

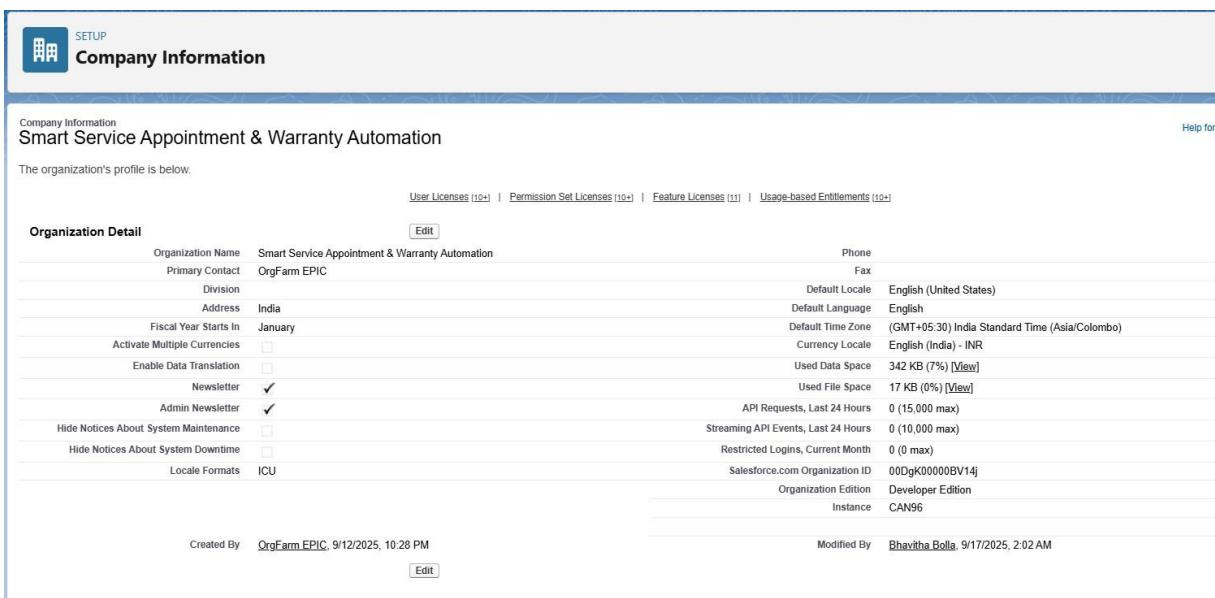
PROJECT- SMART SERVICE APPOINTMENT & WARRANTY AUTOMATION

PHASE 2 - Org Setup & Configuration

Company Profile Setup

Set basic org details under *Setup* → *Company Information* → *Edit*:

- **Name:** Smart Service Appointment & Warranty Automation
- **Time Zone:** Default working timezone (e.g., *GMT+05:30 Kolkata*).
- **Locale:** Controls date/number formats (e.g., *English (India/US)*).
- **Language:** English (India)
- **Currency:** Corporate currency (e.g., *INR, USD*).



The screenshot shows the 'Company Information' setup page. At the top, there's a 'SETUP' button and a 'Company Information' section. Below that, the page title is 'Smart Service Appointment & Warranty Automation'. A note says 'The organization's profile is below.' There are tabs for 'User Licenses', 'Permission Set Licenses', 'Feature Licenses', and 'Usage-based Entitlements'. The main section is 'Organization Detail' with an 'Edit' button. It lists various settings: Organization Name (Smart Service Appointment & Warranty Automation), Primary Contact (OrgFarm EPIC), Division (India), Address (India), Fiscal Year Starts In (January), Activate Multiple Currencies (unchecked), Enable Data Translation (unchecked), Newsletter (checked), Admin Newsletter (checked), Hide Notices About System Maintenance (unchecked), Hide Notices About System Downtime (unchecked), Locale Formats (ICU). On the right, there are columns for 'Phone' and 'Fax'. Under 'Phone', it shows Default Locale (English (United States)), Default Language (English), Default Time Zone (GMT+05:30 India Standard Time (Asia/Colombo)), Currency Locale (English (India) - INR), Used Data Space (342 KB (7%) [View]), Used File Space (17 KB (0%) [View]). Under 'Fax', it shows API Requests, Last 24 Hours (0 (15,000 max)), Streaming API Events, Last 24 Hours (0 (10,000 max)), Restricted Logins, Current Month (0 (max)), Salesforce.com Organization ID (00DgK00000BV14j), Organization Edition (Developer Edition), Instance (CAN96). At the bottom, it shows 'Created By' (OrgFarm EPIC, 9/12/2025, 10:28 PM) and 'Modified By' (Bhavitha Bolla, 9/17/2025, 2:02 AM).

