manager.

Click Create → Custom Object.

Name: Lead

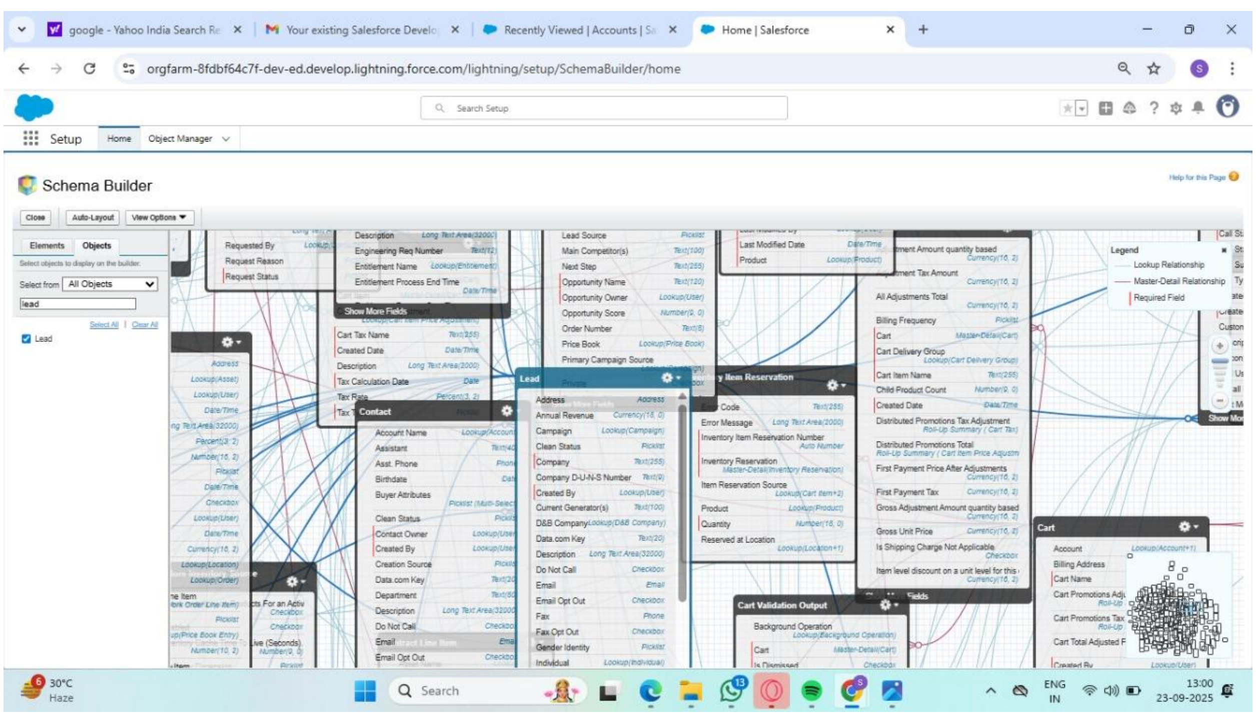
Add fields:



Step 3: Establish Relationships

Validate relationships in Schema Builder:

Setup → Schema Builder → drag objects and check connections.



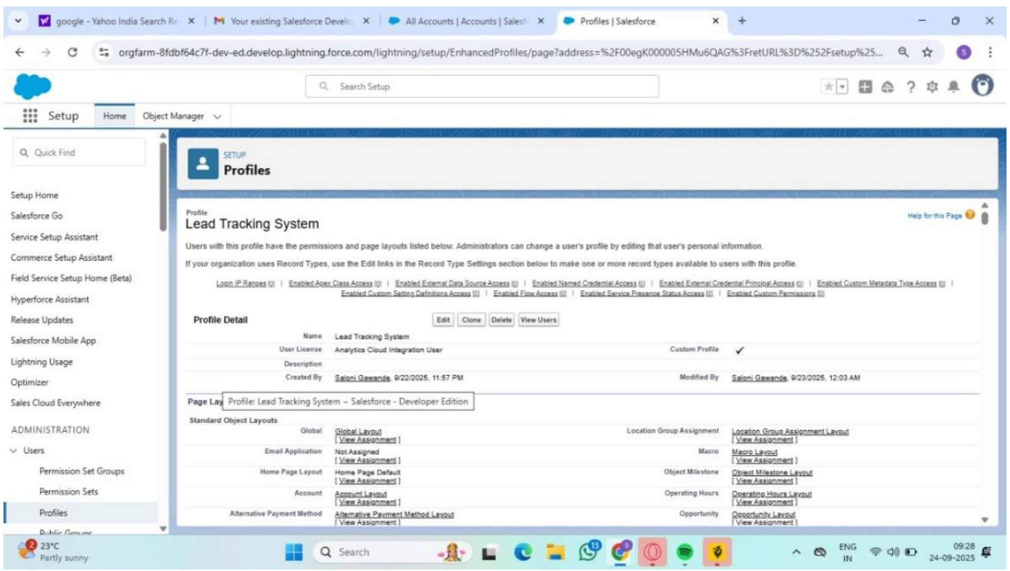
Step 4: Define Page Layouts & Record Types

