

Phase 2 Report: Org Setup & Configuration

Project: Hyper-Local 'Barter & Skill-Share' Network Management

Batch: 4

Program: TCS Last Mile SmartBridge

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1. Introduction

This phase covers the foundational setup of the Salesforce Developer Org for the "NeighborNet" Barter & Skill-Share Management System. It establishes the core environment by configuring the company profile, defining business hours, and setting up initial user accounts, profiles, and roles tailored to the community's structure. Foundational security settings, including Org-Wide Defaults (OWD), are implemented to ensure role-based access control from the start. Finally, the strategies for sandbox testing and deployment are documented to support a structured development lifecycle.

2. Objectives

The key objectives accomplished in this phase include:

- Configure a Salesforce Developer Org and set the company profile for "NeighborNet."
- Define initial roles and profiles for "NeighborNet Admin" and "Community Member."
- Establish crucial organizational settings like business hours and fiscal year.
- Create initial user accounts for testing and administration.
- Apply baseline security measures via Org-Wide Defaults (OWD).
- Document the sandbox and deployment strategies for the project.

3. Steps Performed

3.1 Salesforce Edition

- A new Developer Edition Org was created via a Trailhead Playground.
- **Edition confirmed:** Salesforce Developer Edition.

3.2 Company Profile Setup

- The **Organization Name** was updated to "**NeighborNet Community Hub**".
- **Default Locale, Time Zone, and Currency** were configured for the community's location.
- **Primary Contact** details were filled for the system administrator.

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar and a navigation menu with categories like 'Objects and Fields', 'Company Settings', and 'Calendar Settings'. The 'Company Information' link is highlighted. The main content area is titled 'Company Information' and displays details for 'NeighborNet Community Hub'. It includes a table for 'Organization Detail' with fields like Organization Name, Primary Contact, Division, Address, Fiscal Year Starts In, and various settings like 'Activate Multiple Currencies' and 'Enable Data Translation'. There are also links for 'User Licenses', 'Permission Set Licenses', 'Feature Licenses', and 'Usage-based Entitlements'.

Organization Detail		Edit	Deactivate Org
Organization Name	NeighborNet Community Hub	Phone	
Primary Contact	Manikanta Tripurani	Fax	
Division		Default Locale	English (India)
Address	IN	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	390 KB (8%) [View]
Newsletter	<input checked="" type="checkbox"/>	Used File Space	21 KB (0%) [View]
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	00DdL00000d5o2X
		Organization Edition	Developer Edition
		Instance	IND134

3.3 Business Hours & Holidays

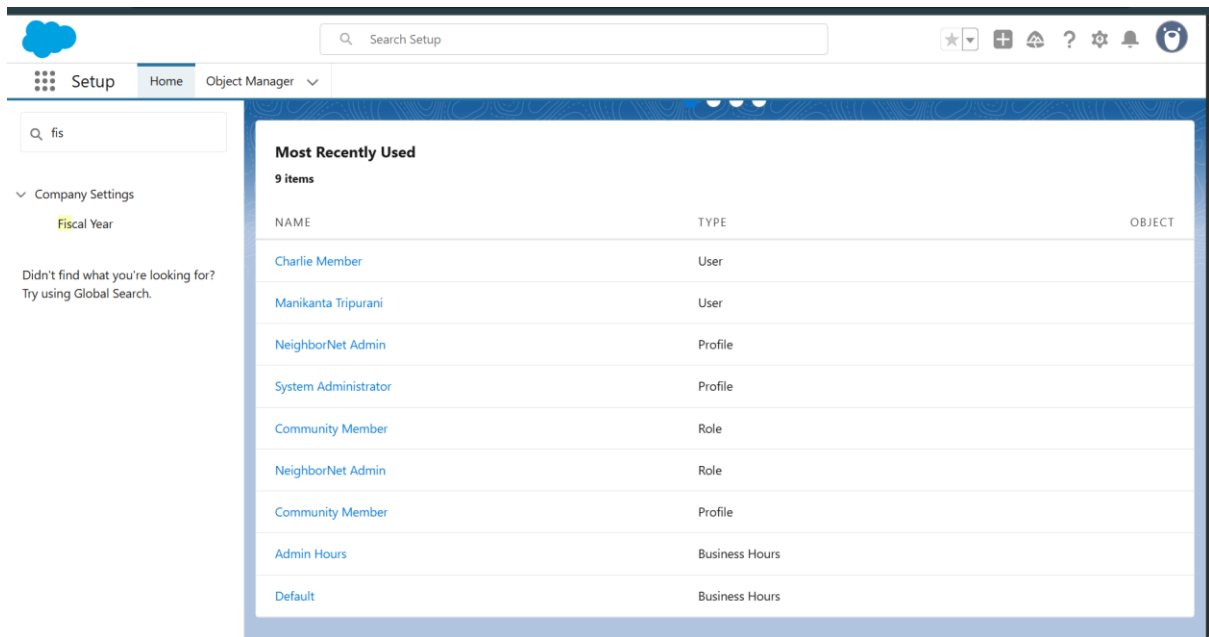
- **Standard business hours** were defined to represent when the NeighborNet Admins are typically available: Monday-Friday, 10:00 AM–4:00 PM.

