

Phase 2: Org Setup & 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 & Locale settings.

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'company' and a list of setup categories: Company Settings, Business Hours, Calendar Settings, Public Calendars and Resources, Company Information (selected), 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 'Deepfake Incident Management System'. It includes links for User Licenses, Permission Set Licenses, Feature Licenses, and Usage-based Entitlements. The 'Organization Detail' section contains a table of settings.

Organization Detail		Phone
Organization Name	Deepfake Incident Management System	
Primary Contact	OrgFarm EPIC	Fax
Division		Default Locale
Address	India	English (India)
Fiscal Year Starts In	January	Default Language
Activate Multiple Currencies	<input type="checkbox"/>	English
Enable Data Translation	<input type="checkbox"/>	Default Time Zone
Newsletter	<input checked="" type="checkbox"/>	(GMT+05:30) India Standard Time (Asia/Kolkata)
Admin Newsletter	<input checked="" type="checkbox"/>	Currency Locale
Hide Notices About System Maintenance	<input type="checkbox"/>	English (India) - INR
Hide Notices About System Downtime	<input type="checkbox"/>	Used Data Space
Locale Formats	ICU	342 KB (7%) 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
		00DgK00008001N
		Organization Edition
		Developer Edition
		Instance
		CAN96

◆ 3. Business Hours & 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

Organization Business Hours

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.

Business Hours Detail

Business Hours Name	Analyst Working Hours	Time Zone
Business Hours	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)

Active: ☒

Created By: 9/12/2025, 9:04 PM

Last Modified By: 9/22/2025, 10:06 AM

Holidays

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

Organization Fiscal Year Edit: Deepfake Incident Management System.

To specify the fiscal year type for your organization, choose one of the options below.

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.

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.

Change Fiscal Year Period

Name: Deepfake Incident Management System.

Fiscal Year Start Month: January

Fiscal Year is Based On: ☒ The ending month ☐ 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

 **SETUP**
Users

All Users [Help for this Page](#)

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: **All Users** | [Edit](#) | [Create New View](#)

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 **All**

<input type="checkbox"/>	Action	Full Name	Alias	Username	Role ↑	Active	Profile
<input type="checkbox"/>	Edit	EPIC_OrgFarm	OEPIG	epic.212015d27864@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/>	Edit	User_Integration	integ	integration@00d9k0000bdo1nuax.com		✓	Analytics Cloud Integration User
<input type="checkbox"/>	Edit	Chatter_Expert	Chatter	chatty.00d9k0000bdo1nuax.q3thjc3fhwv@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/>	Edit	User_Security	sec	insightssecurity@00d9k0000bdo1nuax.com		✓	Analytics Cloud Security User
<input checked="" type="checkbox"/>	Edit	jain_yash	yjain	yash7789@gmail.com	Assistant Manager	✓	Standard User
<input checked="" type="checkbox"/>	Edit	dub		3540@agentforce.com	Company Director	✓	System Administrator
<input checked="" type="checkbox"/>	Edit	thakur_kajal	kthak	kajal2398@gmail.com	Manager	✓	Standard User

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

◆ 6. Profiles

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

◆ 7. Roles

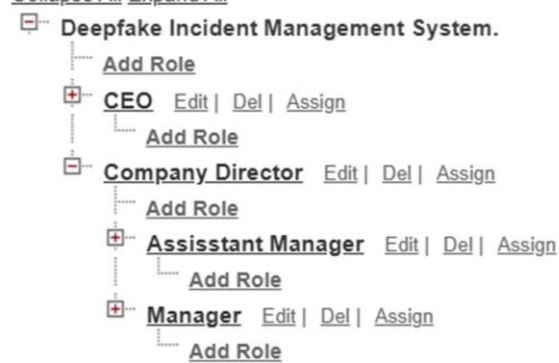
- Define hierarchy (data visibility).
- Higher roles automatically get access to lower role records.

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](#)



○

◆ 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)

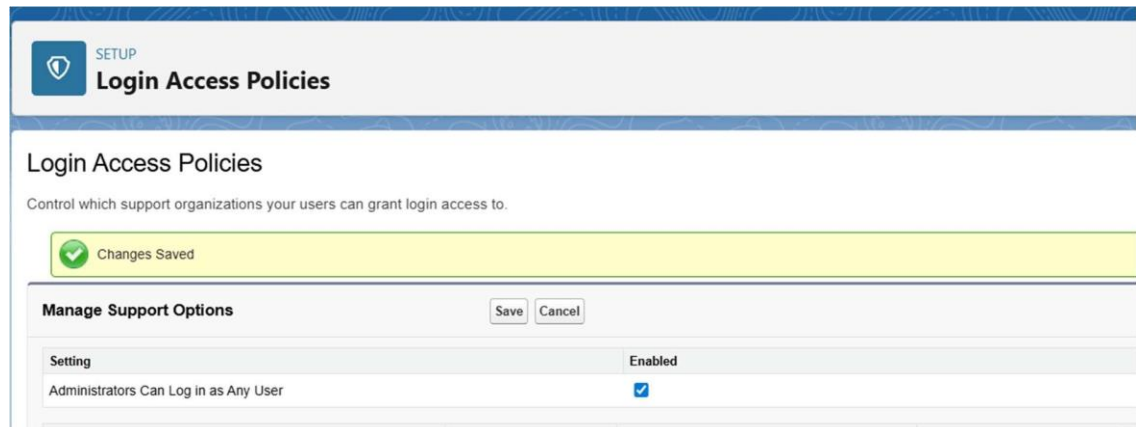
- Define **default record-level access**.
- Project Object: Private
- Task Object: Controlled by Parent
- Team Member Object: Public Read/Write

◆ 10. Sharing Rules

- Shared “Project” records of Assistant Manager with Manager role.
 - Ensures collaboration while maintaining security.
-

◆ 11. Login Access Policies

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



◆ 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 00Dgk00000BD01NUAX
PS C:\Users\Shreyansh.Dubey\Desktop\TCS_Lastmile\force-app\main\default\lwc\hikeCards
```

◆ 13. Deployment Basics

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