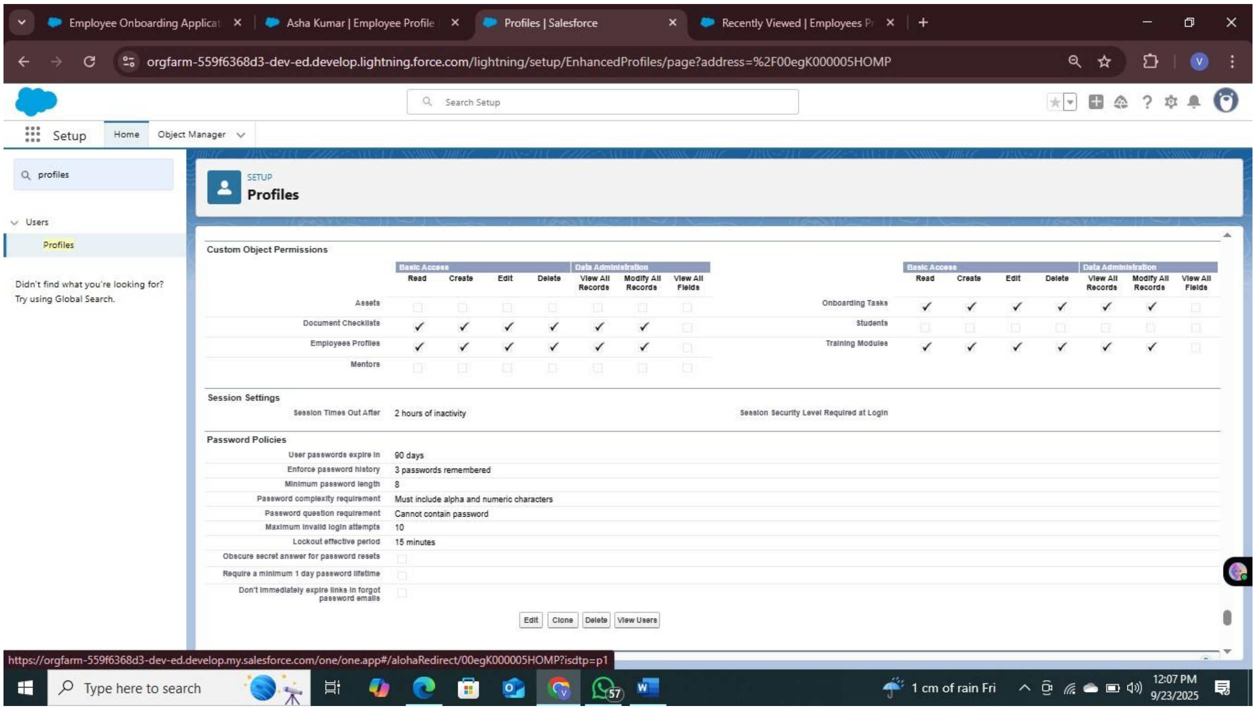
Go to Object Manager → Lead Profile → Page Layouts.

Step 5: Role-Based Access & Profiles

Go to Setup → Profiles.

HR Manager → Full access to all objects.