The screenshot shows the Salesforce Setup interface for 'Business Hours'. The left sidebar has a search bar and a navigation menu with 'Company Settings' and 'Business Hours' highlighted. The main content area is titled 'Business Hours' and displays 'Organization Business Hours'. It includes a table for 'Business Hours Detail' with columns for Business Hours Name, Admin Hours, and Time Zone. The table shows a 'Default Business Hours' entry for Monday through Friday, 10:00 am to 4:00 pm. There are also links for 'Holidays' and 'Edit'.

Business Hours Detail		Edit
Business Hours Name	Admin Hours	Time Zone
Business Hours	Sunday 24 Hours	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
	Monday 10:00 am to 4:00 pm	Default Business Hours <input type="checkbox"/>
	Tuesday 10:00 am to 4:00 pm	
	Wednesday 10:00 am to 4:00 pm	
	Thursday 10:00 am to 4:00 pm	
	Friday 10:00 am to 4:00 pm	
	Saturday 24 Hours	
Active	<input checked="" type="checkbox"/>	
Created By	Manikanta Tripurani 22/09/2025, 2:57 pm	Last Modified By
		Manikanta Tripurani 22/09/2025, 2:57 pm

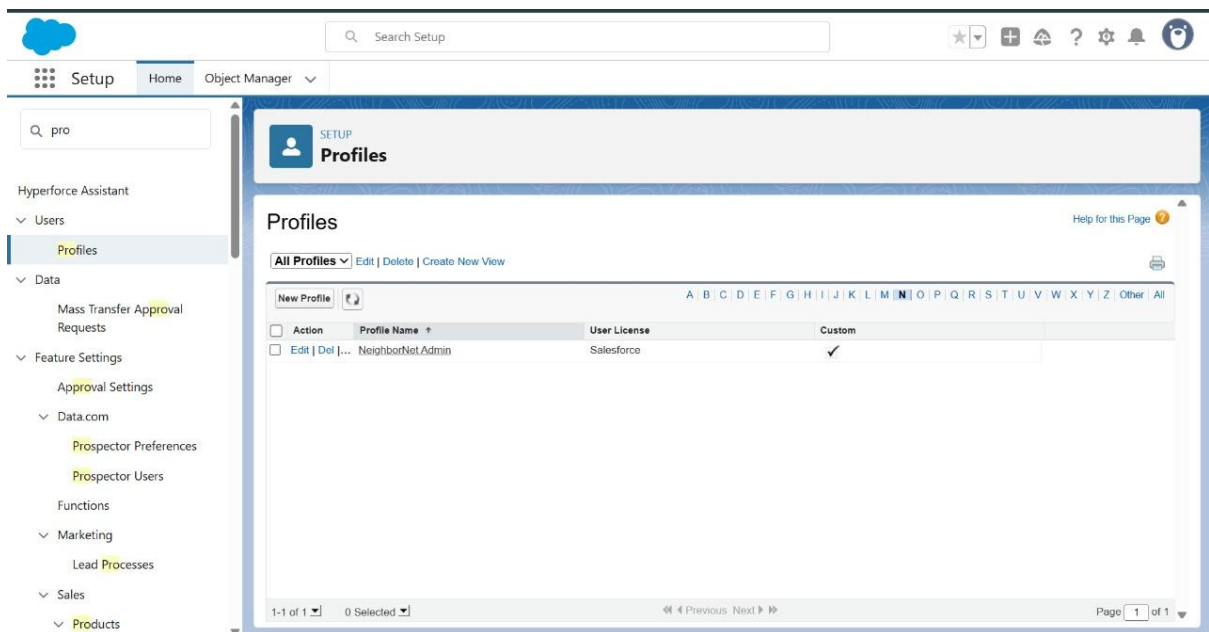
3.4 Fiscal Year

- A **Standard Fiscal Year** (January-December) was chosen for straightforward yearly reporting on community activity.



3.5 User Setup & Licenses

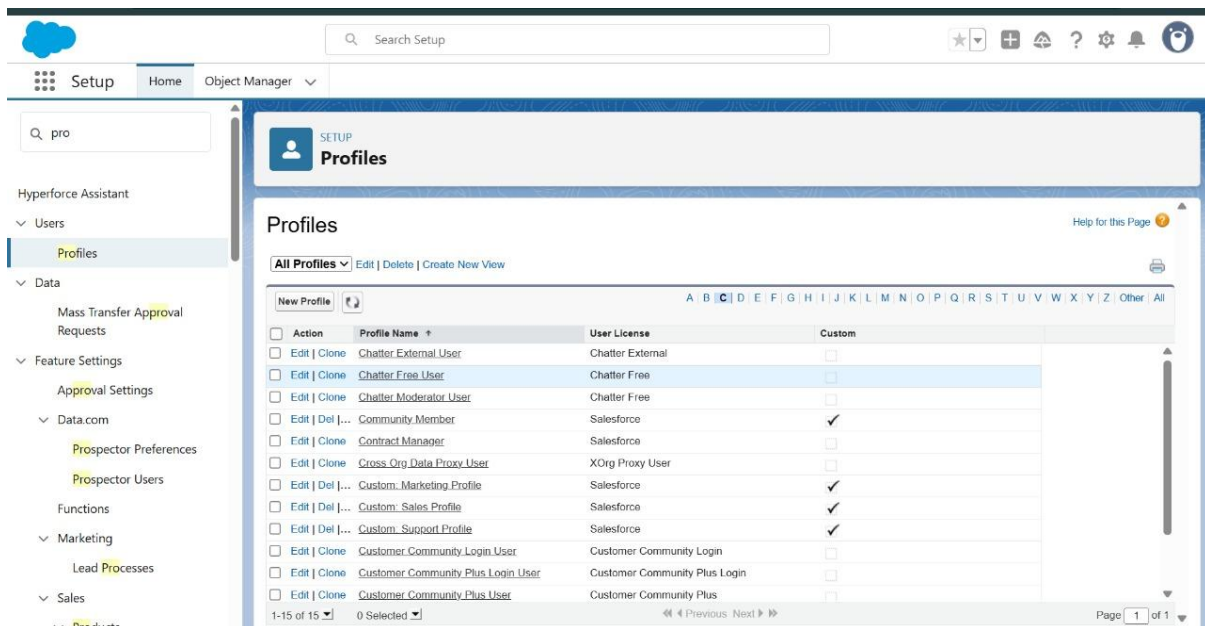
- Test users were created to represent the key roles in the network:
 - NeighborNet Admin (the community coordinator/manager).
 - Community Member (a regular user of the platform).
- Each user was assigned an appropriate profile and role.



3.6 Profiles

- Custom profiles were created by cloning a standard profile:
 - **NeighborNet Admin Profile:** Designed with full administrative access.

- **Community Member Profile:** Will be restricted later to ensure members can only manage their own data.

