

This document provides a step-by-step visual and descriptive walkthrough of the setup and configuration performed in Phase 2 for the Retail CRM project.

The organization was set up as “Retail CRM Pvt Ltd”. The default time zone was configured to (GMT+05:30) India Standard Time (Asia/Kolkata) to ensure all date- and time-fields align with the project’s regional context.

Business hours were established for Monday through Saturday, 9:00 AM to 9:00 PM IST. Sunday is designated as a non-working day, preventing case escalations. Key national holidays were also added to manage service-level agreements accurately.

Setup

Home

Object Manager

Business Hours

Company Settings

Business Hours

Didn't find what you're looking for?

Try using Global Search.

Business Hours

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 Detail

Business Hours Name

Retail Support Hours

Time Zone

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

Business Hours

Sunday

No Hours

Default Business Hours

Monday

9:00 AM to 9:00 PM

Tuesday

9:00 AM to 9:00 PM

Wednesday

9:00 AM to 9:00 PM

Thursday

9:00 AM to 9:00 PM

Friday

9:00 AM to 9:00 PM

Saturday

9:00 AM to 9:00 PM

Active

Created By

Sathwik Manikyam

9/24/2025, 12:36 AM

Last Modified By

Sathwik Manikyam

9/24/2025, 12:36 AM

Holidays

Add/Remove

Holiday Name

Description

Date and Time

Christmas Day

12/25/2025 All Day

Setup

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Holidays

Didn't find what you're looking for?

Try using Global Search.

Holidays

Holidays

Holidays are dates and times at which business hours are suspended. Business hours are the days and hours that your support team is available.

Holidays

Action

Holiday Name

Description

Date and Time

Edit | Del

Christmas Day

12/25/2025 All Day

Edit | Del

Gandhi Jayanti

10/2/2025 All Day

Edit | Del

Independence Day

8/15/2026 All Day

Edit | Del

New Year's Day

1/1/2026 All Day

Edit | Del

Republic Day

1/26/2026 All Day

Elapsed Holidays

No records to display

3. User & Role Management

Five users were created to simulate the core retail team. A role hierarchy was then established to model the organizational structure, ensuring a proper chain of command for data visibility and reporting.

Note on Licenses:

Due to Developer Edition license limits, the Marketing Manager and Regional Manager were created with Chatter licenses and thus are not part of the formal role hierarchy, demonstrating an understanding of platform constraints.

Users

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: [All Users](#) | [Edit](#) | [Create New View](#)

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty00d900000c3yr3uaf.woozeebvmou@chatter.salesforce.com		✓	Chatter Free User
Edit Login	EPIC_OrgFarm	CEPIC	epic.bb0aaf35b110@orgfarm.salesforce.com		✓	System Administrator
Edit	Manikam_Sathwik	ims	ims.sathwik2004728@agentforce.com	CEO	✓	System Administrator
Edit	Marketing_Manager	marmanag	mark.manag@sathwikretail.com		✓	Chatter Free User
Edit	Regional_Manager	regmanag	reg.manag@sathwikretail.com		✓	Chatter Moderator User
Edit Login	Sales_Agent	sagent	sales.agent@sathwikretail.com	Sales Agent	✓	Standard User
Edit Login	Service_Agent	servagen	serv.agent@sathwikretail.com	Service Agent	✓	Standard User
Edit	User_Integration	integ	integration@00d900000c3yr3uaf.com		✓	Analytics Cloud Integration User
Edit	User_Security	sec	insightssecurity@00d900000c3yr3uaf.com		✓	Analytics Cloud Security User

Roles

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#) [Show in tree view](#)

- Retail CRM Pvt Ltd**
 - [Add Role](#)
 - CEO**
 - [Add Role](#)
 - COO**
 - [Add Role](#)
 - Marketing Manager**
 - [Add Role](#)
 - Regional Manager**
 - [Add Role](#)
 - Sales Agent**
 - [Add Role](#)
 - Service Agent**
 - [Add Role](#)
 - SVP Customer Service & Support**
 - [Add Role](#)
 - SVP Human Resources**
 - [Add Role](#)
 - SVP Sales & Marketing**
 - [Add Role](#)

4. Custom Profiles & Permission Sets

To manage permissions granularly, the standard User profile was cloned to create a Sales Agent profile and a Service Agent profile. Additionally, an “Export Reports” permission set was created to grant specific users extra capabilities without altering their base profile.

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Permission

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

Didn't find what you're looking for?
Try using Global Search.

SETUP

Permission Sets

Help for this Page

Permission Sets

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

All Permission Sets | Edit | Delete | Create New View

New

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

| Action | Permission Set Name | Description | License |
|-------------|------------------------------------|---|--|
| Clone | DeliveryEstimationServicePermSet | | Cloud Integration User |
| Clone | Developer Edition | Permission to view the Developer Edition app. | Salesforce |
| Clone | Event Monitoring User | Query all Event Monitoring data, including Event Log Files, Event Log | Salesforce |
| Del Clone | Experience Profile Manager | | Salesforce |
| Del Clone | Export Reports | | |
| Clone | Facility Manager | Lets users create, read, edit, and delete locations, sublocations, queu | Facility Manager |
| Clone | FieldServiceMobileStandardPermSet | Give your mobile workforce access to the Field Service mobile app. S | Field Service Mobile |
| Clone | ManageAssessment Surveys | Gives users access to create, edit, and delete assessment surveys us | Enablement Resources |
| Clone | Manage Enablement Analytics | Gives users access to view and configure reports and dashboards for | Enablement |
| Clone | Manage Enablement Essentials | Gives users access to build, assign, track, and take Enablement progr | Enablement |
| Clone | Manage In-App Guidance | Gives users access to create, edit, and delete prompts and walkthrou | Enablement Resources |
| Clone | Marketing Cloud Reporting C2C Perm | Allows MCR app to access data from core | Cloud Integration User |
| Clone | MarketingCloudPublishingC2CPermSet | | Cloud Integration User |
| Clone | Merchandiser | Allow access to commerce merchandising features | Commerce Merchandiser User Permission Set License Seat |

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Profiles

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Profiles

Help for this Page

Profiles

All Profiles | Edit | Delete | Create New View

New Profile

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

| Action | Profile Name | User License | Custom |
|-------------|---|--------------------------|--------|
| Clone | Minimum Access - Salesforce | Salesforce | |
| Clone | Partner App Subscription User | Partner App Subscription | |
| Clone | Partner Community Login User | Partner Community Login | |
| Clone | Partner Community User | Partner Community | |
| Del Clone | Read Only | Salesforce | |
| Del Clone | Sales Agent Profile | Salesforce | |
| Del Clone | Salesforce API Only System Integrations | Salesforce Integration | |
| Del Clone | Service Agent Profile | Salesforce | |
| Clone | Silver Partner User | Silver Partner | |
| Clone | Solution Manager | Salesforce | |
| Clone | Standard Platform User | Salesforce Platform | |
| Clone | Standard User | Salesforce | |
| Clone | System Administrator | Salesforce | |
| Clone | Work.com Only User | Work.com Only | |

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