

Phase 2:Org Setup & Configuration

1. Salesforce Editions

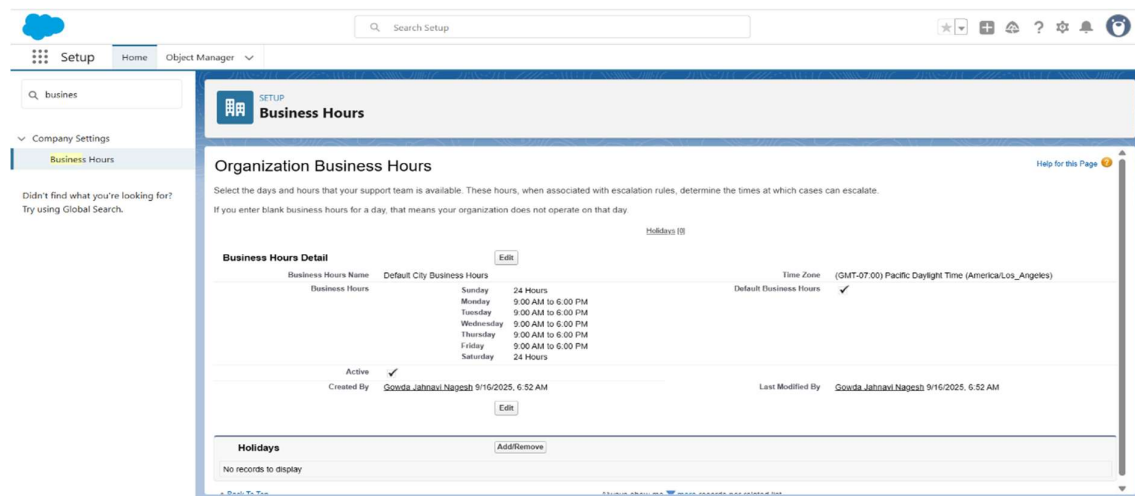
- Verified that we are working in **Developer Edition**, which provides full customization and supports Apex, LWC, and Flows.

2. Company Profile Setup

- Navigated to **Setup** → **Company Information**.
- Verified and updated the **Company Name, Default Locale, Language, Currency, and Time Zone**.

3. Business Hours & Holidays

- Created **Default Business Hours** for 9:00 AM – 6:00 PM, Monday to Friday.



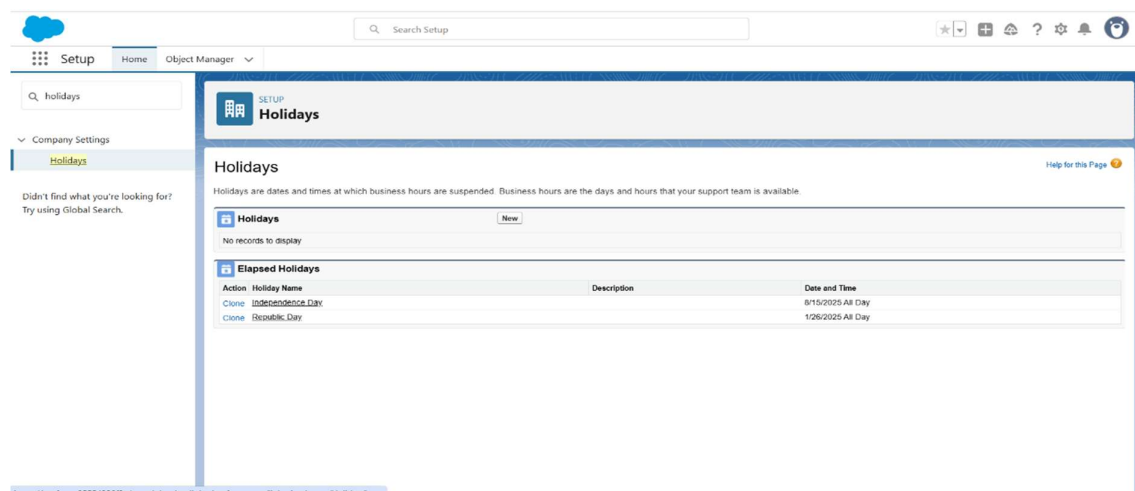
The screenshot shows the Salesforce Setup interface for Business Hours. The left sidebar contains a search bar with 'business' and a list of settings including 'Company Settings' and 'Business Hours'. The main content area is titled 'Organization Business Hours' and includes a description: 'Select the 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.' Below this is a 'Business Hours Detail' section with a table showing the default business hours for each day of the week. The table has columns for 'Business Hours Name', 'Default City Business Hours', and 'Time Zone'. The 'Default City Business Hours' column shows the hours for each day: Sunday (24 Hours), Monday (9:00 AM to 6:00 PM), Tuesday (9:00 AM to 6:00 PM), Wednesday (9:00 AM to 6:00 PM), Thursday (9:00 AM to 6:00 PM), Friday (9:00 AM to 6:00 PM), and Saturday (24 Hours). The 'Time Zone' column shows '(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)'. Below the table, there is a section for 'Holidays' with a table showing no records to display. The 'Business Hours Detail' section also includes an 'Active' checkbox (checked), a 'Created By' field (Govinda Jathnani Nagach), a 'Created' date (9/16/2025, 6:52 AM), and a 'Last Modified By' field (Govinda Jathnani Nagach) with a 'Last Modified' date (9/16/2025, 6:52 AM).

