


# Phase 2: Org Setup & Configuration

## 1. Salesforce Editions

- The project is implemented on the **Salesforce Developer Edition org**, which provides free access for customization and testing.
- For real-world deployment, **Enterprise Edition** would be preferred because it supports advanced features like profiles, roles, sharing rules, API integration, and sandbox creation.

## 2. Company Profile Setup

- Company profile set as **Student Accommodation Finder Pvt. Ltd.**
- Details such as company name, address, primary contact, default currency (**INR**), and time zone configured.

 **SETUP**

**Company Information**

Company Information

Student Accommodation Finder Pvt. Ltd.

[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

Organization Name	Student Accommodation Finder Pvt. Ltd.	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (United States)
Address	Madhya Pradesh, Jabalpur Jabalpur 482003 Madhya Pradesh India	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	489 KB (10%) <a href="#">[View]</a>
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) <a href="#">[View]</a>
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	229 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00DgK000007dGvM
		Organization Edition	Developer Edition
		Instance	CAN96

Created By

OrgFarm EPIC, 7/18/2025, 2:42 AM

Modified By

Aakarsh verma, 9/12/2025, 7:38 AM

## 3. Business Hours & Holidays

- Business hours: **Monday–Saturday (9:00 AM – 7:00 PM)**
- Public holidays (e.g., Independence Day, Diwali, New Year) added

## Organization Business Hours

[Help for this Page](#)

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.

[Holidays \[0\]](#)

### Business Hours Detail

[Edit](#)

Business Hours Name	Support Hours - Student Finder	Time Zone
Business Hours	<div> <div>Sunday</div> <div>Monday</div> <div>Tuesday</div> <div>Wednesday</div> <div>Thursday</div> <div>Friday</div> <div>Saturday</div> </div> <div> <div>No Hours</div> <div>9:00 AM to 7:00 PM</div> <div>9:00 AM to 7:00 PM</div> <div>9:00 AM to 7:00 PM</div> <div>9:00 AM to 7:00 PM</div> <div>9:00 AM to 7:00 PM</div> <div>9:00 AM to 7:00 PM</div> </div>	(GMT+05:30) India Standard Time (Asia/Kolkata)
	Default Business Hours	<input type="checkbox"/>
Active	<input checked="" type="checkbox"/>	
Created By	Aakarsh verma 9/12/2025, 7:51 AM	
	Last Modified By	Aakarsh verma 9/12/2025, 7:51 AM

[Edit](#)

## 4. Fiscal Year Settings

- Standard fiscal year chosen (April–March)

## 5. User Setup & Licenses

- Users created for roles: **Students, Landlords, Admins**
- Licenses assigned:
  - Platform License → Students and Landlords
  - Salesforce License → Admins and Managers

### User Rahul Sharma

[User Profile](#) [Help for this Page](#)

[Permission Set Assignments \[0\]](#) | 
 [Permission Set Assignments: Activation Required \[0\]](#) | 
 [Permission Set Group Assignments \[0\]](#) | 
 [Permission Set License Assignments \[0\]](#) | 
 [Personal Groups \[0\]](#) | 
 [Public Group Membership \[0\]](#) | 
 [Queue Membership \[0\]](#) | 
 [Team \[0\]](#) | 
 [Managers in the Role Hierarchy \[1\]](#) | 
 [OAuth Apps \[0\]](#) | 
 [Third-Party Account Links \[0\]](#) | 
 [Built-in Authenticators \[0\]](#) | 
 [Installed Mobile Apps \[0\]](#) | 
 [Authentication Settings for External Systems \[0\]](#) | 
 [Login History \[0+\]](#) | 
 [User Provisioning Accounts \[0\]](#)

### User Detail

[Edit](#)
[Sharing](#)
[Reset Password](#)
[Login](#)
[Freeze](#)
[View Summary](#)

Name	Rahul Sharma	Role	Student
Alias	rshar	User License	Salesforce Platform
Email	umanshu50@gmail.com <a href="#">[Verify]</a>	Profile	Student Profile
Username	rahul.sharma@accommodation.com	Active	<input checked="" type="checkbox"/>
Nickname	RahulS	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>

SETUP

Users

User

Suresh Verma

[Permission Set Assignments \[0\]](#) | [Permission Set Assignments: Activation Required \[0\]](#) | [Permission Set Group Assignments \[0\]](#) | [Permission Set License Assignments \[0\]](#) | [Personal Groups \[0\]](#) | [Public Group Membership \[0\]](#) | [Queue Membership \[0\]](#) | [Team \[0\]](#) | [Managers in the Role Hierarchy \[0\]](#) | [OAuth Apps \[0\]](#) | [Third-Party Account Links \[0\]](#) | [Built-in Authenticators \[0\]](#) | [Installed Mobile Apps \[0\]](#) | [Authentication Settings for External Systems \[0\]](#) | [Login History \[0+\]](#) | [User Provisioning Accounts \[0\]](#)

