Phase 2: Org Setup & Configuration- Completion Report

Project: InvoicePro Automated Invoice Payment Reminder CRM

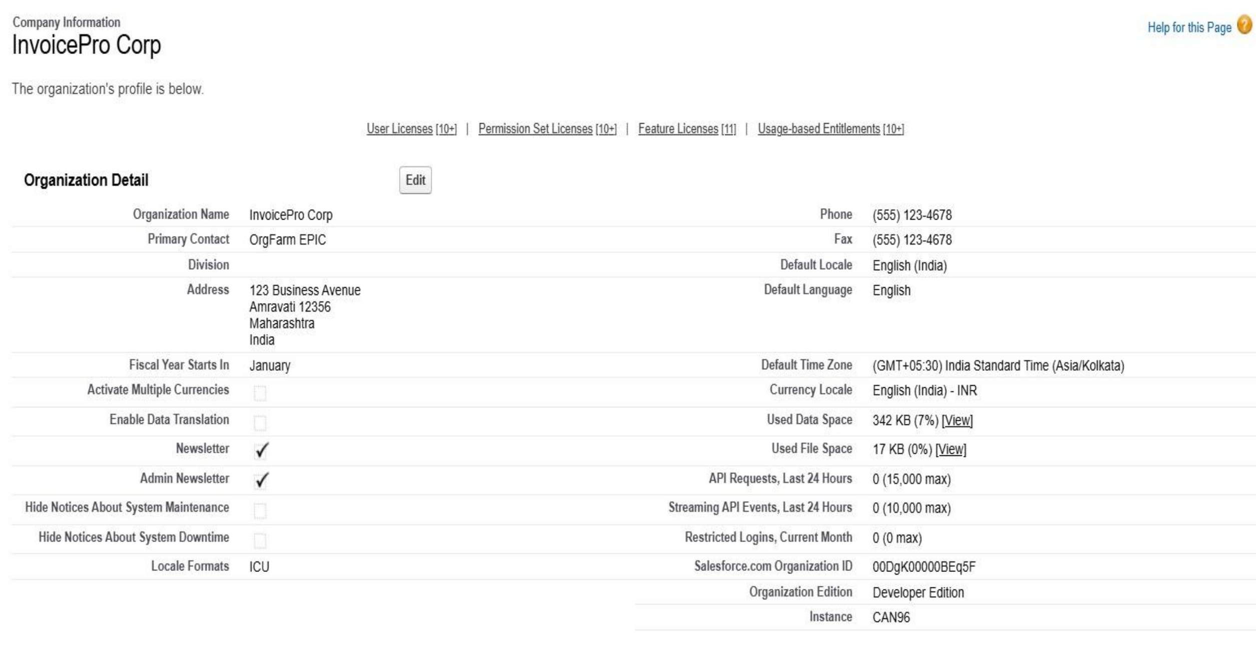
Institute: Prof. Ram Meghe Institute of Technology & Research

1. Salesforce Edition

- Developer Org used for implementation

2. Company Profile Setup

- Company Name: InvoicePro Corp
- Default Locale: English (India)
- Default Currency: INR
- Default Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)
- Process Flow: Setup → Company Information → Edit Company Profile


Company Information
InvoicePro Corp
Help for this Page
The organization's profile is below.
User Licenses [10+] | Permission Set Licenses [10+] | Feature Licenses [11] | Usage-based Entitlements [10+]

