

AeroSense: Phase 2 – Org Setup & Configuration

Objective: To prepare the Salesforce Developer Org for the AeroSense project by configuring company information, creating users, profiles, roles, and setting up the security model.

1. Company Information Setup

1. Log in to your **Salesforce Developer Org**.
2. On the top right → Click the **Gear Icon** → Select **Setup**.
3. In the **Quick Find box** (left side) → Type **Company Information** → Click it.
4. Verify or update:
 - **Company Name:** AeroSense Technologies
 - **Default Locale:** English (India).
 - **Default Currency:** Hindi (India) - INR
 - **Time Zone:** Asia/Kolkata.
 - **Country:** India
5. Click **Save**

The screenshot shows the 'Company Information' setup page for the organization 'AeroSense Technologies'. The page includes a navigation bar with links like Leads, Accounts, Contacts, etc., and a sidebar with various tabs. The main content area displays organization details such as name, contact, and currency settings, along with performance metrics and usage statistics. The 'Edit' button is visible at the bottom of the form.

Organization Detail	
Organization Name	AeroSense Technologies
Primary Contact	Raksha
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

	Phone	Fax
Default Locale	English (United States)	
Default Language	English	
Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	
Currency Locale	Hindi (India) - INR	
Used Data Space	560 KB (11%) [View]	
Used File Space	23 KB (0%) [View]	
API Requests, Last 24 Hours	6 (15,000 max)	
Streaming API Events, Last 24 Hours	0 (10,000 max)	
Restricted Logins, Current Month	0 (0 max)	
Salesforce.com Organization ID	00Dg1.000007kjED	
Organization Edition	Developer Edition	
Instance	CAN98	

Created By: OrgFarm EPIC, 7/23/2025, 1:55 AM Modified By: Raksha Kalaskar, 9/17/2025, 7:56 AM

2. User Profiles

Profiles control what users can **see** and **do**.

1. Create Custom Object: Sensor and Reading
2. Setup → In **Quick Find**, type **Profiles** → Click **Profiles**.
3. Click **Clone** on **Standard User**.
4. Create custom object for Sensor And Reading
5. Name it **Volunteer Profile** → Save.
 - Edit → Go to **Object Settings** → Grant **Read/Create/Edit** on **Sensor__c** and **Reading__c**.
6. Repeat steps to create:
 - **Data Engineer Profile** (Full CRUD on all custom objects like **Calibration__c**, **DailyAggregate__c**).
 - **Executive Profile** (Read-Only on Sensors, Readings, Alerts; Full on Reports/Dashboards).
7. **Save** changes.

The screenshot shows the Salesforce 'Profiles' page under the 'SETUP' tab. The page title is 'Profiles'. At the top left, there's a 'New Profile' button and a search icon. Below the header, there's a dropdown menu 'All Profiles' with options 'Edit | Delete | 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'. The main content area displays a table with two rows. The first row has columns for 'Action' (checkbox), 'Profile Name' (dropdown set to 'Data Engineer Profile'), 'User License' (dropdown set to 'Salesforce'), and 'Custom' (checkbox checked). The second row is partially visible. The table has a light gray background with white borders between rows and columns.

Profiles

All Profiles  Edit | Delete | Create New View

New Profile 		A B C D E F G H I J K L M N	
Action	Profile Name ↑	User License	Custom
<input type="checkbox"/> Edit Del ...	Volunteer Profile	Salesforce	<input checked="" type="checkbox"/>

Profiles

All Profiles  Edit | Delete | Create New View

New Profile 		A B C D E F G H I J K	
Action	Profile Name ↑	User License	Custom
<input type="checkbox"/> Edit Clone	Einstein Agent User	Einstein Agent	<input type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Event Manager	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Executive Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	External Apps Login User	External Apps Login	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	External Identity User	External Identity	<input type="checkbox"/>

3. Users

1. Setup → In Quick Find, type **Users** → Click **Users**.
2. Click **New User**.
3. Fill details:
 - **First Name:** Tom | **Last Name:** Volunteer
 - **Alias:** tv
 - **Email:** any working email
 - **Username:** [raks.volunteer@aerosense.com](#) (must be unique)
 - **User License:** Salesforce
 - **Profile:** Volunteer Profile
 - Save.
4. Repeat for:
 - **Alisa Engineer** (Data Engineer Profile)

- o **Jhon Executive** (Executive Profile)