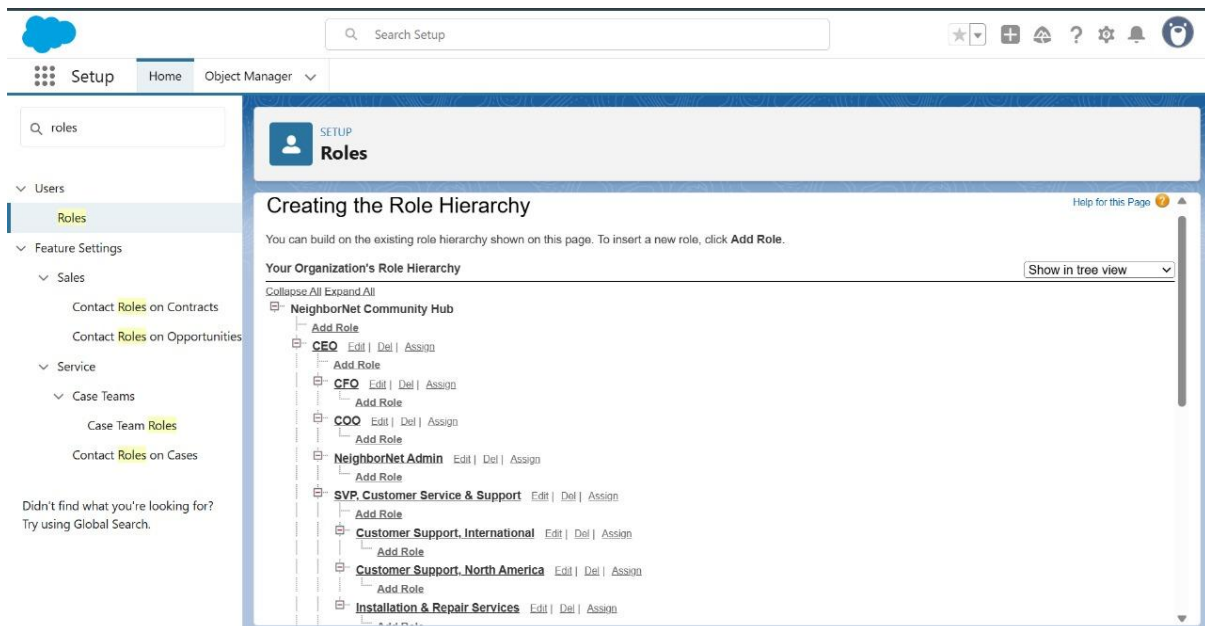


The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The left sidebar contains a search bar with 'pro' and a navigation menu with categories like Users, Data, Feature Settings, and Sales. The main content area displays a table of profiles with columns for Action, Profile Name, User License, and Custom. The table lists various profiles such as Chatter External User, Chatter Free User, Chatter Moderator User, Community Member, Contract Manager, Cross Org Data Proxy User, Custom Marketing Profile, Custom Sales Profile, Custom Support Profile, Customer Community Login User, Customer Community Plus Login User, and Customer Community Plus User. The 'Community Member' profile is highlighted, showing it is assigned the 'Salesforce' license and has the 'Custom' checkbox checked.

Action	Profile Name	User License	Custom
Edit Clone	Chatter External User	Chatter External	<input type="checkbox"/>
Edit Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
Edit Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
Edit Del ...	Community Member	Salesforce	<input checked="" type="checkbox"/>
Edit Clone	Contract Manager	Salesforce	<input type="checkbox"/>
Edit Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
Edit Del ...	Custom Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
Edit Del ...	Custom Sales Profile	Salesforce	<input checked="" type="checkbox"/>
Edit Del ...	Custom Support Profile	Salesforce	<input checked="" type="checkbox"/>
Edit Clone	Customer Community Login User	Customer Community Login	<input type="checkbox"/>
Edit Clone	Customer Community Plus Login User	Customer Community Plus Login	<input type="checkbox"/>
Edit Clone	Customer Community Plus User	Customer Community Plus	<input type="checkbox"/>

3.7 Roles

- A simple role hierarchy was established to reflect the community's structure:
 - CEO (default top level)
 - NeighborNet Admin
 - Community Member



The screenshot shows the Salesforce Setup interface with the 'Roles' page selected. The left sidebar contains a search bar with 'roles' and a navigation menu with categories like Users, Feature Settings, and Sales. The main content area displays the 'Creating the Role Hierarchy' page, which shows a tree view of the organization's role hierarchy. The hierarchy starts with 'NeighborNet Community Hub' at the top, followed by 'CEO', 'CFO', 'COO', 'NeighborNet Admin', 'SVP, Customer Service & Support', 'Customer Support, International', 'Customer Support, North America', and 'Installation & Repair Services'. Each role in the hierarchy has an 'Add Role' button next to it.

