Phase 2 Report – Org Setup & Configuration

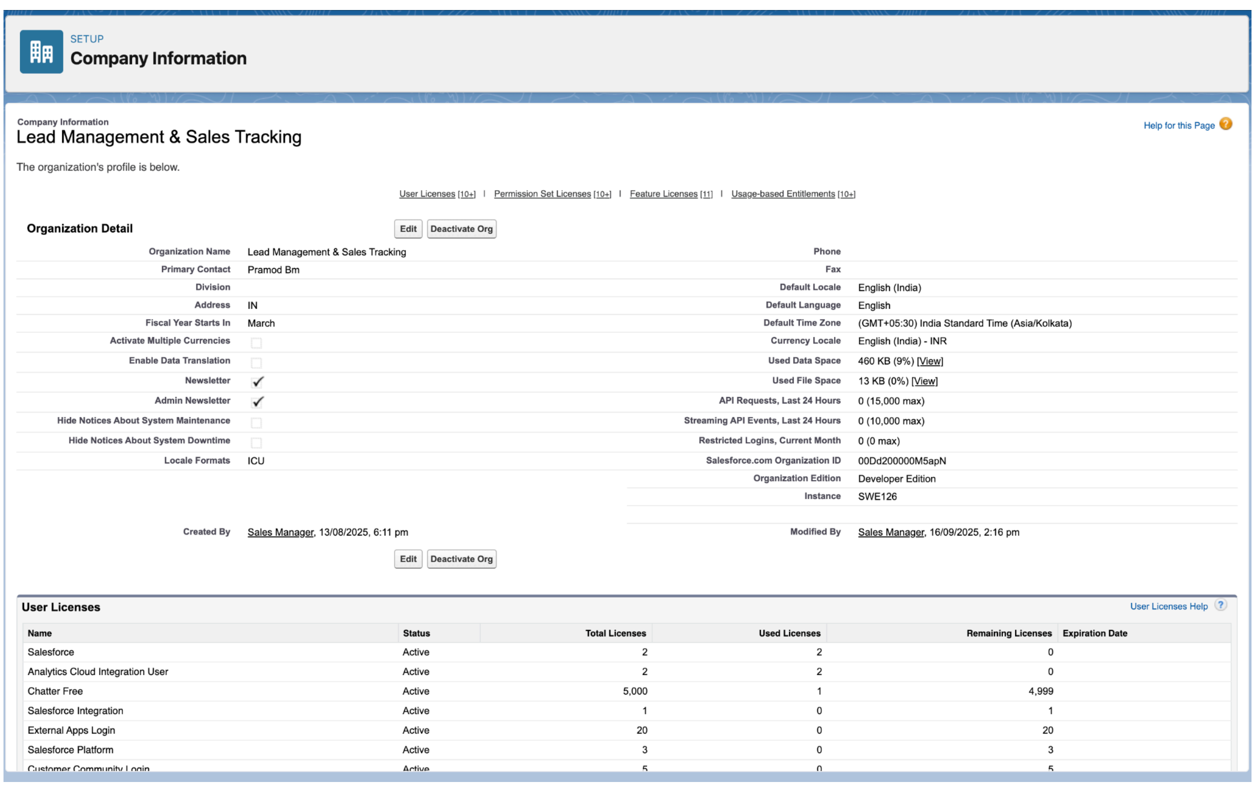
Project: Lead Management & Sales Tracking

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
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	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	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