| Business Hours Name | Default City Business Hours | Time Zone |
|---------------------|---|---|
| Business Hours | Sunday 24 Hours Monday 9:00 AM to 6:00 PM Tuesday 9:00 AM to 6:00 PM Wednesday 9:00 AM to 6:00 PM Thursday 9:00 AM to 6:00 PM Friday 9:00 AM to 6:00 PM Saturday 24 Hours | (GMT-07:00) Pacific Daylight Time (America/Los_Angeles) |

| Active | Created By | Created | Last Modified By | Last Modified |
|-------------------------------------|-------------------------|--------------------|-------------------------|--------------------|
| <input checked="" type="checkbox"/> | Govinda Jathnani Nagach | 9/16/2025, 6:52 AM | Govinda Jathnani Nagach | 9/16/2025, 6:52 AM |

| Holidays |
|-----------------------|
| No records to display |

- Added **National Holidays** to exclude SLA timelines during holidays.



The screenshot shows the Salesforce Setup interface for Holidays. The left sidebar contains a search bar with 'holidays' and a list of settings including 'Company Settings' and 'Holidays'. The main content area is titled 'Holidays' and includes a description: 'Holidays are dates and times at which business hours are suspended. Business hours are the days and hours that your support team is available.' Below this is a 'Holidays' section with a table showing no records to display. The 'Elapsed Holidays' section has a table with columns for 'Action', 'Holiday Name', 'Description', and 'Date and Time'. The table shows two records: 'Independence Day' on 8/15/2025 at 00:00:00 and 'Recreation Day' on 1/26/2025 at 00:00:00.

| Action | Holiday Name | Description | Date and Time |
|--------|------------------|-------------|--------------------|
| Clone | Independence Day | | 8/15/2025 00:00:00 |
| Clone | Recreation Day | | 1/26/2025 00:00:00 |

4. Fiscal Year Settings

- Confirmed **Standard Fiscal Year** (Jan–Dec).

5. User Setup & Licenses

- Created additional test users with Salesforce Platform License.
- Assigned appropriate Profiles (System Admin, Standard User).

The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains navigation links: Setup, Home, Object Manager, Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Feature Settings. The main content area is titled 'All Users' and includes a search bar, a 'View' dropdown set to 'All Users', and a 'Create New User' button. Below this is a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several users, including 'Blank_John', 'Citizen_Test', 'EPIC_OrgFarm', 'Nagesh_Gowda.Jahnavi', 'Nagesh_Gowda.Jahnavi', 'Pratikshith', 'Shetty_Ram', 'User_Integration', and 'User_Security'. The 'User_Security' user is highlighted in blue.

