**PART 1: OBJECTS**

**2) Small Business Object** - Represents individual small businesses participating in the program.

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ok

ok

ok

ok

ok

ok

ok

ok

ok

ok

ok

ok

* **Type of Work (Picklist)** Energy Efficiency, Renewable Energy, Technical Consulting, Administrative Support, Facility Management, etc.
* **NAICS Codes (Text)** Example: 541330 (Engineering Services), 561210 (Facilities Support Services), etc.
* **Annual Revenue (Currency):** Specifies the annual revenue generated by the small business.
* **Time Spent in EERE Small Business Program in months (Number):** Records the duration of the small business's participation in the EERE Small Business Program.
* **Grants/Deals/Agreements Given by DoE (Related List to Grants/Deals/Agreements Object):** Establishes a relationship with the grants, deals, or agreements provided to the small business by the Department of Energy (DoE).

**1) Grants/Deals/Agreements** – Tracks grants, deals and agreements given by the DOE to small businesses

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**ok**

**ok**

**ok**

**ok**

**ok**

**ok?**

**ok**

**3)Application** – Manages the application process for small businesses applying to the program

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N/A

ok

ok

ok

ok

ok

ok

rev range

ok

make

global

picklist

ok

ok

**4) Application Step** – Tracks each step of the application process and associated data

* **A screenshot of a computer program

  Description automatically generated**In User object, add a “Title” field

**PART 2: PROFILES**

**Profiles to create:**

**OK 1. Sales User**:

*Assign to:*

* **Sales Representative:** This profile can be assigned to users in sales roles, including Sales Associates.
* **Sales Manager Profile:** This profile can be assigned to Sales Managers who oversee sales teams.

**OK 2. Service User:**

*Assign to:*

* **Service Technician Profile:** This profile can be assigned to users in service roles, including Service Associates.
* **Service Manager Profile:** This profile can be assigned to Service Managers who oversee service teams.

**OK 3. Management User:**

*Assign to:*

* **Regional VP Profile:** This profile can be assigned to Regional VPs who oversee all department-related actions in a specific region.
* **Director Profile:** This profile can be assigned to Directors who manage specific locations within a region.

**Permission Sets:**

**Regional Vice President Permission Set:**

* View All Data: Grant the "View All Data" permission to allow Regional Vice Presidents to see all records within their region, regardless of sharing settings.
* Modify All Data: Grant the "Modify All Data" permission to allow Regional Vice Presidents to edit or delete any record within their region.
* Customize Application: Allow customization permissions to enable Regional Vice Presidents to modify layouts, fields, and other aspects of the Salesforce application as needed.
* Assign this permission set to Regional Vice Presidents responsible for overseeing sales and service teams in specific regions.

**Director Permission Set:**

* View All Data: Grant the "View All Data" permission to allow Directors to see all records at the locations they manage, regardless of sharing settings.
* Customize Application: Allow customization permissions to enable Directors to modify layouts, fields, and other aspects of the Salesforce application as needed.
* Assign this permission set to Directors responsible for managing specific locations within a region.

**Manager Permission Set:**

* Modify All Data: Grant the "Modify All Data" permission to allow Managers to edit or delete any record within their teams.
* Customize Application: Allow customization permissions to enable Managers to modify layouts, fields, and other aspects of the Salesforce application as needed.
* Assign this permission set to Managers responsible for day-to-day operations and team management.

**Associate Permission Set:**

* View All Data: Grant the "View All Data" permission to allow Associates to see all records within their teams.
* Create and Edit on Specific Objects: Grant creates and edit permissions on specific objects relevant to their tasks.
* Assign this permission set to Associates responsible for specific tasks within their teams.

**FOR Sharing Rules**

**Roles to create:**

**Regional Vice President:**

* Oversees all department-related actions in a specific region.
* Full access to data within their region.
* Should be assigned to regional vice presidents responsible for overseeing sales and service teams in specific regions.

**Director:**

* Manages specific locations within a given region and reports to the regional vice president.
* Full access to data at their managed locations.
* Should be assigned to directors responsible for managing specific locations.

**Manager:**

* Handles day-to-day operations with their teams of associates and reports to the director.
* Full access to data within their teams.
* Should be assigned to managers responsible for day-to-day operations.

**Associate:**

* Handles specific tasks in their fields and reports to their manager.
* Limited access to their own records.
* Should be assigned to associates responsible for specific tasks within their teams.

VP, Sales West

Director, Sales West

Manager, Sales West

Associate Sales, West

VP, Sales Central

Director, Sales Central

Manager, Sales Central

Associate Sales, Central

VP, Sales East

Director, Sales East

Manager, Sales East

Associate Sales, East

VP, Support West

Director, Support West

Manager, Support West

Associate Support, West

VP, Support Central

Director, Support Central

Manager, Support Central

Associate Support, Central

VP, Support East

Director, Support East

Manager, Support East

Associate Support, East

May have to Re-do to standard objects

Ideas:

**Standard Objects**

**Accounts**

**Leads**

*Ideas*

* Concept, Full, Selection
* Concept, Full, Selection, Rejected-Not Converted, Converted
* Open – Not Contacted, Working – Contacted, Closed – Not Converted, Converted

**Opportunities**

* Negotiation, Performance
* Negotiation, Performance, Closed

**Cases**

**Custom Objects**

Programs

Products/Services

Industry Funds with NAICS codes

* Download from North American Industry Classification System reference files
* Lead Assignment rules now!
* Lead Process
* Email templates and enhanced letterhead

Type of Business

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SCRATCH PAPER

Small Business Type