

# Project Title: Sales Performance Reporting

## Phase 2-Org Setup & Configuration

### 1. Salesforce Editions

- Use a Salesforce Developer Edition (Free) org for this project.
  - A Developer Org provides the Sales Cloud features needed: Accounts, Contacts, Opportunities, Reports, and Dashboards.
  - If this were a real company, a Sandbox would be used for development and testing, and configurations would later be deployed to Production.
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### 2. Company Profile Setup

- Navigate: **Setup** → **Company Information**.
- Configure the following:
  - **Company Name:** *GlobalTech Sales Pvt. Ltd.* (example)
  - **Default Locale:** English (India)
  - **Currency:** INR (₹) or USD (\$), depending on reporting needs
  - **Time Zone:** (GMT-07:00) Pacific Daylight Time (America/Los\_Angeles)

Setup

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Object Manager

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Company Information

GlobalTech Sales Pvt. Ltd.

The organization's profile is below.

Organization Detail

Organization Name

GlobalTech Sales Pvt. Ltd.

Primary Contact

OrgFarm EPIC

Division

United States

Address

January

Fiscal Year Starts In

Activate Multiple Currencies

Enable Data Translation

Newsletter

Admin Newsletter

Hide Notices About System Maintenance

Hide Notices About System Downtime

Locale Formats

ICU

Phone

Fax

Default Locale

English (United States)

Default Language

English

Default Time Zone

(GMT-07:00) Pacific Daylight Time (America/Los\_Angeles)

Corporate Currency

U.S. Dollar

Used Data Space

342 KB (7%)

Used File Space

17 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

00DgL000008VM7y

Organization Edition

Developer Edition

Instance

CAN98

Created By

OrgFarm EPIC, 9/12/2025, 2:16 PM

Modified By

Ahmarav Dhote, 9/17/2025, 10:50 AM

### 3. Business Hours & Holidays

- Setup → Business Hours → Create “Standard Business Hours”.
  - Open: Mon–Fri (9:00 AM – 6:00 PM)
  - Closed: Sat–Sun

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Business Hours

Organization Business Hours

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.

Business Hours Detail

Business Hours Name

Standard Business Hours

Time Zone

(GMT+05:30) India Standard Time (Asia/Kolkata)

Default Business Hours

✓

Active

✓

Created By

OrgFarm EPIC, 9/12/2025, 2:16 PM

Last Modified By

Ahmarav Dhote, 9/17/2025, 11:33 AM

Holidays

Holiday Name

Description

Date and Time

Saturday

9/20/2025 All Day

Sunday

9/20/2025 All Day

## 4. Fiscal Year Settings

- **Setup** → **Fiscal Year** → Enable **Standard Fiscal Year**.
- Choose **January** (US: Jan–Dec).

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'fiscal' entered and a list of settings including 'Company Settings' and 'Fiscal Year'. The main content area is titled 'Organization Fiscal Year Edit: GlobalTech Sales Pvt. Ltd.' and contains a 'Fiscal Year Information' section with a warning about changing the fiscal year. Below this is a 'Change Fiscal Year Period' form with fields for 'Name', 'Fiscal Year Start Month' (set to January), and 'Fiscal Year is Based On' (set to 'The ending month').

Setup  
Organization Fiscal Year Edit: GlobalTech Sales Pvt. Ltd.

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

**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.

☒ Standard Fiscal Year **Standard Fiscal Year**  
☐ Custom Fiscal Year

**Change Fiscal Year Period**

Name: GlobalTech Sales Pvt. Ltd.  
Fiscal Year Start Month: January  
Fiscal Year is Based On: ☒ The ending month ☐ The starting month

Save Cancel

## 5. User Setup & Licenses

- Create at least two users:
  1. **Sales Manager** – monitors performance and dashboards
  2. **Sales Rep** – enters Opportunities and manages deals
- Assign **Salesforce** license with **Standard User Profile** as baseline.

**Setup** Home Object Manager

Search Setup

**Users**

All Users

On this page you can create, view, and manage users.  
To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users Edit Create New View

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter_00d0l00000bvm7yuaah.vuo7md2l6tsu@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Dhote Atharav	ath	atharavdhote29313@agentforce.com		✓	System Administrator
<input type="checkbox"/> Edit	EPIC_QroFarm	QEPIC	seic.b392908c382@qrofarm.salesforce.com		✓	System Administrator
<input type="checkbox"/> Edit	Patel Rahul	ruate	rahul.patel-manager@gmail.com	Sales Manager	✓	Sales Manager Profile
<input type="checkbox"/> Edit	Shah Priva	pshah	priva.shah-rec1@gmail.com	Sales Rep	✓	Sales Rep Profile
<input type="checkbox"/> Edit	User Integration	inteo	integration@00d0l00000bvm7yuaah.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightsecurity@00d0l00000bvm7yuaah.com		✓	Analytics Cloud Security User

## 6. Profiles

- **Sales Rep Profile (Cloned from Standard User):**
  - Permissions: Create/Edit Accounts & Opportunities.
  - Restricted from deleting records or changing org settings.
- **Sales Manager Profile (Cloned from Standard User):**
  - Permissions: Create/Edit/Delete Opportunities, Accounts.
  - Access to Reports and Dashboards (Create and Customize Reports).

