

Phase 2: Organization & Setup Configuration

1. Problem Statement:

The "Promptly" project aims to address the issue of capturing fleeting thoughts and micro-tasks without the friction of a complex to-do list app. The solution provides a quick, voice-activated tool for setting reminders that are too small to be added to a traditional to-do list but are too important to forget. The app's simplicity is its key differentiator.

2. Salesforce Edition & Environment Setup

- **Edition:** Salesforce Developer Edition
- **Instance:** SWE106.
- **Purpose:** The purpose of this environment is to serve as a dedicated space for building and testing the Promptly reminder application.

3. Company Profile Configuration

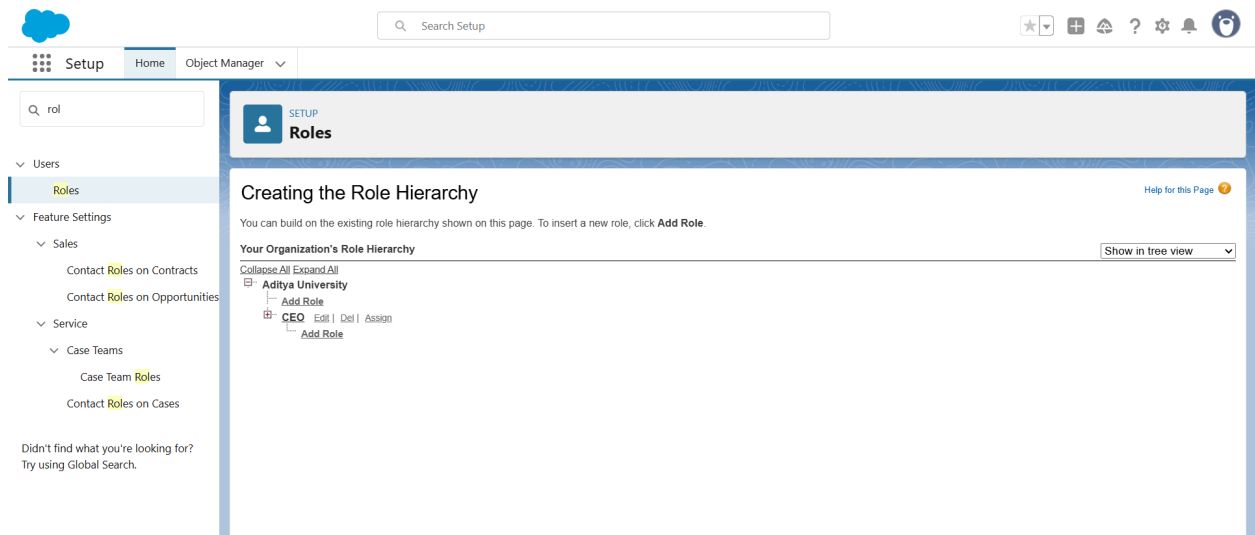
- **Organization Name:** Aditya University
- **Industry:** Non-profit organization
- **Default Locale:** English (India)
- **Default Language:** English
- **Default Time Zone:** (GMT+05:30) India Standard Time (Asia/Kolkata)
- **Currency:** English (India) - INR

The screenshot displays the Salesforce Setup interface. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'Company Information' and shows the organization's profile for 'Aditya University'. The profile details include:

- Organization Name:** Aditya University
- Primary Contact:** Gunnam Preethi Ashritha
- Address:** IN
- Fiscal Year Starts In:** January
- Activate Multiple Currencies:** ☐
- Enable Data Translation:** ☐
- Newsletter:** ☒
- Admin Newsletter:** ☒
- Hide Notices About System Maintenance:** ☐
- Hide Notices About System Downtime:** ☐
- Locale Formats:** ICU
- Phone:**
- Fax:**
- Default Locale:** English (India)
- Default Language:** English
- Default Time Zone:** (GMT+05:30) India Standard Time (Asia/Kolkata)
- Currency Locale:** English (India) - INR
- Used Data Space:** 450 KB (9%) [View](#)
- Used File Space:** 21 KB (0%) [View](#)
- API Requests, Last 24 Hours:** 34 (15,000 max)
- Streaming API Events, Last 24 Hours:** 0 (10,000 max)
- Restricted Logins, Current Month:** 0 (0 max)
- Salesforce.com Organization ID:** 00DWU00000W98Gr
- Organization Edition:** Developer Edition
- Instance:** SWE106

