

Phase 2: Org Setup & Configuration

1. Salesforce Editions

Salesforce offers different editions depending on the organization's size and requirements. For this project, a **Developer Edition** org is used, which provides:

- **Core CRM Objects:** Accounts, Contacts, Cases, Events, Tasks
- **Customization Options:** Custom fields, Profiles, Permission Sets, Roles
- **Sandbox Support:** Single developer sandbox for testing metadata changes
- **License Limitations:** 5 users, standard Salesforce licenses

Rationale: Developer Edition is ideal for testing and learning because it provides most features without requiring production licenses.

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 contains two tables.

Company Information Table:

Name	Status	Total Licenses	Used Licenses	Remaining Licenses	Expiration Date
Salesforce	Active	4	4	0	
Analytics Cloud Integration User	Active	2	2	0	
Chatter Free	Active	5,000	1	4,999	
External Apps Login	Active	40	0	40	
Salesforce Integration	Active	1	0	1	
Salesforce Platform	Active	6	0	6	
Customer Community Login	Active	5	0	5	
Work.com Only	Active	3	0	3	
Customer Portal Manager Custom	Active	10	0	10	
Identity	Active	110	0	110	

[Show 10 more »](#) | [Go to list \(25\) »](#)

Permission Set Licenses Table:

Name	Status	Total Licenses	Used Licenses	Remaining Licenses	Expiration Date	Enabled for Integrations	Custom Permission Set License
Agent platform builder	Active	5	0	5		<input type="checkbox"/>	<input type="checkbox"/>
Agentforce (Default)	Active	5	1	4		<input type="checkbox"/>	<input type="checkbox"/>
Agentforce Service Agent Builder	Active	10,000	1	9,999		<input type="checkbox"/>	<input type="checkbox"/>
Agentforce Service Agent User	Active	200	0	200		<input type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Builder	Disabled	0	0	0		<input type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Explorer	Disabled	0	0	0		<input type="checkbox"/>	<input type="checkbox"/>
Analytics View Only Embedded App	Active	3	0	3		<input type="checkbox"/>	<input type="checkbox"/>
B2B Buyer Manager Permission Set One Seat	Active	40	0	40		<input type="checkbox"/>	<input type="checkbox"/>
B2B Buyer Permission Set One Seat	Active	40	0	40		<input type="checkbox"/>	<input type="checkbox"/>

2. Company Profile Setup

Configuration:

- Primary Contact: Name - Palak Lodhi , Email - palak.lodhi.aiml22@ggits.net
- Default Locale: English (India)
- Default Time Zone: GMT+5:30 Asia/Kolkata
- Default Currency: INR

Purpose:

Ensures accurate formatting for reports, dashboards, and date-time calculations across the org.

The screenshot shows the Salesforce Setup interface for the 'Company Information' section. The left sidebar contains a navigation menu with options like 'Setup', 'Home', 'Object Manager', 'Company Settings', 'Calendar Settings', 'Data Protection and Privacy', 'Fiscal Year', 'Holidays', 'Language Settings', and 'My Domain'. The main content area is titled 'Company Information' and displays the organization's profile for 'Gyan Ganga Institute of Technology and Sciences'. The profile includes details such as Organization Name, Primary Contact (Org'am EPIC), Division, Address (United States), Fiscal Year Starts In (January), and various system settings like Default Locale (English (United States)), Default Language (English), Default Time Zone (GMT-07:00 Pacific Daylight Time (America/Los_Angeles)), Currency Locale (English (United States) - USD), Used Data Space (403 KB (8%) [View]), Used File Space (17 KB (0%) [View]), API Requests, Last 24 Hours (0 (15,000 max)), Streaming API Events, Last 24 Hours (0 (10,000 max)), Restricted Logins, Current Month (0 (0 max)), Salesforce.com Organization ID (000GL000007VXDN), Organization Edition (Developer Edition), and Instance (CAN96). The page also shows the creation and modification dates and times.

