

Phase 2

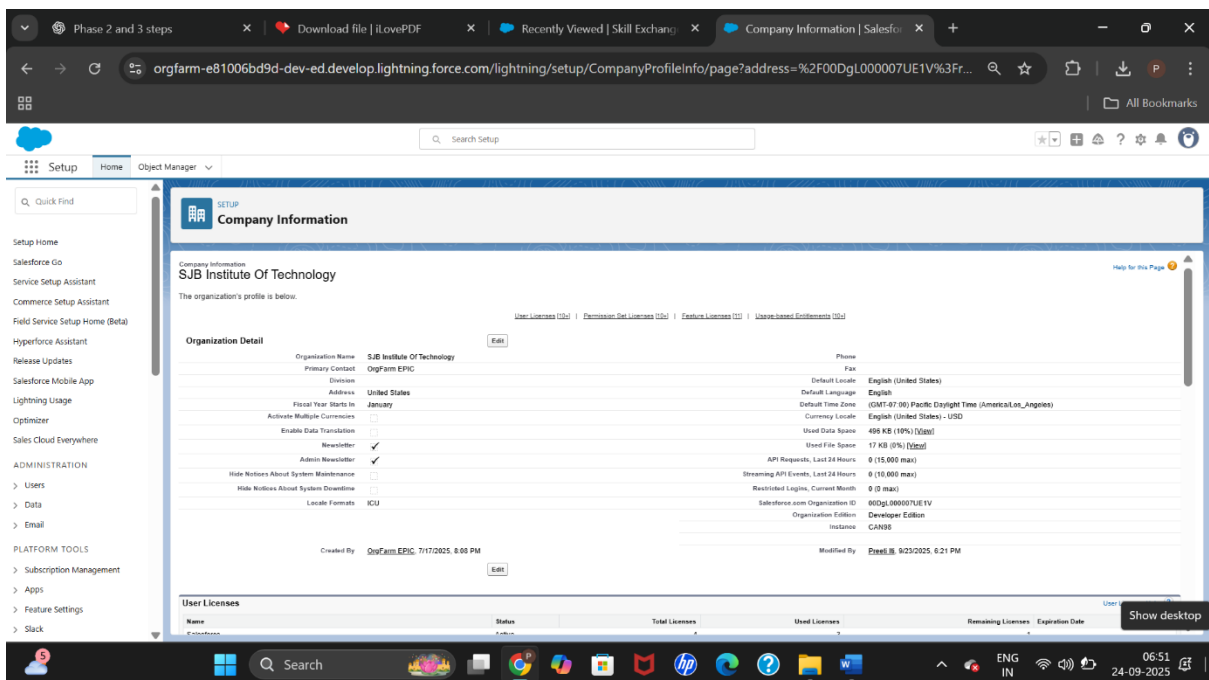
Org Setup & Configuration

1. Salesforce Editions

- Using **Salesforce Developer Edition Org**.
- Developer Edition provides Enterprise-level features free with limited licenses and storage.
- Suitable for student projects and practice.

2. Company Profile Setup

- Company Name: **SJB**
- Time Zone: **Asia/Kolkata**
- Locale: **English (India)**
- Ensures correct organization details and local time display.