5. Each user will get a welcome email.

The screenshot shows the Salesforce Setup interface under the 'Users' section. On the left, there's a sidebar with navigation links like 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Prospector Users'. The 'Users' link is highlighted. Below the sidebar, a message says 'Didn't find what you're looking for? Try using Global Search.' The main area displays a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. Each user row includes edit and login links. The table lists several users, including 'Chatter_Expert', 'Engineer_Alisa', 'EPIC_OrgFarm', 'Executive_Jhon', 'Kalaskar_Raksha', 'Kalsakr_Raksha', 'Manager_Event', 'User_Integration', 'User_Security', 'user_test', 'User_Test', and 'Volunteer_Tom'. The 'Active' column shows checkboxes for each user, and the 'Profile' column lists various profiles such as 'Chatter Free User', 'Standard Platform User', 'System Administrator', etc.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter_Expert	Chatter	chatty.00dg000007kjedua.y9m724kbqysfb@chatter.salesforce.com	Data_Engineer	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit Login	Engineer_Alisa	aengi	alisa.engineer@aerosense.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit Login	EPIC_OrgFarm	OEPIC	epic.1fc912deac7e@orgfarm.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit Login	Executive_Jhon	jexec	john.executive@aerosense.com	Executive	<input checked="" type="checkbox"/>	Minimum Access - API Only Integrations
<input type="checkbox"/> Edit	Kalaskar_Raksha	rak	rakshakalaskar2598372@agentforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit Login	Kalsakr_Raksha	raksha	rakshakalaskar12@gmail.com	Test role	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Manager_Event	evm	event.manager@eventpro.com	Event_Manager	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	User_Integration	integ	integration@00dg000007kjedua.y9m724kbqysfb@chatter.salesforce.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00dg000007kjedua.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input type="checkbox"/> Edit	user_test	testuser	testuser787721@gmail.com	Western_Sales_Team	<input type="checkbox"/>	Minimum Access - API Only Integrations
<input type="checkbox"/> Edit	User_Test	mt_testuser_677678656	mt_testuser_677678656@gmail.com		<input type="checkbox"/>	Minimum Access - Salesforce
<input type="checkbox"/> Edit Login	Volunteer_Tom	tvolu	tom.volunteer@aerosense.com	Volunteer	<input checked="" type="checkbox"/>	Volunteer Profile

4. Role Hierarchy

1. Setup → In Quick Find, type **Roles** → Click **Roles** → Click **Set Up Roles**.
2. Click **Add Role** under the CEO.
 - o Name: VP Environment.
 - o Save.
3. Under VP Environment → Add Role: **Data Engineers**.
4. Under Data Engineers → Add Role: **Volunteers**.
5. Assign Users:
 - o Tom Volunteer → Volunteers.
 - o Alisa Engineer → Data Engineers.
 - o Jhon Executive → VP Environment.

The screenshot shows the Salesforce Setup interface for managing Roles. On the left, there's a sidebar with a search bar and a tree view of setup categories: Users (Roles is selected), Feature Settings (Sales, Service), and Contact Roles on Contracts, Opportunities, Cases. Below this is a note about global search. The main content area is titled 'SETUP Roles' and shows a hierarchical list of roles:

- Recruiter** (Edit | Del | Assign)
 - Add Role
- SVP_Sales & Marketing** (Edit | Del | Assign)
 - Add Role
- VP_International_Sales** (Edit | Del | Assign)
 - Add Role
- VP_Marketing** (Edit | Del | Assign)
 - Add Role
 - Marketing_Team** (Edit | Del | Assign)
 - Add Role
- VP_North_American_Sales** (Edit | Del | Assign)
 - Add Role
 - Director_Channel_Sales** (Edit | Del | Assign)
 - Add Role
 - Channel_Sales_Team** (Edit | Del | Assign)
 - Add Role
 - Director_Direct_Sales** (Edit | Del | Assign)
 - Add Role
 - Eastern_Sales_Team** (Edit | Del | Assign)
 - Add Role
 - Western_Sales_Team** (Edit | Del | Assign)
 - Add Role
- VP_Environment** (Edit | Del | Assign)
 - Add Role
 - Data_Engineers** (Edit | Del | Assign)
 - Add Role
 - Volunteers** (Edit | Del | Assign)
 - Add Role

5. Permission Sets

Permission Sets provide extra access without changing profiles.

