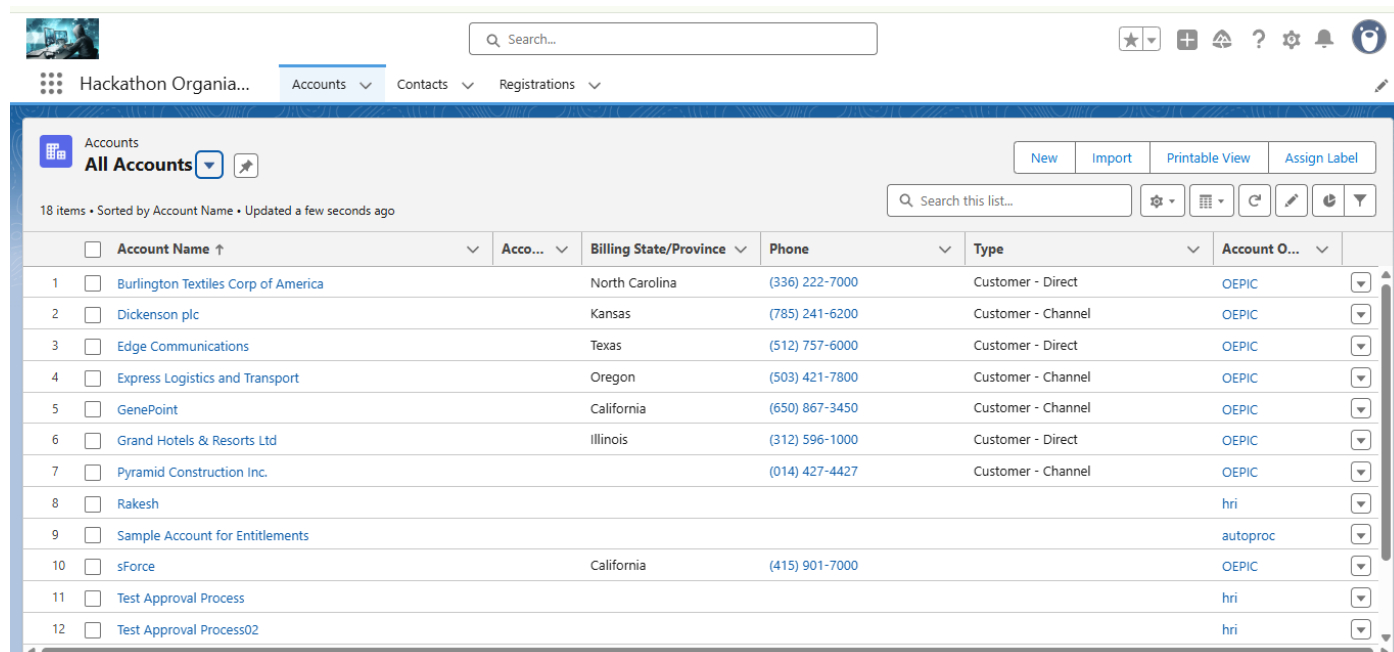


# Phase 2: Org Setup & Configuration

## 1. Org Creation

- **Edition Selected:** Salesforce **Enterprise Edition Developer Org** was created.
- **Org Name:** *Hackathon Org* to represent the central environment for managing hackathons and events.
- **Company Profile Updated:**
  - Company Name: *Hackathon Org*
  - Locale, Timezone, and Currency were aligned with event requirements.



The screenshot shows the Salesforce 'Accounts' page. At the top, there's a navigation bar with 'Hackathon Organia...' and tabs for 'Accounts', 'Contacts', and 'Registrations'. Below this, the 'Accounts' section is active, showing 'All Accounts' with a search bar and buttons for 'New', 'Import', 'Printable View', and 'Assign Label'. A table lists 18 accounts, sorted by name. The table has columns for 'Account Name', 'Accto...', 'Billing State/Province', 'Phone', 'Type', and 'Account O...'. The first 12 rows are visible, showing various companies like 'Burlington Textiles Corp of America', 'Dickenson plc', 'Edge Communications', etc.