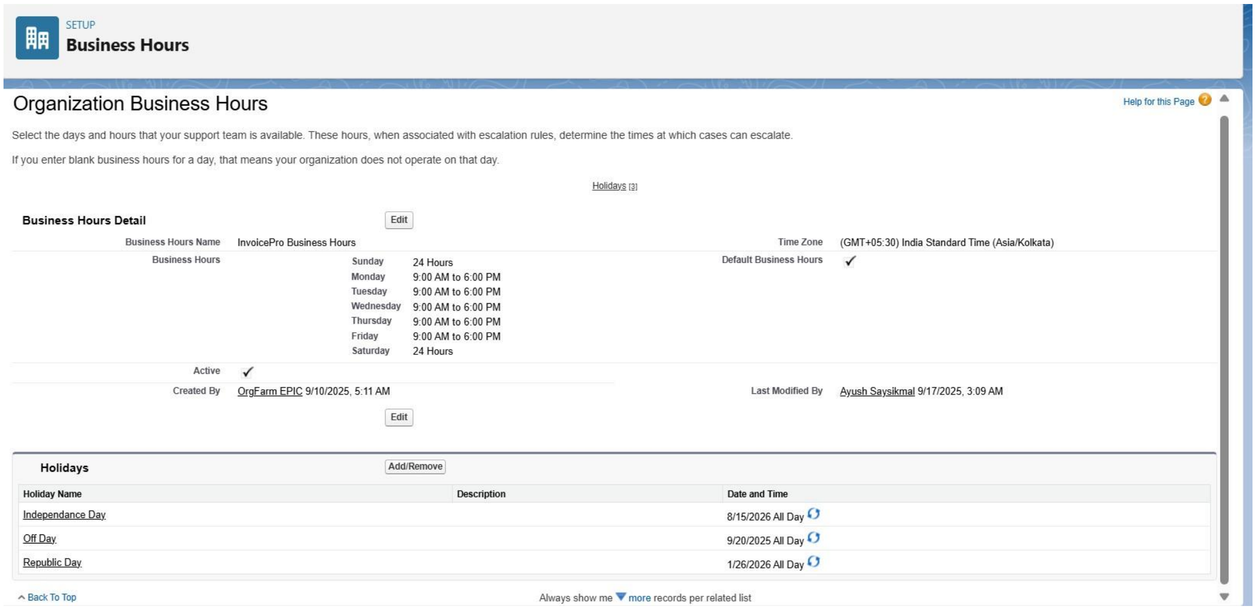
Organization Detail Edit

Organization Name	InvoicePro Corp	Phone	(555) 123-4678
Primary Contact	OrgFarm EPIC	Fax	(555) 123-4678
Division		Default Locale	English (India)
Address	123 Business Avenue Amravati 12356 Maharashtra India	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	☐	Currency Locale	English (India) - INR
Enable Data Translation	☐	Used Data Space	342 KB (7%) [View]
Newsletter	✓	Used File Space	17 KB (0%) [View]
Admin Newsletter	✓	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Maintenance	☐	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	☐	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00DgK00000BEq5F
		Organization Edition	Developer Edition
		Instance	CAN96

3. Business Hours & Holidays

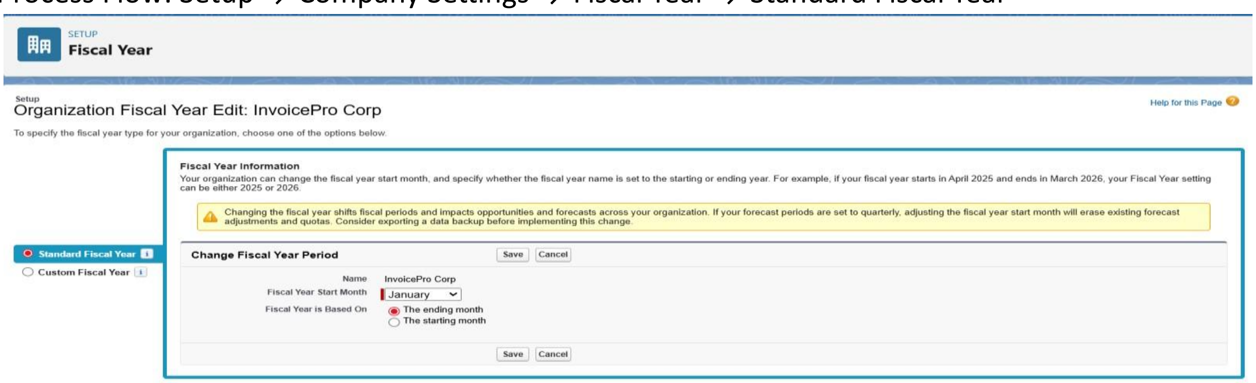
- Business Hours: All days, 09:00 AM – 06:00 PM
- Holidays: Independence Day (15 Aug)
  Republic Day (26 Jan)
  Off Day (Saturday & Sunday- Weekly)

