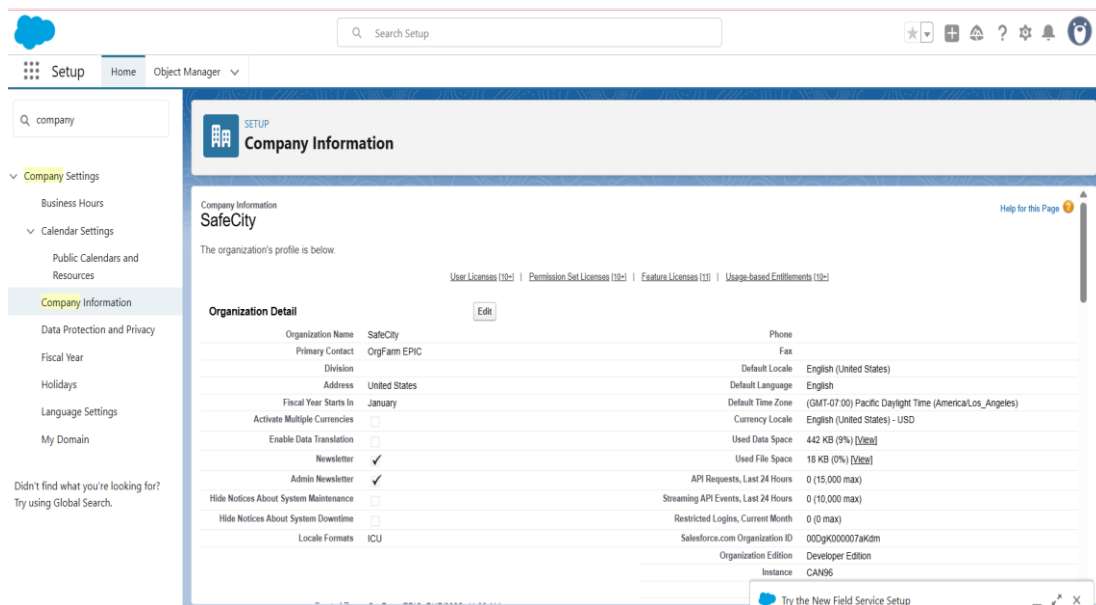


# SafeCity Salesforce Project:

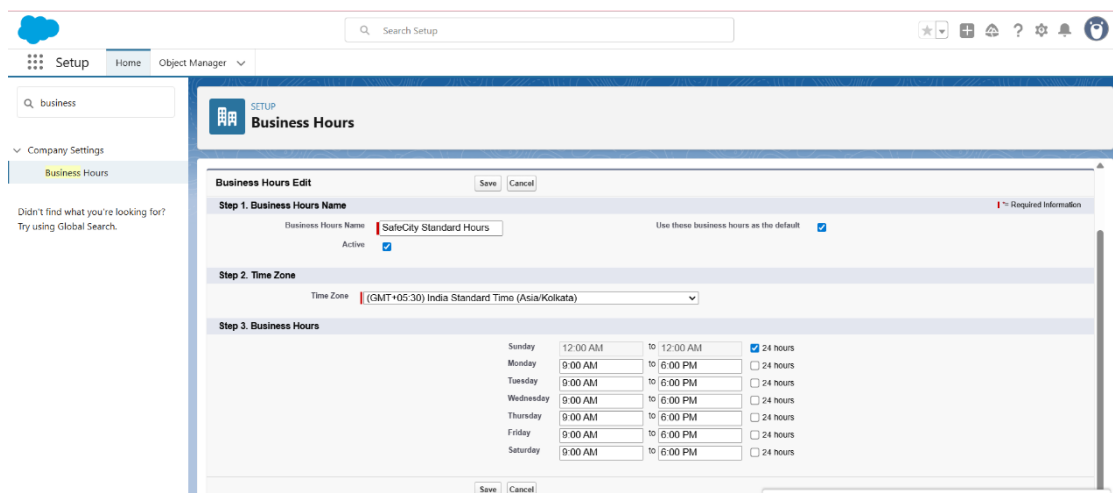
## Phase 2: Org Setup & Configuration

### 1. Company Information

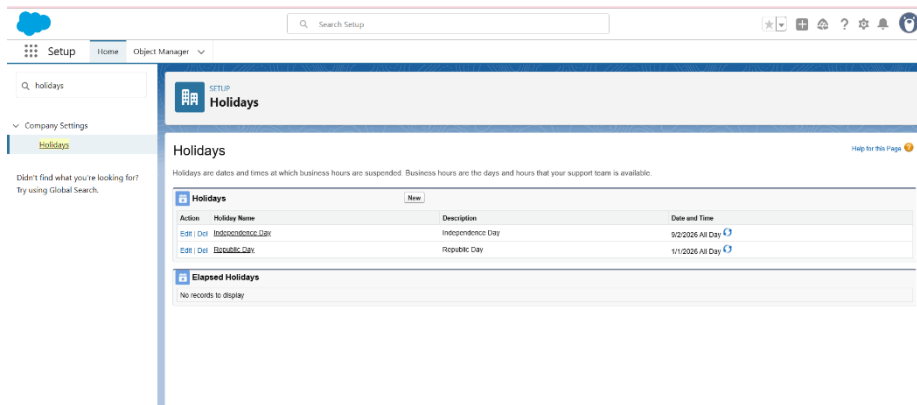
- Organization Name: SafeCity CRM
- Fiscal Year: Standard Gregorian (default)
- Business Hours: 9 AM – 6 PM, Monday to Saturday
- Holidays Defined:
  - Independence Day (15 August)
  - Republic Day (26 January)



The screenshot shows the Salesforce Setup interface for 'Company Information'. The left sidebar contains a search bar and a list of settings categories: Company Settings, Business Hours, Calendar Settings, Public Calendars and Resources, Company Information (selected), Data Protection and Privacy, Fiscal Year, Holidays, Language Settings, and My Domain. The main content area is titled 'Company Information' and displays the organization's profile. It includes links for 'Use Licenses (10x)', 'Permission Set Licenses (10x)', 'Feature Licenses (11)', and 'Usage-based Commitments (10x)'. The 'Organization Detail' section is expanded, showing fields for Organization Name (SafeCity), Primary Contact (OrgFarm EPIC), Division (United States), Address, Fiscal Year Starts In (January), Activate Multiple Currencies, Enable Data Translation, Newsletter, Admin Newsletter, Hide Notices About System Maintenance, Hide Notices About System Downtime, and Locale Formats (ICU). The right side of the page shows fields for Phone, Fax, Default Locale (English (United States)), Default Language (English), Default Time Zone (GMT-07:00 Pacific Daylight Time (America/Los\_Angeles)), Currency Locale (English (United States) - USD), Used Data Space (442 KB (9%)), Used File Space (18 KB (0%)), API Requests, Last 24 Hours (0 (15,000 max)), Streaming API Events, Last 24 Hours (0 (10,000 max)), Restricted Logins, Current Month (0 (0 max)), Salesforce.com Organization ID (00DgK000007AKdm), Organization Edition (Developer Edition), and Instance (CAN96). A 'Try the New Field Service Setup' button is visible at the bottom right.