Organization Detail	
Organization Name	Gyan Ganga Institute of Technology and Sciences
Primary Contact	Org'am EPIC
Division	
Address	United States
Fiscal Year Starts In	January
Activate Multiple Currencies	<input type="checkbox"/>
Enable Data Translation	<input type="checkbox"/>
Newsletter	<input checked="" type="checkbox"/>
Admin Newsletter	<input checked="" type="checkbox"/>
Hide Notices About System Maintenance	<input type="checkbox"/>
Hide Notices About System Downtime	<input type="checkbox"/>
Locale Formats	ICU
Phone	
Fax	
Default Locale	English (United States)
Default Language	English
Default Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Currency Locale	English (United States) - USD
Used Data Space	403 KB (8%) [View]
Used File Space	17 KB (0%) [View]
API Requests, Last 24 Hours	0 (15,000 max)
Streaming API Events, Last 24 Hours	0 (10,000 max)
Restricted Logins, Current Month	0 (0 max)
Salesforce.com Organization ID	000GL000007VXDN
Organization Edition	Developer Edition
Instance	CAN96

Created By: Org'am EPIC, 7/19/2025, 2:42 AM
Modified By: Palak Lodhi, 9/22/2025, 3:44 AM

3. Business Hours & Holidays

Configuration:

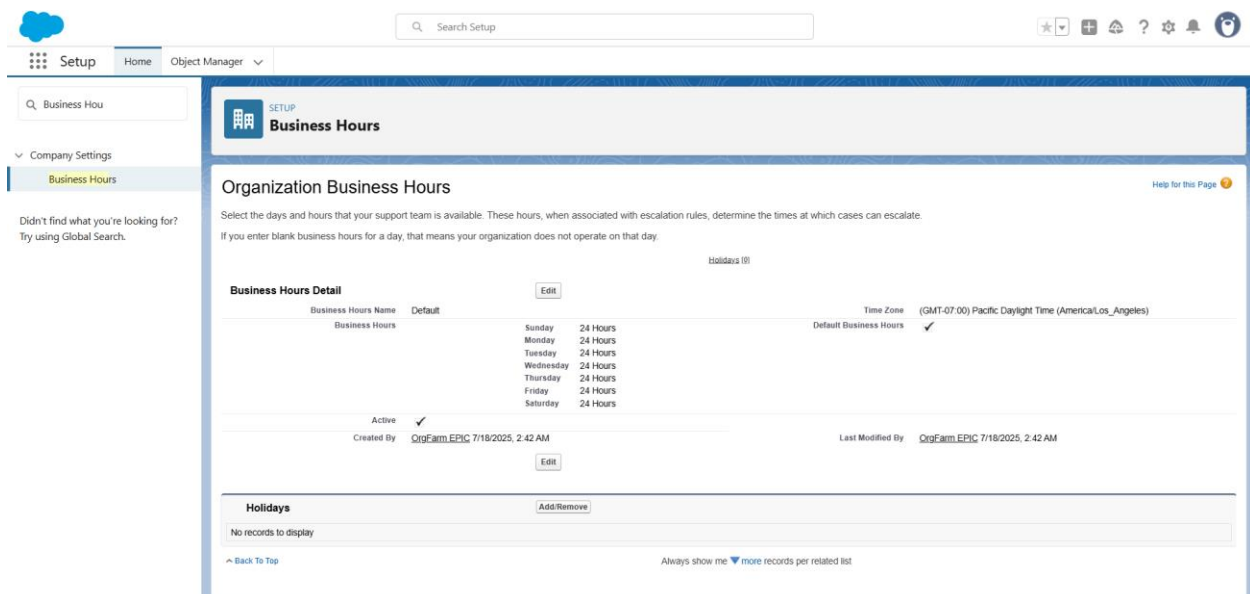
- Business Hours: Monday to Friday, 09:00 – 17:00
- Holidays: Organization-specific (optional)

Steps:

1. Setup → Business Hours → New
2. Enter Business Hours Name: Standard Business Hours
3. Select working days and times
4. Save

Purpose:

Defines operational hours for appointments, Events, and SLA calculations for Cases.



The screenshot shows the Salesforce Setup interface for configuring Business Hours. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled "Business Hours" and includes a search bar. Below the title, there is a section for "Organization Business Hours" with instructions on how to select days and hours for support team availability. A table titled "Business Hours Detail" shows the current configuration for "Business Hours" (Default), which is active and set for Monday through Friday, 24 hours. The table also shows the time zone as "(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)". At the bottom, there is a section for "Holidays" with an "Add/Remove" button and a note that no records are currently displayed.

