

# SALESFORCE PROJECT PHASE 2

## 📍 Phase 2: Org Setup & Configuration

### 1. Company Profile Setup

- Company Name: EdTech Pvt. Ltd.

The screenshot shows the Salesforce Setup interface. The left sidebar is collapsed, and the main content area is titled "Company Information". The organization's name is listed as "EdTech Pvt. Ltd". Below this, there is a section titled "Organization Detail" containing various configuration settings. The "Primary Contact" is listed as "OrgFarm EPIC". Other settings include "Division" (India), "Fiscal Year Starts In" (January), "Default Locale" (English (India)), and "Default Language" (English). The "Phone" and "Fax" fields are empty. The "Used Data Space" is 342 KB (7%) and "Used File Space" is 17 KB (0%). API requests and streaming API events are both at 0. Restricted logins are at 0 (0 max). The "Salesforce.com Organization ID" is 00DgL00000BjrbC, and the "Organization Edition" is Developer Edition. The "Instance" is CAN98. A "Help for this Page" link is visible in the top right corner.

- Business Hours: 9:00 AM – 6:00 PM IST (Monday to Saturday).

The screenshot shows the Salesforce Setup interface. The left sidebar is collapsed, and the main content area is titled "Business Hours". The "Business Hours Detail" table lists the days of the week with their respective business hours. The table includes columns for "Business Hours Name" (Default), "Business Hours", "Time Zone" (GMT+05:30) India Standard Time (Asia/Kolkata), and "Default Business Hours" (checked). The business hours are: Sunday (9:00 AM to 5:00 PM), Monday (9:00 AM to 5:00 PM), Tuesday (9:00 AM to 5:00 PM), Wednesday (9:00 AM to 5:00 PM), Thursday (9:00 AM to 5:00 PM), Friday (9:00 AM to 5:00 PM), and Saturday (9:00 AM to 5:00 PM). The "Active" status is checked. The "Created By" is OrgFarm EPIC (9/14/2025, 4:48 PM) and the "Last Modified By" is Shaik Mohammed Kaif (9/18/2025, 5:51 AM). A "Holidays" section is present at the bottom of the page, with an "Add/Remove" button. A JavaScript error message is visible at the bottom: "Javascript:srcUp(%27%2F01mgL000003pzy%3Fstdtr%3Dn%27); display".

- Holidays: Added common holidays to avoid demo scheduling on non-working days.

The screenshot shows the Salesforce Setup interface under the Company Settings section. The left sidebar has 'Holidays' selected. The main area displays a table of holidays with one entry: 'Gandhi Jayanthi' on 10/2/2025 All Day. Below the table is a section titled 'Elapsed Holidays' which says 'No records to display'.

<https://orgfarm-e3afed41a3-dev-ed.develop.lightning.force.com/lightning/setup/Holiday/holiday>

- Fiscal Year: Standard fiscal year enabled.

The screenshot shows the Salesforce Setup interface under the Company Settings section. The left sidebar has 'Fiscal Year' selected. The main area shows the 'Organization Fiscal Year Edit' screen for 'EdTech Pvt. Ltd'. It displays a warning about changing the fiscal year start month. A modal window titled 'Change Fiscal Year Period' is open, showing settings for a standard fiscal year starting in January. The 'Save' button is visible at the bottom of the modal.

## 2. User Setup

Created users to simulate different roles in the company:

User	Role	Profile	License	Purpose
Sales Manager	EdTech Manager	Manager Profile	Salesforce	Approves enrollments, views all dashboards & reports
Sales Executive A	EdTech Sales Executive	Sales Executive Profile	Salesforce	Handles Website/Ad leads
Sales Executive B	EdTech Sales Executive	Sales Executive Profile	Salesforce	Handles Webinar leads
Support Agent	EdTech Support Agent	Support Profile	Salesforce Platform	Manages Cases & student queries

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>   Edit	Chatter Expert	Chatter	chatty.00dg00000b1bcuar.tobuvihnz4pk@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>   Edit	EPIC_OrgFarm	OEPIC	epic.3ar8e550008@orgfarm.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>   Edit	kumesh_rana	kumesh	kumesh@gmail.com	EdTech Support Agent	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>   Edit	Mohammed_Kaif_Shak	sha	shakmndkar25296@agentforce.com	EdTech Manager	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>   Edit	Mohammed_Kaif_Shak	smdkaif	shakmndkar25296@gmail.com	EdTech Sales Executive	<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/>   Edit	sahil_shak	sahil	sahilshak@gmail.com		<input checked="" type="checkbox"/>	Sales Executive
<input type="checkbox"/>   Edit	User_Integration	Integ	integration@00dg00000b1bcuar.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>   Edit	User_Security	sec	insightssecurity@00dg00000b1bcuar.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

### 3. Role Hierarchy

Designed a simple role hierarchy to control record visibility:

#### EdTech Manager

- └─ EdTech Sales Executive

- └─ EdTech Support Agent

- Manager: Sees all records (Leads, Opportunities, Courses, Enrollments).
- Sales Executives: See only their own records.
- Support Agent: Sees only Cases and related Contacts.

