

# AutoCare Pro - Smart Vehicle Service Management

## Phase 2 Implementation Documentation

### Project Overview

**Project Name:** AutoService Manager

**Phase:** 2 - Organization Setup & Configuration

**Salesforce Edition:** Developer Edition

**Implementation Date:** [Current Date]

**Implemented by:** [Your Name]

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### Phase 2 Objectives Completed

- ☒ Company Profile Configuration
  - ☒ Business Hours & Holiday Setup
  - ☒ Role Hierarchy Creation
  - ☒ Custom Profile Development
  - ☒ User Account Creation
  - ☒ Permission Sets Configuration
  - ☒ Security & Sharing Settings
  - ☒ User Access Testing
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### Company Configuration

#### Company Information Setup

**Location:** Setup → Company Information → Company Information

**Configured Settings:**

- **Company Name:** Gyan Ganga Institute of Technology and Sciences - AutoService Manager
- **Address:** Bhopal, Madhya Pradesh, India
- **Phone:** (0755) XXX-XXXX
- **Website:** [www.ggits.net](http://www.ggits.net)
- **Time Zone:** India Standard Time (IST)
- **Language:** English
- **Locale:** India

## Business Hours Configuration

**Location:** Setup → Business Hours → Business Hours

### GGITS AutoService Hours:

- **Monday - Friday:** 9:00 AM - 5:00 PM IST
- **Saturday:** 10:00 AM - 3:00 PM IST
- **Sunday:** Closed
- **Time Zone:** India Standard Time (IST)

## Holidays Added

**Location:** Setup → Business Hours → Holidays

### Configured Indian Holidays:

- Republic Day (January 26, Annual)
- Independence Day (August 15, Annual)
- Gandhi Jayanti (October 2, Annual)
- Diwali (Variable date, Annual)
- Holi (Variable date, Annual)

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## Role Hierarchy Implementation

**Location:** Setup → Users → Roles

### Hierarchy Structure:



## Role Details

| Role              | API Name          | Reports To        | Purpose                                       |
|-------------------|-------------------|-------------------|---|
| Shop Manager      | Shop_Manager      | CEO               | Overall AutoService operations management     |
| Service Advisor   | Service_Advisor   | Shop Manager      | Customer service and appointment coordination |
| Senior Technician | Senior_Technician | Shop Manager      | Lead automotive repair and maintenance        |
| Junior Technician | Junior_Technician | Senior Technician | Automotive repair under supervision           |

## Profile Configuration

**Location:** Setup → Users → Profiles

### Custom Profiles Created

#### 1. Manager Profile

**Based on:** Standard User

**Purpose:** Full administrative access for shop management

#### Key Permissions:

- ☒ View Setup and Configuration
- ☒ Customize Application
- ☒ Create and Customize Reports
- ☒ Run Reports

- ☒ View All Data
- ☒ Modify All Data
- ☒ Edit Tasks and Events

## 2. Service Advisor Profile

**Based on:** Standard User

**Purpose:** Customer service and basic administrative tasks

### Key Permissions:

- ☒ View Setup and Configuration (Limited)
- ☐ Customize Application
- ☒ Create and Customize Reports
- ☒ Run Reports
- ☐ View All Data
- ☒ Edit Tasks and Events

## 3. Technician Profile

**Based on:** Standard User

**Purpose:** Basic access for repair technicians

### Key Permissions:

- ☐ View Setup and Configuration
- ☐ Customize Application
- ☐ Create and Customize Reports
- ☒ Run Reports (Limited)
- ☐ View All Data
- ☒ Edit Tasks and Events