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Onboarding Tasks
Students
Training Modules
Session Settings
Session Times Out After
2 hours of inactivity
Session Security Level Required at Login
Password Policies
User passwords expire in
90 days
Enforce password history
3 passwords remembered
Minimum password length
8
Password complexity requirement
Must include alpha and numeric characters
Password question requirement
Cannot contain password
Maximum invalid login attempts
10
Lockout effective period
15 minutes
Obscure secret answer for password resets
Require a minimum 1 day password lifetime
Don't immediately expire links in forgot password emails
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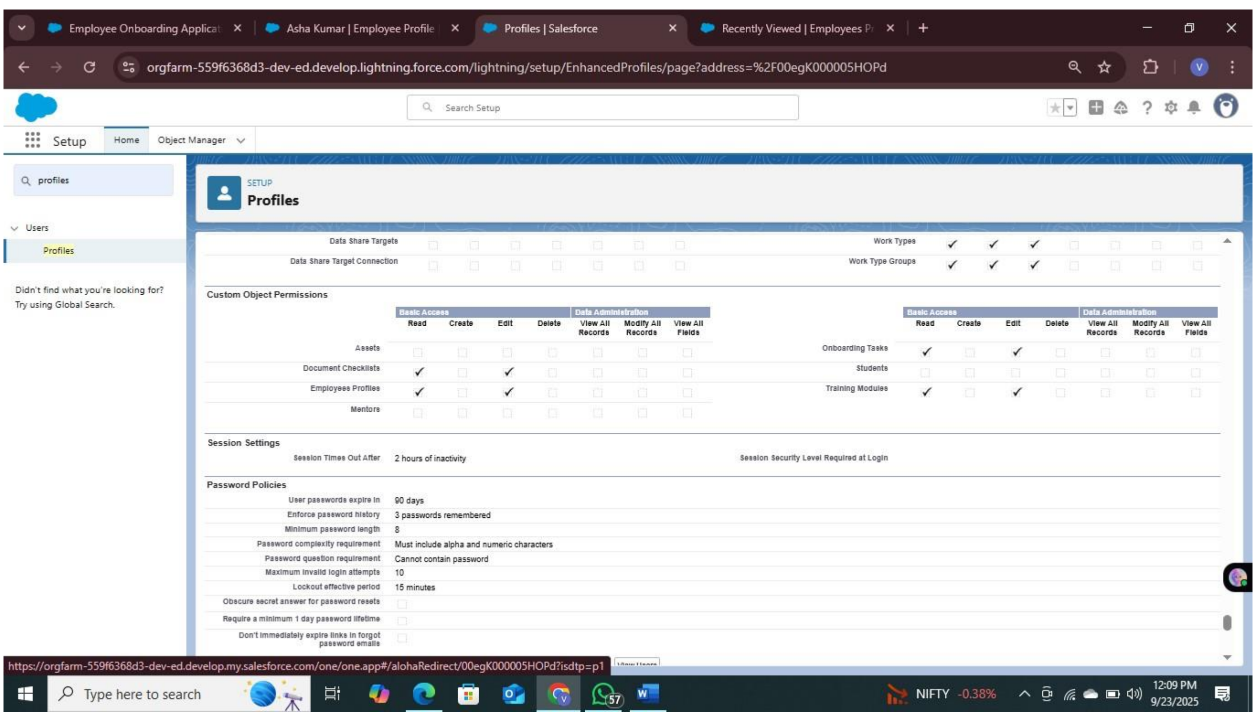
Team Lead :



