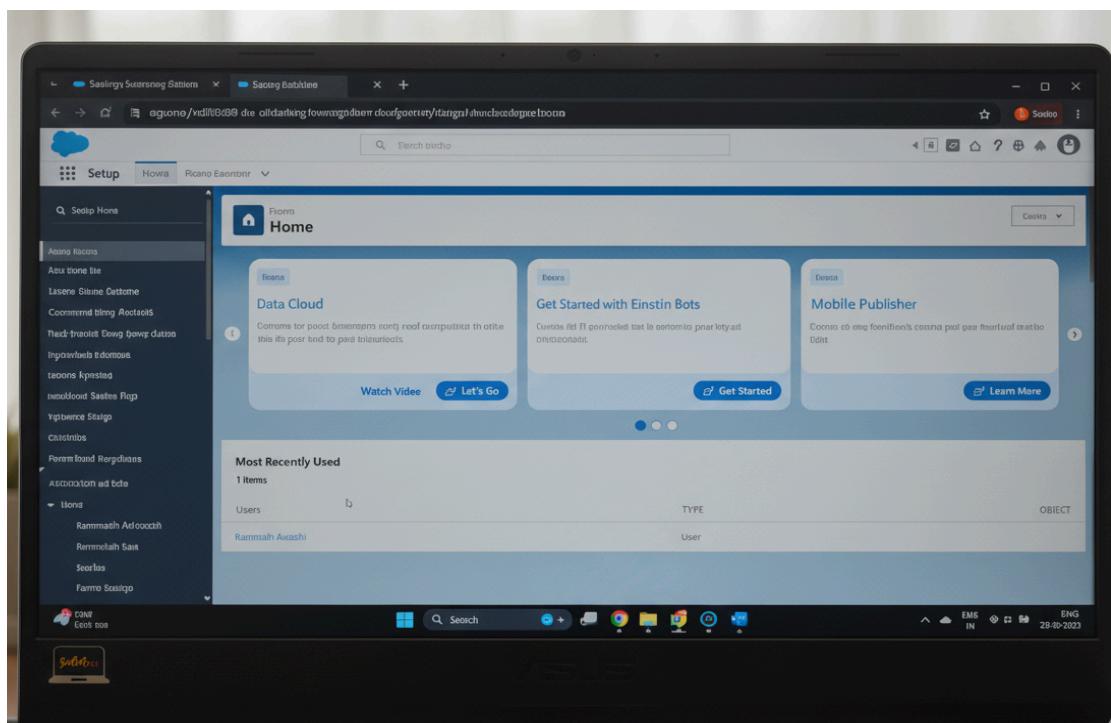


## **Phase 2: Org Setup & Configuration:**

## Salesforce Editions:

Salesforce provides different editions such as Essentials, Professional, Enterprise, and Unlimited, each designed for specific business needs. ResidentConnect should operate on Enterprise Edition, as it supports customization, automation, roles, profiles, permission sets, and sandbox environments. The choice of edition determines the features, number of users, API access, and development capabilities. Ensuring the correct edition is chosen is the first step before proceeding with configuration.



## Company Profile Setup:

information configured with:

## **Organization Name → ResidentConnect**

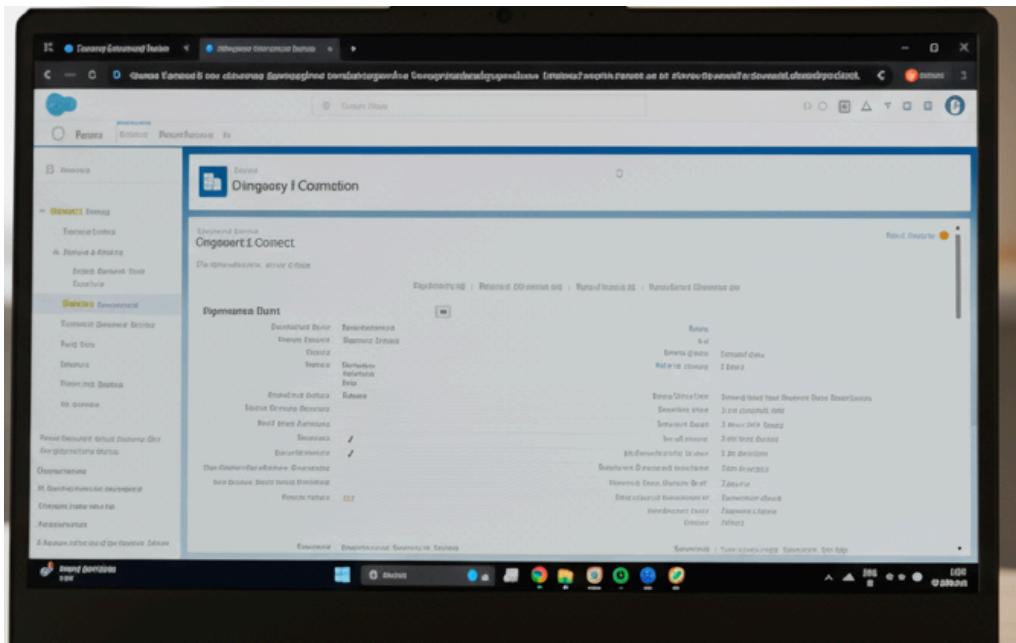
**Default Time Zone → (GMT+05:30) India Standard Time (Asia/Kolkata)**

## **Default Locale → English (India)**

## Default Language → English

**Default Currency → INR – Indian Rupee**

## Primary Contact → avanthi



## **Business Hours & Holidays:**

Business Hours-Monday to Friday, 9:00 AM to 6:00 PM

Holidays such as national holidays or organization-wide holidays.

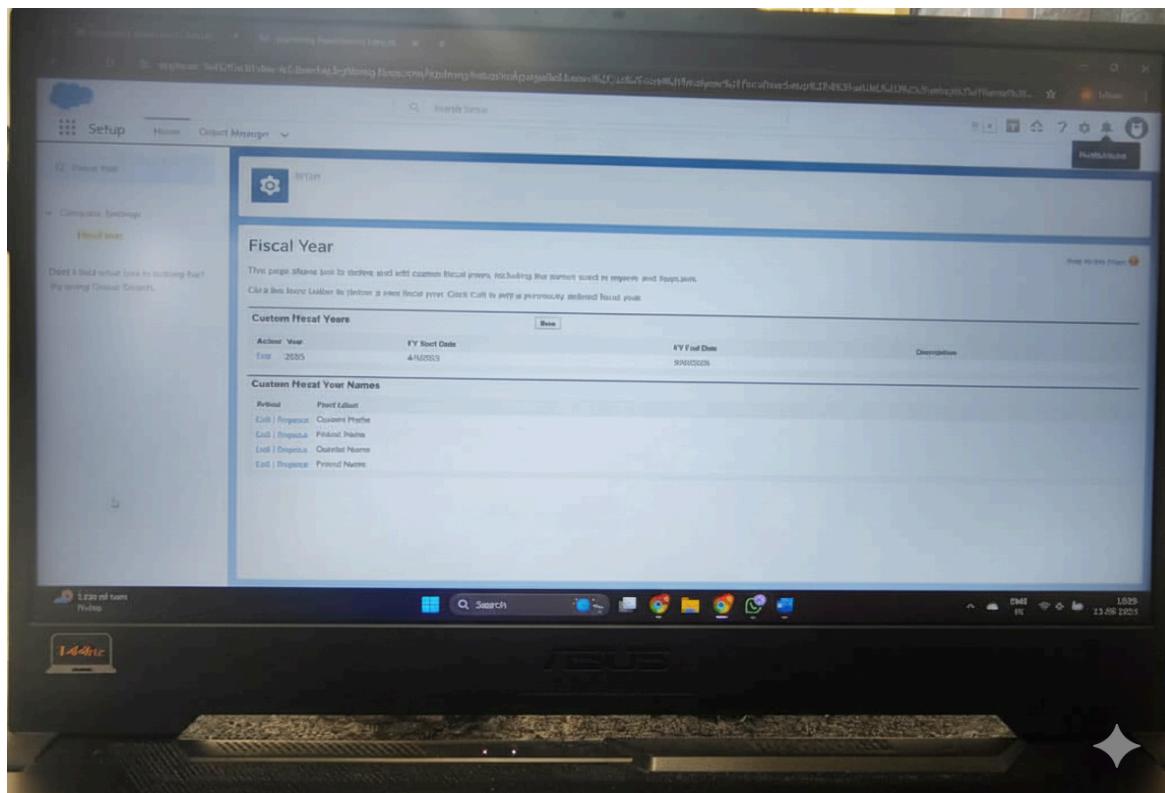
Excluded from SLA calculations.