3. Business Hours & Holidays

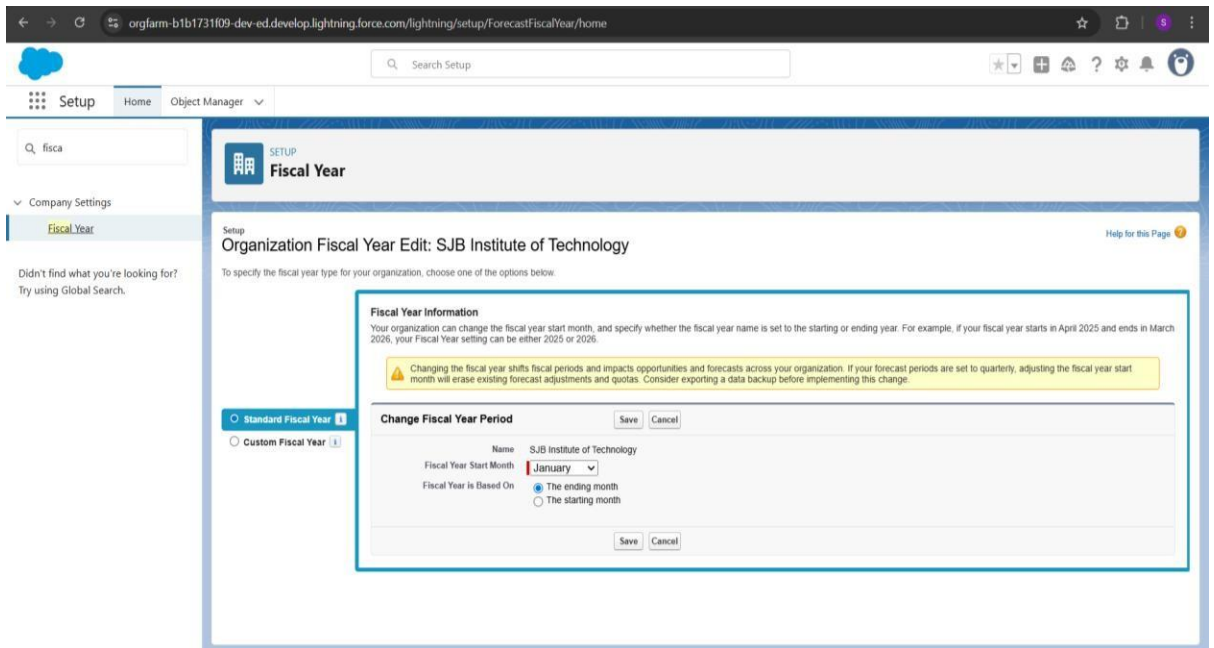
- Business Hours: **Mon–Fri, 9:00 AM – 6:00 PM IST (active)**.
- Holiday Created: **holiday, 23-Sep-2025 (All Day)**.

The screenshot shows the Salesforce Setup interface for configuring Business Hours. The browser address bar displays the URL: `orgfarm-e81006bd9d-dev-ed.develop.lightning.force.com/lightning/setup/BusinessHours/page?address=%2F01mgL000002YsuT%3Fa...`. The left sidebar shows the navigation menu with 'Setup' and 'Home' tabs, and a search bar containing 'business'. 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, there is a table for 'Business Hours Detail' with columns for 'Business Hours Name', 'Default', 'Time Zone', and 'Default Business Hours'. The table shows a single entry named 'Business Hours' with a default time zone of '(GMT+05:30) India Standard Time (Asia/Kolkata)'. The table also lists the hours for each day of the week: Sunday (No 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 (No Hours). The 'Active' checkbox is checked, and the 'Created By' field shows 'Orgfarm_EPIC' with a timestamp of '7/17/2025, 8:08 PM'. The 'Last Modified By' field shows 'Preethi' with a timestamp of '9/23/2025, 6:29 PM'. Below the table, there is a section for 'Holidays' with a link to 'Add/Remove'. The bottom of the screen shows a Windows taskbar with various application icons and a system clock displaying '06:59 24-09-2025'.

The screenshot shows the Salesforce Setup interface for configuring Holidays. The browser address bar displays the URL: `orgfarm-e81006bd9d-dev-ed.develop.lightning.force.com/lightning/setup/Holiday/page?address=%2F0C0gL00000024xB`. The left sidebar shows the navigation menu with 'Setup' and 'Home' tabs, and a search bar containing 'holidays'. The main content area is titled 'Holiday Detail' and includes a description: 'Holidays are dates and times at which business hours are suspended. These dates and times, when associated with business hours, also suspend any escalation rules associated with business hours. Add or remove business hours to holidays to suspend business hours and escalation rules during the holidays.' Below this, there is a table for 'Holiday Detail' with columns for 'Holiday Name', 'Description', 'Date and Time', and 'Created By'. The table shows a single entry named 'Holiday' with a description of '9/23/2025 All Day', a date and time of '9/23/2025, 6:30 PM', and a created by of 'Preethi'. The 'Last Modified By' field shows 'Preethi' with a timestamp of '9/23/2025, 6:30 PM'. Below the table, there is a section for 'Business Hours' with a link to 'Add/Remove'. The bottom of the screen shows a Windows taskbar with various application icons and a system clock displaying '07:00 24-09-2025'.