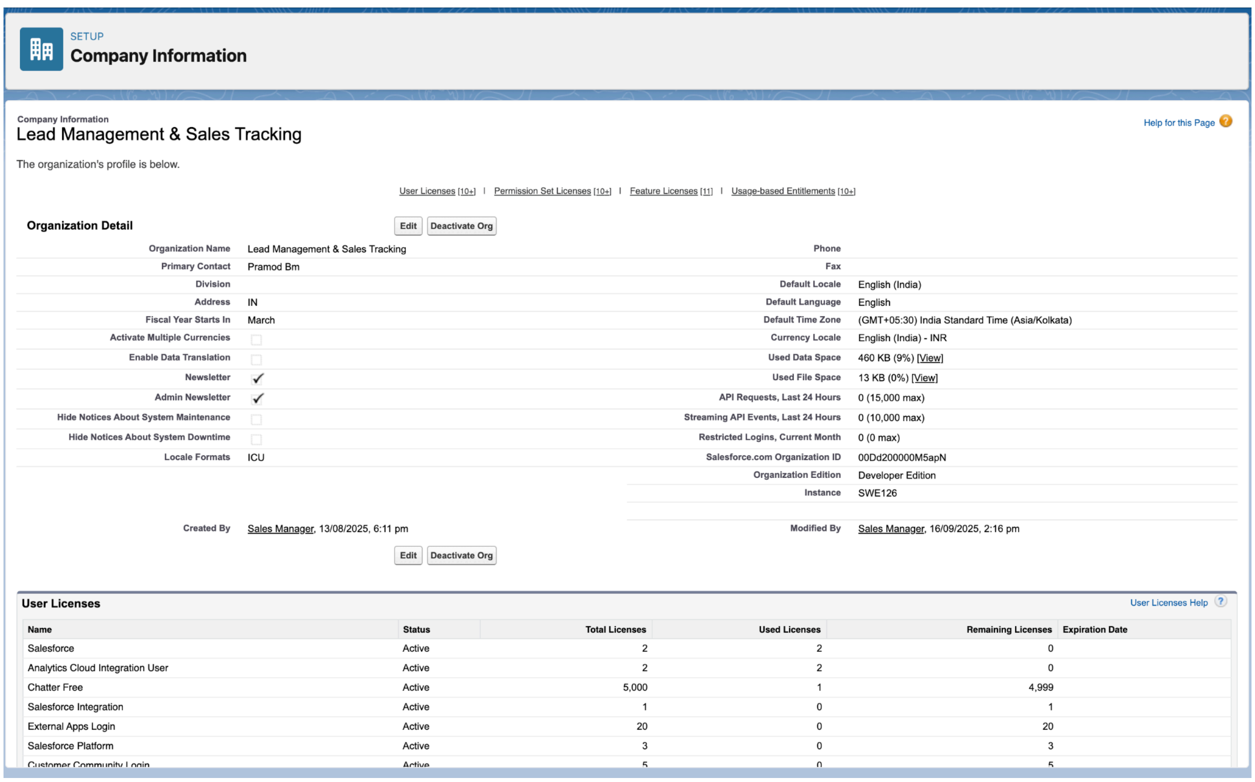
Name	Status	Total Licenses	Used Licenses	Remaining Licenses	Expiration Date
Salesforce	Active	2	2	0	
Analytics Cloud Integration User	Active	2	2	0	
Chatter Free	Active	5,000	1	4,999	
Salesforce Integration	Active	1	0	1	
External Apps Login	Active	20	0	20	
Salesforce Platform	Active	3	0	3	
Customer Community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