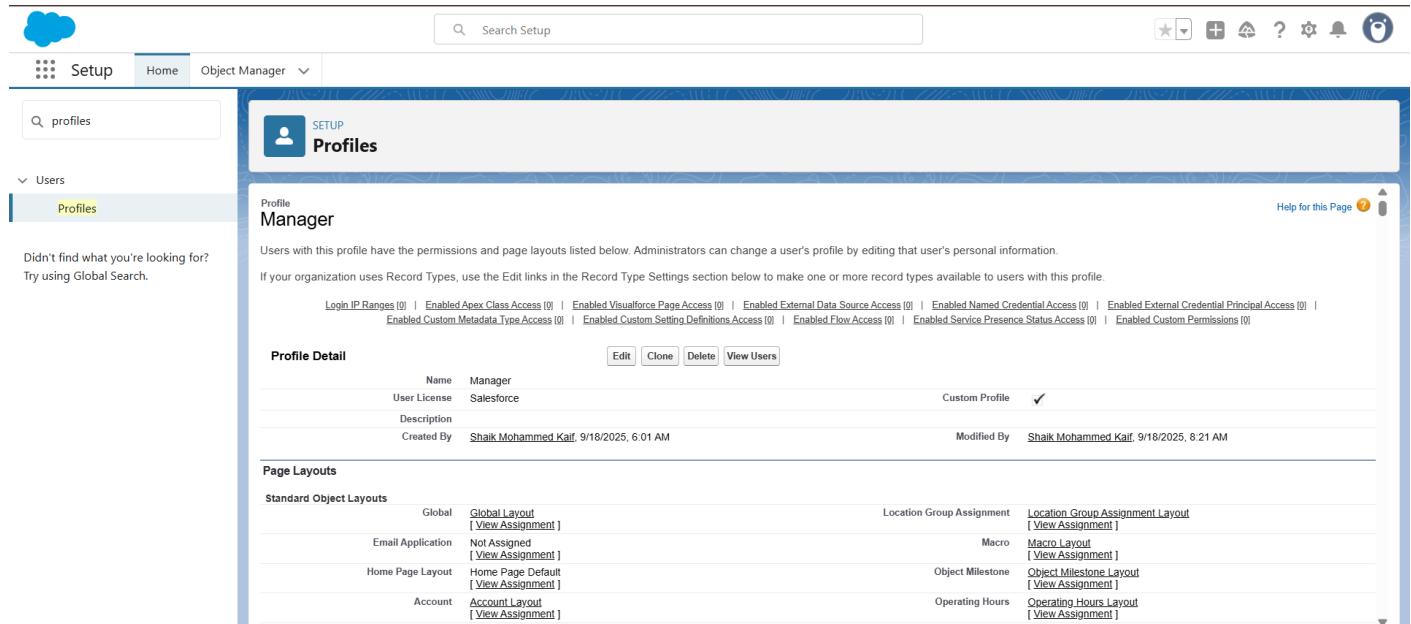
```

graph TD
    EdTechPvtLtd[EdTech Pvt. Ltd] --> CEO[CEO]
    EdTechPvtLtd --> EdTechManager[EdTech Manager]
    CEO --> AddRoleCEO[Add Role]
    EdTechManager --> AddRoleManager[Add Role]
  
