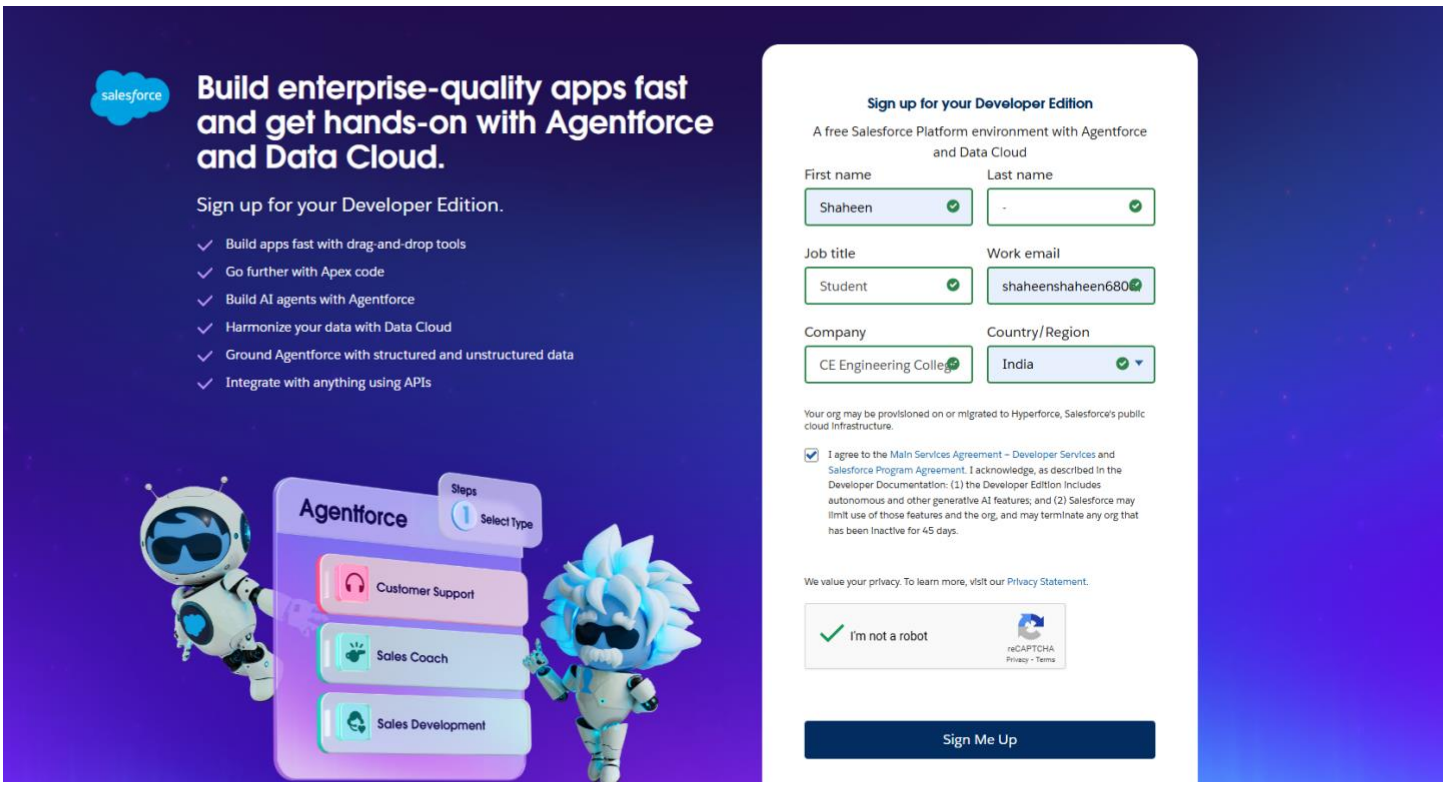
Lead Management & Task Tracking System
Phase 2: Org Setup & Configuration

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.