4. Role Hierarchy Setup

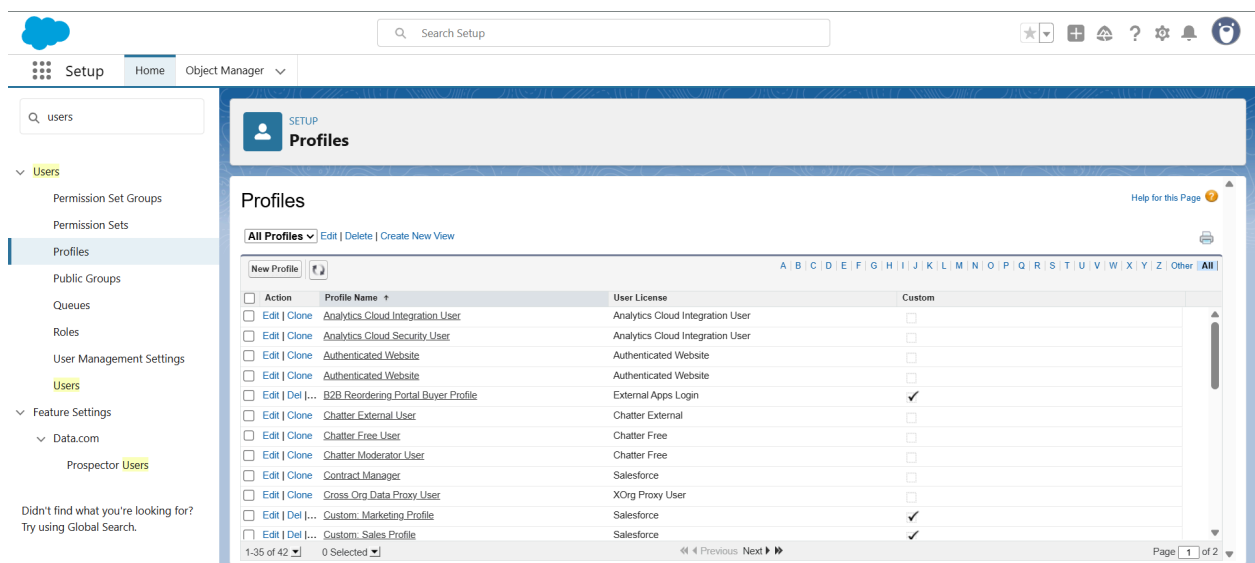
- **Role Structure:** Role hierarchy is not applicable to this project as it's a front-end, single-user application.



The screenshot shows the Salesforce Setup interface for the 'Roles' section. The left sidebar contains a search bar with 'rol' and a navigation menu with options like Users, Roles, Feature Settings, Sales, Service, and Case Teams. The main content area is titled 'Creating the Role Hierarchy' and includes a search bar, a 'Show in tree view' dropdown, and a tree diagram for 'Aditya University' showing a hierarchy with 'CEO' and 'Add Role' options.

5. User Profiles

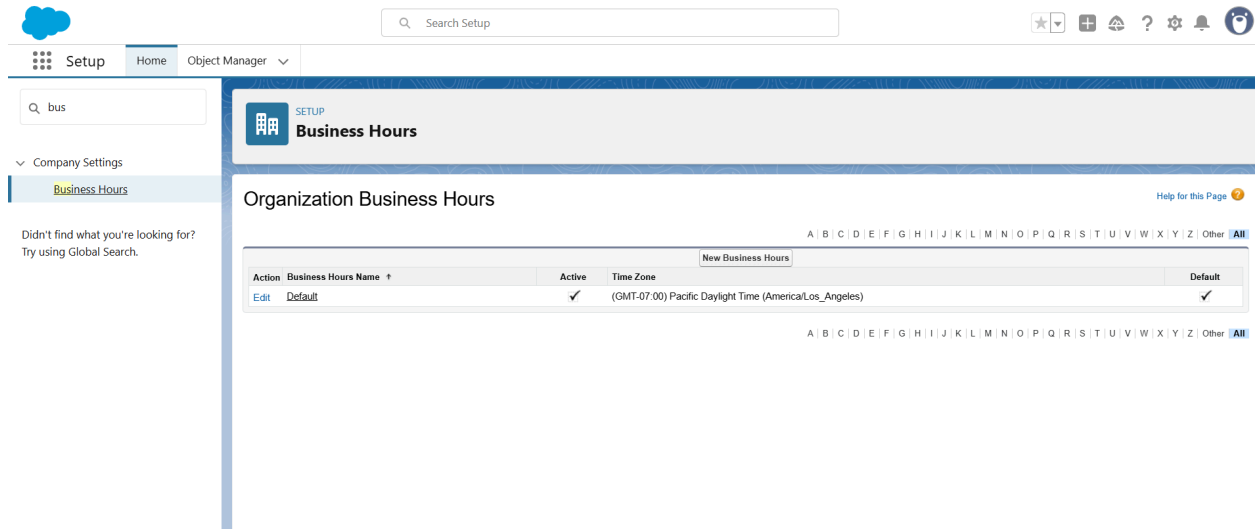
- User profiles are not applicable as there is no user management or authentication.



The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains a search bar with 'users' and a navigation menu with options like Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users. The main content area is titled 'Profiles' and includes a search bar, a 'Create New View' button, and a table listing various profiles with columns for Action, Profile Name, User License, and Custom. The table shows profiles like 'Analytics Cloud Integration User', 'Authenticated Website', 'External Apps Login', 'Chatter External User', 'Chatter Free User', 'Chatter Moderator User', 'Contract Manager', 'Cross Org Data Proxy User', 'Custom: Marketing Profile', and 'Custom: Sales Profile'.

6. Business Hours & Holidays Configuration

- Business hours and holidays are not configured as this is a front-end application with no server-side processes.



7. User License Management

- User license management is not applicable. The project is a single-file web application and does not require any licenses.

8. Security Foundation

- **Organization-Wide Defaults (OWD):** Not applicable.
- **Role Hierarchy & Sharing Rules:** Not applicable, as no data is stored on a server.
- **Security Review:** The application is highly secure because it handles no sensitive user data. No information is ever sent to a server.

9. Development Setup

- **Current Environment:** The project is built using a frontend web application.
- **Deployment Method:** The `promptly.html`, `promptly.js` files will be hosted on a public GitHub repository. GitHub Pages will be used for deployment.