- Process Flow: Setup → Company Settings → Business Hours → Define & Assign



4. Fiscal Year Settings

- **Fiscal Year:** Standard, January (The ending month)
- Process Flow: Setup → Company Settings → Fiscal Year → Standard Fiscal Year



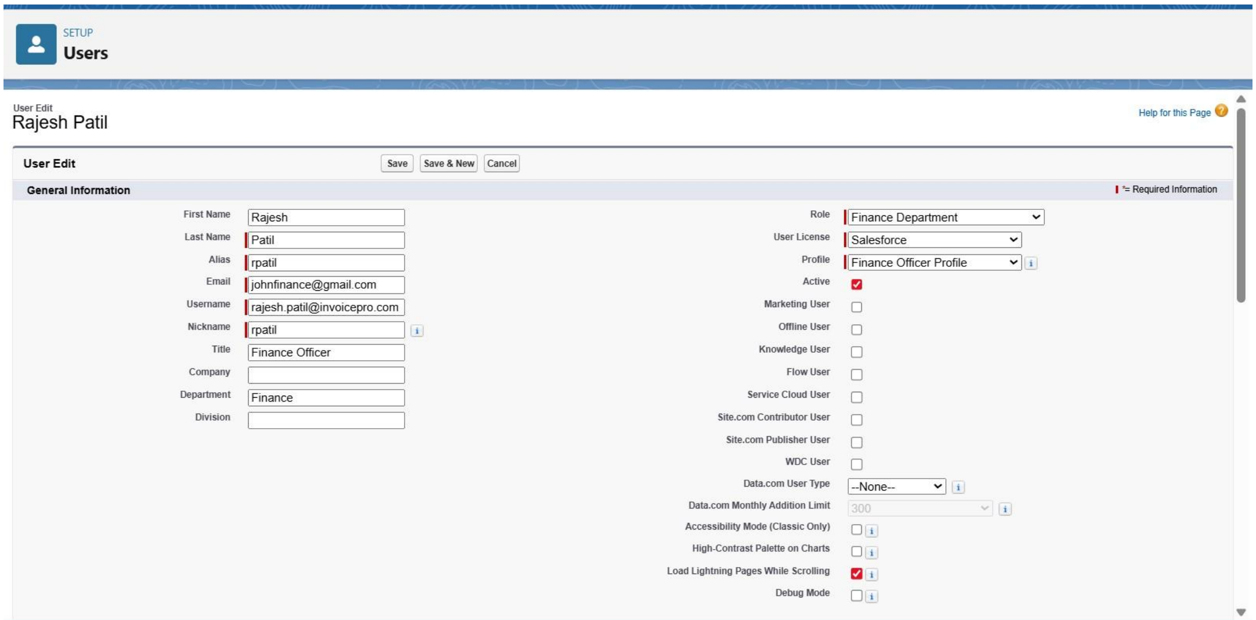
5. User Setup & Licenses

- Finance Officer: License = Salesforce, Profile = Finance Officer Profile, Role = Finance Department

- Finance Manager: License = Salesforce, Profile = Finance Manager Profile, Role = Finance Manager

- Sales Representative: License = Salesforce Platform, Profile =Sales User Profile, Role = Sales Department