Business Hours Detail

Business Hours Name	Default	Time Zone																
Business Hours	<table border="1"><thead><tr><th>Day</th><th>Hours</th></tr></thead><tbody><tr><td>Sunday</td><td>24 Hours</td></tr><tr><td>Monday</td><td>24 Hours</td></tr><tr><td>Tuesday</td><td>24 Hours</td></tr><tr><td>Wednesday</td><td>24 Hours</td></tr><tr><td>Thursday</td><td>24 Hours</td></tr><tr><td>Friday</td><td>24 Hours</td></tr><tr><td>Saturday</td><td>24 Hours</td></tr></tbody></table>	Day	Hours	Sunday	24 Hours	Monday	24 Hours	Tuesday	24 Hours	Wednesday	24 Hours	Thursday	24 Hours	Friday	24 Hours	Saturday	24 Hours	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Day	Hours																	
Sunday	24 Hours																	
Monday	24 Hours																	
Tuesday	24 Hours																	
Wednesday	24 Hours																	
Thursday	24 Hours																	
Friday	24 Hours																	
Saturday	24 Hours																	

Active: ☒ Created By: OrgEam.EPIC 7/18/2025, 2:42 AM Last Modified By: OrgEam.EPIC 7/18/2025, 2:42 AM

Holidays

No records to display

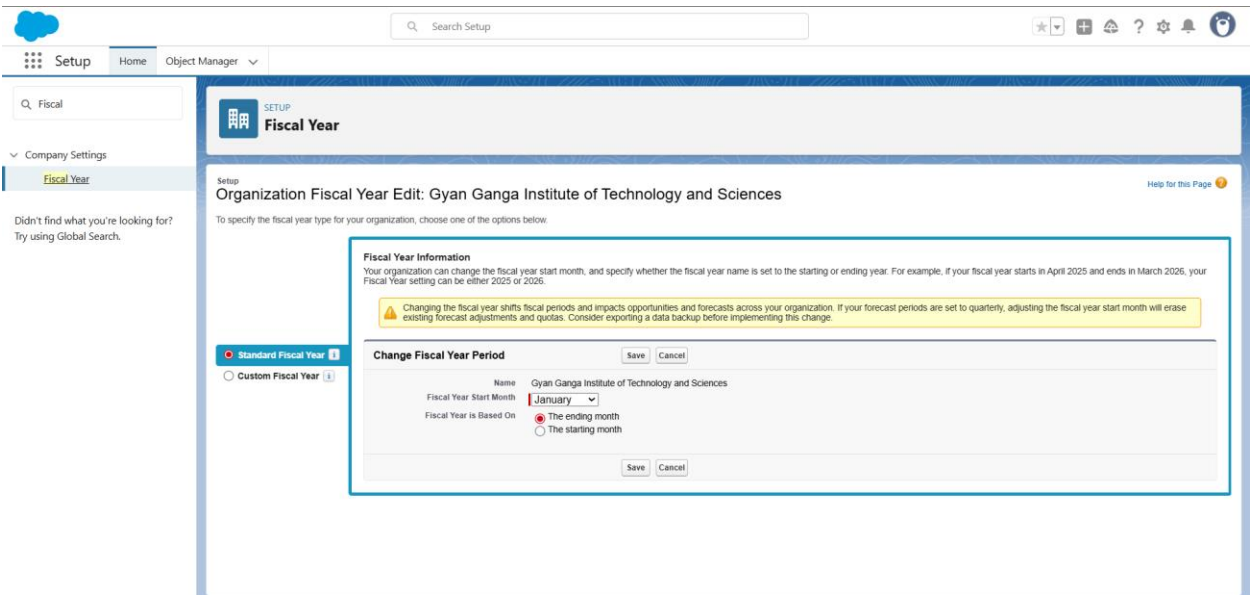
4. Fiscal Year Settings

Configuration:

- Fiscal Year Type: Standard (January – December)

Purpose:

Ensures accurate reporting, dashboards, and KPI calculations aligned with organizational fiscal periods.



5. User Setup & Licenses

Purpose: Create test users to verify profile and permission configurations.

