

Phase 2: Org Setup G Configuration

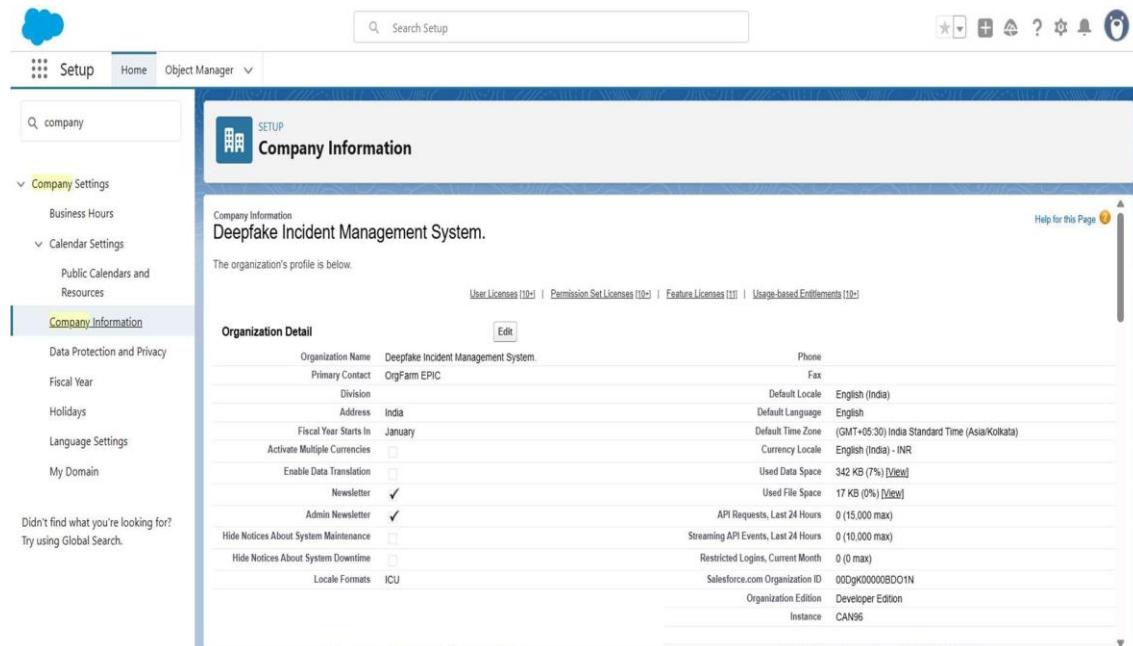
Project: Deepfake CRM: Intelligent Salesforce Integration Project

◆ 1. Salesforce Editions

- Salesforce Editions define features and limits.
- Common editions: Essentials, Professional, Enterprise, Unlimited.
- For project/demo → **Developer Edition** is used (free, full-featured for dev).

◆ 2. Company Profile Setup

- Add company details (name, address, primary contact, language, currency).
- Example: Company Name → **Deepfake Solutions**
- Configure Fiscal Year C Locale settings.



The screenshot shows the Salesforce Setup interface. The top navigation bar includes a cloud icon, 'Setup', 'Home', and 'Object Manager'. A search bar says 'Search Setup' and a toolbar has icons for Home, Object Manager, and various setup functions. On the left, a sidebar menu is open under 'Company Settings', showing 'Business Hours', 'Calendar Settings', 'Public Calendars and Resources', and 'Company Information' (which is selected and highlighted in blue). Other options like 'Data Protection and Privacy', 'Fiscal Year', 'Holidays', 'Language Settings', and 'My Domain' are also listed. Below the sidebar, a message says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Company Information' and displays the organization's profile for 'Deepfake Incident Management System'. It shows the primary contact as 'OrgFarm EPIC', division as 'India', and fiscal year starts in 'January'. Other details include newsletter settings (Newsletter checked, Admin Newsletter checked), locale formats (ICU), and various system metrics like API requests and streaming API events. The right side of the page has a 'Help for this Page' link and a vertical scroll bar.

◆ 3. Business Hours G Holidays

- Setup → Company Information → Business Hours.

- Define **Working Hours** (e.g., Mon–Fri, 9 AM–6 PM).
- Add **Holidays** (e.g., 26 Jan – Republic Day, 15 Aug – Independence Day).
- Used in case escalation rules G support processes.

Business Hours Detail

Business Hours Name	Analyst Working Hours	Time Zone														
Business Hours	<table border="1"> <tr><td>Sunday</td><td>No Hours</td></tr> <tr><td>Monday</td><td>9:00 AM to 6:00 PM</td></tr> <tr><td>Tuesday</td><td>9:00 AM to 6:00 PM</td></tr> <tr><td>Wednesday</td><td>9:00 AM to 6:00 PM</td></tr> <tr><td>Thursday</td><td>9:00 AM to 6:00 PM</td></tr> <tr><td>Friday</td><td>9:00 AM to 6:00 PM</td></tr> <tr><td>Saturday</td><td>No Hours</td></tr> </table>	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	Saturday	No Hours	(GMT+05:30) India Standard Time (Asia/Kolkata)
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															
Saturday	No Hours															
		Default Business Hours														

Active ✓
Created By [User Name]
Created On 9/12/2025, 9:04 PM
Last Modified By [User Name]
Last Modified On 9/22/2025, 10:06 AM

Holidays
Add/Remove
No records to display

◆ 4. Fiscal Year Settings

- Two types: **Standard Fiscal Year** (Jan–Dec or Apr–Mar) OR **Custom Fiscal Year**.
- Example: College/Company projects often use **Apr–Mar** cycle.

