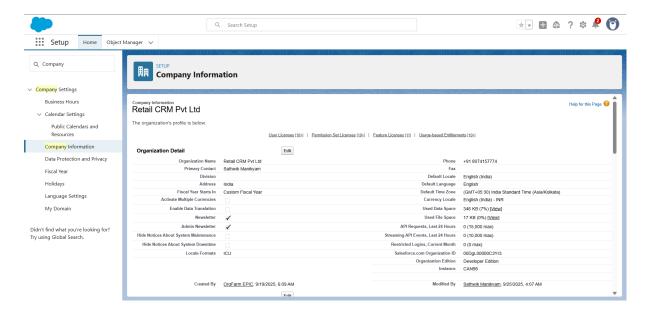
Phase 2: Org Setup & Configuration – Deliverables

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.

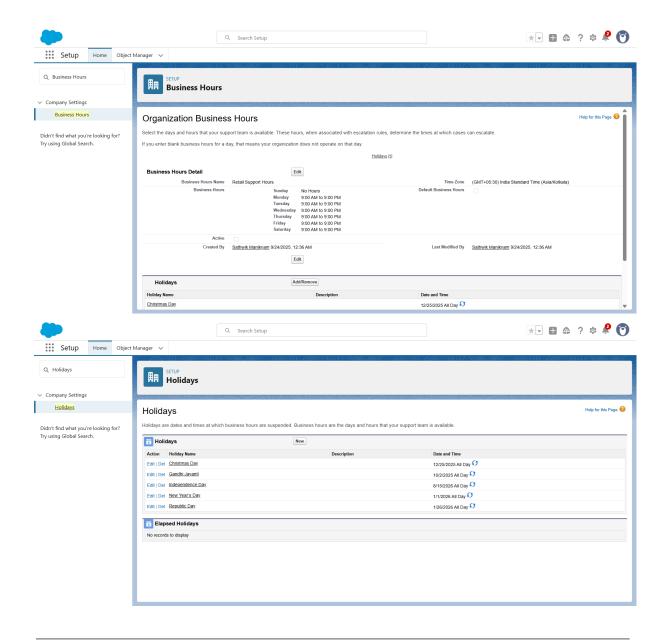
1. Company Information

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.



2. Business Hours & Holidays

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.

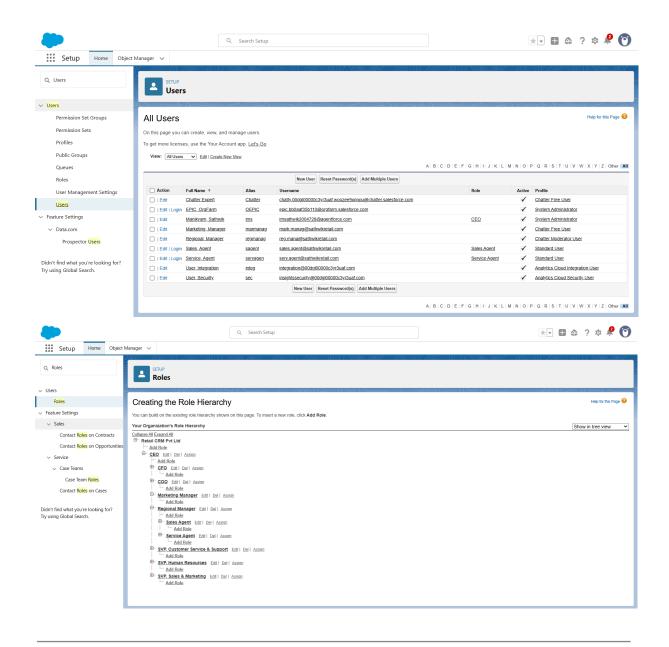


3. User & Role Management

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.



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.