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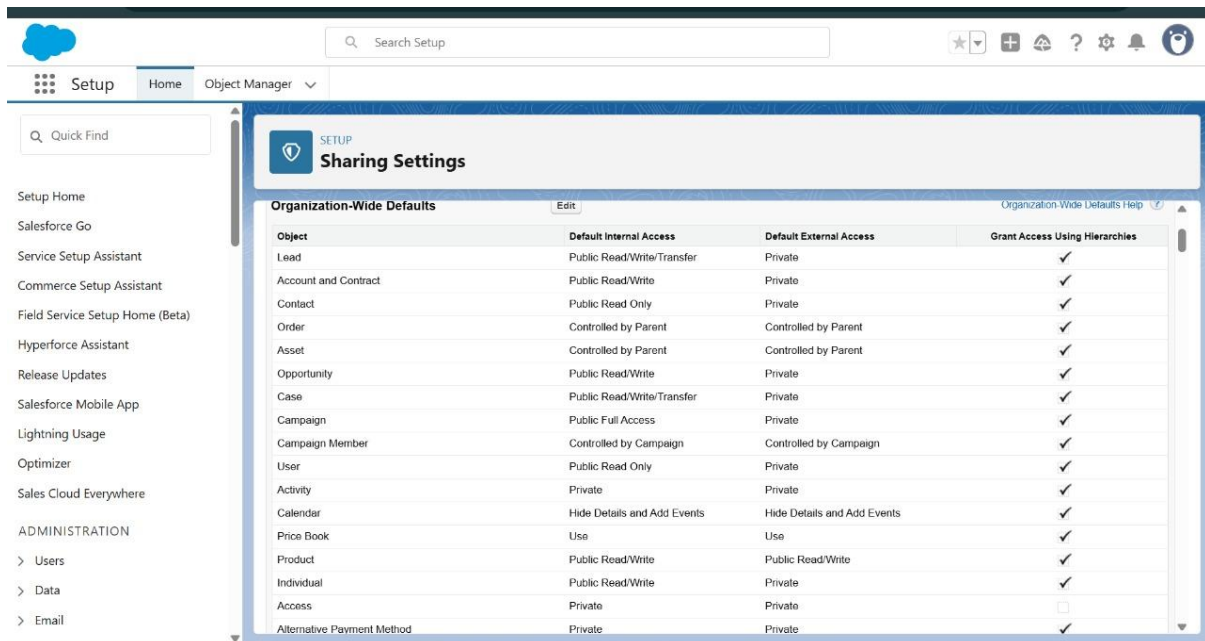
graph TD
    Hub[NeighborNet Community Hub] --> CEO[CEO]
    Hub --> CFO[CFO]
    Hub --> COO[COO]
    Hub --> Admin[NeighborNet Admin]
    Hub --> SVP[SVP, Customer Service & Support]
    Hub --> CS_Int[Customer Support, International]
    Hub --> CS_NA[Customer Support, North America]
    Hub --> IR[Installation & Repair Services]
  
```

3.8 Permission Sets

- A placeholder "**Reporting Access**" permission set was created. This will be assigned to NeighborNet Admins to grant them specific access to view dashboards and reports on community engagement.

3.9 Org-Wide Defaults (OWD)

- Initial OWDs were set with a focus on privacy and future sharing:
 - **Contact:** Public Read Only (so members can see each other to connect).
 - **Planned:** Future custom objects will be set to **Private**.



The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Setup Home, Salesforce Go, Service Setup Assistant, Commerce Setup Assistant, Field Service Setup Home (Beta), Hyperforce Assistant, Release Updates, Salesforce Mobile App, Lightning Usage, Optimizer, Sales Cloud Everywhere, and ADMINISTRATION (with sub-links for Users, Data, and Email). The main content area is titled 'Sharing Settings' and displays a table for 'Organization-Wide Defaults'. The table has four columns: Object, Default Internal Access, Default External Access, and Grant Access Using Hierarchies. The 'Access' row is highlighted in blue.

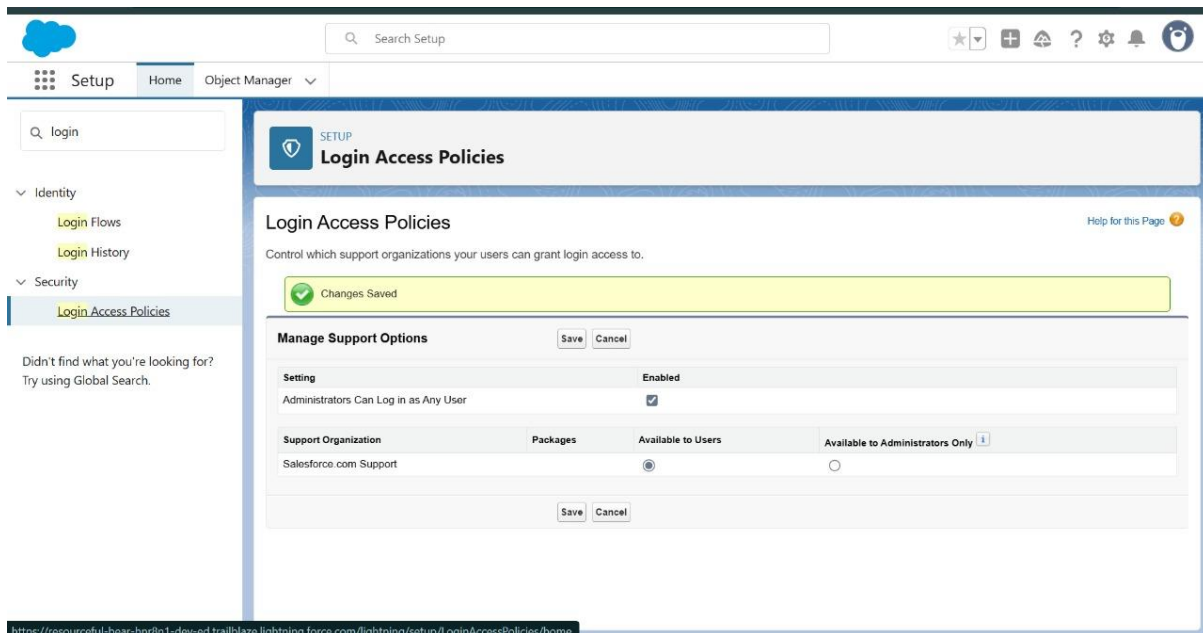
Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Public Read Only	Private	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	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	✓
Product	Public Read/Write	Public Read/Write	✓
Individual	Public Read/Write	Private	✓