1. Setup → In Quick Find, type **Permission Sets** → Click it.
2. Click **New Permission Set**.
 - Name: Sensor_Editor
 - License: Salesforce
 - Save.
 - Under **Object Settings** → Sensor_c → Check Create/Edit → Save.

The screenshot shows the 'Permission Sets' page in the Salesforce Setup. A permission set named 'Sensor_Editor' is selected. The 'Permission Set Overview' section shows the API Name as 'Sensor_Editor', Namespace Prefix as 'Sensor', and it was created by 'Raksha Kalaskar' on 9/18/2025 at 7:17 AM. The 'Description' field is empty, and 'Session Activation Required' is unchecked. Under the 'Apps' section, there are several categories listed:

- Assigned Apps**: Settings that specify which apps are visible in the app menu.
- Assigned Connected Apps**: Settings that specify which connected apps are visible in the app menu.
- Object Settings**: Permissions to access objects and fields, and settings such as tab availability.
- App Permissions**: Permissions to perform app-specific actions, such as "Manage Call Centers".
- Apex Class Access**: Permissions to execute Apex classes.
- Visualforce Page Access**: Permissions to execute Visualforce pages.
- External Data Source Access**

3. Create another:

- Name: Alert_Viewer → Give Read-Only on Alert__c.

The screenshot shows the 'Permission Sets' page in the Salesforce Setup. A new permission set named 'Alert_Viewer' is being created. The 'Permission Set Overview' section shows the API Name as 'Alert_Viewer', Namespace Prefix as 'Alert', and it was created by 'Raksha Kalaskar' on 9/18/2025 at 7:14 AM. The 'Description' field is empty, and 'Session Activation Required' is unchecked. Under the 'Apps' section, there are several categories listed:

- Assigned Apps**: Settings that specify which apps are visible in the app menu.
- Assigned Connected Apps**: Settings that specify which connected apps are visible in the app menu.
- Object Settings**: Permissions to access objects and fields, and settings such as tab availability.
- App Permissions**: Permissions to perform app-specific actions, such as "Manage Call Centers".
- Apex Class Access**: Permissions to execute Apex classes.
- Visualforce Page Access**: Permissions to execute Visualforce pages.
- External Data Source Access**

4. Assign Permission Sets:

- Go to User → Permission Set Assignments → Add → Select relevant sets.

Setup Home Object Manager

user

Users

- Permission Set Groups
- Permission Sets**
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users**
- Feature Settings
 - Data.com
 - Prospector Users
- Service
 - Embedded Service

SETUP Permission Sets

Permission Set Assignments
Tom Volunteer

Save Cancel

Available Permission Sets

- (Legacy) Data Cloud Marketing Admin
- (Legacy) Data Cloud for Marketing Data Aware S
- (Legacy) Data Cloud for Marketing Manager
- (Legacy) Data Cloud for Marketing Specialist
- Access Agentforce Default Agent
- Agent Platform Builder
- Agentforce Default Admin
- Agentforce Service Agent Configuration
- Agentforce Service Agent Object Access
- Agentforce Service Agent Secure Base

Enabled Permission Sets

Sensor_Editor

Add Remove

Save Cancel

user

Users

- Permission Set Groups
- Permission Sets**
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users**
- Feature Settings
 - Data.com
 - Prospector Users
- Service
 - Embedded Service
- Messaging for In-App and Web User Verification
- User Interface

SETUP Permission Sets

Permission Set Assignments
Jhon Executive

Save Cancel

Available Permission Sets

- Access Agentforce Default Agent
- Agent Platform Builder
- Agentforce Default Admin
- Agentforce Service Agent Configuration
- Agentforce Service Agent Object Access
- Agentforce Service Agent Secure Base
- Agentforce Service Agent User
- Authenticated Payer
- Buyer
- Buyer Manager

Enabled Permission Sets

Alert_Viewer

Add Remove

Save Cancel

6. Organization-Wide Defaults (OWD)

1. Setup → In Quick Find, type **Sharing Settings** → Click it.
2. Scroll to **Organization-Wide Defaults** → Click **Edit**.
3. Set:
 - **Sensor__c = Private**
 - **Reading__c = Controlled by Parent**
 - **Alert__c = Controlled by Parent**
 - **DailyAggregate__c = Public Read Only**
4. Save.

