

# “Government Schemes Management System”

## PHASE 2 – Org Setup & Configuration

### Company Profile Setup

- **Path:** Setup → Company Information → Edit
- **Details Configured:**
  - **Name:** Government Schemes Management – Dev
  - **Time Zone:** GMT+05:30 (Asia/Kolkata)
  - **Locale:** English (India) – to control date/number formats
  - **Language:** English
  - **Currency:** INR (₹)

Company Information

Govt Schemes Management System – Dev

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	Govt Schemes Management System – Dev	Phone	
Primary Contact	KAPPAACHCHITHA	Fax	
Division		Default Locale	English (India)
Address	IN	Default Language	English
Fiscal Year Starts In	April	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	346 KB (7%) <a href="#">View</a>
Newsletter	<input checked="" type="checkbox"/>	Used File Space	13 KB (0%) <a href="#">View</a>
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	0 (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	00DdM00000d7Gxd
		Organization Edition	Developer Edition
		Instance	IND136

Created By

KAPPAACHCHITHA, 14/09/2025, 9:11 am

Modified By

KAPPAACHCHITHA, 21/09/2025, 10:33 am

Edit

Deactivate Org

### Business Hours Setup

Configure working hours for escalation rules and SLA tracking:

- **Path:** Setup → Business Hours → New.

- **Name:** Govt Dept Working Hours.
- **Time Zone:** (GMT+05:30) India Standard Time (Asia/Kolkata).
- **Working Hours:**
  - Monday to Friday → 10:00 AM to 5:00 PM
  - Saturday → 10:00 AM to 1:00 PM
  - Sunday → Closed
- **Save:** Applied as Default Business Hours.
- **Active:** Checked.

[Holidays \(10+\)](#)

Business Hours Detail

Edit

Business Hours Name	Government Office Hours	Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Business Hours	Sunday No Hours	Default Business Hours	✓
	Monday 10:00 am to 5:00 pm		
	Tuesday 10:00 am to 5:00 pm		
	Wednesday 10:00 am to 5:00 pm		
	Thursday 10:00 am to 5:00 pm		
	Friday 10:00 am to 5:00 pm		
	Saturday 10:00 am to 1:00 pm		

Active

✓

Created By

KAPPAACHCHITHA 15/09/2025, 9:05 am

Last Modified By

KAPPAACHCHITHA 21/09/2025, 10:40 am

Edit

Fiscal Year Setup

Defines reporting boundaries for forecasts and scheme analysis.

- **Path:** Setup → Fiscal Year
- **Type:** Standard Fiscal Year (April–March)
- **Configuration:** Select the starting month as April
- **Save:** Apply settings to define fiscal periods

## Organization Fiscal Year Edit: Govt Schemes Management System – Dev

To specify the fiscal year type for your organization, choose one of the options below.

☒ Standard Fiscal Year

☐ Custom Fiscal Year

### Fiscal Year Information

Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example, if your fiscal year starts in April 2025 and ends in March 2026, your Fiscal Year setting can be either 2025 or 2026.



Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing this change.

### Change Fiscal Year Period

Save

Cancel

Name Govt Schemes Management System – Dev

Fiscal Year Start Month April

Fiscal Year is Based On  
☐ The ending month  
☒ The starting month

Save

Cancel

## User Setup (Profiles, Roles, Permission Sets, Users)

- **Profiles:** Cloned standard profiles to create custom ones for baseline access.
  - Auditor\_Profile, Officer\_Profile, Citizen\_Profile (to be tuned later with object permissions).
- **Roles:** Defined role hierarchy for access and reporting.
  - CEO, Scheme Manager, Scheme Officer, Auditor, Citizen.
- **Permission Sets:** Created Auditor\_Access\_PS for auditing functions (object permissions to be added once objects exist).
- **Users:** Added sample users with respective profiles and roles.
  - auditor1 → Auditor\_Profile, Role: Auditor
  - officer1 → Officer\_Profile, Role: Scheme Officer
  - citizen1 → Citizen\_Profile, Role: Citizen