## Fiscal years :

Standard Fiscal Year-uses( April 1st to March 31st), aligning with the Indian financial calendar.

Supports all standard Salesforce reports, dashboards, and forecasting tools.

All financial reports, roll-ups, and dashboards automatically use the fiscal year settings.



## User Setup & Licenses:

### Username

priya.sharma@rc.com

### Profile

System Administrator

### License

Salesforce Platform

rajesh.verma@rc.com

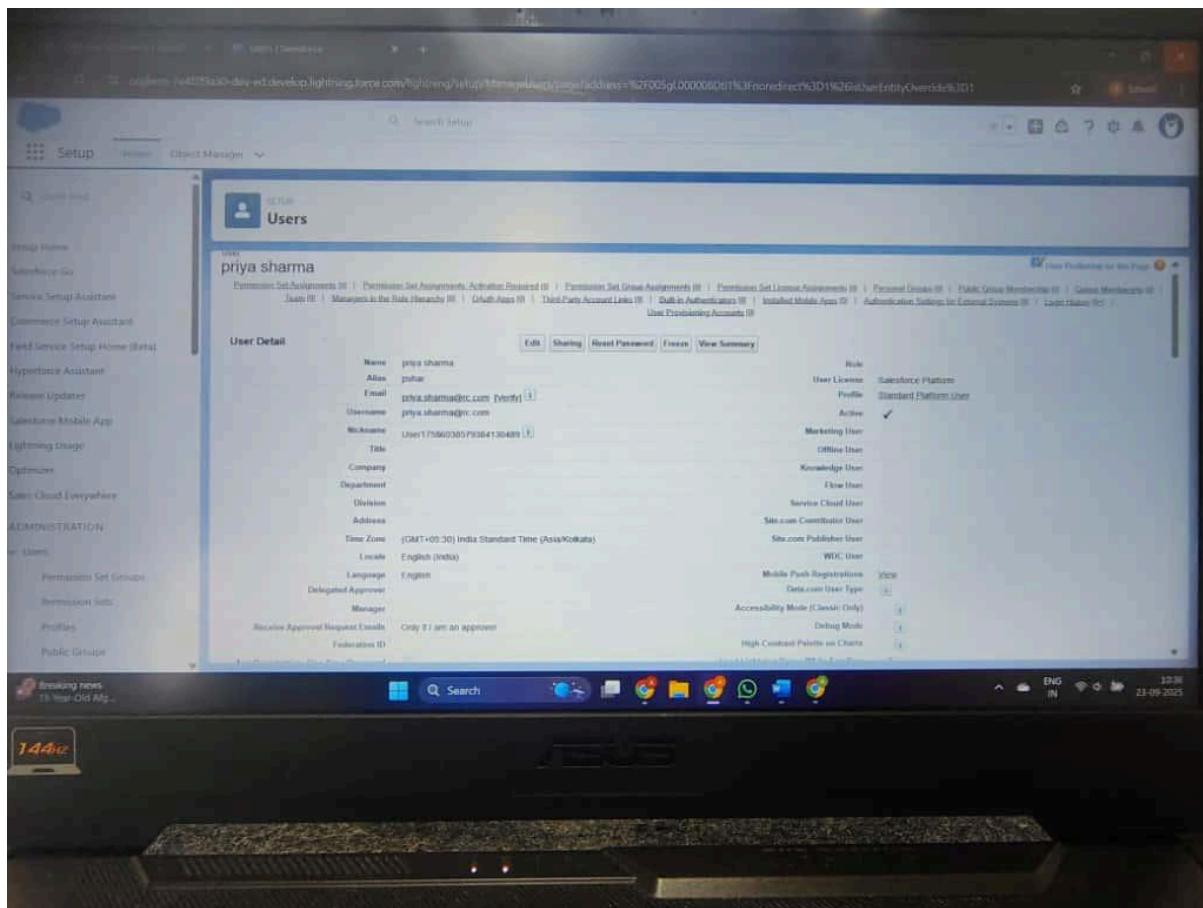
Salesforce CRM

anjali.singh@rc.com

Salesforce Platform

vikram.gupta@rc.com

Salesforce CRM



## Roles:

Admin (full access) - Community Manager (Manage community (users)-Resident Support Agent - handle resident queries and case resolution).