4. Fiscal Year Settings

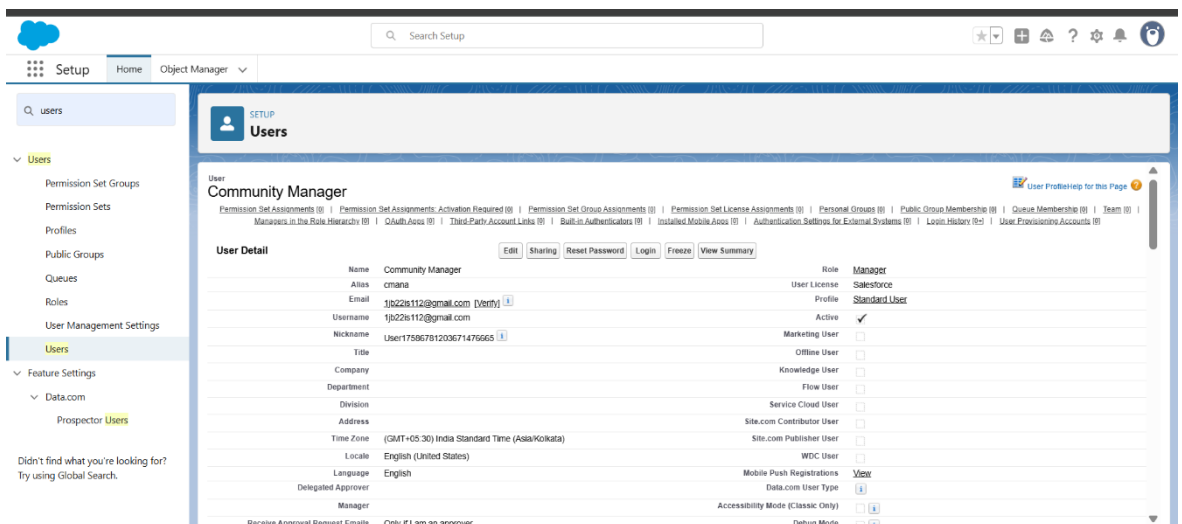
- Fiscal Year: **Standard (January–December)**.
- Custom Fiscal Year not enabled (not needed for this project).

