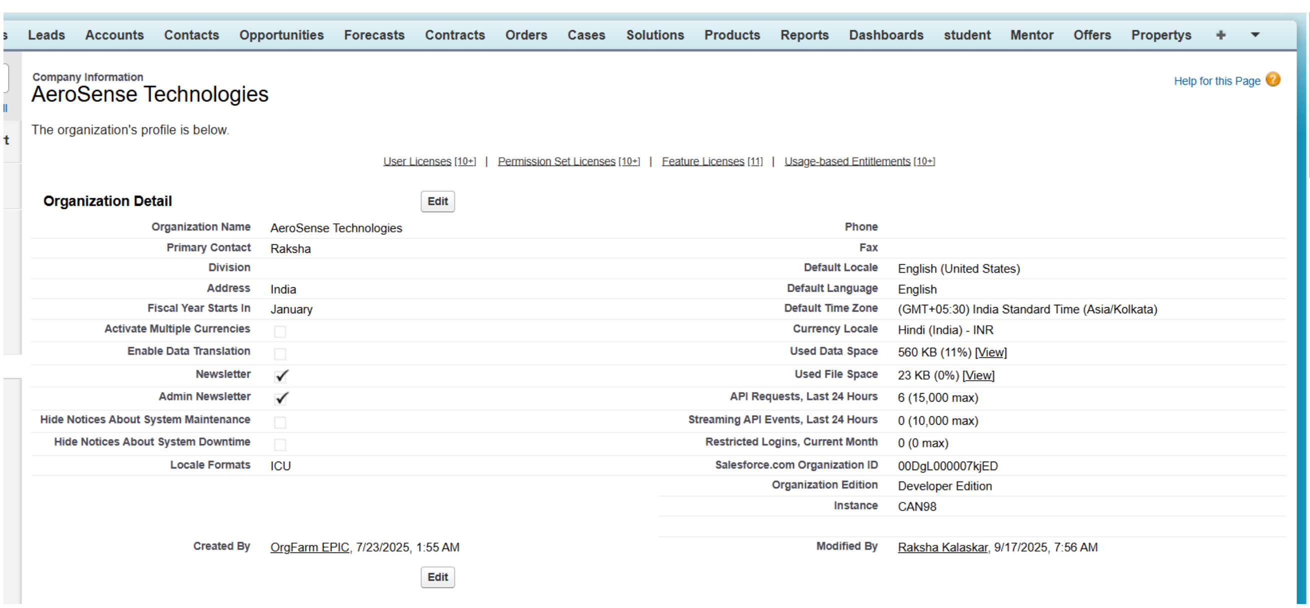
AeroSense: Phase 2 – Org Setup & Configuration

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

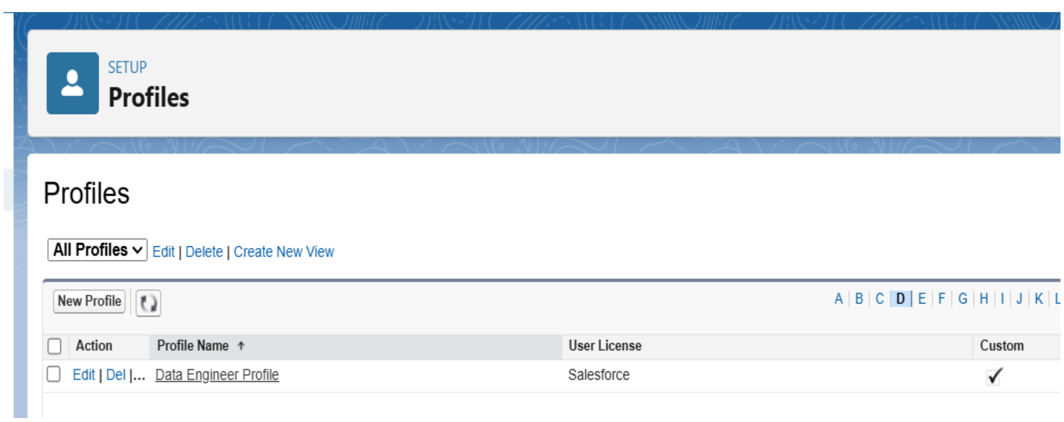
1. Log in to your **Salesforce Developer Org**.
2. On the top right → Click the ⚙️ **Gear Icon** → Select **Setup**.
3. In the **Quick Find box** (left side) → Type **Company Information** → Click it.
4. Verify or update:
    - **Company Name:** AeroSense Technologies
    - **Default Locale:** English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