**Setup** Home Object Manager

Search Setup

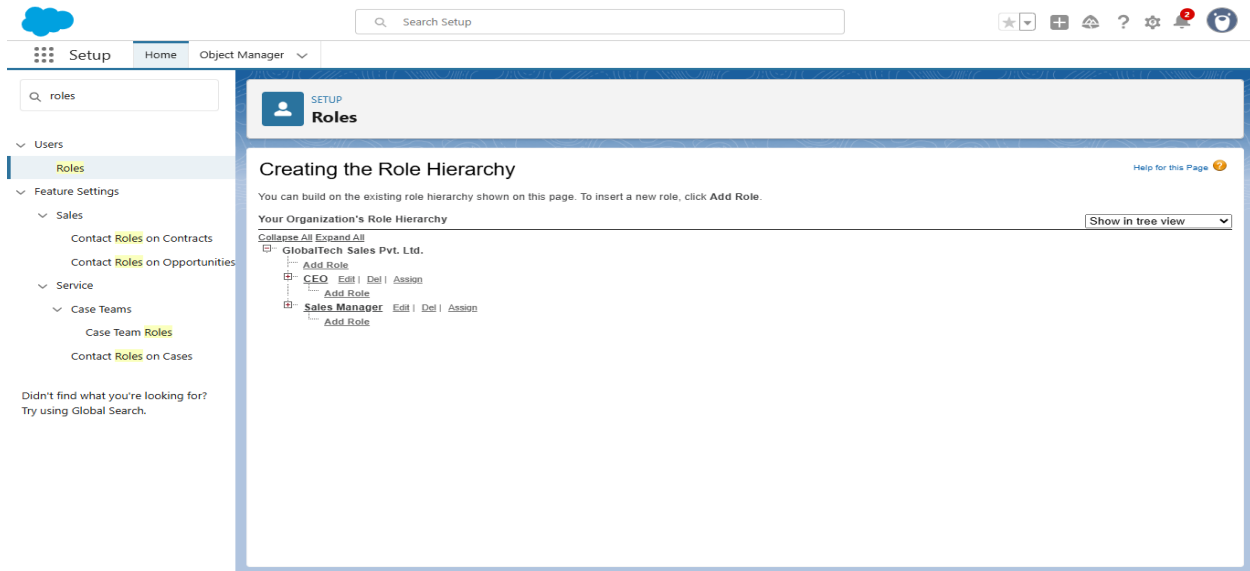
**Profiles**

All Profiles Edit Delete Create New View

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit   Del   Clone	Sales Manager Profile	Salesforce	✓
<input type="checkbox"/> Edit   Del   Clone	Sales Rep Profile	Salesforce	✓
<input type="checkbox"/> Edit   Del   Clone	Salesforce.AB.Only.System.Integrations	Salesforce Integration	✓
<input type="checkbox"/> Edit   Clone	Silver Partner User	Silver Partner	✓
<input type="checkbox"/> Edit   Clone	Solution Manager	Salesforce	✓
<input type="checkbox"/> Edit   Clone	Standard Platform User	Salesforce Platform	✓
<input type="checkbox"/> Edit   Clone	Standard User	Salesforce	✓
<input type="checkbox"/> Edit   Clone	System Administrator	Salesforce	✓