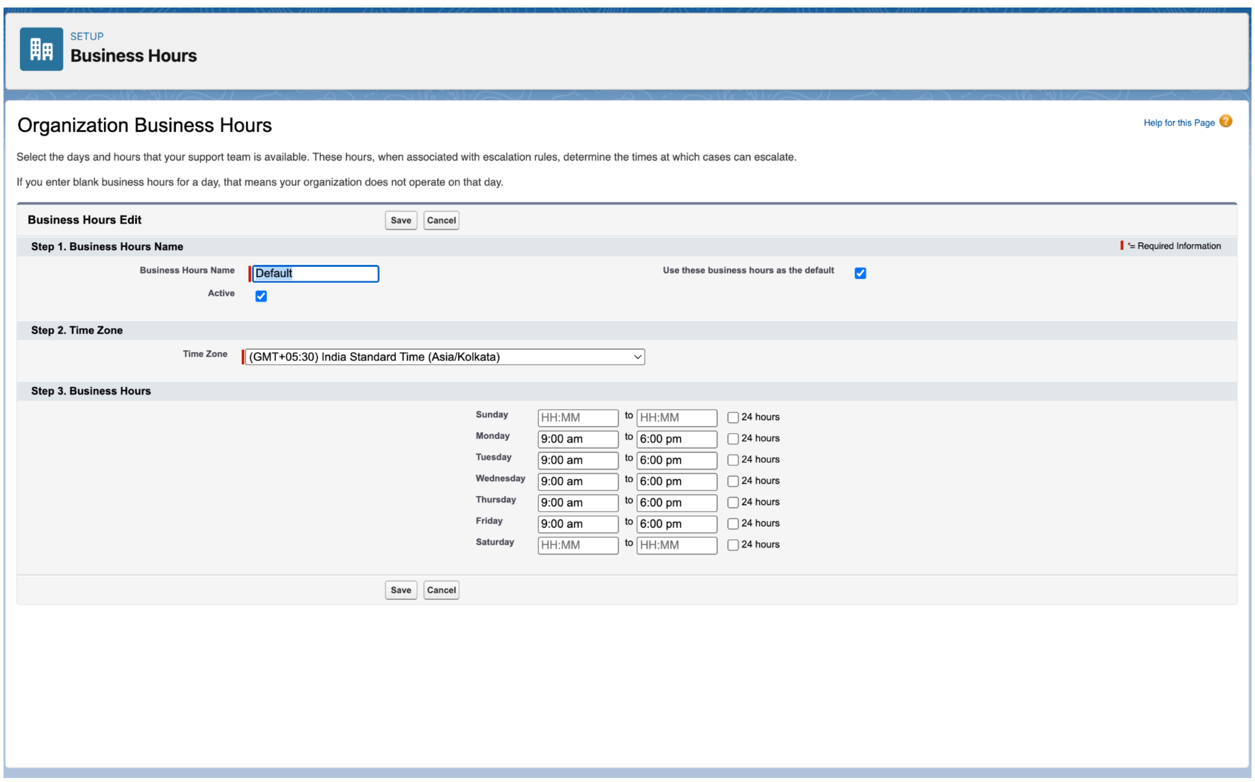


4. Business Hours & Holidays

Default business hours were configured to align with working patterns:

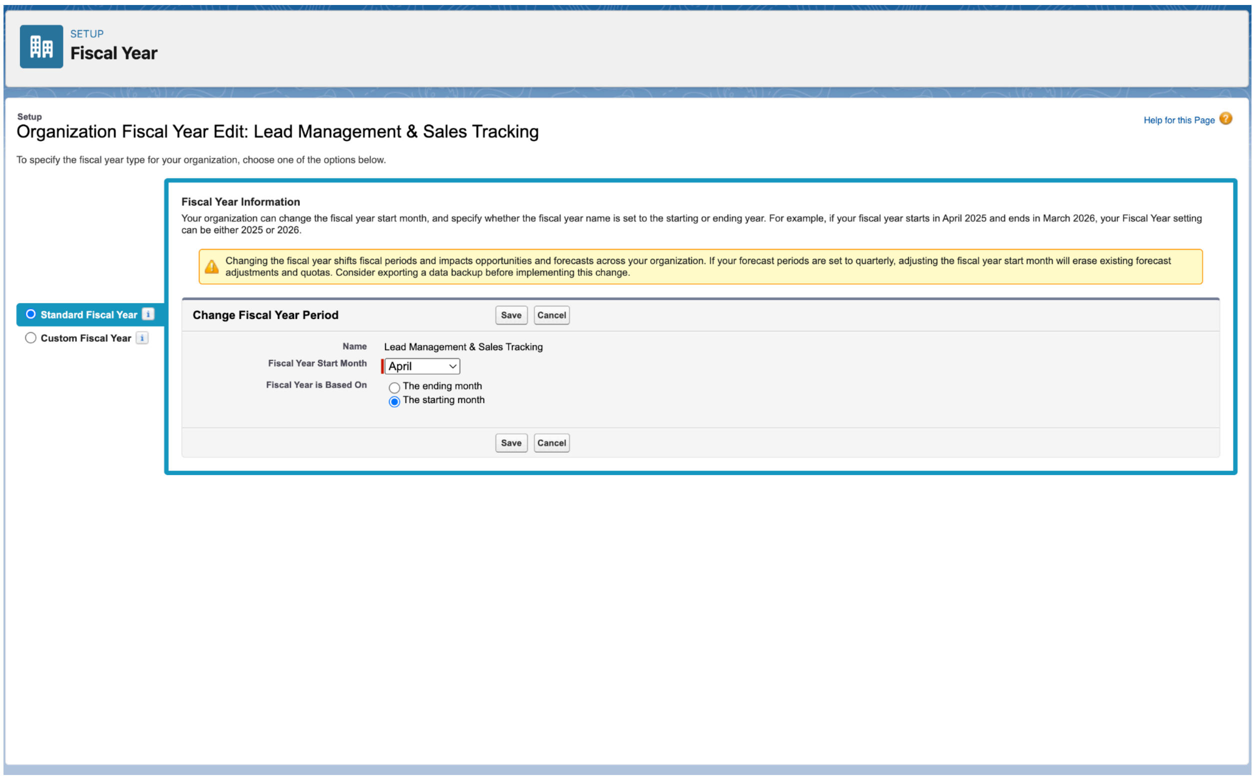
- **Business Hours:** 9:00 AM – 6:00 PM IST, Monday–Friday