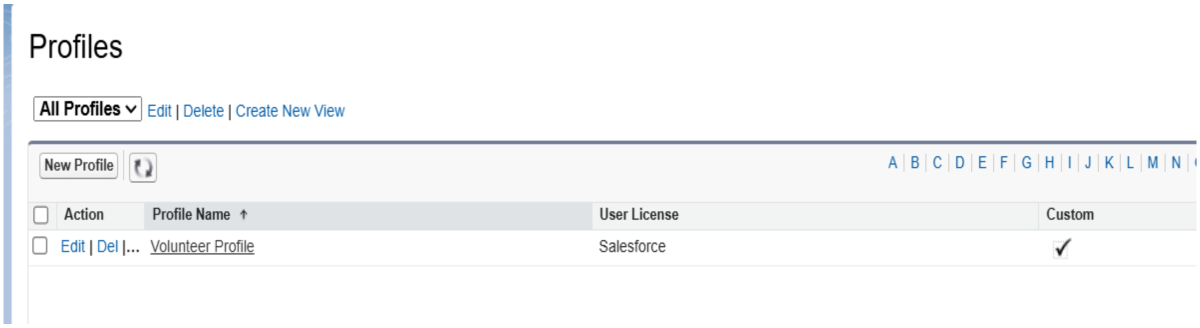


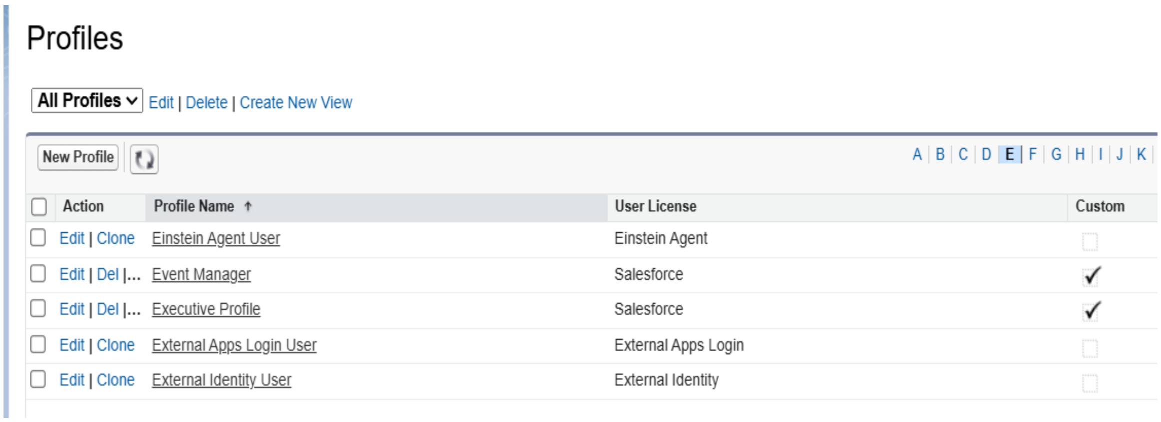
2. User Profiles

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.