Business Hours Setup

Configure working hours for escalation rules and SLA tracking:

- **Path:** *Setup* → *Business Hours* → *New*.
- **Name:** Define (e.g., *Standard Business Hours*).
- **Time Zone:** Select org or regional timezone (e.g., *GMT+05:30 Asia/Kolkata*).
- **Working Hours:** Set daily schedule (e.g., Mon–Sat 9:00 AM–6:00 PM; Sunday closed).
- **Save:** Apply as default if needed.

Organization Business Hours

Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times of 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 Edit

Step 1. Business Hours Name

Business Hours Name: Standard Business Hours

Step 2. Time Zone

Time Zone: (GMT+05:30) India Standard Time (Kolkata)

Step 3. Business Hours

Day	Start Time	End Time	24 hours
Sunday	9:00 AM	6:00 PM	<input checked="" type="checkbox"/>
Monday	9:00 AM	6:00 PM	<input type="checkbox"/>
Tuesday	9:00 AM	6:00 PM	<input type="checkbox"/>
Wednesday	9:00 AM	6:00 PM	<input type="checkbox"/>
Thursday	9:00 AM	6:00 PM	<input type="checkbox"/>
Friday	9:00 AM	6:00 PM	<input type="checkbox"/>
Saturday	9:00 AM	6:00 PM	<input type="checkbox"/>

⊕ Fiscal Year Setup

Defines reporting boundaries for forecasts and opportunities.

- **Path:** *Setup → Fiscal Year.*
- **Type:** Choose *Standard Fiscal Year (Jan–Dec)* or *Custom Fiscal Year* if months differ.
- **Configuration:** Select the starting month (e.g., *January*).
- **Save:** Apply settings to define fiscal periods.

SETUP

Fiscal Year

Organization Fiscal Year Edit: Smart Service Appointment & Warranty Automation

To specify the fiscal year type for your organization, choose one of the options below.

Fiscal Year Information

Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example, if your fiscal year starts in April 2025 and ends in March 2026, your Fiscal Year setting can be either 2025 or 2026.

Change Fiscal Year Period

Standard Fiscal Year

Custom Fiscal Year

Name	Smart Service Appointment & Warranty Automation
Fiscal Year Start Month	January <input type="button" value="▼"/>
Fiscal Year is Based On	<input type="radio"/> The ending month <input checked="" type="radio"/> The starting month

User Setup (Profiles, Roles, Permission Sets, Users)

a) Profiles

Profiles control what users can do (object-level permissions)

1. **Service_Agent_Profile**

- For service reps handling appointments & customer issues.

2. **Warranty_Manager_Profile**

- For users who manage warranty claims and approvals.

3. **Admin_Profile**

- For project manager/system admin who has wider control.

(Later in Phase 3, when you create objects like Appointment, Warranty, Claim, etc., you'll adjust permissions here).

b) Roles

Create the following hierarchy:

CEO

 └— Service Manager

 └— Service Agent

 └— Warranty Manager

- **CEO** → Top-level (sees everything).
 - **Service Manager** → Supervises service agents.
 - **Service Agent** → Handles appointments and service requests.
 - **Warranty Manager** → Approves/rejects warranty claims, works parallel to service team.
-

c) Permission Sets

Permission sets provide **extra permissions** beyond profile.

- Create one for Phase 3 (leave empty for now):
 - **Warranty_Access_PS** → will grant extra access to Warranty object later.
 - **Appointment_Access_PS** → will grant extra access to Appointment object later.
-

d) Users

Create sample users for testing the flow:

1. **agent1** → Profile: Service_Agent_Profile → Role: Service Agent

- Example: Handles new customer appointment bookings.
2. **warranty1** → Profile: Warranty_Manager_Profile → Role: Warranty Manager
- Example: Reviews and approves warranty requests.
3. **manager1** → Profile: Admin_Profile → Role: Service Manager
- Example: Oversees both teams, resolves escalations.

Service_Agent_Profile

Profile Help for this Page

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Profile Detail

Name	Service_Agent_Profile	Custom Profile
User License	Salesforce	<input checked="" type="checkbox"/>
Description		
Created By	Bhavitha Bolla, 9/17/2025, 2:21 AM	Modified By Bhavitha Bolla, 9/17/2025, 2:23 AM

Warranty_Manager_Profile

Profile Help for this Page

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Profile Detail

Name	Warranty_Manager_Profile	Custom Profile
User License	Salesforce Platform	<input checked="" type="checkbox"/>
Description		
Created By	Bhavitha Bolla, 9/17/2025, 2:25 AM	Modified By Bhavitha Bolla, 9/17/2025, 2:25 AM