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



5. Fiscal Year Settings

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

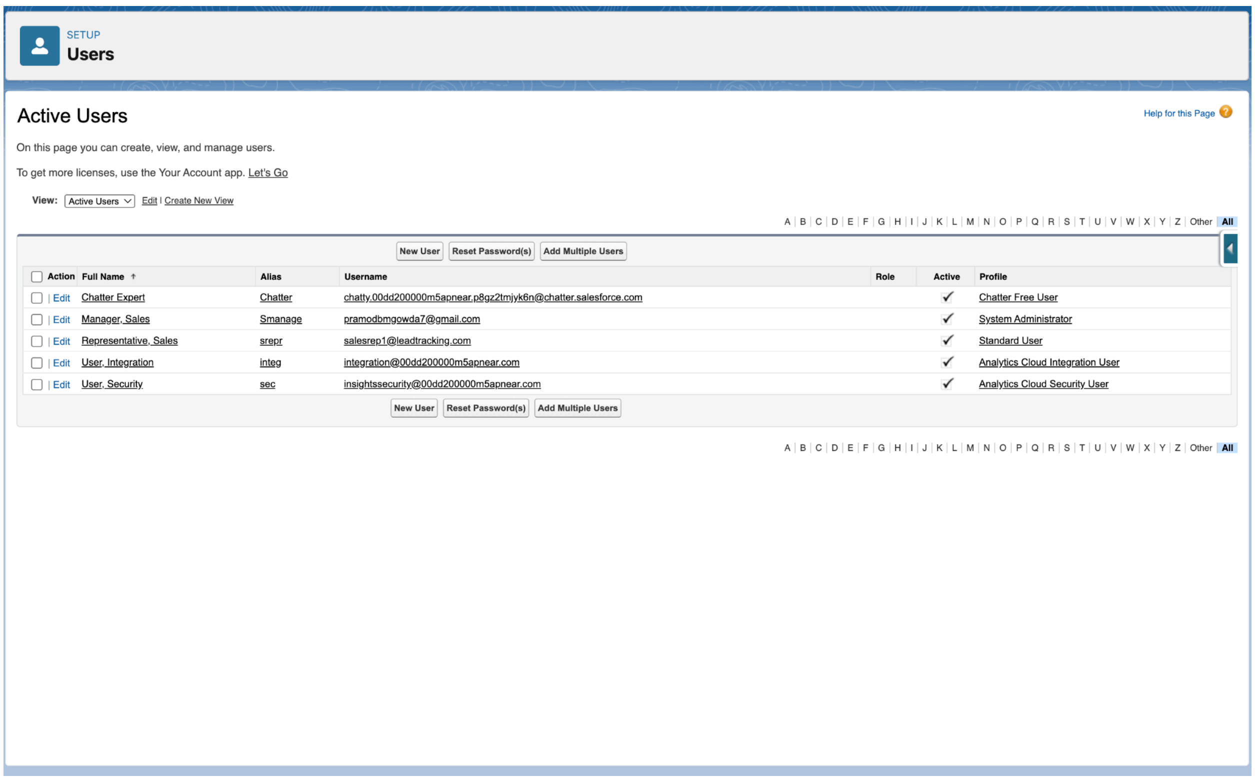


6. User Setup & Licenses

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.