Test Users Created in the Org:

User Type	Full Name	Alia	Username	Role	Profile	Activ
		s				e

Manager	User, Manager	mgr	manageruser1@ggits.com	Manager	Manager Profile	No
Doctor	User, Doctor	doc	doctoruser1@ggits.com	Doctor	Doctor Profile	Yes
Receptionist	User, Receptionist	rcpt	receptionistuser1@ggits.c om	Receptionist	Receptionist Profile	No

Manager: Responsible for supervising all hospital activities, can view and manage all patient records, appointments, and treatments.

Doctor: Can create and update patient records (Contacts), schedule and manage appointments (Events), and record treatments (Cases).

Receptionist: Can create patient records (Contacts) and schedule appointments (Events) but cannot create treatment records (Cases).

The screenshot shows the Salesforce Setup page for Users. The left sidebar contains navigation options like Setup, Home, Object Manager, and a search bar. The main content area is titled 'All Users' and includes a table of users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The users listed are:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit Login	ajay	ajay	ajay45671@test.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.009g000007vxdnuat.06yte7csb68@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit Login	EPIC_OrgFarm	CEPIC	epic.d24844d5c59a@orgfarm.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Lothi_Palak	pal	palak.lothi.ajm22358@agentforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit Login	User_Doctor	doc	doctoruser1@ggits.com	Doctor	<input checked="" type="checkbox"/>	Doctor Profile
<input type="checkbox"/> Edit	User_Integration	integ	integration@009g000007vxdnuat.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Manager	mgr	manageruser1@ggits.com	Manager	<input type="checkbox"/>	Manager Profile
<input type="checkbox"/> Edit	User_Receptionist	rcpt	receptionistuser1@ggits.com	Receptionist	<input type="checkbox"/>	Receptionist Profile
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@009g000007vxdnuat.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

6. Profiles

Profiles Created:

- Manager Profile
- Doctor Profile
- Receptionist Profile

Object Permissions:

Profile	Contacts	Events	Cases
Manager	R/C/E/D	R/C/E/D	R/C/E/D
Doctor	R	R/C/E	R/C/E
Receptionist	R/C/E	R/C/E	R

Steps:

1. Setup → Profiles → Clone Standard User
2. Rename profile accordingly
3. Edit Object Settings → configure permissions per above

Purpose:

Profiles define baseline permissions for objects. Combined with roles and OWD, they control record-level access.

Setup

Home

Object Manager

Users

Profiles

Didn't find what you're looking for?
Try using Global Search.

SETUP

Profiles

Calculated Insight Template Definitions	Internal Organizations
Campaigns	Inventory Reservations
Card Payment Methods	Invoices
Carts	Labels
Cases	Leads
Catalogs	Legal Entities
Categories	Locations
Change Requests	Location Groups
Communication Capping	Location Group Assignments
Communication Capping Definitions	Location Shipping Carrier Methods
Communication Subscriptions	Macros
Communication Subscription Channel Types	Market Segment Definitions
Communication Subscription Consents	Messaging Sessions
Communication Subscription Timings	Messaging Users
Consumption Schedules	Metadata Transaction Logs
Contacts	Mobile App Data Connectors
Contact Point Addresses	Model Prediction Job Definitions
Contact Point Consents	Mulesoft DC Referential Integrity
Contact Point Emails	Multi Org Object References
Contact Point Phones	Multi Org Sync Statuses

[illegible]

Setup Home Object Manager ▾

Q Search Setup

Q profile

▾ Users
Profiles

Didn't find what you're looking for?
Try using Global Search.

SETUP Profiles

Calculated Insight Object Definitions										Internal Data Connectors								
Calculated Insight Template Definitions										Internal Organizations								
Campaigns	✓									Inventory Reservations								
Card Payment Methods										Invoices								
Carts	✓									Labels	✓	✓	✓	✓				
Cases	✓									Leads	✓	✓	✓	✓				
Catalogs	✓									Legal Entities								
Categories	✓									Locations	✓	✓	✓					
Change Requests										Location Groups								
Communication Capping										Location Group Assignments								
Communication Capping Definitions										Location Shipping Carrier Methods								
Communication Subscriptions			✓	✓						Macros	✓							
Communication Subscription Channel Types	✓			✓	✓					Market Segment Definitions								
Communication Subscription Consents	✓	✓	✓	✓						Messaging Sessions								
Communication Subscription Timings	✓	✓	✓	✓						Messaging Users								
Consumption Schedules										Metadata Transaction Logs								
Contacts	✓	✓	✓							Mobile App Data Connectors								
Contact Point Addresses	✓		✓	✓						Model Prediction Job Definitions								
Contact Point Consents	✓	✓	✓	✓						Mulesoft DC Referential Integrity								
Contact Point Emails	✓	✓	✓	✓						Multi Org Object References								