	Account Name ↑	Accto...	Billing State/Province	Phone	Type	Account O...
1	<input type="checkbox"/> Burlington Textiles Corp of America		North Carolina	(336) 222-7000	Customer - Direct	OEPI
2	<input type="checkbox"/> Dickenson plc		Kansas	(785) 241-6200	Customer - Channel	OEPI
3	<input type="checkbox"/> Edge Communications		Texas	(512) 757-6000	Customer - Direct	OEPI
4	<input type="checkbox"/> Express Logistics and Transport		Oregon	(503) 421-7800	Customer - Channel	OEPI
5	<input type="checkbox"/> GenePoint		California	(650) 867-3450	Customer - Channel	OEPI
6	<input type="checkbox"/> Grand Hotels & Resorts Ltd		Illinois	(312) 596-1000	Customer - Direct	OEPI
7	<input type="checkbox"/> Pyramid Construction Inc.			(014) 427-4427	Customer - Channel	OEPI
8	<input type="checkbox"/> Rakesh					hri
9	<input type="checkbox"/> Sample Account for Entitlements					autoproc
10	<input type="checkbox"/> sForce		California	(415) 901-7000		OEPI
11	<input type="checkbox"/> Test Approval Process					hri
12	<input type="checkbox"/> Test Approval Process02					hri

## 2. User Setup

To simulate different stakeholders of the hackathon, multiple users were created:

- **Organizers (Admins)** → Responsible for managing the event.
- **Judges** → Evaluate teams and submissions.
- **Mentors** → Guide participants.
- **Participants** → Register and take part in the hackathon.

SETUP

Users

View: Active Users [Edit](#) [Create New View](#)

A

B

C

D

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H

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K

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N

O

P

Q

R

S

T

U

V

W

X

Y

Z

Other

All

New User

Reset Password(s)

Add Multiple Users

<input type="checkbox"/>	Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	<a href="#">Edit</a>	Chatter Expert	Chatter	chatty.00dgl000007tjcvuao.pjmydliynmw@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/>	<a href="#">Edit</a>	Dahake, Hrishi	hri	hrishidahake547@agentforce.com	COO	✓	System Administrator
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Login</a>	EPIC, OrgFarm	OEPIE	epic.379de33e92db@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/>	<a href="#">Edit</a>	Judges	judg	hackthonjudge@gmail.com	Judges	✓	Einstein Agent User
<input type="checkbox"/>	<a href="#">Edit</a>	Mentors	ment	hackthonmentors@gmail.com	Mentors	✓	Einstein Agent User
<input type="checkbox"/>	<a href="#">Edit</a>	Organizers (Admin)	orga	hackthonorganizer@gmail.com	Organizer	✓	Einstein Agent User
<input type="checkbox"/>	<a href="#">Edit</a>	Participants	part	hackthonparticipants@gmail.com	Participants	✓	Einstein Agent User
<input type="checkbox"/>	<a href="#">Edit</a>	User Integration	integ	integration@00dgl000007tjcvuao.com		✓	Analytics Cloud Integration User
<input type="checkbox"/>	<a href="#">Edit</a>	User Security	sec	insightssecurity@00dgl000007tjcvuao.com		✓	Analytics Cloud Security User

New User

Reset Password(s)

Add Multiple Users

A

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Y

Z

Other

All

(Each user was created with a test email ID and assigned later to roles & profiles.)

### 3. Roles & Hierarchy

A role hierarchy was defined to control record visibility and reporting structure:

Admin (Organizer)

```

graph TD
    Admin[Admin (Organizer)] --- Judge[Judge]
    Admin --- Mentor[Mentor]
    Admin --- Participant[Participant]
  
```

- **Purpose:**
  - Ensures Organizers (Admins) have full visibility across the org.
  - Judges & Mentors can only see records relevant to them.
  - Participants only access their own information.

SETUP

Roles

Creating the Role Hierarchy

Help for this Page

You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.