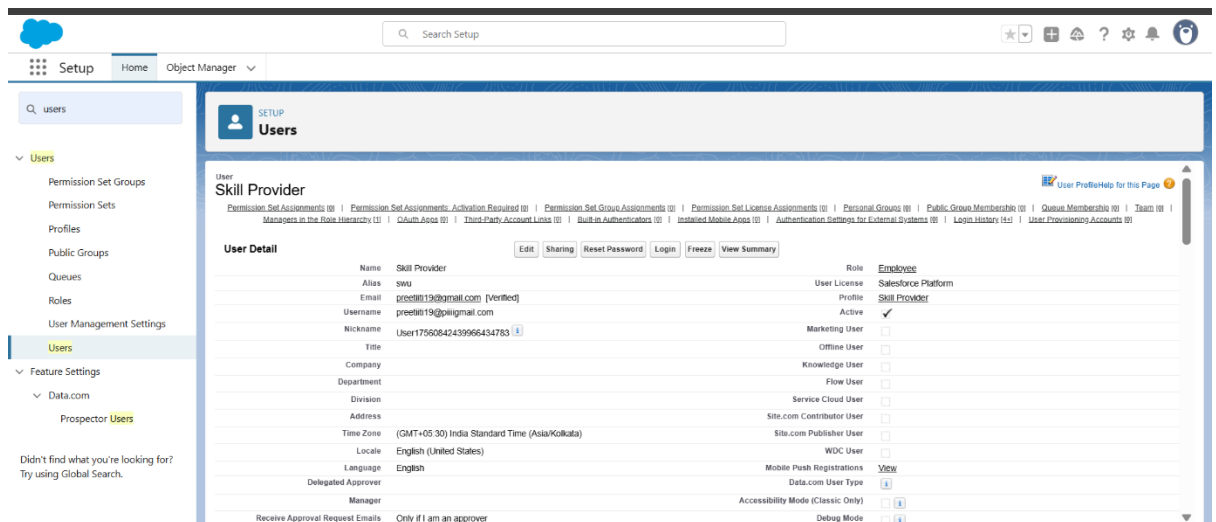


5. User Setup & Licenses

Created 3 test users:

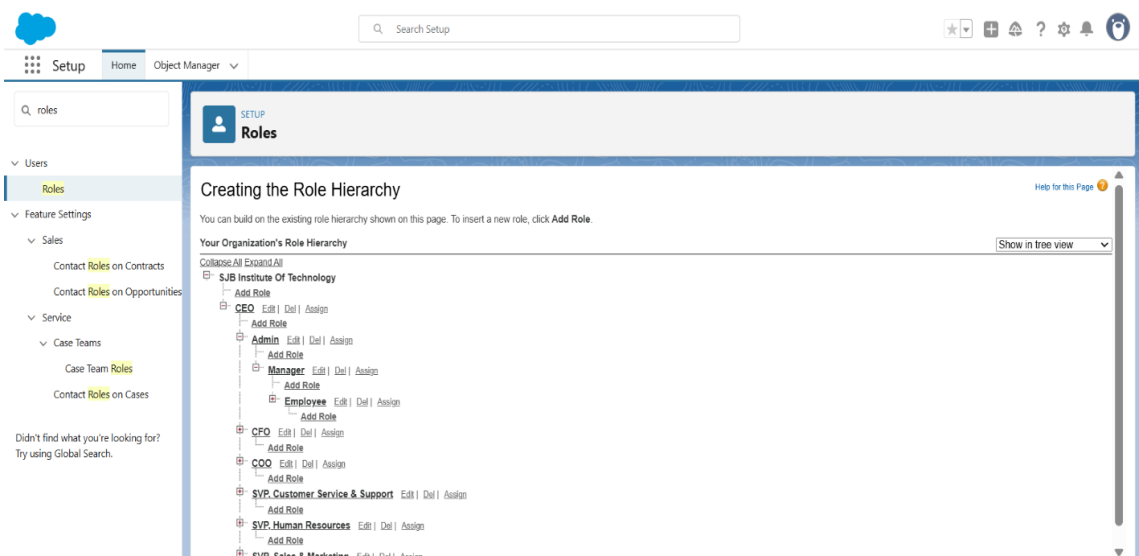
- **Community Manager User** – Oversees the platform, manages users, and approves/monitors skill requests.
- **Skill Provider User** – Offers skills, maintains skill listings, and responds to requests from other users.
- Used **Salesforce Platform licenses** (since only 1 full Salesforce license available).





6. Roles

- Role hierarchy created:
 - Manager (top)
 - Employee
- Defines data visibility (Manager can see subordinates' data).



7. Profiles

- Cloned the Standard User profile to create custom Skill Provider and with tailored object-level permissions.
- Configured object-level permissions: Skill Providers can create/manage Skill Listings and Community Managers have full control.

The screenshot displays the Salesforce Setup interface for the 'Skill Provider Profile'. The left sidebar shows the 'Setup' menu with 'Profiles' selected under 'Users'. The main content area is titled 'Skill Provider Profile' and includes a 'Profile' section with a description: '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. If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.' Below this is a 'Profile Detail' section with fields for Name, User License, Description, Created By, and Modified By. The 'Page Layouts' section lists various layouts and their assignments.

