

# 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<br>Amravati 12356<br>Maharashtra<br>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                     | 342 KB (7%) <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         | 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      | 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

**SETUP 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.

[Holidays \(3\)](#)

**Business Hours Detail** [Edit](#)

| Business Hours Name | InvoicePro Business Hours   | Time Zone                                      |
|---------------------|---|--|
| Business Hours      | Sunday 24 Hours<br>Monday 9:00 AM to 6:00 PM<br>Tuesday 9:00 AM to 6:00 PM<br>Wednesday 9:00 AM to 6:00 PM<br>Thursday 9:00 AM to 6:00 PM<br>Friday 9:00 AM to 6:00 PM<br>Saturday 24 Hours | (GMT+05:30) India Standard Time (Asia/Kolkata) |

Default Business Hours ☒

Active ☒

Created By OrgFarm EPIG 9/10/2025, 5:11 AM

Last Modified By Ayush Sanyal 9/17/2025, 3:09 AM

[Edit](#)

**Holidays** [Add/Remove](#)

| Holiday Name     | Description | Date and Time                       |
|------------------|-------------|-------------------------------------|
| Independence Day |             | 8/15/2026 All Day <a href="#">↻</a> |
| Off Day          |             | 9/20/2025 All Day <a href="#">↻</a> |
| Republic Day     |             | 1/26/2026 All Day <a href="#">↻</a> |

[Back To Top](#) Always show me [more records per related list](#)

## 4. Fiscal Year Settings

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

**SETUP Fiscal Year**

### Organization Fiscal Year Edit: InvoicePro Corp

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 [?](#)

☐ Custom Fiscal Year [?](#)

**Change Fiscal Year Period** [Save](#) [Cancel](#)

|                         |   |
|-------------------------|---|
| Name                    | InvoicePro Corp   |
| Fiscal Year Start Month | January <a href="#">↕</a>   |
| Fiscal Year is Based On | <input checked="" type="radio"/> The ending month<br><input type="radio"/> The starting month |

[Save](#) [Cancel](#)

## 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

**SETUP Users**

User Edit: Rajesh Patil

**User Edit** [Save] [Save & New] [Cancel]

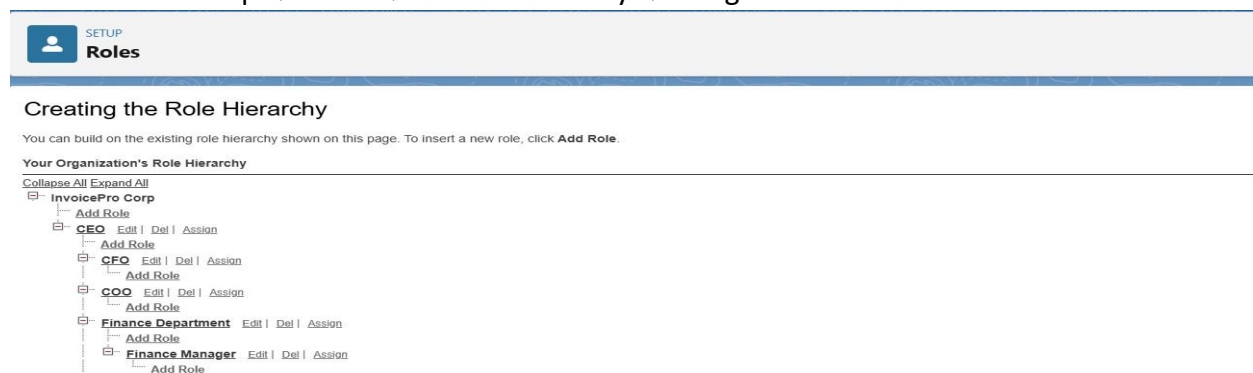
**General Information** ⓘ Required Information

|            |                             |                                      |                                       |
|------------|-----------------------------|--------------------------------------|---------------------------------------|
| First Name | Rajesh                      | Role                                 | Finance Department                    |
| Last Name  | Patil                       | User License                         | Salesforce                            |
| Alias      | rpatil                      | Profile                              | Finance Officer Profile ⓘ             |
| Email      | johnfinance@gmail.com       | Active                               | <input checked="" type="checkbox"/>   |
| Username   | rajesh.patil@invoicepro.com | Marketing User                       | <input type="checkbox"/>              |
| Nickname   | rpatil ⓘ                    | Offline User                         | <input type="checkbox"/>              |
| Title      | Finance Officer             | Knowledge User                       | <input type="checkbox"/>              |
| Company    |                             | Flow User                            | <input type="checkbox"/>              |
| Department | Finance                     | Service Cloud User                   | <input type="checkbox"/>              |
| Division   |                             | Site.com Contributor User            | <input type="checkbox"/>              |
|            |                             | Site.com Publisher User              | <input type="checkbox"/>              |
|            |                             | WDC User                             | <input type="checkbox"/>              |
|            |                             | Data.com User Type                   | --None-- ⓘ                            |
|            |                             | Data.com Monthly Addition Limit      | 300 ⓘ                                 |
|            |                             | Accessibility Mode (Classic Only)    | <input type="checkbox"/> ⓘ            |
|            |                             | High-Contrast Palette on Charts      | <input type="checkbox"/> ⓘ            |
|            |                             | Load Lightning Pages While Scrolling | <input checked="" type="checkbox"/> ⓘ |
|            |                             | Debug Mode                           | <input type="checkbox"/> ⓘ            |

