

# Lead Management & Task Tracking System

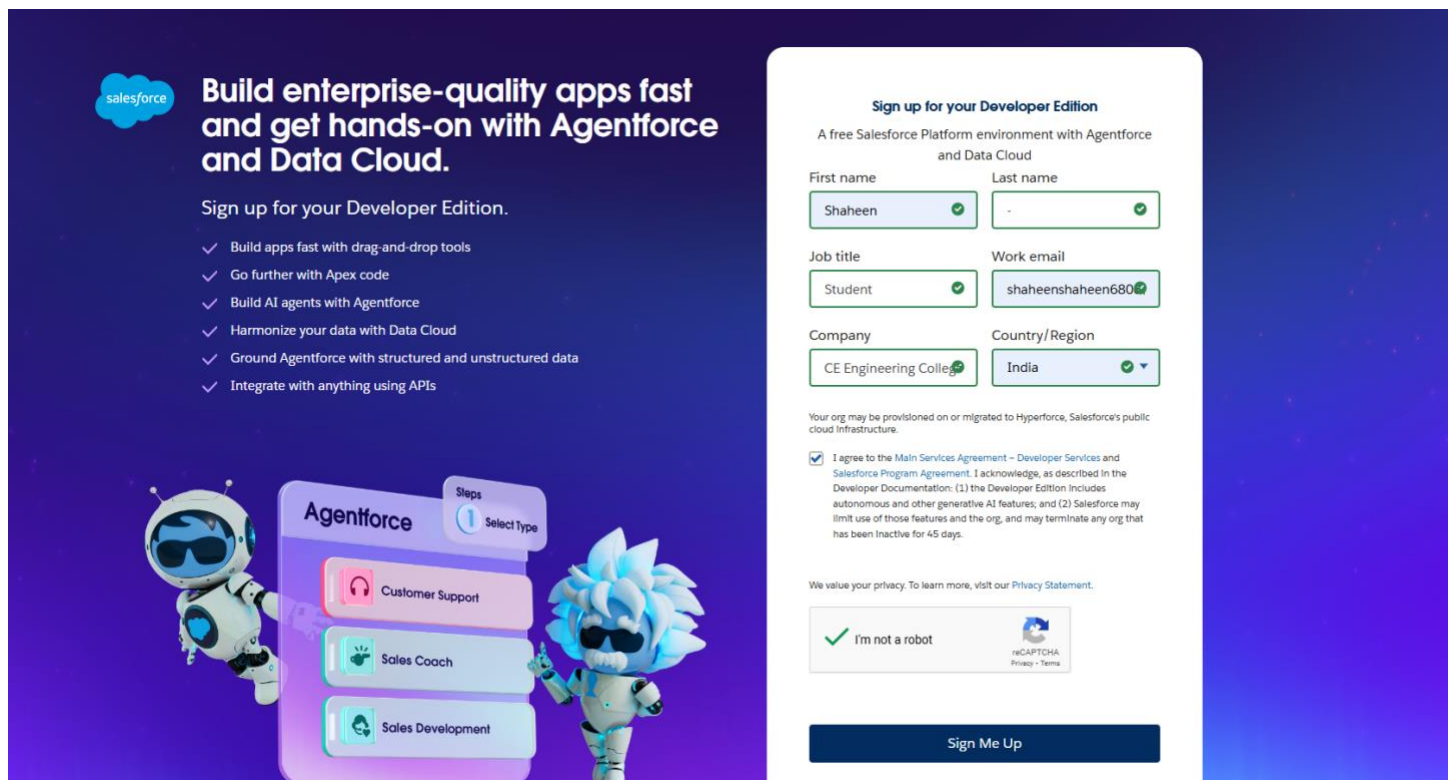
## Phase 2: Org Setup & Configuration

### 1. Salesforce Editions

->Salesforce provides multiple editions: Essentials, Professional, Enterprise, Unlimited, and Developer.

->For this project:

Use Developer Edition (free, full features) to implement lead management, task automation, and reporting.



The image shows the Salesforce Developer Edition sign-up page. On the left, there's a promotional banner with the Salesforce logo and text: "Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud." Below this, it says "Sign up for your Developer Edition." and lists several benefits: "Build apps fast with drag-and-drop tools", "Go further with Apex code", "Build AI agents with Agentforce", "Harmonize your data with Data Cloud", "Ground Agentforce with structured and unstructured data", and "Integrate with anything using APIs". There are also two cartoon robot characters and a "Steps" bar with "1 Select Type".