Your Organization's Role Hierarchy

Show in tree view

Collapse All

Expand All

Hackathon Org

Add Role

CEO

Edit

Del

Assign

Add Role

Organizer

Edit

Del

Assign

Add Role

Judges

Edit

Del

Assign

Add Role

Mentors

Edit

Del

Assign

Add Role

Participants

Edit

Del

Assign

Add Role

---

## 4. Profiles

Customized profiles were created to define baseline permissions:

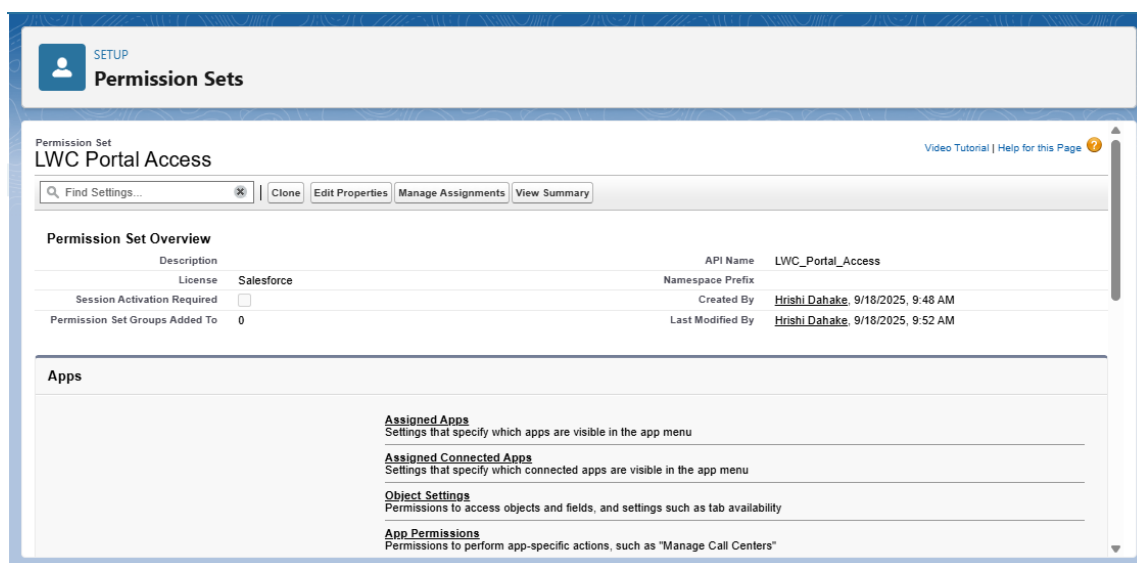
- **Organizer Profile** → cloned from System Administrator.
- **Judge Profile** → cloned from Standard User.
- **Mentor Profile** → cloned from Standard User.
- **Participant Profile** → cloned from Standard User.

*(Profiles ensure different levels of CRUD access for each role.)*

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## 5. Permission Sets

- Created a **Permission Set: LWC Portal Access**.
- Assigned to **Participant Users** to allow them access to future **Lightning Web Components (LWC) portals**.
- This keeps the profile clean and modular while extending access when needed.



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## 6. Org-Wide Defaults (OWD)

Configured **OWD (Org-Wide Defaults)** to control record-level security:

- **Teams Object** → *Private* (only owners can see their teams).
  - **Registrations Object** → *Private* (only owners can see their registration).
-

## 7. Sharing Rules

To provide necessary collaboration:

- **Teams Object:** Shared with **Judges & Mentors** who are assigned to evaluate/guide them.
  - **Registrations Object:** Shared with **Organizers** so they can monitor all participants.
- 

## Deliverables Achieved in Phase 2

By the end of Phase 2, we successfully established:

- A working **Hackathon Org** in Salesforce.
  - Distinct **users** for all hackathon roles.
  - **Role hierarchy** for record visibility.
  - **Profiles & Permission Sets** for security and portal access.
  - **OWD & Sharing Rules** to maintain controlled collaboration between stakeholders.
-