Profile Detail			
Name	Skill Provider Profile		
User License	Salesforce Platform	Custom Profile	✓
Description			
Created By	Preeti J.	9/24/2025, 7:13 AM	Modified By
			Preeti J.
			9/24/2025, 7:17 AM

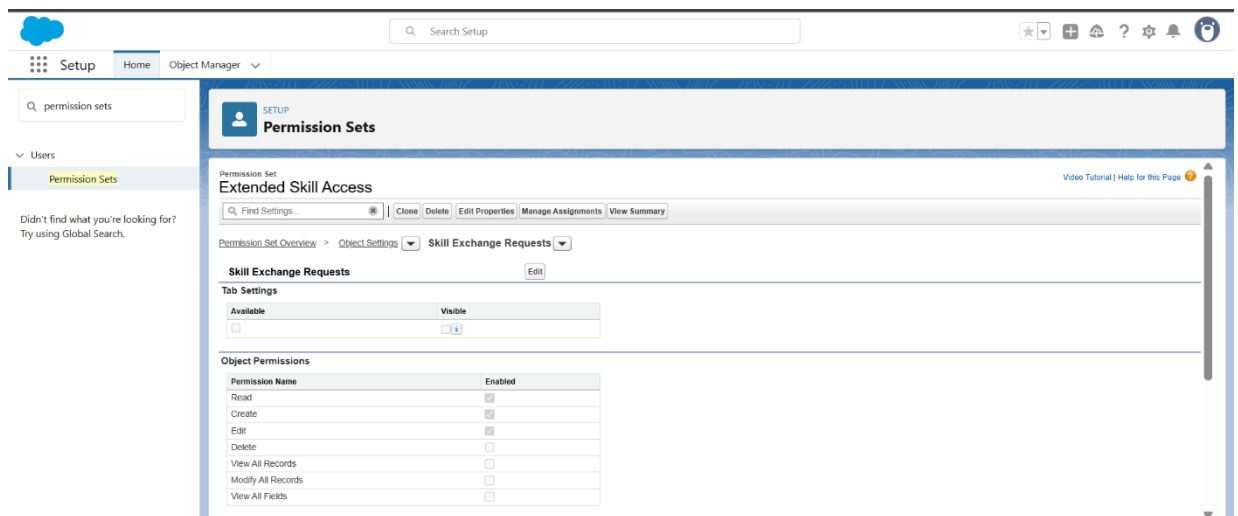
Page Layouts			
Standard Object Layouts			
Global	Global Layout [View Assignment]	Lead	Lead Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Location	Location Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Location Group	Location Group Layout [View Assignment]
Account	Account Layout [View Assignment]	Location Group Assignment	Location Group Assignment Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]

The screenshot displays the Salesforce Setup interface for the 'Community Manager Profile'. The left sidebar shows the 'Setup' menu with 'Profiles' selected under 'Users'. The main content area is titled 'Community Manager Profile' and includes a 'Profile' section with a description: '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. If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.' Below this is a 'Profile Detail' section with fields for Name, User License, Description, Created By, and Modified By. The 'Page Layouts' section lists various layouts and their assignments.

Profile Detail			
Name	Community Manager Profile		
User License	Salesforce	Custom Profile	✓
Description			
Created By	Preeti J.	9/24/2025, 7:10 AM	Modified By
			Preeti J.
			9/24/2025, 7:19 AM