## 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

**Profiles**

All Profiles ▾ Edit | Delete | Create New View

New Profile

| Action   | Profile Name                      | User License                 | Custom                   |
|--|-----------------------------------|------------------------------|--------------------------|
| <a href="#">Edit</a>   <a href="#">Del</a>   ... | Finance Manager Profile           | Salesforce                   | ✓                        |
| <a href="#">Edit</a>   <a href="#">Del</a>   ... | Finance Officer Profile           | Salesforce                   | ✓                        |
| <a href="#">Edit</a>   <a href="#">Clone</a>     | Force.com - App Subscription User | Force.com - App Subscription | <input type="checkbox"/> |
| <a href="#">Edit</a>   <a href="#">Clone</a>     | Force.com - Free User             | Force.com - Free             | <input type="checkbox"/> |

## 8. Permission Sets

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

**Permission Sets**

On this page you can create, view, and manage permission sets.

All Permission Sets ▾ Edit | Delete | Create New View


New

| Action                                      | Permission Set Name         | Description                   | License              |
|---|-----------------------------|-------------------------------|----------------------|
| <a href="#">Clone</a>                       | Facility Manager            | Lets users create, read, e... | Facility Manager     |
| <a href="#">Clone</a>                       | FieldServiceMobileStanda... | Give your mobile workforc...  | Field Service Mobile |
| <a href="#">Del</a>   <a href="#">Clone</a> | Finance API Access          | API & Apex access for Fin...  |                      |

## 9. Organization- Wide Defaults (OWD)

- Invoice=private

Process Flow: Setup → Sharing Settings → Define OWD



SETUP


Sharing Settings

|                       |                   |         |                                     |
|-----------------------|-------------------|---------|-------------------------------------|
| Snapshot              |                   |         |                                     |
| Finance Transaction   | Private           | Private | <input checked="" type="checkbox"/> |
| Flow                  | Private           | Private | <input checked="" type="checkbox"/> |
| Flow Interview        | Private           | Private | <input checked="" type="checkbox"/> |
| Flow Interview Log    | Private           | Private | <input checked="" type="checkbox"/> |
| Flow Test Result      | Public Read Only  | Private | <input checked="" type="checkbox"/> |
| Fulfillment Order     | Public Read/Write | Private | <input checked="" type="checkbox"/> |
| Image                 | Private           | Private | <input checked="" type="checkbox"/> |
| Incident              | Private           | Private | <input checked="" type="checkbox"/> |
| Inventory Reservation | Public Read/Write | Private | <input checked="" type="checkbox"/> |
| Invoice               | Private           | Private | <input checked="" type="checkbox"/> |
| Legal Entity          | Private           | Private | <input checked="" type="checkbox"/> |
| List Email            | Private           | Private | <input checked="" type="checkbox"/> |
| Location              | Public Read/Write | Private | <input checked="" type="checkbox"/> |
| Location Group        | Public Read/Write | Private | <input checked="" type="checkbox"/> |
| Location Shipping     | Public Read Only  | Private | <input checked="" type="checkbox"/> |

## 10. Sharing Rules

- Invoice: Shared with Finance Manager

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



SETUP

Sharing Settings

Setup

Invoice Sharing Rule

Help for this Page

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.

Note: "Roles and subordinates" includes all users in a role, and the roles below that role.

You can use sharing rules only to grant wider access to data, not to restrict access.

Label

Share Owned Invoices With I

Rule Name

Share\_Owned\_Invoices\_Wit

Description

Invoice: owned by members of

Role: Finance Department

Share with

Role: Finance Manager

Access Level

Read/Write

Modified By

Ayush Saysikmal, 9/17/2025, 11:19 AM

Created By

Ayush Saysikmal, 9/17/2025, 11:19 AM

Save

Cancel

### 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 Manager have proper controls on invoices, etc.
- Phase 2 deliverables completed. Ready to proceed to Phase 3: Data Modeling & Relationships.