```

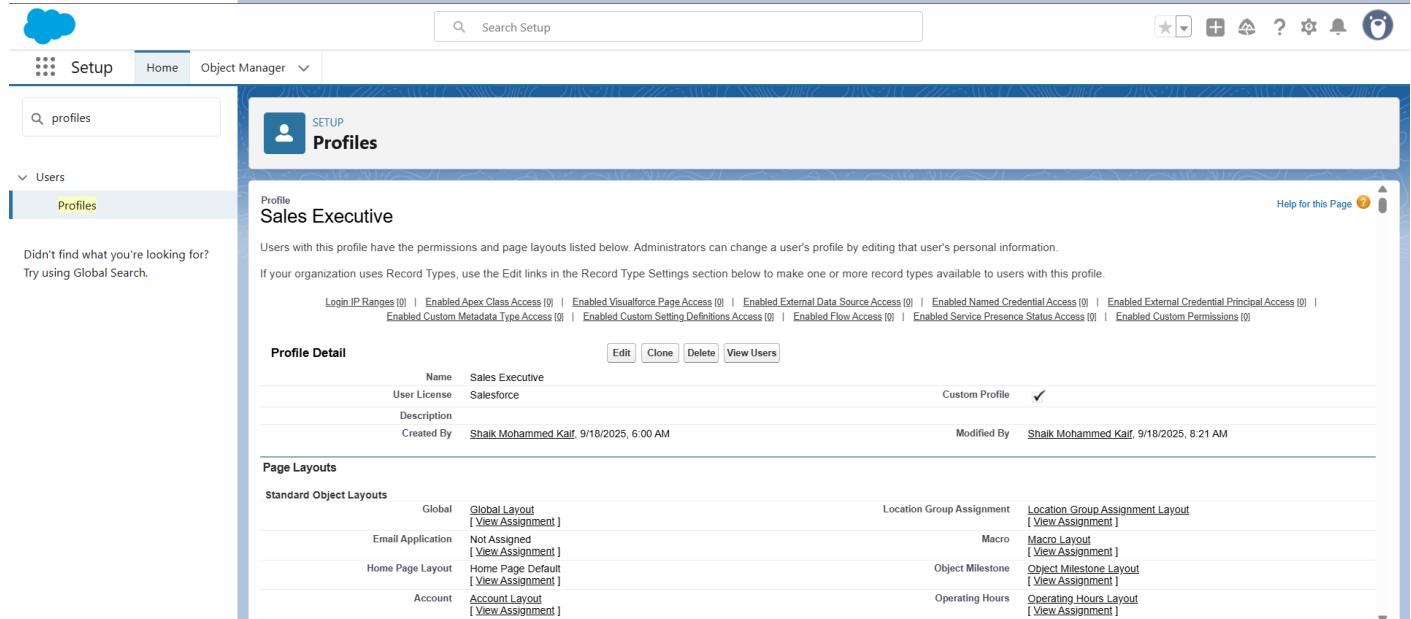
## 4. Profiles

Defined Profiles to manage object-level permissions:

- Manager Profile: Full access to Leads, Opportunities, Accounts, Contacts, Courses, Demo Sessions, Enrollments, Reports, Dashboards.
- Sales Executive Profile: Access to Leads, Opportunities, Courses, Demo Sessions, and Enrollments (own records only). No access to Cases.
- Support Profile: Access only to Cases & Contacts. No access to Leads/Opportunities.



The screenshot shows the Salesforce Setup interface for managing profiles. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right says 'Search Setup'. On the left, a sidebar shows 'Profiles' selected under 'Users'. The main content area is titled 'SETUP Profiles' and shows the 'Manager' profile. It includes sections for 'Profile Detail' (Name: Manager, User License: Salesforce, Description: Manager, Created By: Shaik Mohammed Kalf, 9/18/2025, 6:01 AM) and 'Page Layouts' (Standard Object Layouts for Global, Email Application, Home Page Layout, and Account objects, each with specific page layout assignments like 'Global Layout' or 'Not Assigned'). A note at the bottom states: 'Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.'

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## 5. Permission Sets (Optional)

Created a Demo Scheduler Permission Set to give selected Sales Executives extra ability to schedule Demo Sessions without modifying profiles.

## 6. Security & Sharing Settings

- Organization-Wide Defaults (OWD):
  - Leads → Private
  - Opportunities → Private
  - Courses → Public Read-Only
  - Enrollments → Controlled by Parent

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Private	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Private	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓

- **Sharing Rules:**
  - Leads automatically shared with Manager.

The screenshot shows the 'Sharing Settings' page in the Salesforce Setup interface. The left sidebar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top has 'sharing' typed into it. The main content area is titled 'Sharing Settings' and contains sections for 'Other Settings' and 'Sharing Rules'. Under 'Other Settings', there are three checkboxes: 'Manager Groups' (unchecked), 'Secure guest user record access' (checked), and 'Require permission to view record names in lookup fields' (unchecked). Under 'Sharing Rules', there are four sections: 'Lead Sharing Rules' (Action: Criteria, Criteria: 'Owner in Role: EdTech Sales Executive', Shared With: 'Role: EdTech Manager', Lead Sharing Rules Help), 'Account Sharing Rules' (No sharing rules specified, Account Sharing Rules Help), 'Opportunity Sharing Rules' (No sharing rules specified, Opportunity Sharing Rules Help), and 'Case Sharing Rules' (No sharing rules specified, Case Sharing Rules Help).

- Courses shared with Sales Executives.

This screenshot shows the 'Sharing Settings' page in the Salesforce Setup interface, specifically focusing on 'Course Sharing Rules'. The left sidebar and search bar are identical to the previous screenshot. The main content area shows a table for 'Course Sharing Rules'. It has columns for 'Action' (Edit | Del), 'Criteria' ('Owner in Role: EdTech Manager'), 'Shared With' ('Role: EdTech Sales Executive'), and 'Access Level' ('Read Only'). A help link 'Course Sharing Rules Help' is also present.

## 7. Sandbox/Developer Org

- Project developed in a Salesforce Developer Org with Salesforce licenses for Manager & Sales Executive, plus Platform license for Support.
- Prepared for future deployment via Change Sets/SFDX.

### ✓ Phase 2 Outcome:

- Salesforce org configured with users, roles, profiles, and security model.
- Proper hierarchy ensures Managers have visibility, Sales Executives manage their own pipeline, and Support focuses only on Cases.
- This setup provides the foundation for data modeling, automation, and reporting in later phases.