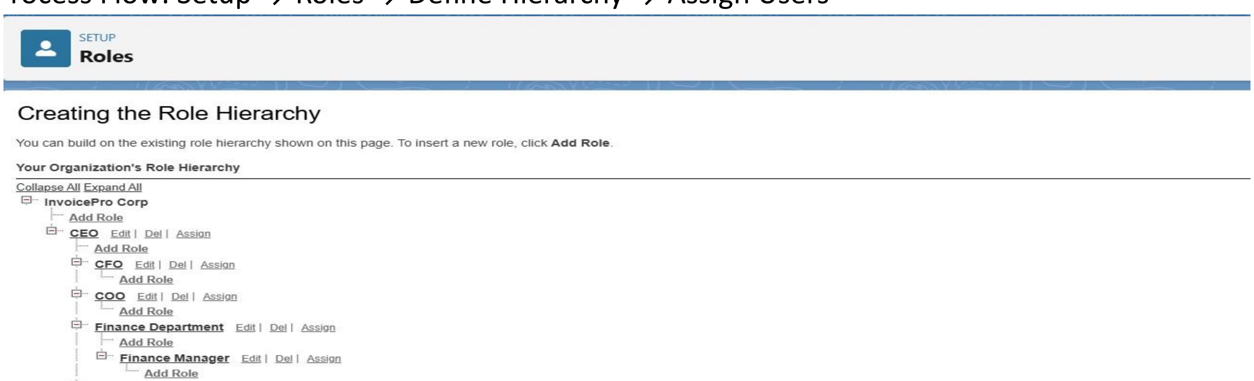
Process Flow: Setup → Users → New User → Assign License & Profile