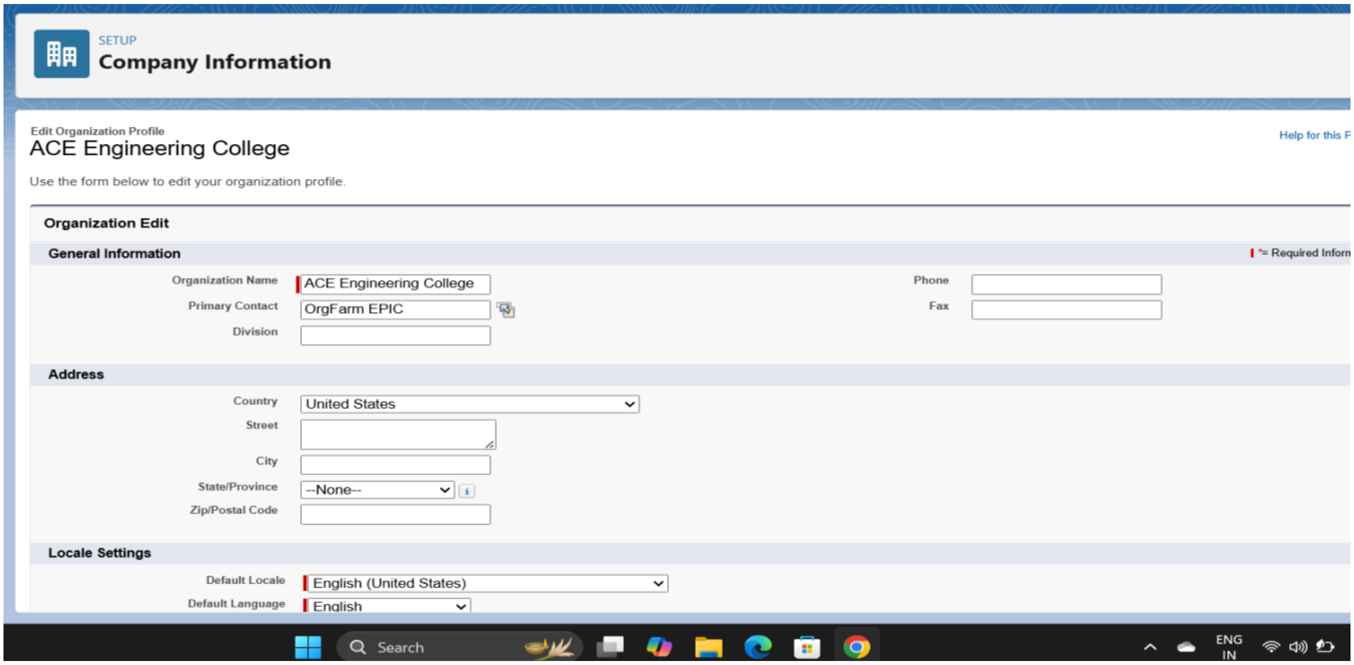


2. Company Profile Setup

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

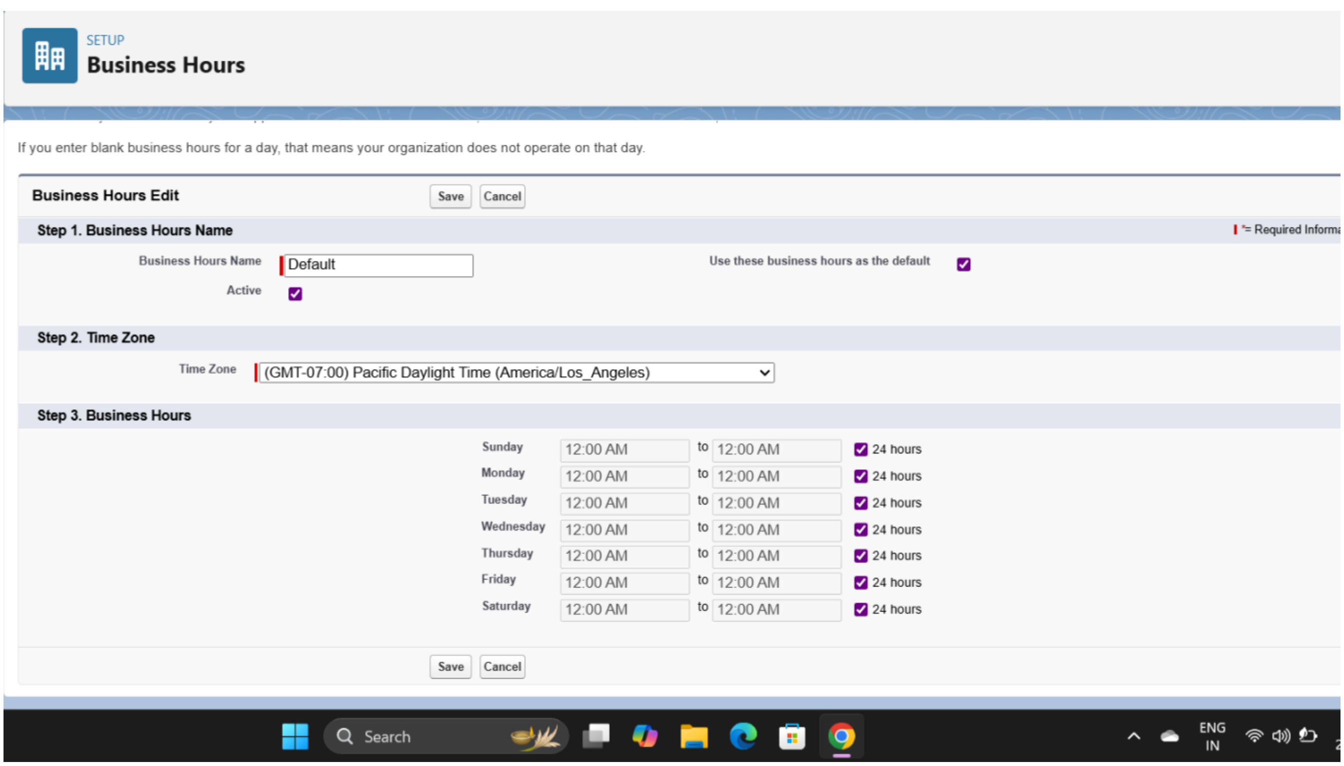


3. Business Hours & Holidays

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