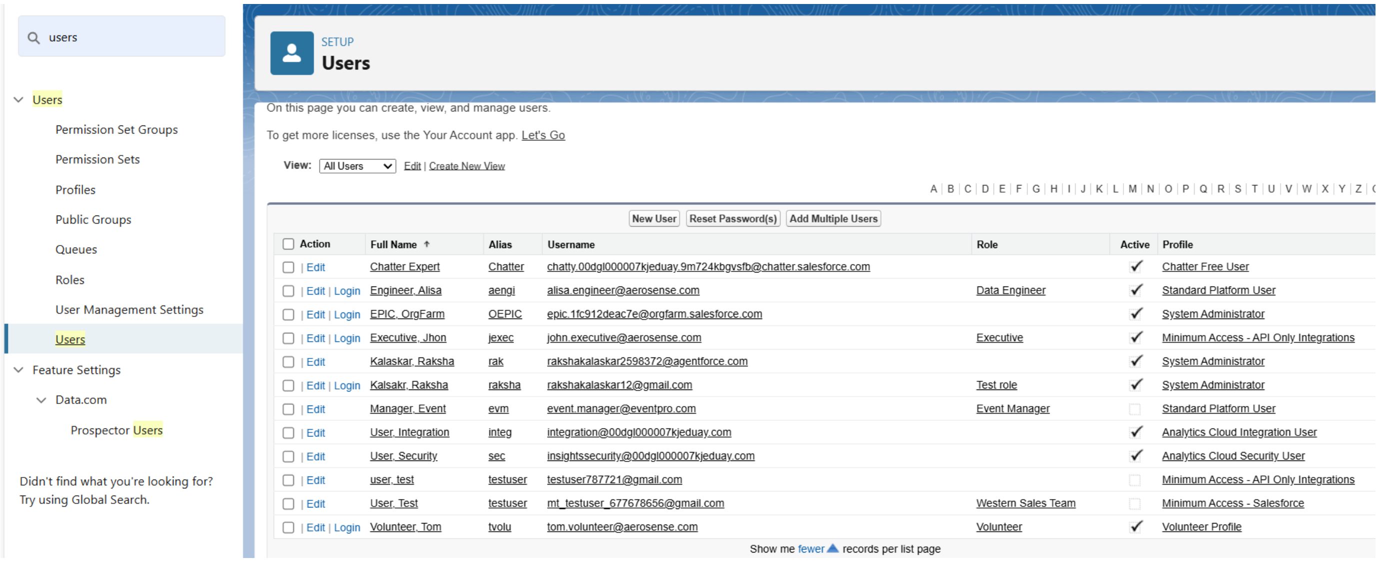


3. Users

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)

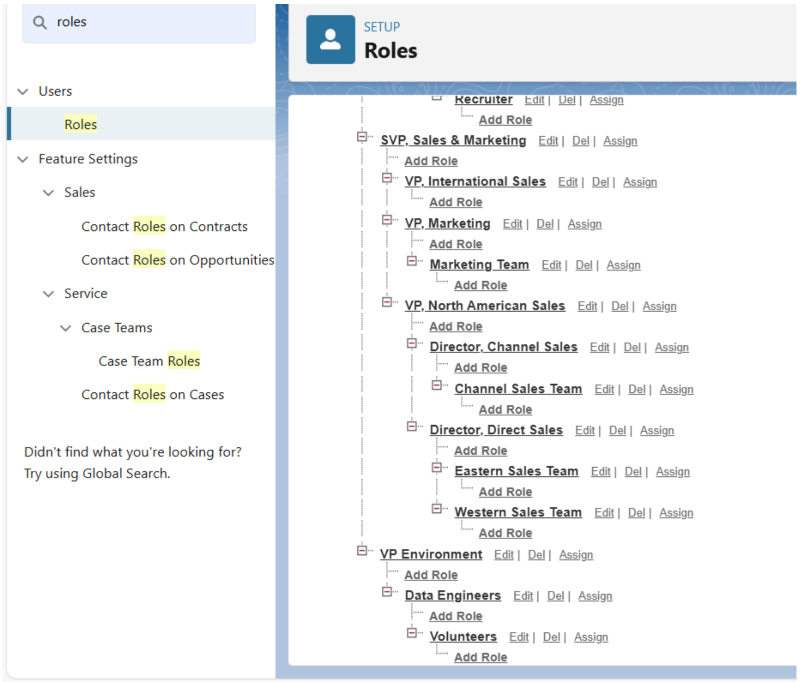
- **Jhon Executive** (Executive Profile)

5. Each user will get a welcome email.



4. Role Hierarchy

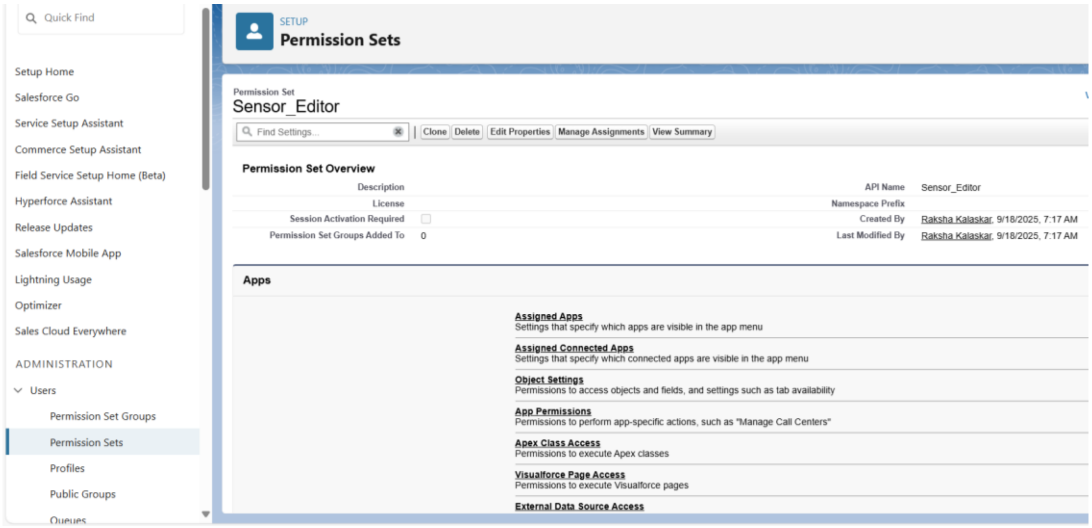
1. Setup → In **Quick Find**, type **Roles** → Click **Roles** → Click **Set Up Roles**.
2. Click **Add Role** under the CEO.
    - Name: VP Environment.
    - Save.
3. Under VP Environment → Add Role: **Data Engineers**.
4. Under Data Engineers → Add Role: **Volunteers**.
5. Assign Users:
    - Tom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