6. Roles

- CEO → Finance Department → Finance Manager
- Sales Department under CEO

Process Flow: Setup → Roles → Define Hierarchy → Assign Users



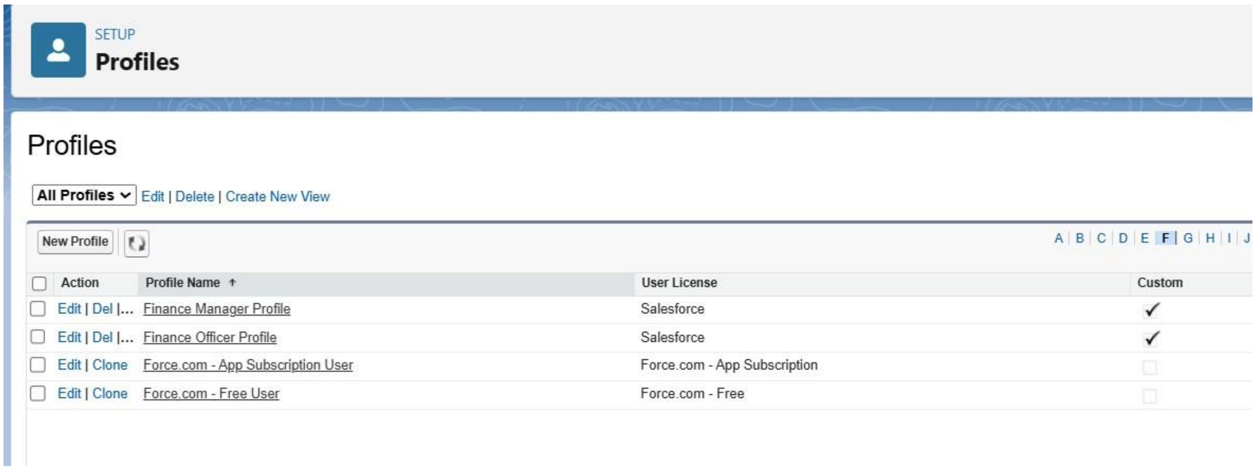
7. Profiles

- Finance Officer Profile

- Finance Manager Profile

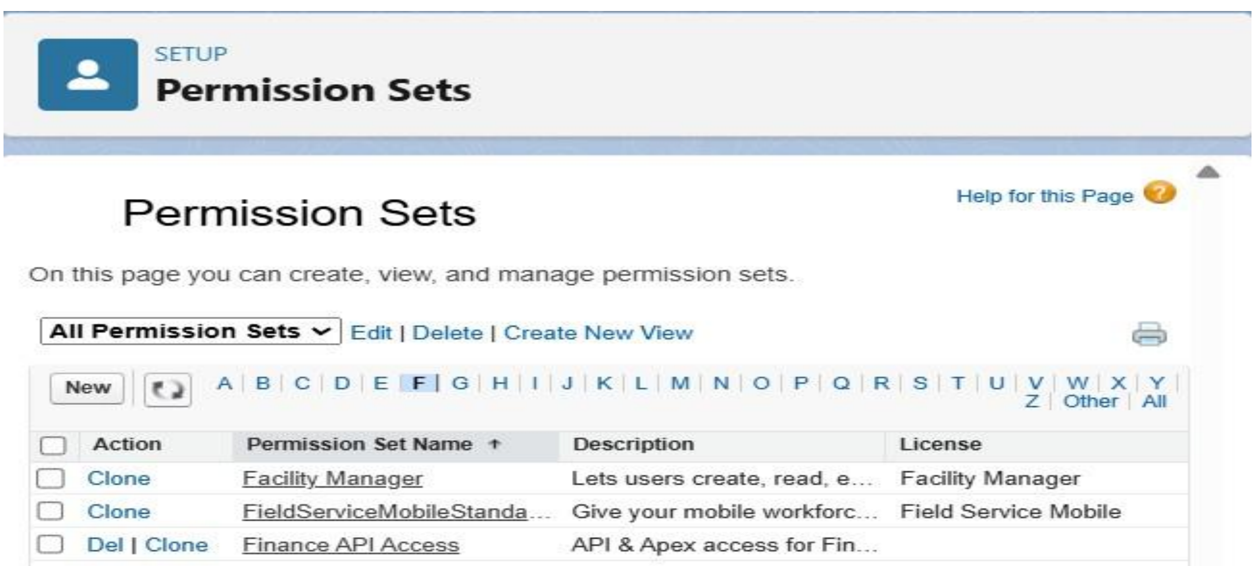
- Sales User Profile

Process Flow: Setup → Profiles → New Profile



8. Permission Sets

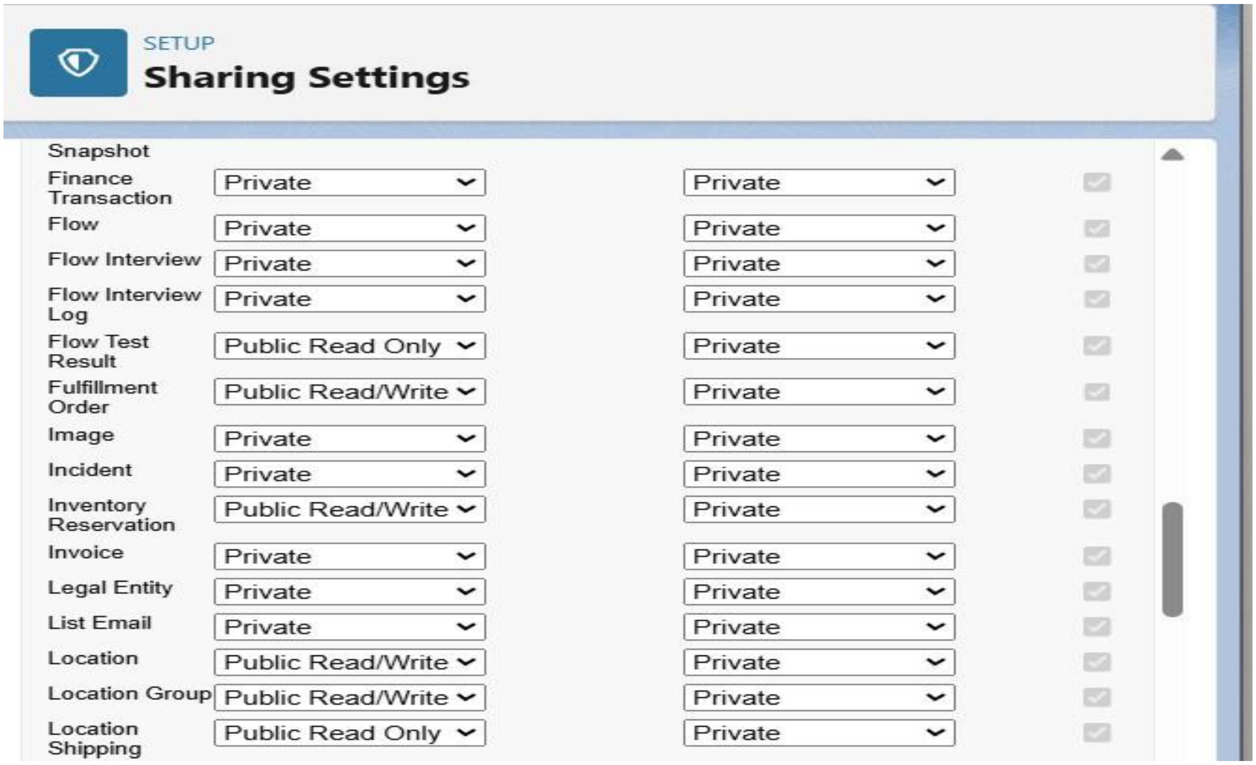
- Finance API Access → Finance Officer
- Reports Editor → Finance Manager
- View Invoices