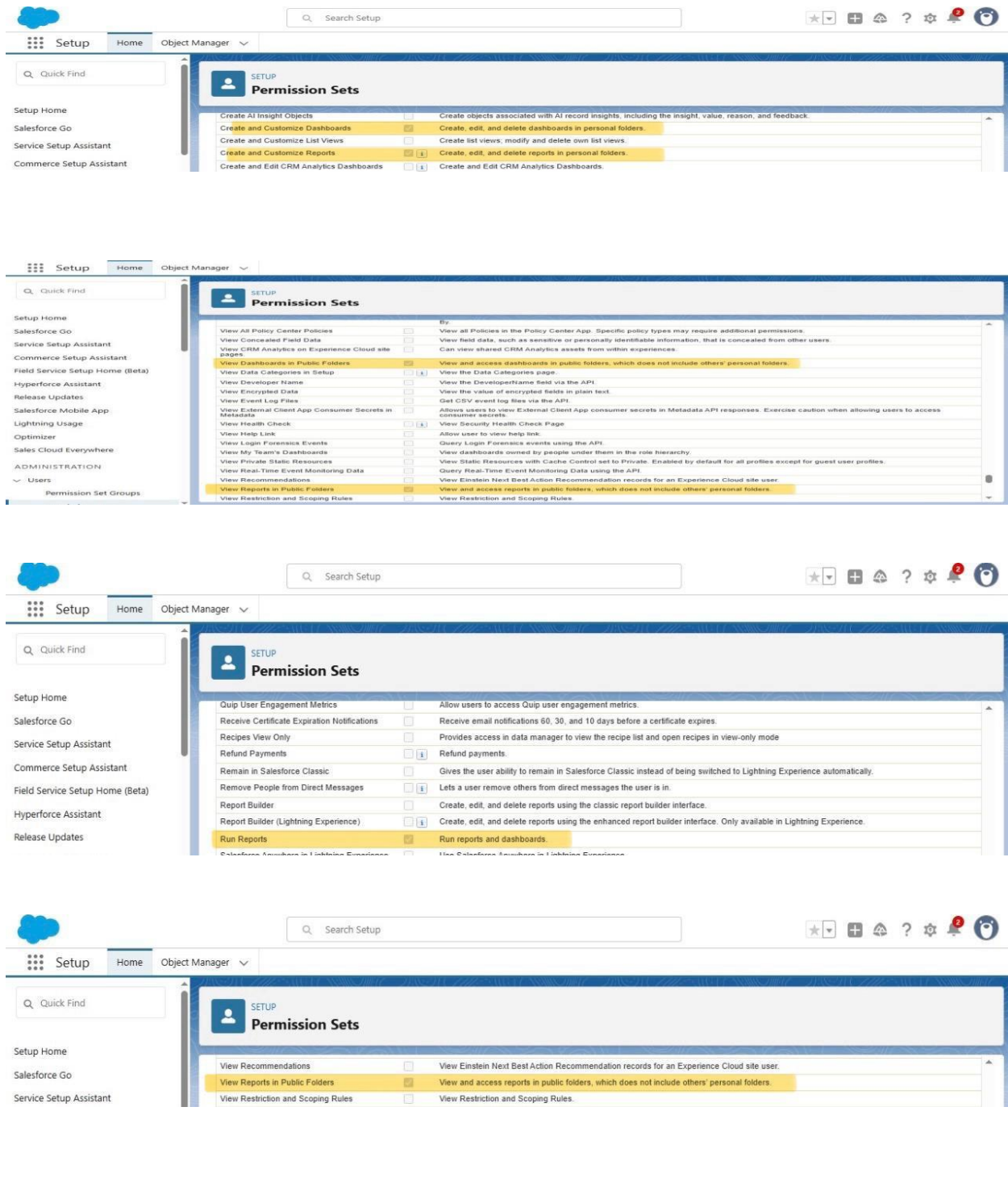
## 7. Roles (Role Hierarchy)

- Setup → Roles → Set Up Roles.
- Create:
  - Sales Manager (Top Role)
  - Sales Rep (Child Role under Manager)



## 8. Permission Sets

- Create **Dashboard Access Permission Set**.
- Add permissions:
  - Run Reports
  - View Dashboards
  - Create & Customize Reports (optional)
- Assign this Permission Set to Sales Reps who need reporting access.



## 9. Org-Wide Defaults (OWD)

- **Setup** → **Sharing Settings** → **Edit Defaults**:
  - **Opportunities**: Private (only owner and role hierarchy can view).

- **Accounts:** Public Read Only (all users can view but not edit).

**Organization-Wide Defaults**

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
<b>Account and Contract</b>	<b>Public Read/Write</b>	<b>Private</b>	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
<b>Opportunity</b>	<b>Public Read/Write</b>	<b>Private</b>	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓
Product	Public Read/Write	Public Read/Write	✓
Individual	Public Read/Write	Private	✓
Voice Call	Private	Private	✓
Activation Target	Private	Private	✓
Activation Target Internal Organization Access	Private	Private	✓
Activation Target Platform	Private	Private	✓
Activation Target Platform Field Value	Private	Private	✓

## 10. Login Access Policies

- Restrict **Sales Rep** login hours: Mon–Fri (9 AM–6 PM).
- Allow **Managers/Admins** 24/7 access.

**Profiles**

**Login Hours**

Day	Start Time	End Time
Sunday	All Day	All Day
Monday	9:00 AM PDT	6:00 PM PDT
Tuesday	9:00 AM PDT	6:00 PM PDT
Wednesday	9:00 AM PDT	6:00 PM PDT
Thursday	9:00 AM PDT	6:00 PM PDT
Friday	9:00 AM PDT	6:00 PM PDT
Saturday	All Day	All Day

**Login IP Ranges**

No login IP ranges specified. Users from any IP address are allowed to log in.

**Enabled Apex Class Access**

No Apex Classes enabled.

**Enabled Visualforce Page Access**

No Visualforce Pages enabled.

**Enabled External Data Source Access**

No External Data Sources enabled.