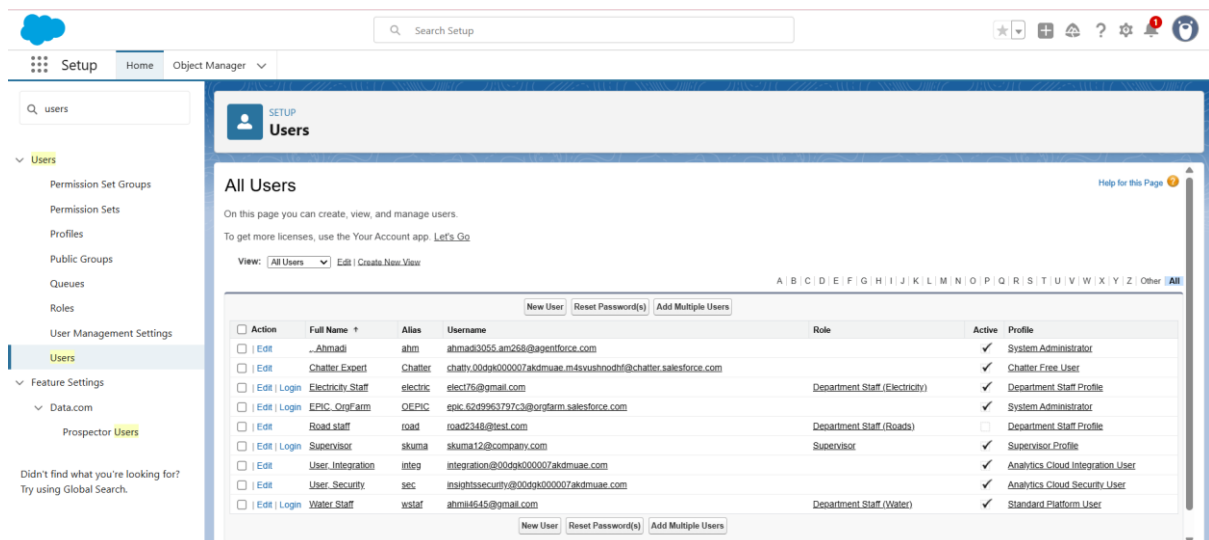


The screenshot shows the Salesforce Setup interface for 'Business Hours'. The left sidebar contains a search bar and a list of settings categories: Company Settings, Business Hours (selected), and Calendar Settings. The main content area is titled 'Business Hours' and displays the 'Business Hours Edit' form. The form has three steps: Step 1. Business Hours Name, Step 2. Time Zone, and Step 3. Business Hours. Step 1 shows the Business Hours Name (SafeCity Standard Hours) and a checkbox to 'Use these business hours as the default' (checked). Step 2 shows the Time Zone (GMT+05:30 India Standard Time (Asia/Kolkata)). Step 3 shows a table for defining business hours for each day of the week. The table has columns for the day, start time, end time, and a checkbox for '24 hours'. The current settings are: Sunday (12:00 AM to 12:00 AM, 24 hours), Monday (9:00 AM to 6:00 PM, 24 hours), Tuesday (9:00 AM to 6:00 PM, 24 hours), Wednesday (9:00 AM to 6:00 PM, 24 hours), Thursday (9:00 AM to 6:00 PM, 24 hours), Friday (9:00 AM to 6:00 PM, 24 hours), and Saturday (9:00 AM to 6:00 PM, 24 hours). A 'Save' button is at the bottom.



## 2. User Setup & Licenses

- **System Administrator:** (default admin user)
- **Supervisor User:** Created with Standard User license
- **Department Staff Users:** Created for Roads, Water, Electricity
  - Example: Roads Staff, Water Staff, Electricity Staff
- *(Optional)* Test Citizen User (to be used later if Experience Cloud is enabled)

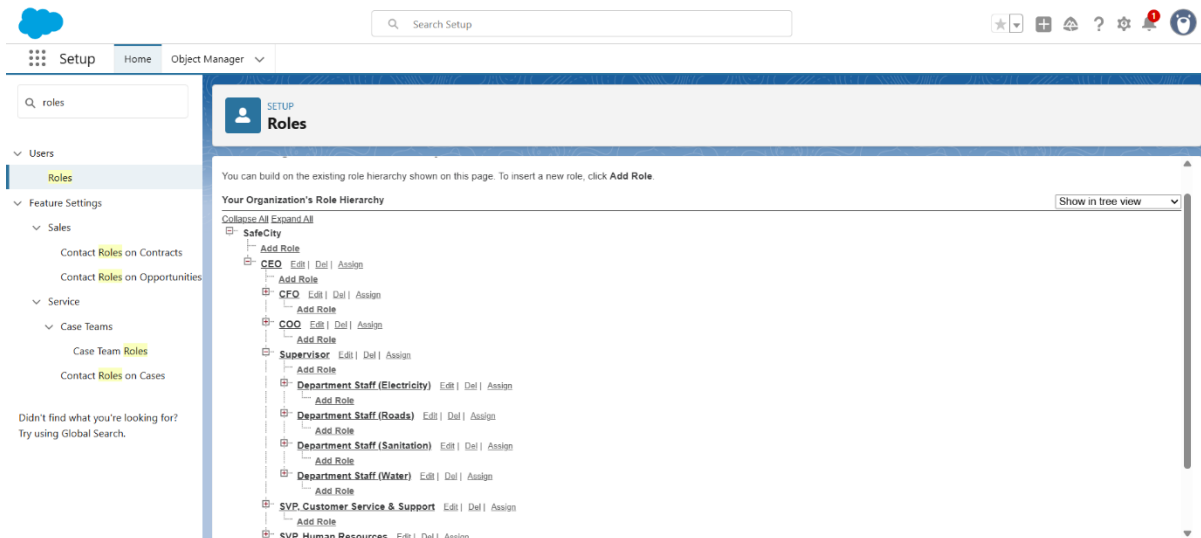


## 3. Roles & Role Hierarchy

- **City Admin (Top Role)**
  - **Supervisor**
    - **Department Staff (Roads)**
    - **Department Staff (Water)**

- **Department Staff (Electricity)**
- **Department Staff (Sanitation)**

This ensures supervisors can see their staff's records, and staff only see their own assigned complaints.



## 4. Profiles & Permission Sets

- **Profiles Created:**
  - **Department Staff Profile** (cloned from Standard User)
    - Complaint\_\_c: Read, Create, Edit
    - Citizen\_\_c: Read
    - Department\_\_c: Read Only
    - Feedback\_\_c: Read, Create
  - **Supervisor Profile** (cloned and customized)
    - Full access to Complaint\_\_c and Feedback\_\_c
    - Read on Citizen\_\_c and Department\_\_c
    - Full access to Reports & Dashboards
- **Permission Sets Created:**
  - *SafeCity\_Reports*: Extra access for reports & dashboards
  - *SafeCity\_Feedback*: Manage Feedback object

Setup

Home

Object Manager

profiles

Users

Profiles

Didn't find what you're looking for?  
Try using Global Search.