| Action | Full Name | Alias | Username | Role | Active | Profile |
|---------------------------------------|----------------------|--------|---|--------------------------------|--------|----------------------------------|
| <input type="checkbox"/> Edit Login | Blank_John | jblank | jblank@mail.com | Water Department Manager | ✓ | Standard Platform User |
| <input type="checkbox"/> Edit Login | Citizen_Test | iciti | test.citizen@marcity.com | Citizen User | ✓ | Standard Platform User |
| <input type="checkbox"/> Edit Login | EPIC_OrgFarm | CEPIC | epic-bc3861c81du@orgfarm.salesforce.com | | ✓ | System Administrator |
| <input type="checkbox"/> Edit | Nagesh_Gowda.Jahnavi | jah | jahnavgowda812793@agentforce.com | | ✓ | System Administrator |
| <input type="checkbox"/> Edit Login | Nagesh_Gowda.Jahnavi | onage | jahnavgowda812@gmail.com | Electricity Department Manager | ✓ | System Administrator |
| <input type="checkbox"/> Edit | Pratikshith | pradi | pratikshith@test.com | Water Department Manager | ✓ | System Administrator |
| <input type="checkbox"/> Edit Login | Shetty_Ram | srani | srani@test.com | Road Department Manager | ✓ | System Administrator |
| <input type="checkbox"/> Edit | User_Integration | integ | integration@009gk00007x17uaw.com | | ✓ | Analytics Cloud Integration User |
| <input type="checkbox"/> Edit | User_Security | sec | insightssecurity@009gk00007x17uaw.com | | ✓ | Analytics Cloud Security User |

6. Profiles

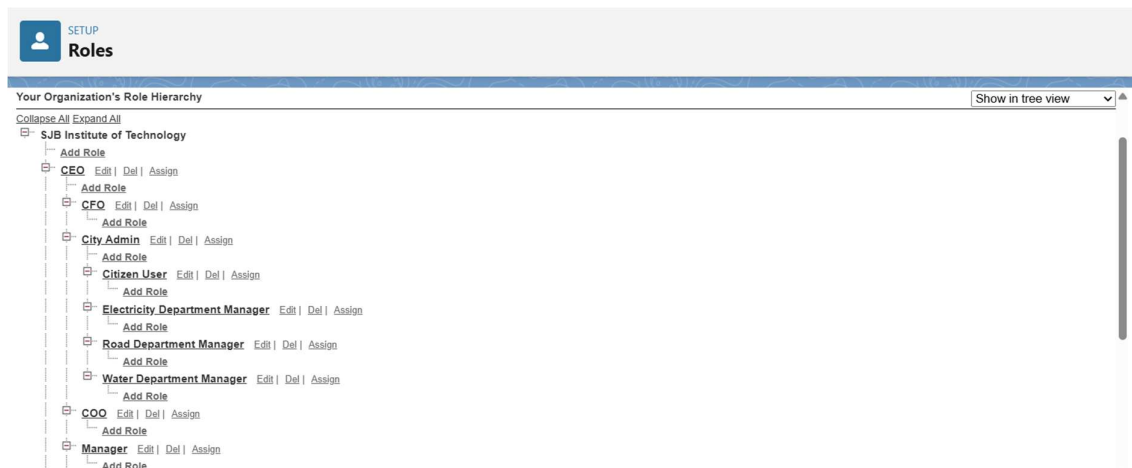
- Customized Profile permissions for **Citizens** (limited access) and **Admins** (full access).
- Configured Object-level security for Complaint__c and Department__c.

The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains navigation links: Setup, Home, Object Manager, Users, Profiles, Didn't find what you're looking for? Try using Global Search. The main content area is titled 'Profiles' and includes a search bar, a 'View' dropdown set to 'All Profiles', and a 'Create New Profile' button. Below this is a table of profiles with columns for Action, Profile Name, User License, and Custom. The table lists several profiles, including 'Chatter External User', 'Chatter Free User', 'Chatter Moderator U', 'Citizen Profile', 'City Admin Profile', 'Contract Manager', 'Cross Org Data Pro...', 'Custom Marketing P...', 'Custom Sales Profile', 'Custom Support Pro...', 'Customer Communit...', 'Customer Communit...', 'Customer Communit...', and 'Customer Communit...'. The 'Contract Manager' profile is highlighted in blue.

