

Phase 2 Report – Org Setup & Configuration

Project: Lead Management & Sales Tracking

1. Introduction

The purpose of Phase 2 is to configure the Salesforce Org to align with the requirements of the Lead Management & Sales Tracking project. This phase focuses on establishing the foundational setup, including company details, security model, users, roles, and permissions. These configurations ensure that the system is ready for customization and supports secure, role-based access to data.

2. Salesforce Edition

For this project, a Salesforce Developer Edition org was provisioned. This edition provides Sales Cloud and Service Cloud capabilities, two Salesforce user licenses, and sufficient functionality to demonstrate CRM configuration and workflows.

SETUP

Company Information

Company Information

Lead Management & Sales Tracking

The organization's profile is below.

User Licenses (10+)

Permission Set Licenses (10+)

Feature Licenses (11)

Usage-based Entitlements (10+)

Organization Detail

Edit

Deactivate Org

Organization Name

Lead Management & Sales Tracking

Phone

Primary Contact

Pramod Bm

Fax

Division

Default Locale

English (India)

Address

IN

Default Language

English

Fiscal Year Starts In

March

Default Time Zone

(GMT+05:30) India Standard Time (Asia/Kolkata)

Activate Multiple Currencies

☐

Currency Locale

English (India) - INR

Enable Data Translation

☐

Used Data Space

460 KB (9%) [View](#)

Newsletter

☒

Used File Space

13 KB (0%) [View](#)

Admin Newsletter

☒

API Requests, Last 24 Hours

0 (15,000 max)

Hide Notices About System Maintenance

☐

Streaming API Events, Last 24 Hours

0 (10,000 max)

Hide Notices About System Downtime

☐

Restricted Logins, Current Month

0 (0 max)

Locale Formats

ICU

Salesforce.com Organization ID

00Dd200000M5apN

Organization Edition

Developer Edition

Instance

SWEY26

Created By

Sales Manager, 13/08/2025, 6:11 pm

Modified By

Sales Manager, 16/09/2025, 2:16 pm

Edit

Deactivate Org

User Licenses

User Licenses Help

Name	Status	Total Licenses	Used Licenses	Remaining Licenses	Expiration Date
Salesforce	Active	2	2	0	
Analytics Cloud Integration User	Active	2	2	0	
Chatter Free	Active	5,000	1	4,999	
Salesforce Integration	Active	1	0	1	
External Apps Login	Active	20	0	20	
Salesforce Platform	Active	3	0	3	
Customer Community Login	Active	5	0	5	

3. Company Profile Setup

The company profile was updated to reflect organizational information.

- **Company Name:** The SmartBridge
- **Default Locale:** English (India)
- **Time Zone:** (GMT+05:30) India Standard Time
- **Currency:** INR

This ensures consistency across all records and processes.

SETUP

Company Information

Company Information

Lead Management & Sales Tracking

Help for this Page

The organization's profile is below.

User Licenses (10)

Permission Set Licenses (10)

Feature Licenses (11)

Usage-based Entitlements (10)

Organization Detail

Edit

Deactivate Org

Organization Name

Lead Management & Sales Tracking

Phone

Primary Contact

Pramod Bm

Fax

Division

Default Locale

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Address

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Default Language

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Fiscal Year Starts In

March

Default Time Zone

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Restricted Logins, Current Month

0 (0 max)

Locale Formats

ICU

Salesforce.com Organization ID

00Dd200000M5apN

Organization Edition

Developer Edition

Instance

SWE126

Created By

[Sales Manager](#)

13/08/2025, 6:11 pm

Modified By

[Sales Manager](#)

16/09/2025, 2:16 pm

Edit

Deactivate Org

User Licenses

User Licenses Help


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4. Business Hours & Holidays

Default business hours were configured to align with working patterns:

- **Business Hours:** 9:00 AM – 6:00 PM IST, Monday–Friday

This setup prevents escalations or reminders from triggering outside of working hours.

 **SETUP**
Business Hours

Organization Business Hours

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

Save

Cancel

Step 1. Business Hours Name

Business Hours Name

Default

Active

☒

Use these business hours as the default

☒

Required Information

Step 2. Time Zone

Time Zone

(GMT+05:30) India Standard Time (Asia/Kolkata)

Step 3. Business Hours

Sunday	<input type="text" value="HH:MM"/>	to	<input type="text" value="HH:MM"/>	<input type="checkbox"/> 24 hours
Monday	<input type="text" value="9:00 am"/>	to	<input type="text" value="6:00 pm"/>	<input type="checkbox"/> 24 hours
Tuesday	<input type="text" value="9:00 am"/>	to	<input type="text" value="6:00 pm"/>	<input type="checkbox"/> 24 hours
Wednesday	<input type="text" value="9:00 am"/>	to	<input type="text" value="6:00 pm"/>	<input type="checkbox"/> 24 hours
Thursday	<input type="text" value="9:00 am"/>	to	<input type="text" value="6:00 pm"/>	<input type="checkbox"/> 24 hours
Friday	<input type="text" value="9:00 am"/>	to	<input type="text" value="6:00 pm"/>	<input type="checkbox"/> 24 hours
Saturday	<input type="text" value="HH:MM"/>	to	<input type="text" value="HH:MM"/>	<input type="checkbox"/> 24 hours

Save

Cancel

5. Fiscal Year Settings

A Standard Fiscal Year was enabled for this project. This ensures alignment with Salesforce forecasting and reporting features.