Admin_Profile

Profile Help for this Page

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Profile Detail

Name	Admin_Profile	Custom Profile
User License	Salesforce	<input checked="" type="checkbox"/>
Description		
Created By	Bhavitha Bolla, 9/17/2025, 2:26 AM	Modified By Bhavitha Bolla, 9/17/2025, 2:26 AM

Role Hierarchy Setup

- ☒ **CEO:** Full access to all modules.
- ☒ **Operations Manager:** Monitors service appointments and warranty processing.
- ☒ **Service Executive / Technician:** Works on service requests, updates status, logs issues.
- ☒ **Warranty Coordinator:** Reviews warranty claims, approves replacements, manages warranty data.
- ☒ **Sales Manager / Sales Rep:** Manages customer sales and links sales to service/warranty records.
- ☒ **Finance Manager / Executive:** Tracks payments, invoices, and warranty costs.

CEO



The screenshot shows a software interface titled "SETUP Roles". At the top left is a user icon. Below it, the word "Roles" is displayed in a large, bold, black font. The main content area displays a hierarchical tree structure under the heading "Your Organization's Role Hierarchy". A "Collapse All" button is located at the top of the tree. The tree starts with a root node "Smart Service Appointment & Warranty Automation", which has several child nodes: "CEO", "Finance Manager", "VP, Marketing", "VP, North American Sales", "Operations Manager", and "Sales Manager". Each node has "Edit | Del | Assign" buttons next to it. Under each of these main nodes, there is an "Add Role" link. The entire interface has a light blue header bar.

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](#)



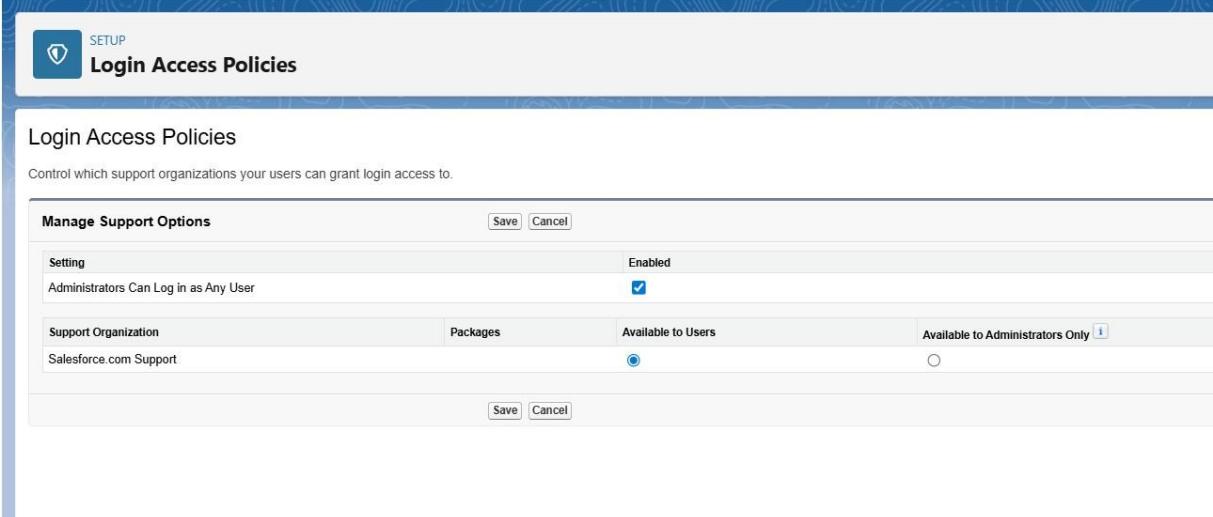
OWD (Org Wide Default)

This has to be done in the Phase 3, as the OWD setting are needed to be applied on an object which will be implemented in next phase of the project.

Sharing Rule

This has to be done in the Phase 3 as well considering it has to be implemented on an object.

Assign Permission Set(s)



The screenshot shows the 'Login Access Policies' setup page. At the top, there's a 'Manage Support Options' section with a 'Save' and 'Cancel' button. Below it is a table with four columns: 'Setting', 'Enabled' (checkbox), 'Support Organization', and 'Available to Administrators Only'. Under 'Setting', it says 'Administrators Can Log in as Any User' with a checked checkbox. Under 'Support Organization', there are two options: 'Salesforce.com Support' (radio button selected) and 'Available to Administrators Only' (radio button unselected). At the bottom of the table are 'Save' and 'Cancel' buttons.

Dev Org Setup



- To implement the following project a Salesforce Developer Edition org was setup.
 - Made a GitHub Repository for source control.
 - Setting up the VS Code and SFDX for the implementation of the LWC Component for development.
-