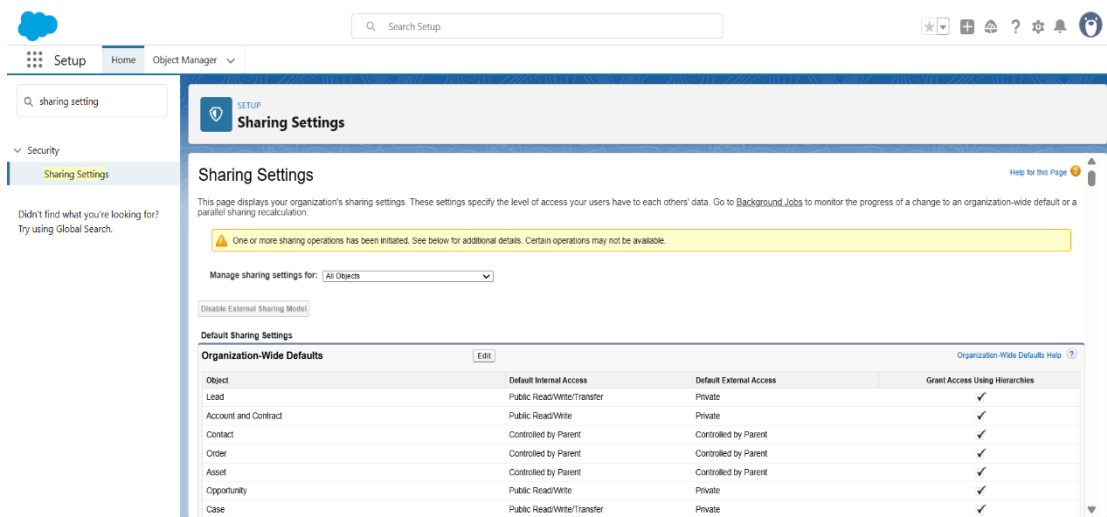
Page Layouts			
Standard Object Layouts			
Global	Global Layout [View Assignment]	Location Group	Location Group Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Location Group Assignment	Location Group Assignment Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Macro	Macro Layout [View Assignment]
Account	Account Layout [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Operational Hours	Operational Hours Layout [View Assignment]

- Assigned custom profiles (Skill Provider, Skill Requester, Community Manager) to respective users to enforce role-based permissions



9. Organization-Wide Defaults (OWD)

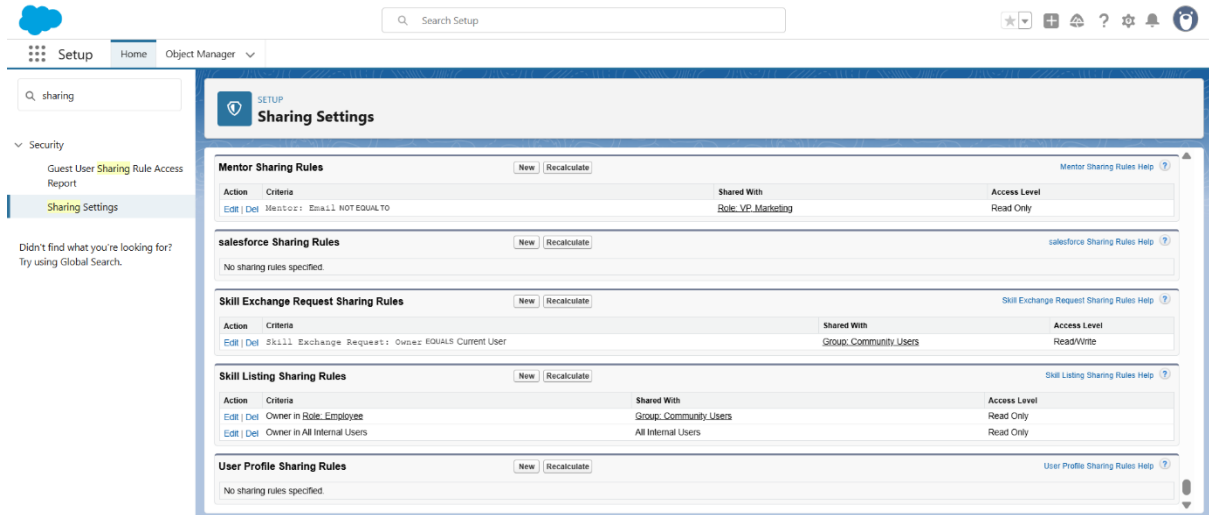
- Configured Organization-Wide Defaults:
- Skill Listings set to Public Read Only, Skill Exchange Requests set to Private, and User Profiles set to Public Read Only, ensuring secure and role-based visibility.