5. Permission Sets

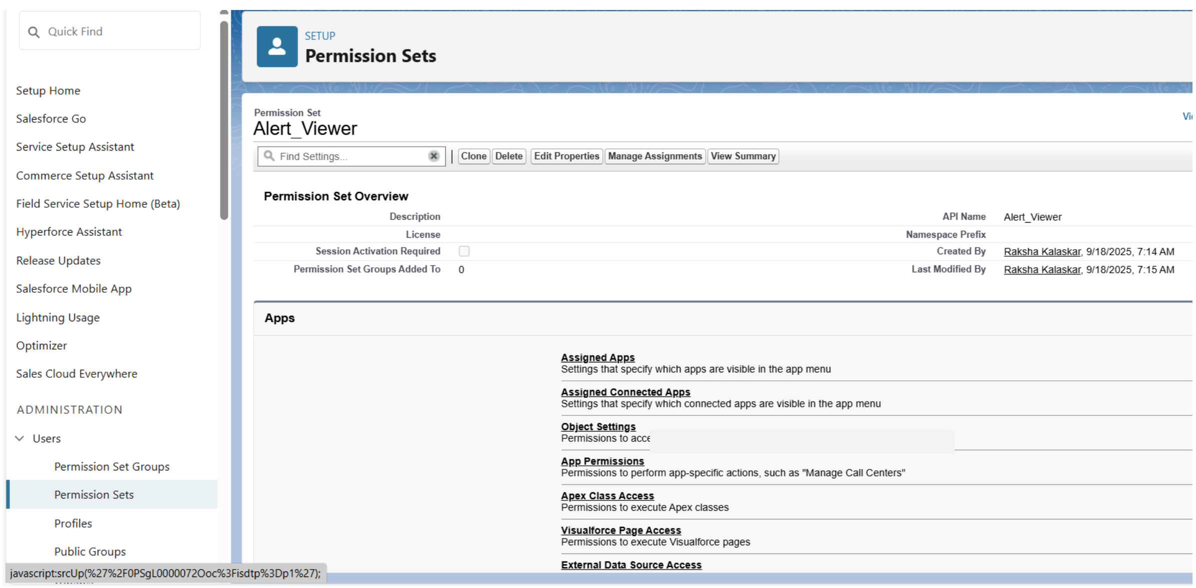
Permission Sets provide extra access without changing profiles.

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.



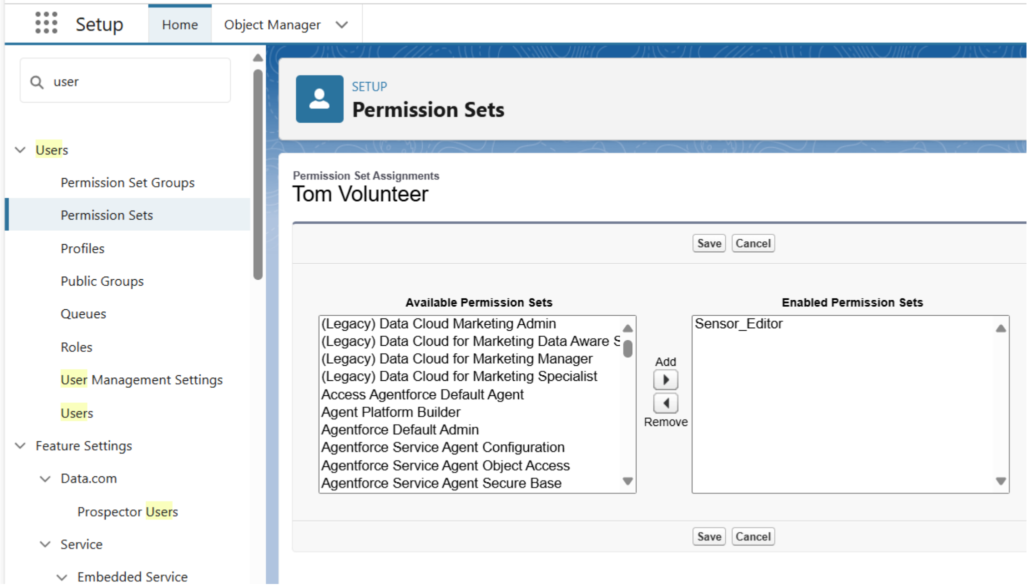
3. Create another:

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



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
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Access Agentforce Default Agent
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Agentforce Service Agent Object Access
Agentforce Service Agent Secure Base
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Sensor_Editor
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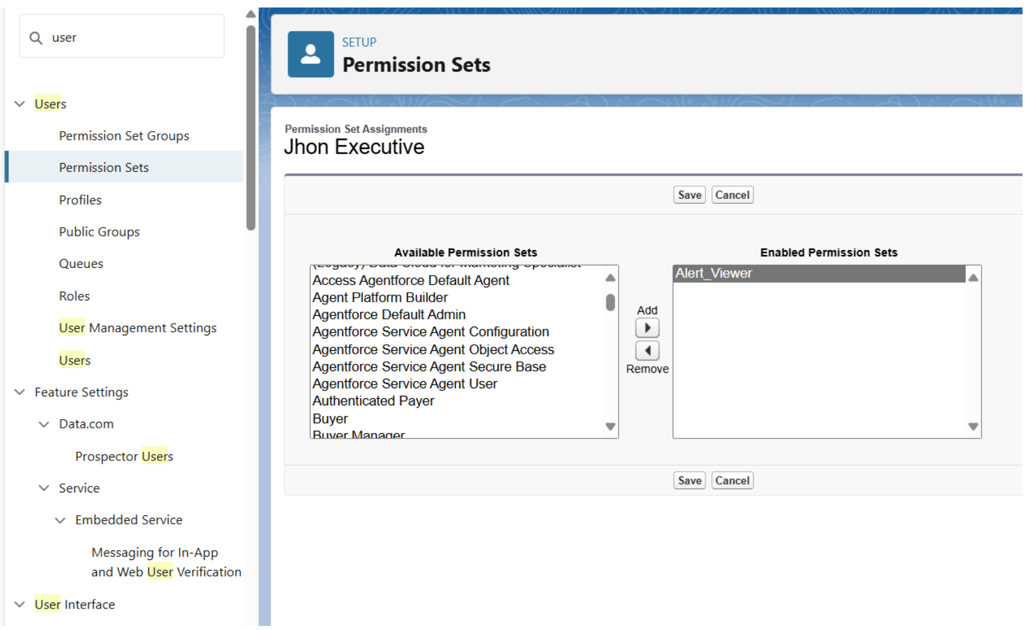
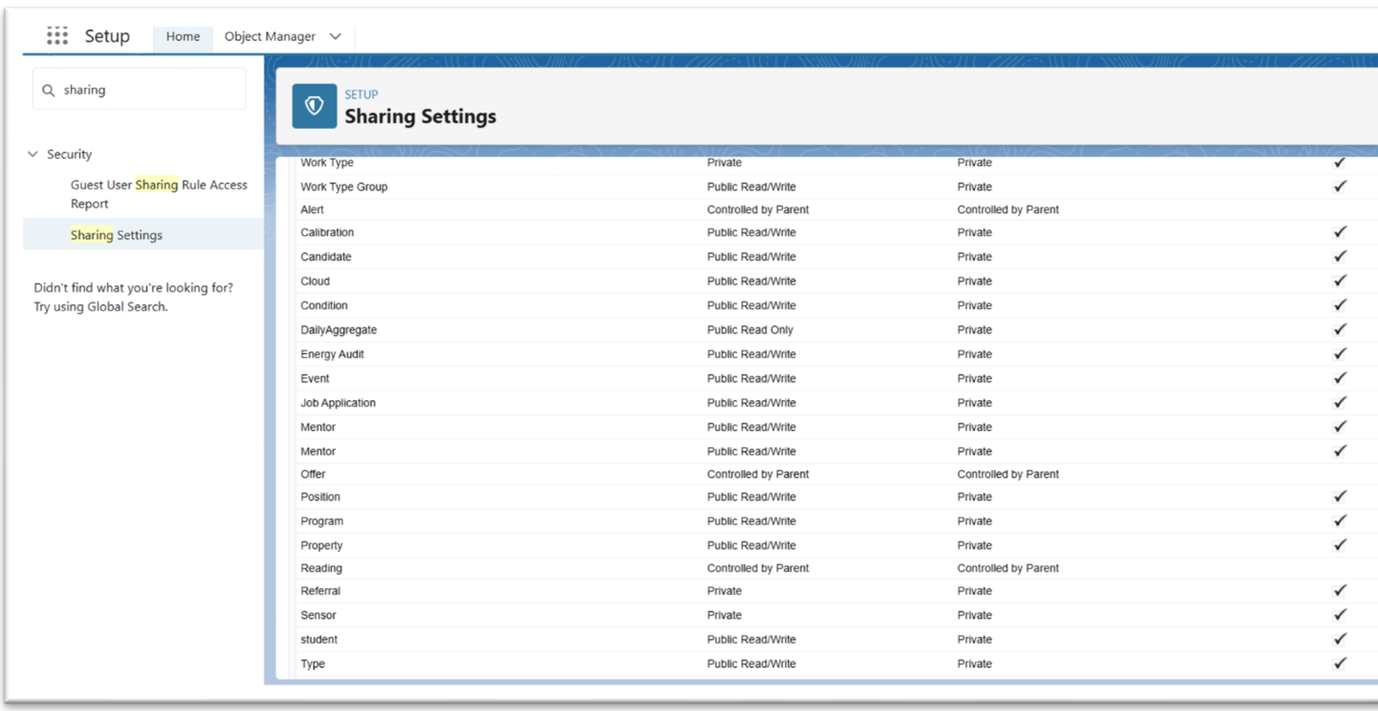