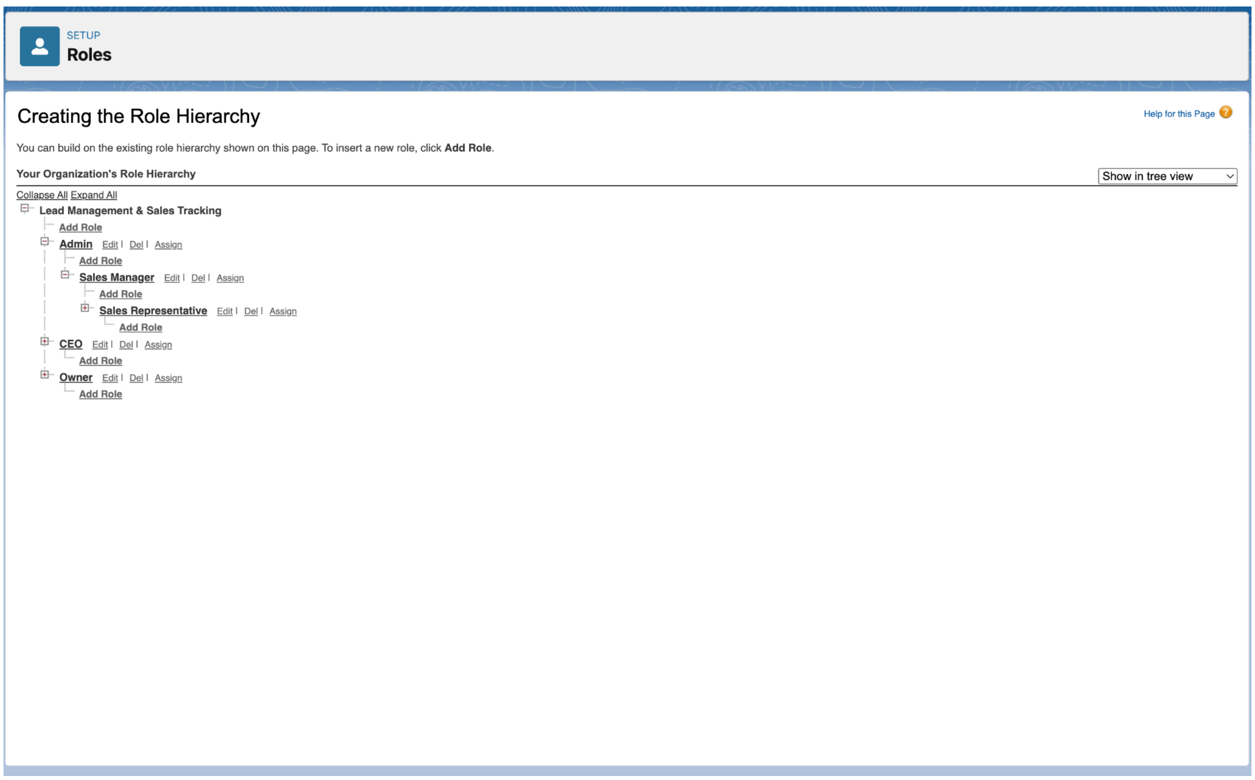


7. Roles

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.