On the right, the "Sign up for your Developer Edition" form is displayed. It includes fields for "First name" (Shaheen), "Last name" (a hyphen), "Job title" (Student), "Work email" (shaheenshaheen680), "Company" (CE Engineering College), and "Country/Region" (India). Below the form, there's a checkbox for agreeing to the Main Services Agreement and a CAPTCHA verification section with the text "I'm not a robot". A "Sign Me Up" button is at the bottom.

### 2. Company Profile Setup

Defines basic information for the Salesforce org.

Configuration for project:

- Company Name: *Lead & Task Management System*
- Default Locale: English (India)
- Currency: INR
- Time Zone: Asia/Kolkata

SETUP

Company Information

Edit Organization Profile

ACE Engineering College

Help for this F

Use the form below to edit your organization profile.

Organization Edit

General Information

Organization Name

ACE Engineering College

Phone

Primary Contact

OrgFarm EPIC

Fax

Division

Address

Country

United States

Street

City

State/Province

--None--

Zip/Postal Code

Locale Settings

Default Locale

English (United States)

Default Language

English

Windows Taskbar

Search

ENG

IN

### 3. Business Hours & Holidays

Business hours are used for task assignments and workflow rules.

Setup:

- Business Hours: Mon–Sat, 9:00 AM – 6:00 PM IST
- Holidays: National holidays like 26th Jan, 15th Aug, 2nd Oct

SETUP

Business Hours

If you enter blank business hours for a day, that means your organization does not operate on that day.

Business Hours Edit

Save Cancel

Step 1. Business Hours Name

Business Hours Name

Default

Use these business hours as the default

☒

Active

☒

Step 2. Time Zone

Time Zone

(GMT-07:00) Pacific Daylight Time (America/Los\_Angeles)

Step 3. Business Hours

Sunday	12:00 AM	to	12:00 AM	<input checked="" type="checkbox"/> 24 hours
Monday	12:00 AM	to	12:00 AM	<input checked="" type="checkbox"/> 24 hours
Tuesday	12:00 AM	to	12:00 AM	<input checked="" type="checkbox"/> 24 hours
Wednesday	12:00 AM	to	12:00 AM	<input checked="" type="checkbox"/> 24 hours
Thursday	12:00 AM	to	12:00 AM	<input checked="" type="checkbox"/> 24 hours
Friday	12:00 AM	to	12:00 AM	<input checked="" type="checkbox"/> 24 hours
Saturday	12:00 AM	to	12:00 AM	<input checked="" type="checkbox"/> 24 hours

Save Cancel

Windows Taskbar

Search

ENG

IN

## 4. Fiscal Year Settings

- Defines the reporting period for Salesforce.
- For India, set Standard Fiscal Year: April 1 – March 31.

## 5. User Setup & Licenses

Create users according to project roles:

Role	License Type	Permissions
System Admin	Salesforce Admin	Full access to all objects
Sales Manager	Salesforce	Manage Leads, View all reports

Sales Agent Salesforce Platform Manage own leads & tasks


## 6. Profiles

Profiles define access to objects and features:

- System Admin → Full access.
- Sales Manager → Modify All Leads, Tasks, Reports.
- Sales Agent → Create, Read, Update Leads & Tasks (no delete).

## 7. Roles

- Define hierarchy to control record visibility:

 **SETUP**  
**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](#)

- [-] **ACE Engineering College**
  - [-] **Add Role**
  - [-] **CEO** [Edit](#) | [Del](#) | [Assign](#)
    - [-] **Add Role**
    - [-] **Sales Manager** [Edit](#) | [Del](#) | [Assign](#)
      - [-] **Add Role**
      - [-] **Sales Rep** [Edit](#) | [Del](#) | [Assign](#)
        - [-] **Add Role**

- Sales Agents see only their leads.
- Sales Managers see all leads under their hierarchy.

## **8. Permission Sets**

- Use to grant additional access without changing profile.
- Example: Permission set to allow agents to export reports.

## **9. Organization-Wide Defaults (OWD)**

- Set Leads → Private
- Set Tasks → Controlled by Parent (Task visibility depends on associated Lead)

## **10. Sharing Rules**

- Grant managers visibility of all leads:
  - Rule: All Leads owned by Sales Agents → Shared with Sales Manager role.