9. Organization- Wide Defaults (OWD)

- Invoice=private

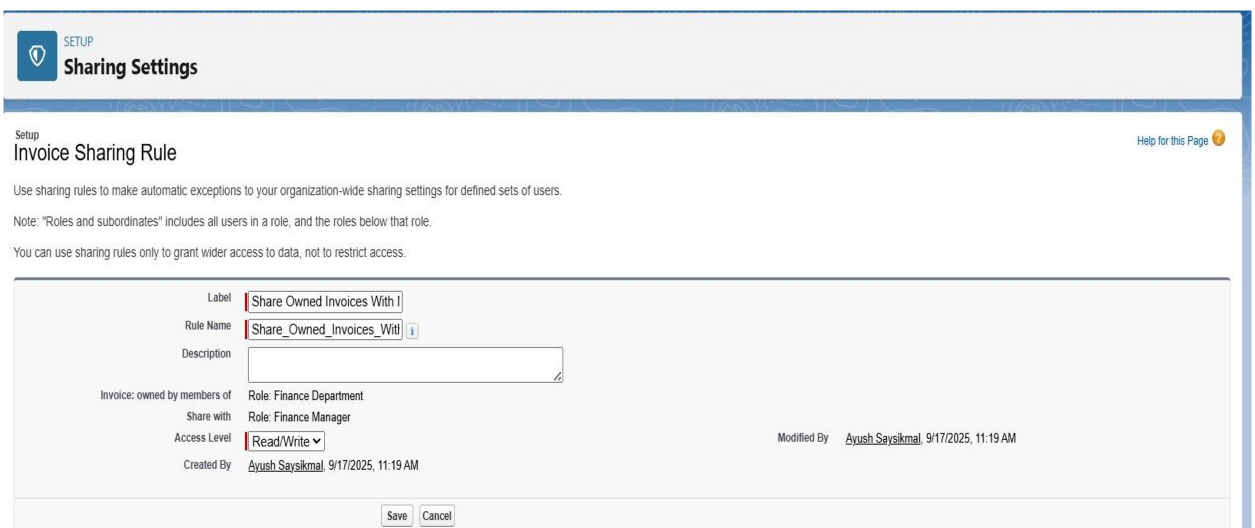
Process Flow: Setup → Sharing Settings → Define OWD



10. Sharing Rules

- Invoice: Shared with Finance Manager

Process Flow: Setup → Sharing Settings → New Sharing Rule → Define Access



Outcomes of Phase 2:

- Developer Org successfully configured
- Company information standardized.
- Roles, profiles, and permission sets created and assigned.

- OWD and Sharing Rules enforced for record-level security.
- Finance Officer and Finance Manger have proper controlled on invoices,etc.
- Phase 2 deliverables completed. Ready to proceed to Phase 3: Data Modeling & Relationships.