10. Sharing Rules

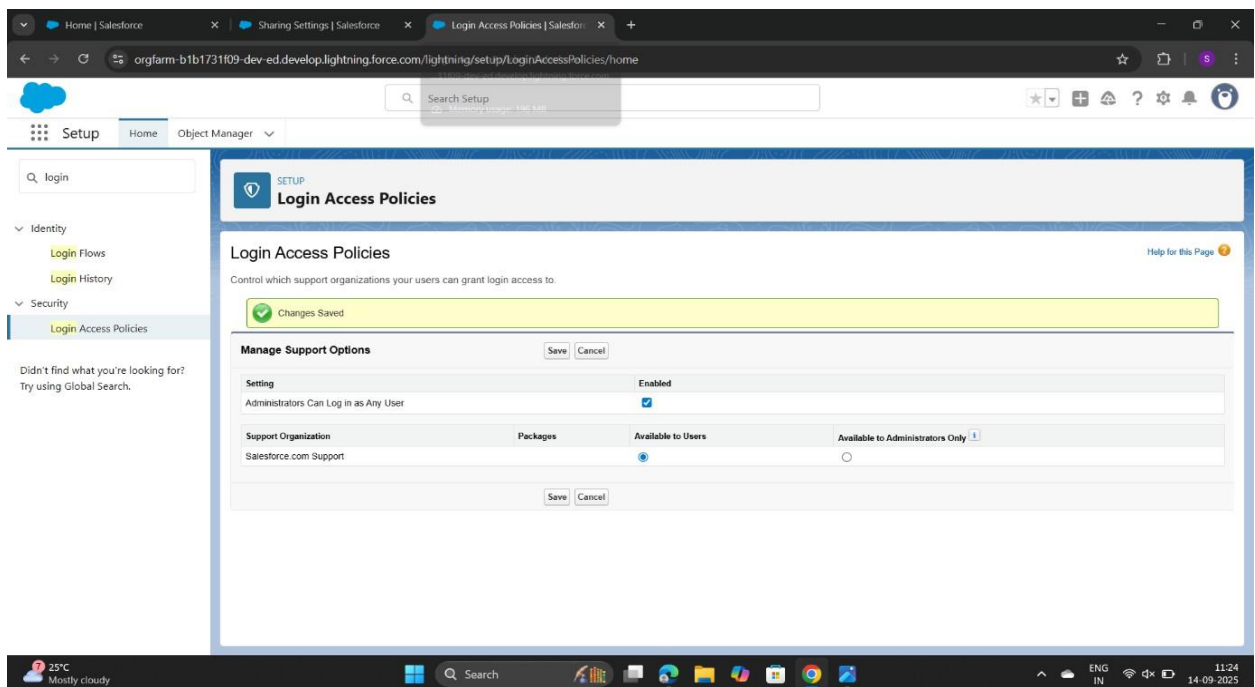
- Sharing Rules were implemented using **Public Groups** to grant community users controlled access to the platform.

- Skill Listings were shared as **Read Only** for browsing, while Skill Requests were shared as **Read/Write** for users to manage their own requests.
- User Profiles are visible only to their respective owners. This setup ensures **internal user privacy** while enabling community users to access necessary records safely.



11. Login Access Policies

- Enabled: **Administrators Can Log in as Any User.**
- Allows admin to troubleshoot by logging in as other users.



12. Developer Org Setup

- Project built in **Salesforce Developer Edition Org.**
- Provides free Enterprise-level features for learning and development.

13. Sandbox Usage

- Sandboxes **not available in Developer Edition.**
- In real-world companies, sandboxes are used for testing and training.

14. Deployment Basics

- Deployment methods: **Change Sets** or **Salesforce CLI/VS Code.**
- Not required here since project is completed in a single Developer Org.