SETUP

Fiscal Year

Setup

Organization Fiscal Year Edit: Lead Management & Sales Tracking

Help for this Page

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.

Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing this change.

Standard Fiscal Year

Custom Fiscal Year

Change Fiscal Year Period

SaveCancel

Name

Lead Management & Sales Tracking

Fiscal Year Start Month

April

Fiscal Year is Based On

The ending month

The starting month

SaveCancel

6. User Setup & Licenses

Two users were created, utilizing the two Salesforce licenses available in Developer Edition:

- System Administrator – assigned the role of Sales Manager.
- Sales Representative – assigned the role of Sales Rep.

Each user was configured with username, email, profile, and role, and marked as Active.

SETUP

Users

Active Users

Help for this Page

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: Active Users Edit Create New View

New User

Reset Password(s)

Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00dd200000m5apnear.p8qz2mjy6fn@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	Manager Sales	Smanager	ccamodbmppgwdia7@gmail.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Representative Sales	srepsr	salesrep1@leadtracking.com		<input checked="" type="checkbox"/>	Standard User
<input type="checkbox"/> Edit	User Integration	integ	integration@00dd200000m5apnear.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00dd200000m5apnear.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User

Reset Password(s)

Add Multiple Users

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

Other


All

7. Roles

Roles were configured to establish the reporting hierarchy:

- Admin
 - Sales Manager
 - Sales Representative

This ensures record visibility rolls up from Sales Rep → Sales Manager → Admin.

 **SETUP**
Roles

Creating the Role Hierarchy

[Help for this Page](#)

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 Show in tree view

[Collapse All](#) [Expand All](#)

- Lead Management & Sales Tracking
 - [Add Role](#)
 - Admin** [Edit](#) [Del](#) [Assign](#)
 - [Add Role](#)
 - Sales Manager** [Edit](#) [Del](#) [Assign](#)
 - [Add Role](#)
 - Sales Representative** [Edit](#) [Del](#) [Assign](#)
 - [Add Role](#)
 - CEO** [Edit](#) [Del](#) [Assign](#)
 - [Add Role](#)
 - Owner** [Edit](#) [Del](#) [Assign](#)
 - [Add Role](#)

8. Profiles

Profiles were customized to define user permissions:

- **Sales Rep Profile** (cloned from Standard User): Read/Edit on Leads, Accounts, Opportunities.
- **Sales Manager Profile** (cloned from Standard User): Full CRUD access, Reports, and Dashboards.

Profiles were then assigned to respective users.

SETUP Profiles

Profiles Help for this Page

All Profiles | Edit | Delete | Create New View

New Profile

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit <input type="checkbox"/> Del ...	Sales Manager Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit <input type="checkbox"/> Del ...	Sales Representative Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit <input type="checkbox"/> Del ...	Salesforce API Only System Integrations	Salesforce Integration	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit <input type="checkbox"/> Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/> Edit <input type="checkbox"/> Clone	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit <input type="checkbox"/> Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/> Edit <input type="checkbox"/> Clone	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit <input type="checkbox"/> Clone	System Administrator	Salesforce	<input type="checkbox"/>

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9. Permission Sets

In this phase, **Permission Sets were not created**, since the required access was already configured through **Profiles** (Sales Rep Profile and Sales Manager Profile).

10. Org-Wide Defaults (OWD)

Org-wide defaults were configured to control baseline data access:

- **Leads:** Public Read/Write
- **Opportunities:** Private
- **Accounts:** Public Read Only

This ensures collaboration on Leads while restricting Opportunity visibility to owners.

SETUP Sharing Settings			
Organization-Wide Defaults Edit			
Organization-Wide Defaults Help ?			
Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write	Private	✓
Account and Contract	Public Read Only	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Private	Private	✓
Case	Private	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓
Product	Public Read/Write	Public Read/Write	✓
Individual	Public Read/Write	Private	✓
Voice Call	Private	Private	✓
Alternative Payment Method	Private	Private	✓
Analytics User Attribute Function Token	Public Read Only	Private	✓
Appointment Invitation	Private	Private	✓
Approval Submission	Private	Private	✓
Authorization Form	Private	Private	✓
Authorization Form Consent	Private	Private	✓
Authorization Form Data Use	Private	Private	✓
Business Brand	Private	Private	✓
Buyer Group	Private	Private	✓
Catalog	Private	Private	✓
Change Request	Private	Private	✓
Communication Subscription	Private	Private	✓
Communication Subscription Channel Type	Private	Private	✓

11. Sharing Rules

In this phase, **no Sharing Rules were created**, since the required record visibility was already achieved through the **Org-Wide Defaults (OWD)** and **Role Hierarchy**.

- **Reason:** Leads are Public Read/Write for collaboration, Opportunities are Private (rep-owned), and Accounts are Public Read Only.
- Additional sharing was not required at this stage.

13. Developer Org Setup & Deployment Basics

All configurations were performed in a Salesforce Developer Edition org.

- Sandboxes are not available in Developer Edition.
- In enterprise environments, deployments are handled using:
 - Change Sets
 - Salesforce CLI (SFDX)
 - Ant Migration Tool

14. Conclusion

Phase 2 successfully established the Salesforce Org configuration for the Lead Management & Sales Tracking project. The setup included company details, users, roles, profiles, OWD, and sharing rules. With this foundation in place, the org is now prepared for Phase 3: Data Modeling & Lead Object Customization.