Role Hierarchy:

The screenshot shows the Salesforce Setup interface. On the left sidebar, the navigation menu includes 'Setup' (selected), 'Home', and 'Object Manager'. Under 'Setup', there are links for 'Users', 'Roles' (highlighted in blue), 'Feature Settings', 'Sales', 'Service', and 'Case Teams'. The main content area is titled 'Roles' and contains a section 'Creating the Role Hierarchy'. This section explains that users can build on the existing role hierarchy shown on the page and provides instructions to insert a new role by clicking 'Add Role'. Below this, a tree view displays the organization's role hierarchy, starting from 'CEO' at the top, branching down through various roles like 'CFO', 'COO', 'Manager', 'Doctor', 'Receptionist', 'SVP Customer Service & Support', 'Customer Support International', 'Customer Support North America', 'Installation & Repair Services', and finally 'SVP Human Resources'. Each role node has options to 'Edit', 'Delete', or 'Assign'.

Steps:

1. Setup → Roles → Enable Roles (if not already enabled)
2. Add Role under parent role (CEO → Manager → Doctor/Receptionist)
3. Save each role

Purpose:

Roles manage record-level visibility:

- **Managers see all subordinate records**
- **Doctors see only their patient records**
- **Receptionists have limited access**

8. Permission Sets

Configuration:

- **Name: Treatment Access**
- **License: None**
- **Assigned to: Doctor User**

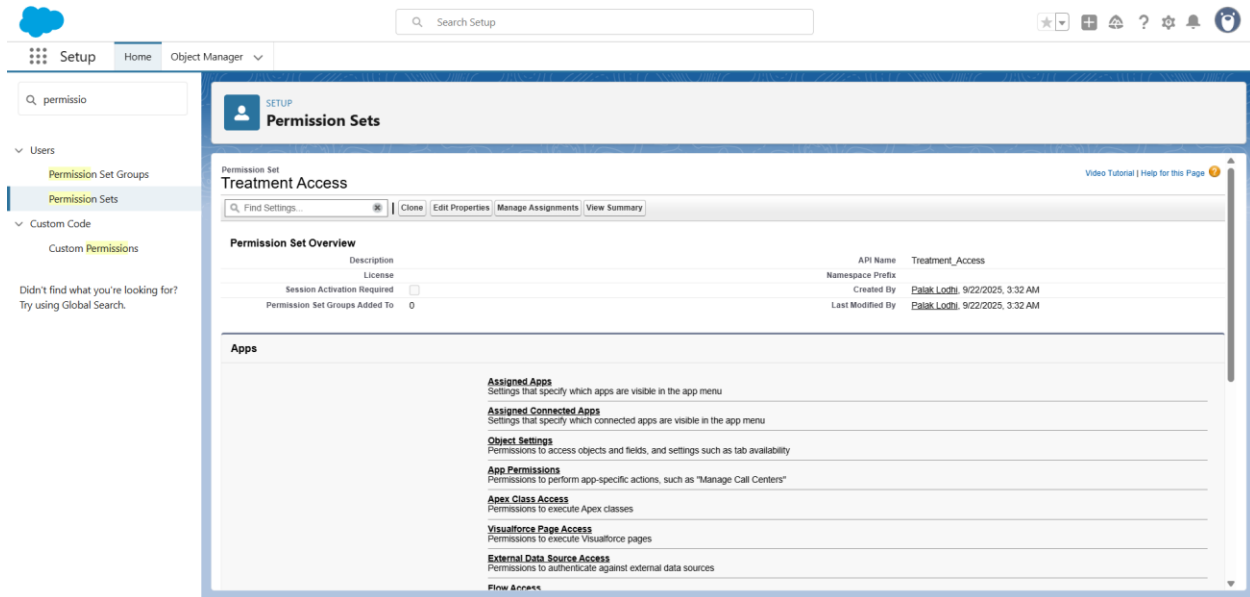
Steps:

1. Setup → Permission Sets → New
2. **Configure Case object permissions (Read/Create/Edit)**

3. Assign to Doctor user

Purpose:

Permission sets provide additional access without altering the user's profile, improving flexibility.