Profile

Auditor

« Back to List: Profiles

Help for this F

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	Auditor		
User License	Salesforce Platform	Custom Profile	✓
Description			
Created By	KAPPAACHCHITHA	16/09/2025, 1:02 pm	Modified By KAPPAACHCHITHA 16/09/2025, 8:04 pm

Profile

Officer

« Back to List: Profiles

Help for this

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	Officer		
User License	Salesforce	Custom Profile	✓
Description			
Created By	KAPPAACHCHITHA, 16/09/2025, 12:18 pm	Modified By	KAPPAACHCHITHA, 16/09/2025, 7:55 pm

Profile

Citizen Profile

« Back to List: Profiles

Help for this F

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	Citizen Profile		
User License	Customer Community Login	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	<a href="#">KAPPAACHCHITHA</a>	16/09/2025, 1:19 pm	Modified By
			<a href="#">KAPPAACHCHITHA</a> 16/09/2025, 1:20 pm

# Role Hierarchy Setup

Defines data visibility and reporting structure within the org.

- **Path:** Setup → Roles → Set Up Roles
- **Top-Level Role:** CEO (root of hierarchy)
- **Scheme Manager Role:** Added as child of CEO

- **Scheme Officer Role:** Added as child under Scheme Manager
- **Auditor Role:** Added as separate top-level role for monitoring purposes
- **Citizen Role:** Added as separate top-level role for public access

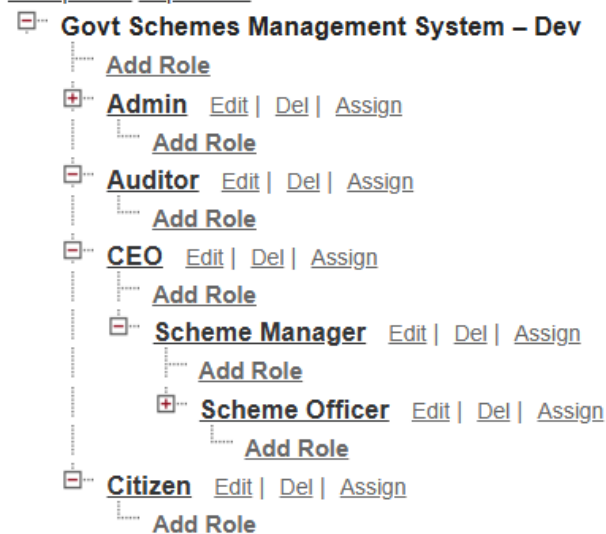
## Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

### Your Organization's Role Hierarchy

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[Collapse All](#) [Expand All](#)



## OWD (Org Wide Default)

- To be implemented in Phase 3, as OWD settings require objects that will be created later.

## Sharing Rule

- To be implemented in Phase 3, since sharing rules depend on object-level access.

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## Assign Permission Set(s)


- After creating users, assign the permission set for auditing functions:

- **Setup → Quick Find → Users → Click the auditor user → Permission Set Assignments → Edit Assignments → Add Auditor\_Reports\_Access → Save**

Permission Set Assignments <span>Edit Assignments</span>			
Action	Permission Set Name	Date Assigned	Expires On
• <a href="#">Del</a>	<a href="#">Auditor Reports Access</a>	16/09/2025	

## Login Access Policies

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

 Changes Saved

Manage Support Options <span>Save</span> <span>Cancel</span>			
Setting	Enabled		
Administrators Can Log in as Any User	<input checked="" type="checkbox"/>		
Support Organization	Packages	Available to Users	Available to Administrators Only <span>i</span>
Salesforce.com Support		<input checked="" type="radio"/>	<input type="radio"/>

Save Cancel

## Dev Org Setup

- Salesforce Developer Edition org was set up for implementation.
- GitHub repository created for source control.
- VS Code and SFDX configured for LWC component development.