Access	Private	Private	<input type="checkbox"/>
Alternative Payment Method	Private	Private	✓

3.10 Sharing Rules

- **Planned:** Sharing rules will be implemented in Phase 3 after custom objects are built. For example, a rule will be created to share active "Offers" and "Requests" with all Community Members.

3.11 Login Access Policies

- The "Administrators can log in as any user" policy was **enabled** to allow Admins to assist community members with troubleshooting.



3.12 Security & Field-Level Security

- **Planned:** Field-Level Security will be used to hide sensitive contact information, only making it visible once an exchange is accepted.

3.13 Sandbox & Testing Strategy

- As a full sandbox is unavailable in a Developer Edition, a **second Developer Org** will be used as a pseudo-sandbox for development and testing.

3.14 Deployment Basics

- **Change Sets** will be the primary method for deploying components (custom objects, fields, flows, etc.) from the development org to the main project org.

4. Expected Outcomes

- The Salesforce Org is fully configured with "NeighborNet's" profile and operational settings.
- A foundational security and user structure is in place with profiles and roles.
- The environment is prepared for the creation of the custom data model.
- Clear strategies for testing and deployment are defined.
- The project is ready to proceed to **Phase 3: Data Modeling & Relationships**.

5. Conclusion

Phase 2 has successfully laid the groundwork for the Hyper-Local 'Barter & Skill-Share' Network Management System. Through the careful configuration of the Salesforce Org, user access controls, and security settings, a secure and scalable foundation has been

established. This environment is now fully prepared for the next phase, where the custom data model for skills, offers, requests, and exchanges will be built.