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

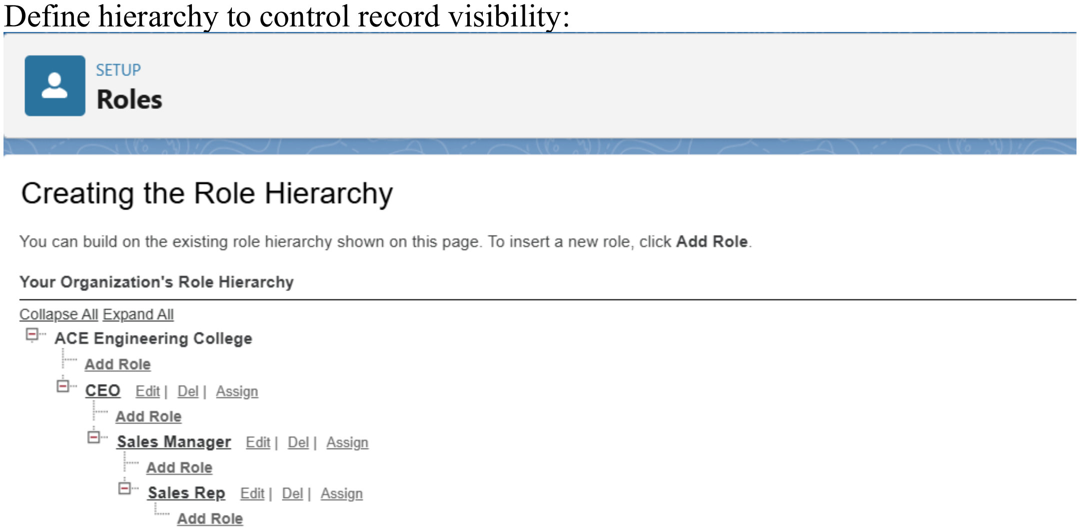
6. Profiles

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:



- 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.