

Phase 2: Org Setup & Configuration

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. On the left is a navigation menu with 'Setup' selected. The main content area is titled 'Company Information' and displays the organization's profile for 'Deepfake Incident Management System'. The profile includes fields for Organization Name, Primary Contact, Division, Address, Fiscal Year Starts In, Activate Multiple Currencies, Enable Data Translation, Newsletter, Admin Newsletter, Hide Notices About System Maintenance, Hide Notices About System Downtime, and Locale Formats. The right side of the profile shows various system settings like Default Locale, Default Language, Default Time Zone, Currency Locale, Used Data Space, Used File Space, API Requests, Streaming API Events, Restricted Logins, Salesforce.com Organization ID, Organization Edition, and Instance.

Organization Detail	
Organization Name	Deepfake Incident Management System
Primary Contact	OrgFarm EPIC
Division	
Address	India
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

System Settings	
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	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	00DgK0000BDO1N
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 & support processes.

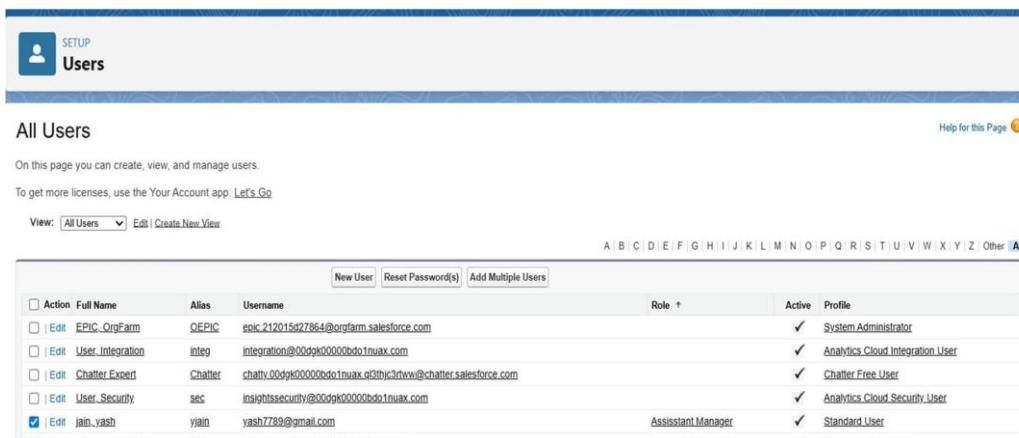
4. Fiscal Year Settings

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

5. User Setup & Licenses

Created 3 users with Salesforce licenses:

1. Shreyansh Dubey – Company
Director o Profile: System
Administrator o Role: Company
Director
2. Yash Jain – Assistant Manager o
Profile: Standard User o
Role: Assistant Manager
3. Kajal – Manager o Profile:
Standard User o Role:
Manager



The screenshot shows the Salesforce Setup Users page. At the top, there's a 'SETUP Users' header. Below it, the 'All Users' section is visible, with a sub-header 'On this page you can create, view, and manage users.' and a link 'To get more licenses, use the Your Account app. Let's Go'. There are buttons for 'View: All Users', 'Edit', and 'Create New User'. A navigation bar at the top of the table lists letters A through Z and 'Other'. The table itself has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. It lists several system users like 'EPIC_OrgFarm', 'User_Integration', 'Chatter_Expert', 'User_Security', and 'jain_yash'.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	EPIC_OrgFarm	OEPIIC	epic.212015d27864@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/> Edit	User_Integration	integ	integration@00d9k00000bdo1nuax.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	Chatter_Expert	Chatter	chatter.00d9k00000bdo1nuax.ql3ibj3rtww@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d9k00000bdo1nuax.com		✓	Analytics Cloud Security User
<input checked="" type="checkbox"/> Edit	jain_yash	yjain	yash7789@gmail.com	Assistant Manager	✓	Standard User

6. Profiles

- System Administrator Profile → Full access (used by Shreyansh Dubey).
- Standard User Profile → Limited object access (used by Yash Jain & Kajal).

7. Roles

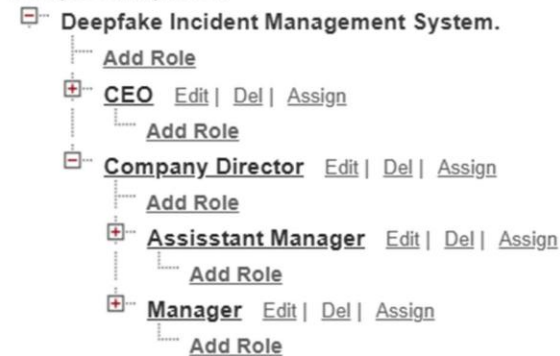
- Define hierarchy (data visibility).
- Higher roles automatically get access to lower role records.

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 Jain).
- Task Access Set → Allows CRUD on Tasks (assigned to Kajal).

9. Organization-Wide Defaults (OWD)

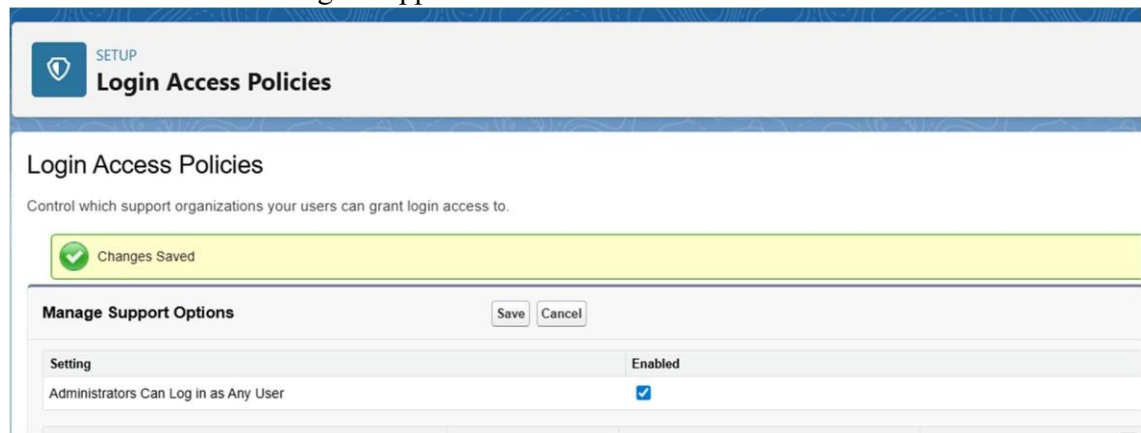
- Define default record-level access.
- Project Object: Private
- Task Object: Controlled by Parent
- Team Member Object: Public Read/Write

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 & support.



12. Dev Org Setup

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

13. Deployment Basics

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