User Detail

Edit

Sharing

Reset Password

Login

Freeze

View Summary

Name	Suresh Verma	Role	Landlord
Alias	sverm	User License	Salesforce Platform
Email	suresh.verma@accommodation.com <a href="#">[Verify]</a>	Profile	Landlord Profile
Username	suresh.verma@accommodation.com	Active	<input checked="" type="checkbox"/>
Nickname	SureshV	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>

## 6. Profiles

- Profiles created to define baseline permissions:
  - **Student Profile** – search, request, view accommodations
  - **Landlord Profile** – list accommodations, update availability, view bookings
  - **Admin Profile** – full access

SETUP

Profiles

Profile

System Administrator

[Help for this Page](#)

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \[0\]](#) | [Enabled Apex Class Access \[14\]](#) | [Enabled Visualforce Page Access \[23\]](#) | [Enabled External Data Source Access \[0\]](#) | [Enabled Named Credential Access \[0\]](#) | [Enabled External Credential Principal Access \[0\]](#) | [Enabled Custom Metadata Type Access \[0\]](#) | [Enabled Custom Setting Definitions Access \[0\]](#) | [Enabled Flow Access \[0\]](#) | [Enabled Service Presence Status Access \[0\]](#) | [Enabled Custom Permissions \[0\]](#)

Profile Detail

Edit

Clone

View Users

Name	System Administrator	Custom Profile	<input type="checkbox"/>
User License	Salesforce	Created By	salesforce.com, inc., 7/18/2025, 2:42 AM
Modified By	salesforce.com, inc., 9/15/2025, 9:38 PM		

SETUP

Profiles

Profile

Student Profile

[Help for this Page](#)

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \[0\]](#) | [Enabled Apex Class Access \[0\]](#) | [Enabled Visualforce Page Access \[0\]](#) | [Enabled External Data Source Access \[0\]](#) | [Enabled Named Credential Access \[0\]](#) | [Enabled External Credential Principal Access \[0\]](#) | [Enabled Custom Metadata Type Access \[0\]](#) | [Enabled Custom Setting Definitions Access \[0\]](#) | [Enabled Flow Access \[0\]](#) | [Enabled Service Presence Status Access \[0\]](#) | [Enabled Custom Permissions \[0\]](#)

Profile Detail

Edit

Clone

Delete

View Users

Name	Student Profile	Custom Profile	<input checked="" type="checkbox"/>
User License	Salesforce Platform	Created By	Aakarsh verma, 9/17/2025, 2:07 PM
Modified By	Aakarsh verma, 9/17/2025, 2:17 PM		

SETUP

Profiles

Profile

Landlord Profile

Help for this Page

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges [0] | Enabled Apex Class Access [0] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] | Enabled External Credential Principal Access [0] | Enabled Custom Metadata Type Access [0] | Enabled Custom Setting Definitions Access [0] | Enabled Flow Access [0] | Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]

Profile Detail

EditCloneDeleteView Users

Name	Landlord Profile		
User License	Salesforce Platform	Custom Profile	✓
Description			
Created By	Aakarsh verma, 9/17/2025, 2:19 PM	Modified By	Aakarsh verma, 9/17/2025, 2:22 PM

7. Roles

- Role hierarchy:
  - Admin (top-level)
  - Landlord Manager
  - Student Support Executive

SETUP

Roles

Role

Admin

Help for this Page

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: Student Accommodation Finder Pvt. Ltd. » CEO » Admin

Siblings: SVP, Sales & Marketing, SVP, Customer Service & Support, CFO, SVP, Human Resources, COO, test Role

Users in Admin Role [0]

Role Detail

EditDelete

Label	Admin	Role Name	Admin
This role reports to	CEO	Role Name as displayed on reports	
Modified By	Aakarsh verma, 9/17/2025, 1:58 PM	Sharing Groups	Role, Role, Internal and Portal Subordinates, Role and Internal Subordinates
Opportunity Access	Users in this role can <b>edit</b> all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can <b>edit</b> all cases associated with accounts that they own, regardless of who owns the cases		
Partner Role	<input type="checkbox"/>		
Customer Role	<input type="checkbox"/>		

SETUP

Roles

Role

Landlord

Help for this Page

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.


Hierarchy: Student Accommodation Finder Pvt. Ltd. » CEO » Admin » Landlord

Users in Landlord Role [1]

Role Detail

EditDelete

Label	Landlord	Role Name	Landlord
This role reports to	Admin	Role Name as displayed on reports	
Modified By	Aakarsh verma, 9/17/2025, 1:59 PM	Sharing Groups	Role, Role, Internal and Portal Subordinates, Role and Internal Subordinates
Opportunity Access	Users in this role can <b>edit</b> all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can <b>edit</b> all cases associated with accounts that they own, regardless of who owns the cases		
Partner Role	<input type="checkbox"/>		
Customer Role	<input type="checkbox"/>		

 **SETUP**  
**Roles**

Role

Student

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: Student Accommodation Finder Pvt. Ltd. » [CEO](#) » [Admin](#) » [Landlord](#) » Student