The screenshot shows the Salesforce Sharing Settings page under the Setup menu. The left sidebar has a search bar and navigation links for Security, Guest User Sharing Rule Access, Report, and Sharing Settings. A note says "Didn't find what you're looking for? Try using Global Search." The main content area is titled "Sharing Settings" and displays a table of sharing rules for different object types. The columns are Work Type, Current sharing rule, and Default sharing rule. A checkmark column is on the far right. The table includes rows for Work Type Group, Alert, Calibration, Candidate, Cloud, Condition, DailyAggregate, Energy Audit, Event, Job Application, Mentor, Offer, Position, Program, Property, Reading, Referral, Sensor, student, and Type.

Work Type	Current sharing rule	Default sharing rule	
Work Type Group	Private	Private	✓
Alert	Public Read/Write	Private	✓
Calibration	Controlled by Parent	Controlled by Parent	✓
Candidate	Public Read/Write	Private	✓
Cloud	Public Read/Write	Private	✓
Condition	Public Read/Write	Private	✓
DailyAggregate	Public Read Only	Private	✓
Energy Audit	Public Read/Write	Private	✓
Event	Public Read/Write	Private	✓
Job Application	Public Read/Write	Private	✓
Mentor	Public Read/Write	Private	✓
Offer	Public Read/Write	Private	✓
Position	Controlled by Parent	Controlled by Parent	✓
Program	Public Read/Write	Private	✓
Property	Public Read/Write	Private	✓
Reading	Controlled by Parent	Controlled by Parent	✓
Referral	Private	Private	✓
Sensor	Private	Private	✓
student	Public Read/Write	Private	✓
Type	Public Read/Write	Private	✓

7. Sharing Rules

1. Still under **Sharing Settings** → Scroll down to **Sharing Rules**.
2. Click **New** → Select **Sensor_c**.
3. Name: Executive_Sensor_Sharing.
 - o Criteria: All Records.
 - o Share with: Role = Executives.
 - o Access Level = Read Only.
4. Save.
5. Repeat for Volunteers → Share only “Owned Records” to role = Volunteers.

Sharing Rules			
Sensor Sharing Rules		New	Recalculate
Action	Criteria	Shared With	Access Level
Edit Del	Sensor: Created By NOTEQUAL To all records	Role: Executive	Read Only
Edit Del	Owner in Role: Volunteers	Role: Volunteers	ReadWrite

8. Login Access Policies

1. Setup → In **Quick Find**, type **Login Access Policies** → Click.
2. Enable **Administrators Can Log In As Any User**.
3. Setup → **Profiles** → Open Executive Profile → **Login IP Ranges** → Restrict to office IPs.

The screenshot shows the Salesforce Setup interface for Profiles. At the top, there's a blue header bar with the word "SETUP" and a user icon. Below it, the main title is "Profiles". A toolbar with buttons for "Edit", "Clone", "Delete", and "View Users" is visible. The page is divided into several sections:

- Login Hours**: Shows a message "No login hours specified".
- Login IP Ranges**: A table with columns "Action", "IP Start Address", "IP End Address", and "Description". One row is listed: "Edit | Del" for address 223.185.37.0, ending at 223.185.37.255.
- Enabled Apex Class Access**: Shows a message "No Apex Classes enabled".
- Enabled Visualforce Page Access**: Shows a message "No Visualforce Pages enabled".
- Enabled External Data Source Access**: Shows a message "No External Data Sources enabled".
- Enabled Named Credential**: Shows a message "No Named Credentials enabled".

9. Dev Org & Sandbox Setup(optional)

1. Setup → In **Quick Find**, type **Dev Hub** → Enable Dev Hub.
2. Setup → In **Quick Find**, type **Sandboxes** → Click **New Sandbox**.
 - Type: Developer Sandbox.
 - Name: AeroSense_Development.
 - Save → Refresh available in ~30 mins.
3. Define Deployment Path:
 - Dev Sandbox → UAT Sandbox → Production.

10. Deployment Basics(optional)

1. Change Sets (Admins):

- Setup → Outbound Change Sets → New → Add Components (Objects, Fields, Flows).
- Upload to Target Org → Inbound Change Sets → Deploy.

2. SFDX CLI (Developers):

- Install VS Code + Salesforce Extensions.
- Authenticate:
○ `sfdx auth:web:login -d -a AeroSenseDev`
- Deploy metadata:
○ `sfdx force:source:deploy -p force-app/main/default`

3. GitHub Integration:

- Create GitHub Repo → Push all project metadata (force-app/).
- Setup CI/CD pipeline (GitHub Actions or Jenkins).