9. Org-Wide Defaults (OWD)

Configuration:

- Contacts → Private
- Cases → Private
- Events → Controlled by related Contact

Steps:

1. Setup → Sharing Settings → Edit

2. Set default internal access for Contacts and Cases to Private
3. Save

Purpose:

Ensures patient information privacy. Access is then controlled via role hierarchy or permission sets.

The screenshot shows the Salesforce Setup interface for Sharing Settings. The left sidebar includes a search bar and a navigation menu with 'Security' expanded, showing 'Guest User', 'Sharing', 'Rule Access', and 'Report'. The main content area is titled 'Sharing Settings' and includes a 'Manage sharing settings for:' dropdown set to 'All Objects'. Below this is a table of default sharing settings.

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	Private	Private	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Private	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	✓

10. Sharing Rules

- No custom sharing rules created in Phase 2
- Default access controlled via Role Hierarchy

Purpose:

Allows for role-based sharing of records without additional rules.

11. Login Access Policies

Configuration:

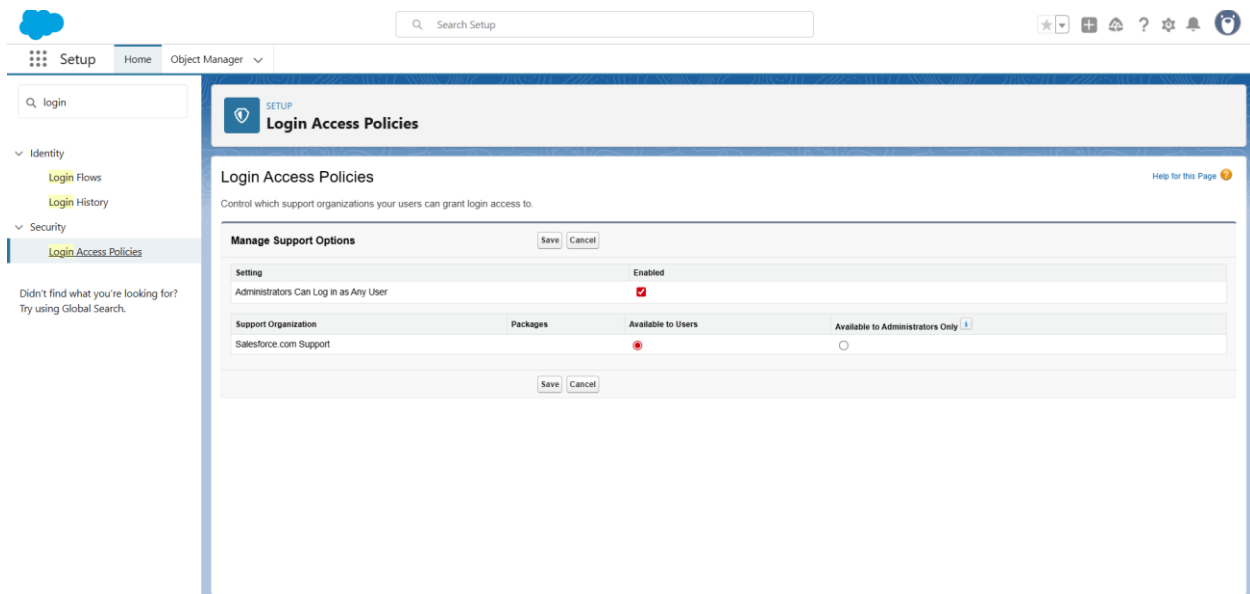
- Administrators Can Log in as Any User → Enabled

Steps:

1. Setup → Login Access Policies → Enable checkbox
2. Save

Purpose:

Allows admin to test visibility and permissions for different users without logging out and logging in manually.



13. Sandbox Usage

- Not used for Phase 2
- Developer Org sufficient for testing configurations

14. Deployment Basics

- Phase 2 focuses on **preparation of org structure**
- No deployments done yet
- Phase 3 will involve workflows, automation, and metadata deployment