Users in Student Role [1]

Role Detail


Edit

Delete

Label	Student	Role Name	Student
This role reports to	<a href="#">Landlord</a>	Role Name as displayed on reports	
Modified By	<a href="#">Aakarsh verma</a> , 9/17/2025, 2:00 PM	Sharing Groups	<a href="#">Role, Role, Internal and Portal Subordinates, Role and Internal Subordinates</a>
Opportunity Access	Users in this role can <b>edit</b> all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can <b>edit</b> all cases associated with accounts that they own, regardless of who owns the cases		
Partner Role	<input type="checkbox"/>		
Customer Role	<input type="checkbox"/>		

8. Permission Sets

- Grant additional permissions without modifying profiles
- Examples:
  - Students → Read Accommodation, Create Booking
  - Landlords → Manage Accommodation, Approve Bookings
  - Admins → Full access

 **SETUP**  
**Permission Sets**

Permission Set

Admin Access

Video Tutorial | Help for this Page

Find Settings...

Clone

Delete


Edit Properties

Manage Assignments

View Summary

Permission Set Overview

Description	API Name	Admin_Access
License	Namespace Prefix	
Session Activation Required	Created By	<a href="#">Aakarsh verma</a> , 9/22/2025, 2:16 AM
Permission Set Groups Added To	Last Modified By	<a href="#">Aakarsh verma</a> , 9/22/2025, 2:19 AM

 **SETUP**  
**Permission Sets**

Permission Set

Landlord Access

Video Tutorial | Help for this Page

Find Settings...

Clone

Delete


Edit Properties

Manage Assignments

View Summary

Permission Set Overview

Description	API Name	Landlord_Access
License	Namespace Prefix	
Session Activation Required	Created By	<a href="#">Aakarsh verma</a> , 9/22/2025, 2:14 AM
Permission Set Groups Added To	Last Modified By	<a href="#">Aakarsh verma</a> , 9/22/2025, 2:16 AM

 **SETUP**  
**Permission Sets**

Permission Set

Student Access


Video Tutorial | Help for this Page ?

**Permission Set Overview**

Description	Grants students access to properties and bookings	API Name	Student_Access
License		Namespace Prefix	
Session Activation Required	<input type="checkbox"/>	Created By	Aakarsh verma, 9/22/2025, 2:12 AM
Permission Set Groups Added To	0	Last Modified By	Aakarsh verma, 9/22/2025, 2:13 AM

## 9. Organization-Wide Defaults (OWD)

- Booking → Private
- Accommodation → Public Read/Write
- Student → Private
- Landlord → Private

 **SETUP**  
**Sharing Settings**

Default Sharing Settings

Organization-Wide Defaults


Edit

Organization-Wide Defaults Help ?

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Booking	Private	Private	<input checked="" type="checkbox"/>

## 10. Sharing Rules

- **Owner-Based:** Bookings owned by Students → shared with Landlord → Read/Write
- **Criteria-Based:** Bookings with Status = Confirmed → shared with Admin → Read/Write

 **SETUP**  
**Sharing Settings**

Default Sharing Settings

Organization-Wide Defaults

Edit

Organization-Wide Defaults Help ?

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Booking	Private	Private	<input checked="" type="checkbox"/>

**Other Settings**

Other Settings Help ?

Manager Groups

☐

Secure guest user record access

☒

Require permission to view record names in lookup fields

☐

Sharing Rules

Booking Sharing Rules


New Recalculate

Booking Sharing Rules Help ?

Action	Criteria	Shared With	Access Level
<a href="#">Edit</a>   <a href="#">Del</a>	Booking: Status EQUALS Confirmed	Role: Admin	Read/Write
<a href="#">Edit</a>   <a href="#">Del</a>	Owner in Role and Internal Subordinates: Student	Role: Landlord	Read/Write

## 11. Login Access Policies

- Enable admins temporary access for support

 **SETUP**  
**Login Access Policies**

### Login Access Policies


Control which support organizations your users can grant login access to.

**Manage Support Options**

Save

Cancel

Setting	Enabled
Administrators Can Log in as Any User	<input checked="" type="checkbox"/>

Support Organization	Packages	Available to Users	Available to Administrators Only 
Salesforce.com Support		<input checked="" type="radio"/>	<input type="radio"/>

## 12. Developer Org Setup

- Sign up/Login at [developer.salesforce.com](https://developer.salesforce.com)
- Create users: Students, Landlords, Admins
- Create custom objects: Student, Landlord, Accommodation, Booking, Payment
- App & Tab Setup: Booking, Accommodation, Student, Landlord, Payment

## 13. Sandbox Usage

- Developer Edition does not include Sandbox; skipped

## 14. Deployment Basics

### Salesforce CLI

```
sfdx force:auth:web:login -a DevOrg
```

```
sfdx force:source:pull
```

```
sfdx force:auth:web:login -a TargetOrg
```

```
sfdx force:source:push -u TargetOrg
```