| Action | Profile Name | User License | Custom |
|---|-----------------------|----------------------|--------------------------|
| <input type="checkbox"/> Edit Clone | Chatter External User | Chatter External | <input type="checkbox"/> |
| <input type="checkbox"/> Edit Clone | Chatter Free User | Chatter Free | <input type="checkbox"/> |
| <input type="checkbox"/> Edit Clone | Chatter Moderator U | Chatter Free | <input type="checkbox"/> |
| <input type="checkbox"/> Edit Del ... | Citizen Profile | Salesforce Platform | ✓ |
| <input type="checkbox"/> Edit Del ... | City Admin Profile | Salesforce | ✓ |
| <input type="checkbox"/> Edit Clone | Contract Manager | Salesforce | ✓ |
| <input type="checkbox"/> Edit Clone | Cross Org Data Pro... | XOrg Proxy User | <input type="checkbox"/> |
| <input type="checkbox"/> Edit Del ... | Custom Marketing P... | Salesforce | ✓ |
| <input type="checkbox"/> Edit Del ... | Custom Sales Profile | Salesforce | ✓ |
| <input type="checkbox"/> Edit Del ... | Custom Support Pro... | Salesforce | ✓ |
| <input type="checkbox"/> Edit Clone | Customer Communit... | Customer Communit... | <input type="checkbox"/> |
| <input type="checkbox"/> Edit Clone | Customer Communit... | Customer Communit... | <input type="checkbox"/> |
| <input type="checkbox"/> Edit Clone | Customer Communit... | Customer Communit... | <input type="checkbox"/> |
| <input type="checkbox"/> Edit Clone | Customer Communit... | Customer Community | <input type="checkbox"/> |

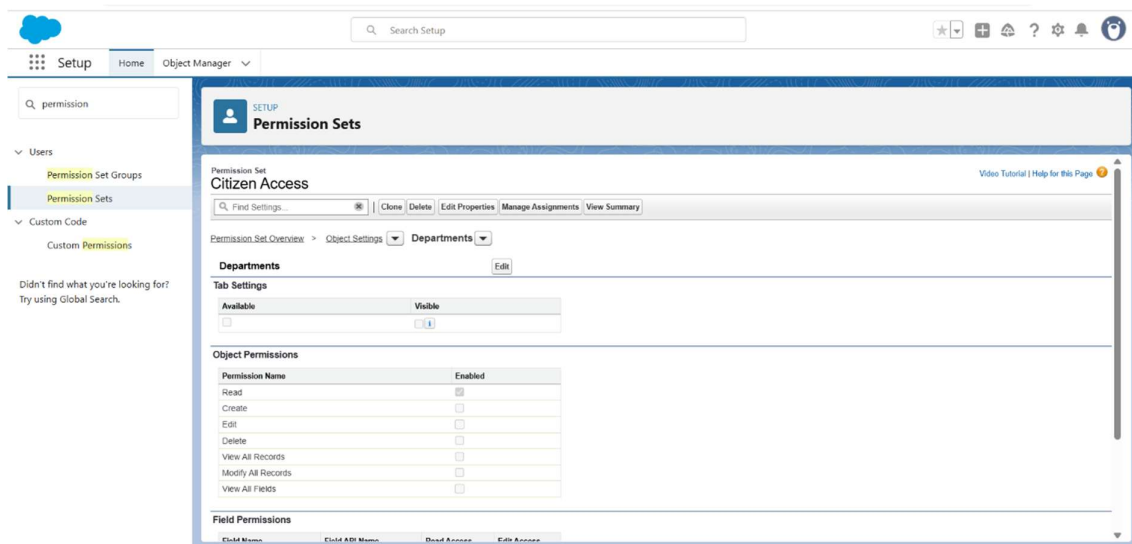
7.Roles

- Defined a Role Hierarchy:
 - CEO (default)
 - City Admin (new)
 - Department Manager – Roads
 - Department Manager – Water
 - Department Manager – Electricity
 - Department Manager – Waste Management
 - Citizen User



8. Permission Sets

- Created **Citizen Access Permission Set** with access to Complaint __c.
- Assigned it to test users for portal simulation.