user
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface
SETUP
Permission Sets
Permission Set Assignments
Jhon Executive
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
Add
Remove
Enabled Permission Sets
Alert_Viewer
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.**

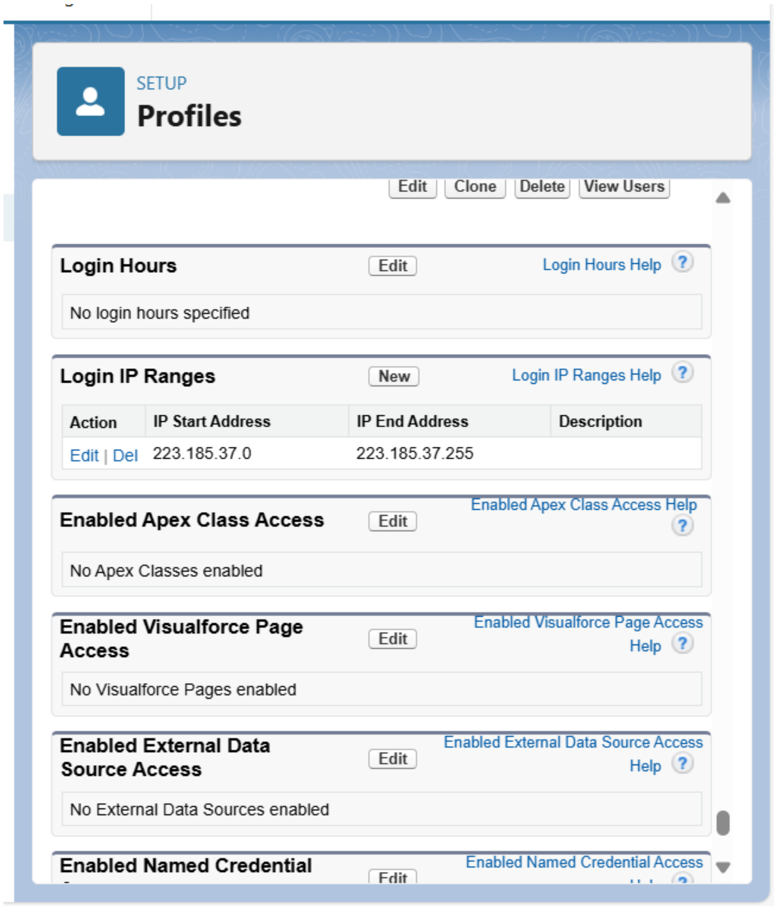


7. Sharing Rules

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

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.



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_Dev.
   - 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).