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Work Type Groups
Custom Object Permissions
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Modify All Records
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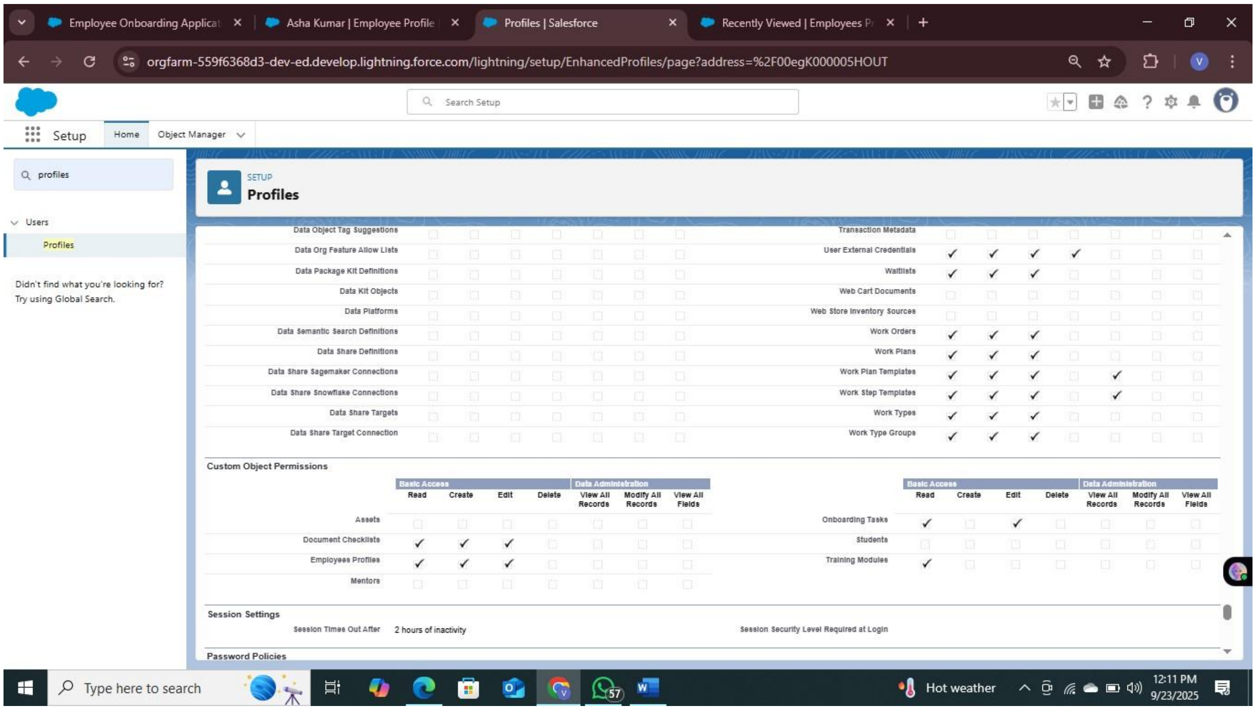
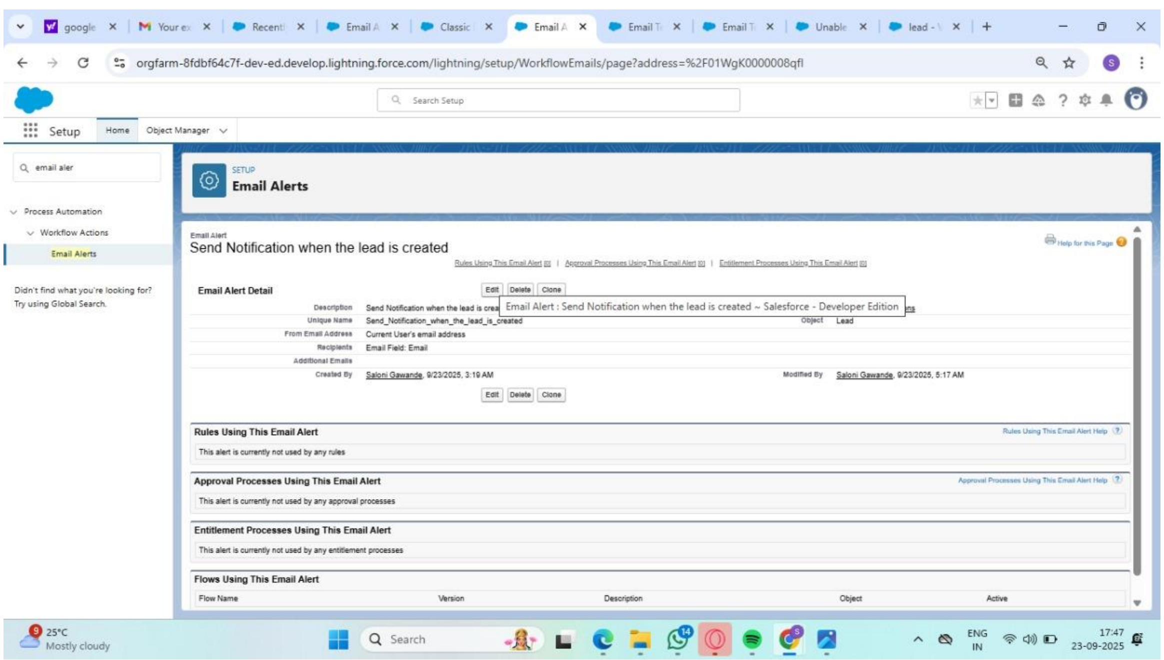
Employee → Read/Edit their own profile.