## Permission Sets:

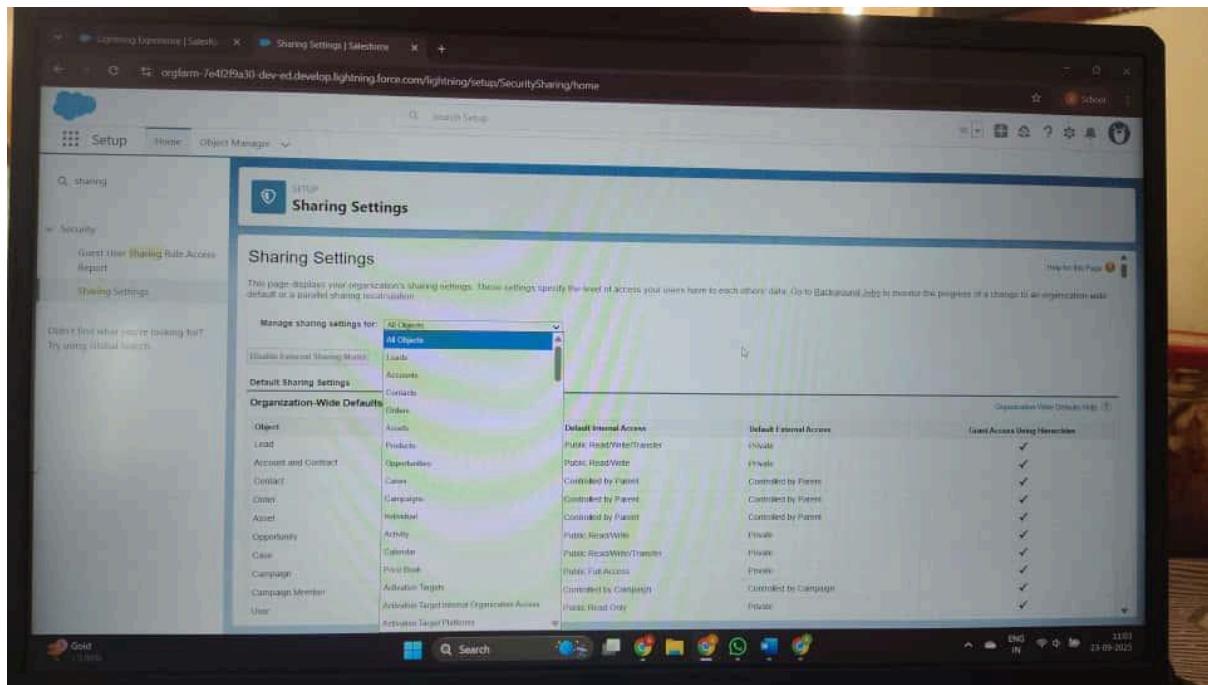
ResidentConnect can create permission sets like *Case Escalation Manager* or *Community App Access* and assign them to specific users.

## Organization-Wide Defaults (OWD):

Object	Access Level	Notes/Justification
Complaints	Private	Sensitive resident data, restrict access

Service Requests	Private	Only owner and higher role should access
Announcements	Public Read Only	Information can be shared broadly
Accounts/Residents	Public Read/Write	Shared for collaboration if required

## Sharing Rules:



## Login Access Policies:

ResidentConnect should enforce trusted IP ranges, set login hours, and enable multi-factor authentication (MFA) for critical roles.

## Dev Org Setup:

ResidentConnect developers can sign up at developer.salesforce.com and use this environment for POCs (proof-of-concepts), coding, and testing.

## Sandbox Usage:

**Partial Copy Sandboxes** for testing with sample data, and a **Full Sandbox** for UAT and staging. Refresh cadence should be defined to keep data up to date.

## **Deployment Basics:**

Deployment involves moving changes from sandbox to production. For admins, **Change Sets** allow easy metadata deployment, while for developers, **Salesforce CLI (SFDX) with VS Code** enables version control and CI/CD pipelines.