SETUP

Profiles

Profile Edit

Department Staff Profile

Set the permissions and page layouts for this profile.

Profile Edit

Name

Department Staff Profile

User License

Salesforce

Description

Custom Profile

✓

Custom App Settings

	Visible	Default		Visible	Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	SafeCity (Ahmadi)	<input type="checkbox"/>	<input type="checkbox"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sales (standard__Sales)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Approvals (standard__Approvals)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sales Cloud Mobile (standard__SalesCloudMobile)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Automation (standard__FlowsApp)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Setup

Home

Object Manager

profiles

Users

Profiles

Didn't find what you're looking for?  
Try using Global Search.

SETUP

Profiles

Profile Edit

Supervisor Profile

Set the permissions and page layouts for this profile.

Profile Edit

Name

Supervisor Profile

User License

Salesforce

Description

Custom Profile

✓

Custom App Settings

	Visible	Default		Visible	Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	SafeCity (Ahmadi)	<input type="checkbox"/>	<input type="checkbox"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sales (standard__Sales)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Approvals (standard__Approvals)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sales Cloud Mobile (standard__SalesCloudMobile)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Automation (standard__FlowsApp)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Setup

Home

Object Manager

perm

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

Didn't find what you're looking for?  
Try using Global Search.

SETUP

Permission Sets

Permission Set

SafeCity\_Reports

Find Settings | Clone | Edit Properties | Manage Assignments | View Summary

Permission Set Overview

Description	License	API Name	Namespace Prefix
SafeCity_Reports	Salesforce	SafeCity_Reports	

Session Activation Required	Created By
<input type="checkbox"/>	Ahmadi, 9/16/2025, 11:18 AM

Permission Set Groups Added To	Last Modified By
0	Ahmadi, 9/16/2025, 11:21 AM

Apps

Assigned Apps

Settings that specify which apps are visible in the app menu

Assigned Connected Apps

Settings that specify which connected apps are visible in the app menu

Object Settings

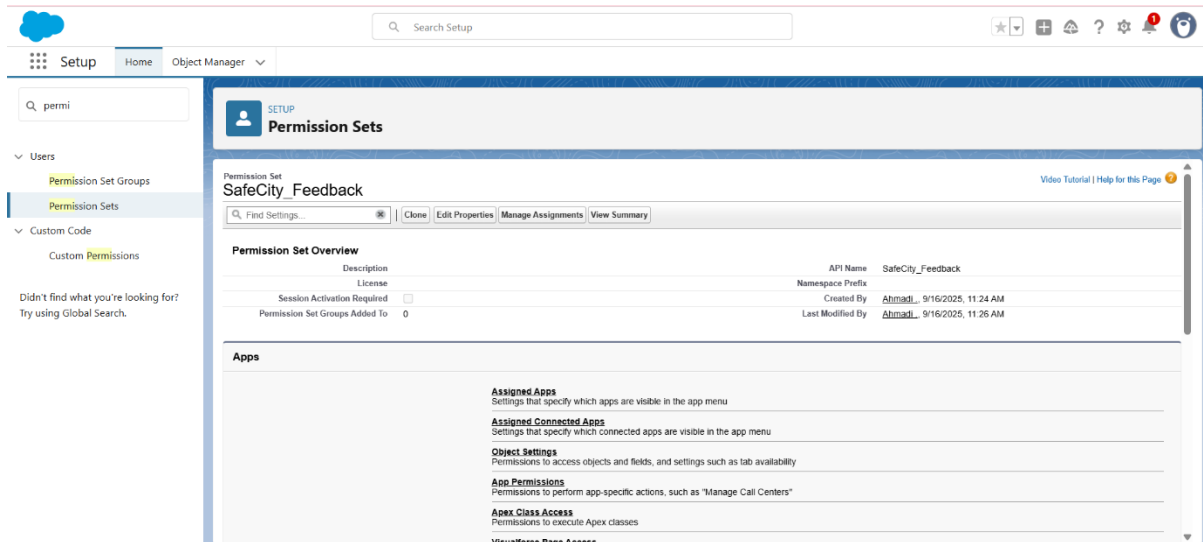
Permissions to access objects and fields, and settings such as tab availability

App Permissions

Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access

Permissions to execute Apex classes



## 5. Organization-Wide Defaults (OWD)

- **Complaint\_\_c**: Private
- **Citizen\_\_c**: Private
- **Department\_\_c**: Public Read Only
- **Feedback\_\_c**: Controlled by Parent

This ensures data security and role-based visibility.

## 6. Sharing Rules

- Criteria-based sharing rules planned by Department to allow staff roles access to complaints from their department.