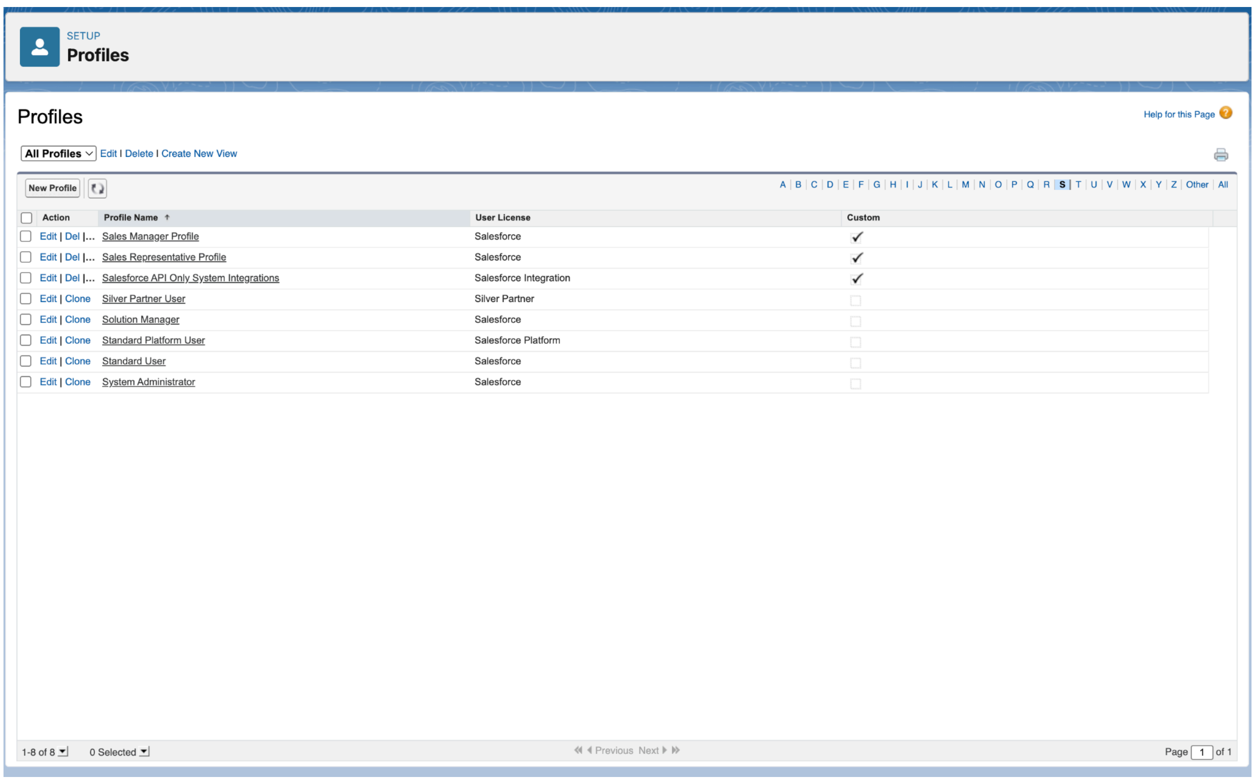


8. Profiles

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.



9. Permission Sets

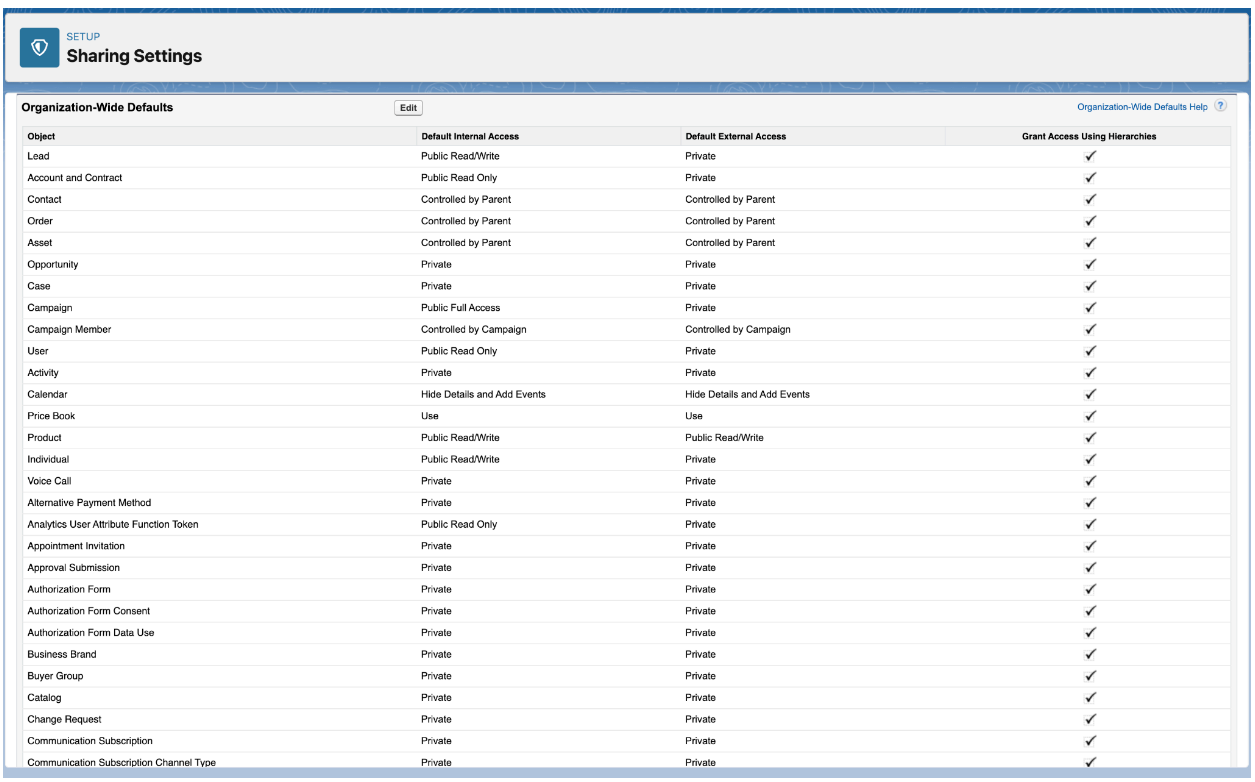
In this phase, **Permission Sets were not created**, since the required access was already configured through **Profiles** (Sales Rep Profile and Sales Manager Profile).

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.