Fiscal Year Information
Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example, if your fiscal year starts in April 2025 and ends in March 2026, your Fiscal Year setting can be either 2025 or 2026.

Change Fiscal Year Period

Name: Deepfake Incident Management System.	Save	Cancel
Fiscal Year Start Month: January	Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing this change.	
Fiscal Year Is Based On:	<input checked="" type="radio"/> The ending month <input type="radio"/> The starting month	

◆ 5. User Setup G Licenses

Created 3 users with Salesforce licenses:

1. **Ponnaganti Gayathri** – Company Director
 - Profile: System Administrator
 - Role: Company Director
2. **Yash** – Assistant Manager
 - Profile: Standard User
 - Role: Assistant Manager
3. **Kajal** – Manager
 - Profile: Standard User
 - Role: Manager

The screenshot shows the Salesforce 'Users' page under the 'SETUP' tab. The page title is 'Users'. At the top, there's a message: 'On this page you can create, view, and manage users.' Below it, a note says 'To get more licenses, use the Your Account app. [Let's Go](#)'. There are buttons for 'View: All Users' and 'Edit | Create New View'. A navigation bar at the top right includes links for A, B, C, D, E, F, G, H, I, J, K, L, M, N, O, P, Q, R, S, T, U, V, W, X, Y, Z, and Other. The main area displays a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists six users: EPIC_OrgFarm, integ, Chatter Expert, sec, Jain_Yash, dub, and tkhak. The 'Jain_Yash' row is selected, indicated by a checked checkbox in the 'Action' column.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	EPIC_OrgFarm	QEPIC	epic_212015d27864@orgfarm.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	User_Integration	integ	integration@00dgk00000bdo1nuax.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	Chatter_Expert	Chatter	chatty_00dgk00000bdo1nuax.cs1hjc3tww@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	User_Security	sec	insightssecurity@00dgk00000bdo1nuax.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input checked="" type="checkbox"/>	Jain_Yash	yjain	yash7789@gmail.com	Assistant Manager	<input checked="" type="checkbox"/>	Standard User
<input checked="" type="checkbox"/>	dub		3640@agentforce.com	Company Director	<input checked="" type="checkbox"/>	System Administrator
<input checked="" type="checkbox"/>	tkhak	kaja2398@gmail.com		Manager	<input checked="" type="checkbox"/>	Standard User

◆ 6. Profiles

- System Administrator Profile → Full access (used by Ponnaganti Gayathri).
- Standard User Profile → Limited object access (used by Yash Kajal).

◆ 7. Roles

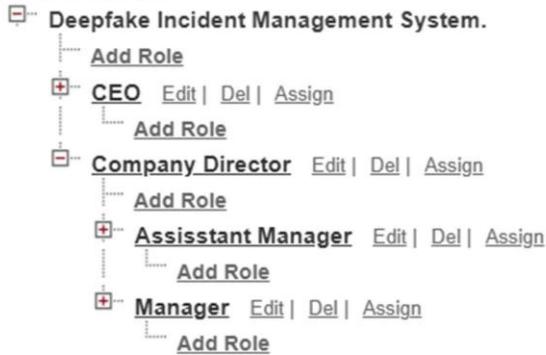
- Define hierarchy (data visibility).
- Higher roles automatically get access to lower role records.

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)



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◆ 8. Permission Sets

- Extra permissions without changing profile.
- Project Access Set → Allows CRUD on Projects (assigned to Yash).
- Task Access Set → Allows CRUD on Tasks (assigned to Kajal).

◆ G. Organization-Wide Defaults (OWD)

- Define **default record-level access**.
- Project Object: Private
- Task Object: Controlled by Parent
- Team Member Object: Public Read/Write

◆ 10. Sharing Rules

- Shared “Project” records of Assistant Manager with Manager role.
 - Ensures collaboration while maintaining security.
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◆ 11. Login Access Policies

- Allow users to grant Admin temporary access.
- Useful for troubleshooting C support.

SETUP

Login Access Policies

Control which support organizations your users can grant login access to.

Changes Saved

Manage Support Options

Setting	Enabled
Administrators Can Log in as Any User	<input checked="" type="checkbox"/>

Save Cancel

◆ 12. Dev Org Setup

- Sign up for **Developer Org** (used for project build).
- Provides free licenses, API access, full configuration.

```
Successfully authorized @agentforce.com with org ID 00DgK00000BDO1NUAX
PS C:\Users\Shrawansh.Dubey\Desktop\TCS_Lastmile\force-app\main\default\lwc\bikeCards>
```

◆ 13. Deployment Basics

- Deployment = moving setup from Sandbox → Production.
- Methods:
 - Change Sets (easy, UI-based)
 - Salesforce CLI / Metadata API (advanced)