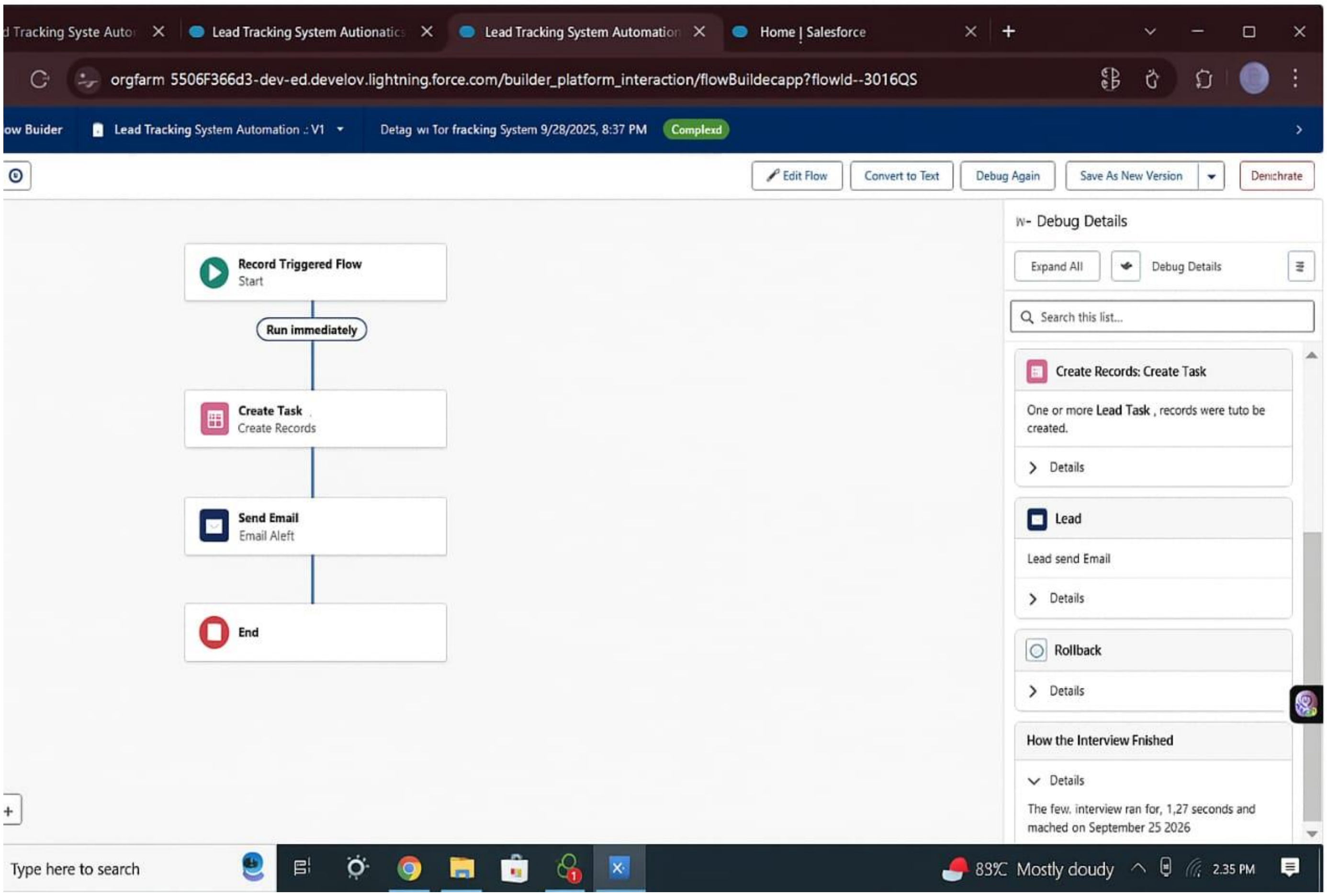
Step 6: Plan Automation Architecture

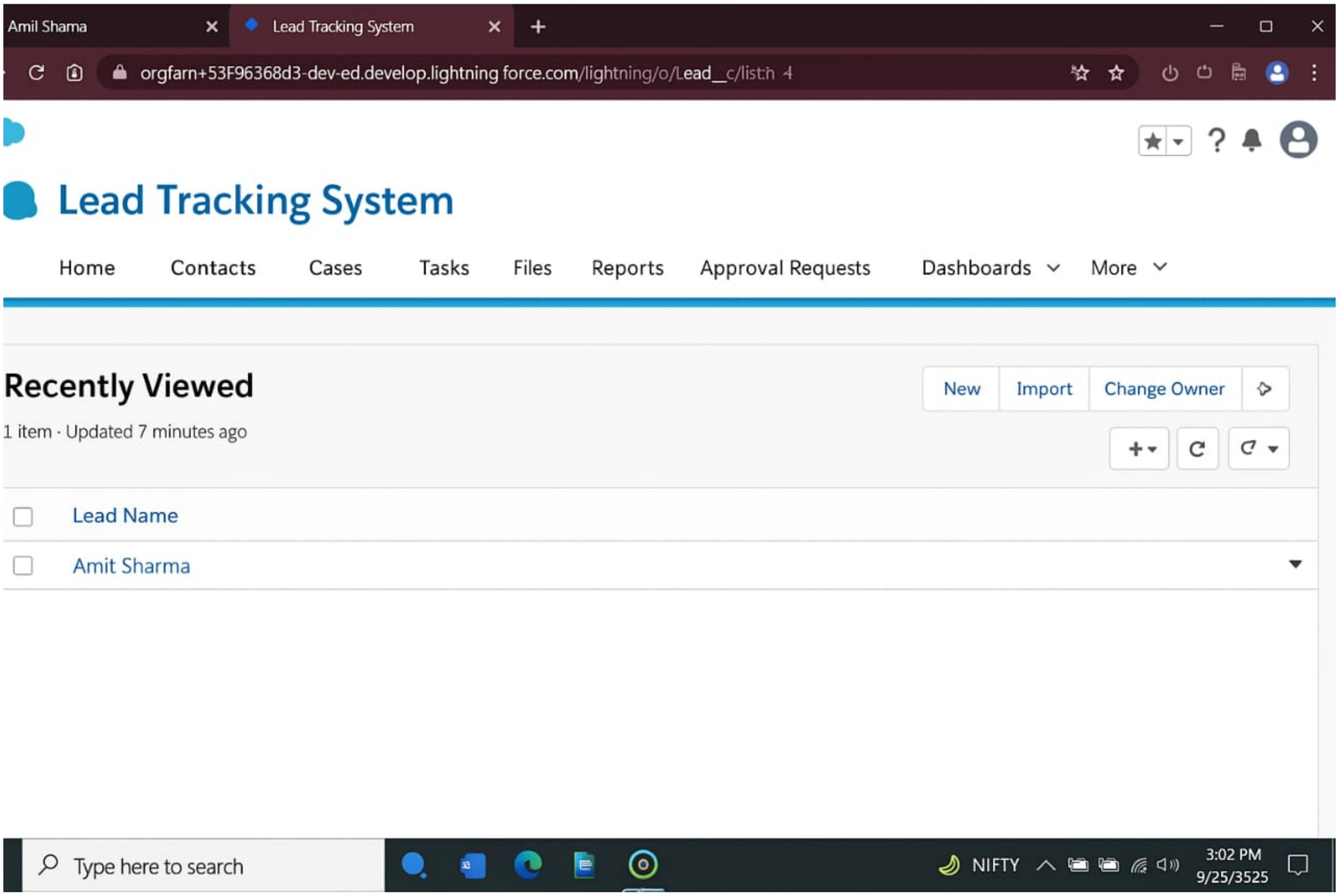
Go to Setup → Flows.

Plan email notifications via Email Alerts + Flows.



Create a Flow (Record-Triggered): When Employee Profile is created → Auto-generate onboarding tasks .




Amil Shama
Lead Tracking System
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New
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