

Phase 2: Org Setup & Configuration Completion Document

Project: Visitor Check-In System for Offices

1. Salesforce Edition


Edition used: Developer Edition

Verified org supports required objects, apps, and dashboards.

2. Company Profile Setup

Company information added: Name, Address, Default Currency, Default Language, Default Locale

Company profile verified in Setup → Company Information

 **SETUP**

Company Information

Company Information

MITS

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	MITS	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	Hindi (India)
Address	Madanapalle 517326 Andhra Pradesh 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	Punjabi (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	468 KB (9%) View
Newsletter	<input type="checkbox"/>	Used File Space	17 KB (0%) View
Admin Newsletter	<input 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	00DgK00000BMLyr
		Organization Edition	Developer Edition
		Instance	CAN96

3. Business Hours & Holidays

Business hours defined for the company.

Public holidays added for accurate case and visit time calculations.


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 0

Business Hours Detail
Edit

Business Hours Name	Office Hours	Time Zone
Business Hours	Sunday No Hours Monday 9:00 AM to 4:00 PM Tuesday 9:00 AM to 4:00 PM Wednesday 9:00 AM to 4:00 PM Thursday 9:00 AM to 4:00 PM Friday 9:00 AM to 4:00 PM Saturday No Hours	(GMT+05:30) India Standard Time (Asia/Kolkata) Default Business Hours <input checked="" type="checkbox"/>

Active ☒

Created By OrgFarm EPIC 9/11/2025, 12:51 PM


Last Modified By HARATHI ASWARTHAGARI 9/15/2025, 6:51 AM

Edit

4. Fiscal Year Settings

Standard Fiscal Year (January – December) selected.

Fiscal year settings verified.


Fiscal Year

Organization Fiscal Year Edit: MITS


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 start month or the ending month.

Setup: Organization Fiscal Year Edit: MITS ~ Salesforce - Developer Edition

⚠ Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. Changing the start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing changes.

☒ **Standard Fiscal Year** 

☐ **Custom Fiscal Year** 

Change Fiscal Year Period
Save Cancel

Name	MITS
Fiscal Year Start Month	January
Fiscal Year is Based On	<input checked="" type="radio"/> The ending month <input type="radio"/> The starting month

Save Cancel

5. User Setup & Licenses

Users created with appropriate Salesforce Licenses.

Example: HARATHI ASWARTHAGARI – System Administrator.

Email, role, and profile assigned.

6. Profiles

System Administrator Profile verified with access to all objects.

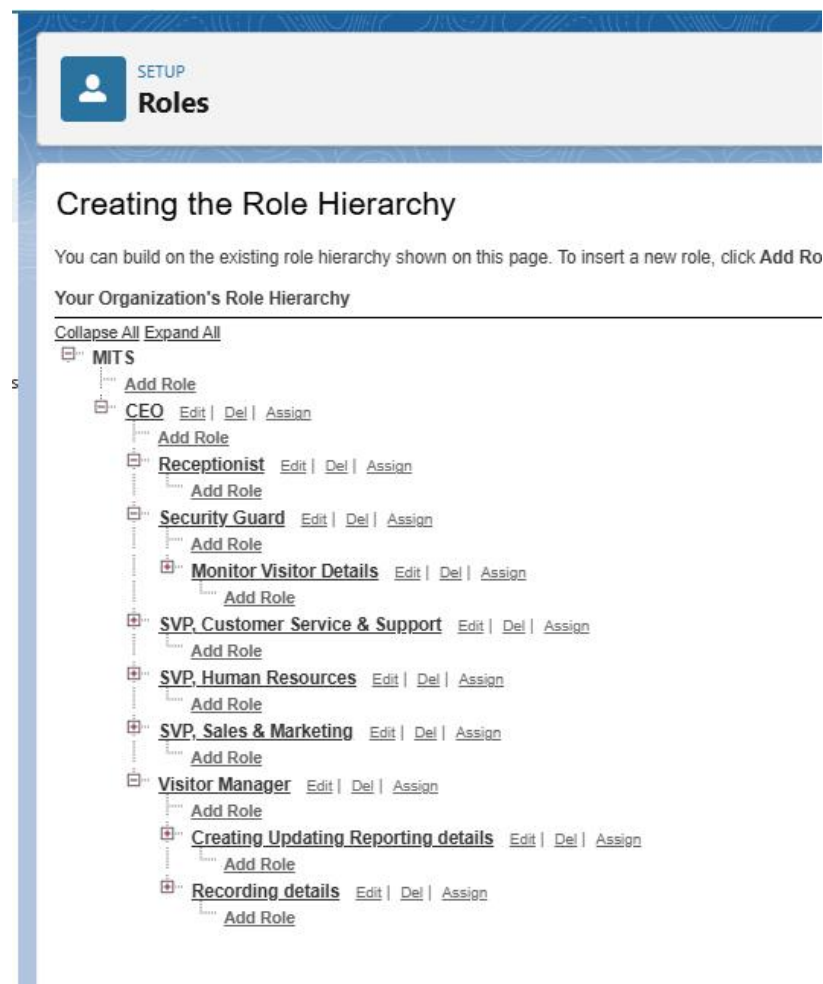
Field-level security configured for sensitive fields like Visitor Email, ID Proof Number.

