Phase 2: Org Setup & Configuration

Objective: Establish Salesforce org foundation with proper configuration, security, and governance for the Insurance Portal.

Concepts Covered:

- Salesforce Editions
- Company Profile Setup
- Business Hours & Holidays
- Fiscal Year Settings
- User Setup & Licenses
- Profiles
- Roles
- Permission Sets
- OWD (Organization-Wide Defaults)
- Sharing Rules
- Login Access Policies
- Dev Org Setup
- Sandbox Usage
- Deployment Basics

Industry Application (Insurance Portal Use Case):

For an insurance portal, a robust Salesforce org setup ensures scalability, compliance, and secure access for agents, policyholders, claims adjusters, and managers.

Sample Configurations & Examples:

- Company Profile: Set working hours as 9 AM – 6 PM IST, with national holidays configured.
- Fiscal Year: Align fiscal year to April–March as per Indian insurance regulations.
- User Setup: Create separate profiles for Agents, Claims Adjusters, Managers, and Finance Teams.
- Roles: Define hierarchy – CEO → Regional Manager → Branch Manager → Insurance Agent.
- Permission Sets: Provide Claims Adjusters additional access to Claim Records without changing base profiles.
- OWD: Set Account/Policy objects to Private to ensure customer data confidentiality.
- Sharing Rules: Share specific policy data with managers for review purposes.
- Sandbox Usage: Use Full Sandbox for UAT (User Acceptance Testing) and Developer Sandbox for unit testing.
- Deployment Basics: Use Change Sets for small changes and SFDX for enterprise-level deployments.

Key Takeaways:

- Proper org setup is the backbone of a scalable Salesforce Insurance Portal.
- Security and compliance require carefully defined roles, profiles, and sharing rules.
- Sandbox strategy ensures smooth development and testing before production deployment.
- Aligning fiscal year, business hours, and holidays with insurance regulations improves reporting accuracy.