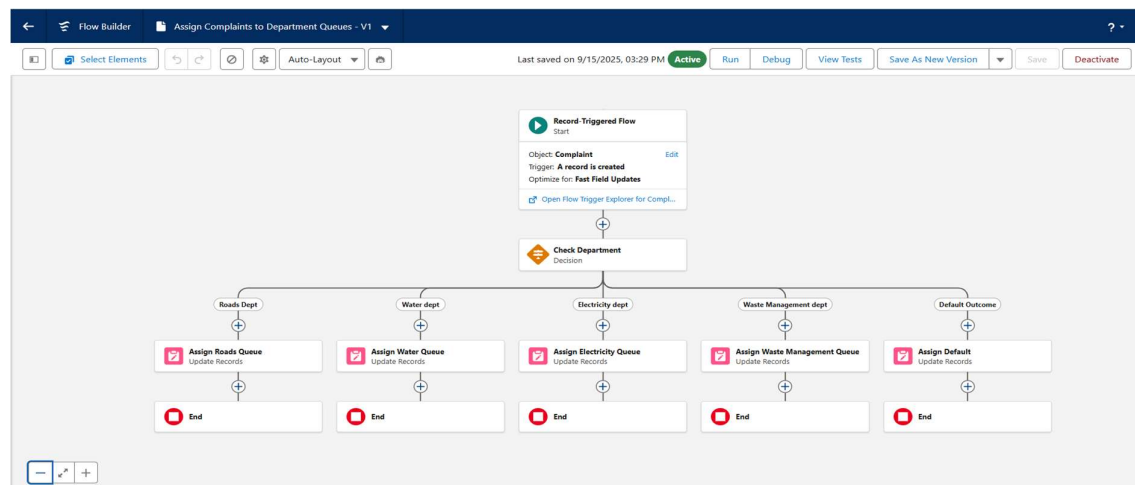


9. Organization-Wide Defaults (OWD)

- Set **Complaint__c = Private** (so users only see complaints they own or that are shared).
- Set **Department__c = Public Read Only** (so department names are visible).

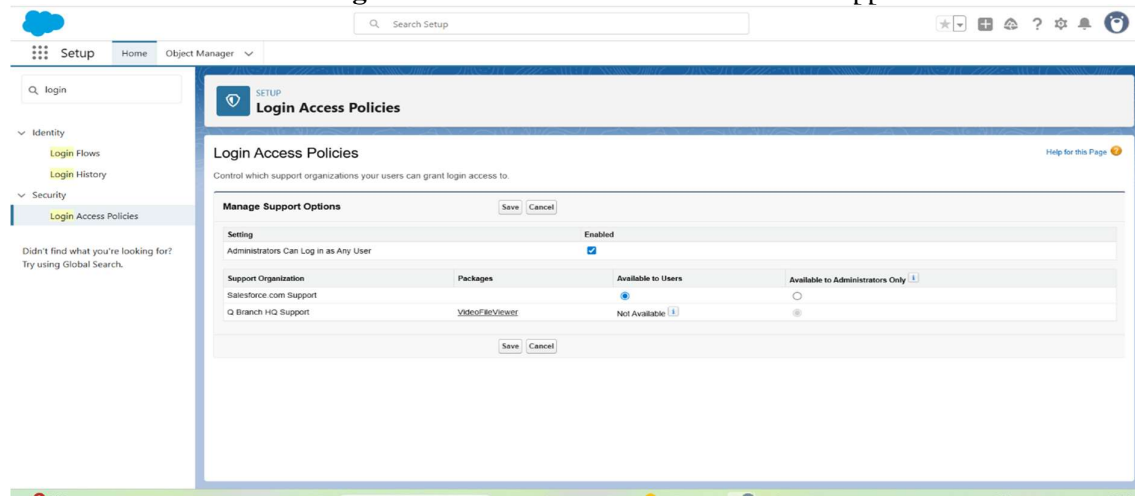
10. Department-Level Access via Queues (Instead of Sharing Rules)

- Created **Queues** for each Department: Roads, Water, Electricity, Waste.
- Configured **Complaint__c** as a supported object.
- Added respective Department Managers as members of their Queues.
- Built a **Record-Triggered Flow**:
 - When a Complaint is created, the Flow checks the Department.
 - Assigns the Complaint's **OwnerId** to the corresponding Queue.



11. Login Access Policies

- Enabled **Grant Account Login Access** for Admins and Salesforce Support.



12.Dev Org Setup

- Developer Edition Org (**SmartCityMain**) created and connected to VS Code using Salesforce CLI.
- Scratch Org (**SmartCityScratch**) used for iterative development and testing before pushing stable changes back to the main org.
- Source tracking enabled via SFDX for smooth metadata management.

13.Sandbox Usage

- Since Developer Edition does not provide Sandboxes, a **Scratch Org** was used to simulate sandbox functionality.
- Scratch Org allowed safe testing of Flows, Apex, and LWC before deploying to the permanent Dev Org.

14.Deployment Basics

- **Salesforce CLI (SFDX)** used as the primary deployment method:
 - sf project deploy start for pushing metadata.
 - sf project retrieve start for pulling changes from org to local.
- Awareness of **Change Sets** (admin-friendly) as an alternative deployment option.
- Queues, Flows, Profiles, and LWC successfully deployed between scratch and main org.