Phase 2: Org Setup & Configuration

Goal

To prepare and configure the Salesforce environment for developing the **Lead Management System**.

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1. Salesforce Edition

- Use **Salesforce Developer Edition (Free Developer Org)** for building and testing the project.
- This edition provides standard objects like **Leads, Accounts, Contacts, and Opportunities**, which are useful for lead management.

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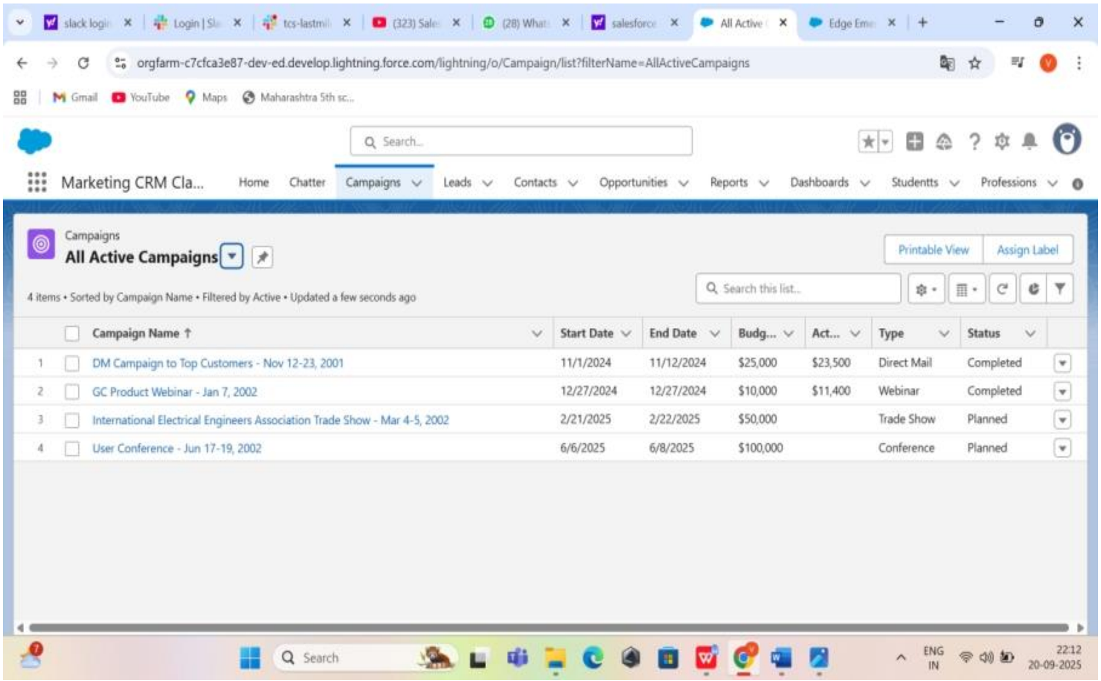
2. Company Profile Setup

- Navigate to **Setup → Company Settings → Company Information**.
- Add organization details such as **Company Name, Address, and Local Time Zone (Asia/Kolkata)**.
- Set **Currency** as INR or USD depending on business needs.
- Define **default locale** for date, time, and number formats.



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3. Business Hours & Holidays

- Set official **working hours: 9:00 AM – 6:00 PM (Monday to Saturday)**.
- Add **public holidays** so that automated workflows or lead assignment rules do not run during non-working days.

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4. Fiscal Year Settings

- Use **Standard Fiscal Year (January–December)** to align with business reporting periods.
- This helps generate accurate **sales and revenue reports** for each quarter.

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5. User Setup & Licenses

Create user accounts according to project roles:

User Role	License Type	Description
Admin	Salesforce License	Full access to configure system and manage users.
Sales Manager	Salesforce License	Approves qualified leads and monitors reports.
Sales Agent	Salesforce License	Handles lead follow-up and updates status.

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6. Profiles

- **Sales Agent Profile:** Can create and update Leads but **cannot modify system settings or sharing rules**.
- **Sales Manager Profile:** Has **full access** to all lead records, reports, and dashboards.
- **Admin Profile:** Has complete system-level privileges for configuration and maintenance.

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7. Roles

Define a role hierarchy to manage data visibility:

Admin

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Sales Manager

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Sales Agents

- This ensures that managers can see the records owned by their agents, but not vice versa.

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8. Permission Sets

- If a Sales Agent requires additional access (e.g., view Reports or Dashboards), create a **Permission Set** rather than changing their profile.
- This maintains **security** and allows **temporary privilege escalation** when needed.

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9. Organization-Wide Defaults (OWD)

- **Lead Object:** Public Read/Write → all agents can view and update lead records.
- **Opportunities or Converted Leads:** Private → only owner and manager can view.

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10. Sharing Rules

- Create a **Sharing Rule** if certain leads (e.g., from high-value sources) should be visible to multiple agents.
- Helps in team-based lead handling or collaboration.

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11. Login Access Policies

- Restrict login hours for **Sales Agents** (e.g., 9 AM – 6 PM).
- Define **IP range restrictions** to ensure access only from company locations or networks.

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12. Developer Org Setup

- The **Developer Org** acts as a **sandbox** where all objects, fields, and automation are built and tested before deployment.
- Includes creating **custom fields**, **validation rules**, **page layouts**, and **record types** related to leads.

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13. Sandbox Usage

- In a real business environment, configurations are built in a **Sandbox** to avoid affecting live data.
- Once tested, the configurations are **deployed to Production**.

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14. Deployment Basics

- Deployment refers to moving configurations, automation, and metadata from **Sandbox to Production**.
- Use **Change Sets** or **Salesforce CLI** for deployment.
- Always test before final deployment to ensure no data loss or automation errors occur.