7. Roles

Role hierarchy created:

System Administrator → Manager → Employee

Users assigned to appropriate roles for record access.



8. Permission Sets

Permission set Visitor Object Access created.

Assigned to System Administrator to allow full access to Visitor Object.

9. Organization-Wide Defaults (OWD)

Visitor object default sharing set to Private.

Verified record visibility for assigned users.

Visit	Public Read/Write	Private	✓
Visitor	Public Read/Write	Private	✓

10. Sharing Rules

Created sharing rules to allow managers and relevant users access to visitor records.

Verified that rules reflect intended record visibility.

Visitor Sharing Rules			
		New	Recalculate
		Visitor Sharing Rules Help ?	
Action	Criteria	Shared With	Access Level
Edit Del	Owner in Role and Internal Subordinates: Receptionist	Role and Internal Subordinates: Visitor Manager	Read/Write

11. Login Access Policies

Login access policies enabled to allow admin login for support and troubleshooting.

12. Visitor Object Configuration

Visitor object created and fields added:

Visitor Name, Email, Phone Number, ID Proof Number, Gender, Age, Check-In/Check-Out Time, Host Employee, Purpose of Visit, Visit Duration

Visitor tab created for easy access.

Page layout verified with all fields visible and arranged logically.

Setup Setup Home Object Manager

SETUP > OBJECT MANAGER

Visitor

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Fields [New](#) [Deleted Fields](#) [Field Dependencies](#) [Set History Tracking](#)

15 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIE...	INDEXED
Age	Age__c	Date		
Created By	CreatedById	Lookup(User)		
Gender	Gender__c	Picklist		
Host Employee	Host_Employee__c	Lookup(User)	✓	
ID Proof Number	ID_Proof_Number__c	Text(50)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)	✓	
Purpose of visit	Purpose_of_visit__c	Picklist		
Visit Duration	Visit_Duration__c	Number(2, 2)		

13. Reports & Dashboards

Custom report type created for Visitor object.

Sample Visitor report created to track visit details.

Report verified with correct fields and filters.


Report: Visitors

New Visitors Report








[Enable Field Editing](#) [Add Chart](#) [Edit](#)

Total Records
2

	Visitor: Visitor Name	Visitor Email	Visitor: Owner Name	Visitor Phone Number	Visitor Check-In Time	Visitor Check-Out Time
1	Gunti Jahnvi	jahnvi@gmail.com	HARATHI ASWARTHAGARI	7894561345	12:30 AM	1:00 AM
2	preethi	preethi@mits.ac.in	HARATHI ASWARTHAGARI	5489756423	1:00 AM	1:15 AM



Q Search...



SalesHomeOpportunitiesLeadsTasksFilesAccountsContactsDashboardsMore

Visitor Dashboard

+ Widget+ FilterRefreshUndoSettingsSaveDone

New Visitors Report

Visito...Vi...Visitor: Ow...Visit...Visito...

Gunti Jahnvi	jahnvi	HARATHI ASWARTHA GARI	789	12:30 AM
preethi	preethi	HARATHI ASWARTHA GARI	548	1:00 AM

View Report (New Visitors Report)

14. Deployment & Sandbox

Configurations tested in Developer Org / Sandbox before final setup.

Verified object creation, permission sets, and reports are functioning correctly.