## User Account Setup

**Location:** Setup → Users → Users

### User Details

| Name                 | Username   | Role              | Profile                 | License             | Email  |
|----------------------|--|-------------------|-------------------------|---------------------|--|
| Shubham Bawistale    | <a href="mailto:shubham.bawistale.csds22@ggits.net">shubham.bawistale.csds22@ggits.net</a>       | Shop Manager      | Manager Profile         | Salesforce          | <a href="mailto:shubham.bawistale.csds22@ggits.net">shubham.bawistale.csds22@ggits.net</a>       |
| Sumit Jain           | <a href="mailto:sumit.jain.csds22@ggits.net">sumit.jain.csds22@ggits.net</a>                     | Service Advisor   | Service Advisor Profile | Salesforce          | <a href="mailto:sumit.jain.csds22@ggits.net">sumit.jain.csds22@ggits.net</a>                     |
| Upendra Singh        | <a href="mailto:upendra.singh.csds22@ggits.net">upendra.singh.csds22@ggits.net</a>               | Senior Technician | Technician Profile      | Salesforce Platform | <a href="mailto:upendra.singh.csds22@ggits.net">upendra.singh.csds22@ggits.net</a>               |
| Abhishek Vishwakarma | <a href="mailto:abhishek.vishwakarma.csds22@ggits.net">abhishek.vishwakarma.csds22@ggits.net</a> | Junior Technician | Technician Profile      | Salesforce Platform | <a href="mailto:abhishek.vishwakarma.csds22@ggits.net">abhishek.vishwakarma.csds22@ggits.net</a> |

## License Allocation Summary

- **Salesforce Licenses:** 2 (Manager, Service Advisor)
- **Salesforce Platform Licenses:** 2 (Technicians)
- **Total Users:** 4 + 1 Admin = 5 users

## Permission Sets Configuration

**Location:** Setup → Users → Permission Sets

### Permission Sets Created

#### *1. Parts Inventory Access*

**API Name:** Parts\_Inventory\_Access

**Purpose:** Access to parts inventory management

**Description:** Manage parts inventory and ordering

**Status:** Created (Ready for Phase 3 object permissions)

## 2. Customer Data Access

**API Name:** Customer\_Data\_Access

**Purpose:** Extended customer information access

**Description:** View comprehensive customer data across accounts

**Status:** Created (Ready for Phase 3 object permissions)

## 3. Financial Reports Access

**API Name:** Financial\_Reports\_Access

**Purpose:** Access to financial data and reports

**Description:** View cost, pricing, and financial reporting data

**Status:** Created (Ready for Phase 3 object permissions)

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# Security Configuration

## Organization-Wide Defaults (OWD)

**Location:** Setup → Security → Sharing Settings

### Configured Settings:

- **Account:** Public Read/Write
- **Contact:** Controlled by Parent
- **Case:** Private
- **Task:** Private
- **Event:** Private

## Session Security Settings

**Location:** Setup → Security → Session Settings

### Configured Settings:

- **Session Timeout:** 2 hours
- **Disable timeout warning popup:** No
- **Lock sessions to IP address:** Yes
- **Lock sessions to domain:** Yes

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# Testing & Validation

## User Access Testing Results

**Test Method:** Incognito browser sessions for each user

| User                               | Login Status | Setup Access   | Expected Behavior          | Result |
|------------------------------------|--------------|----------------|----------------------------|--------|
| Shubham Bawistale (Manager)        | ✔ Success    | Full Access    | Can access all Setup menus | ✔ Pass |
| Sumit Jain (Service Advisor)       | ✔ Success    | Limited Access | Restricted Setup access    | ✔ Pass |
| Upendra Singh (Senior Tech)        | ✔ Success    | No Access      | Basic user access only     | ✔ Pass |
| Abhishek Vishwakarma (Junior Tech) | ✔ Success    | No Access      | Basic user access only     | ✔ Pass |

## Password Management

**Method:** Reset Password function used for all users

**Delivery:** Temporary passwords sent via email

**Status:** All users have functional login credentials

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## Implementation Metrics

### Timeline

- **Phase 2 Start:** [Start Date]
- **Phase 2 Completion:** [Completion Date]
- **Total Time Invested:** [Hours]

### Scope Coverage

- **Company Configuration:** 100% Complete
- **User Management:** 100% Complete
- **Role Hierarchy:** 100% Complete
- **Profile Security:** 100% Complete
- **Permission Framework:** 100% Complete