

⚡ Phase 2: Org Setup & Configuration – Completed ✅

This document records all the setup and configuration steps performed in Salesforce for the **RenewSure – Smart Contract Expiry & Renewal Tracker** project. Phase 2 focused on preparing the Salesforce org environment and ensuring proper security, access, and configuration settings.

❖ 1. Salesforce Edition & Org Setup

- Selected **Salesforce Developer Edition Org** for initial implementation.
- Connected Org with **VS Code (SFDX Project Setup)**.
- Verified basic org information:
 - Company Profile: RenewSure Demo Corp
 - Default Locale: **English (India)**
 - Default Currency: **INR (₹)**

The screenshot shows the 'Company Information' page in the Salesforce Setup. The top navigation bar includes 'SETUP' and the 'Company Information' section. Below the header, a message states 'The organization's profile is below.' A navigation bar at the top right includes links for 'User Licenses [10+]', 'Permission Set Licenses [10+]', 'Feature Licenses [11]', and 'Usage-based Entitlements [10+]'. The main content area is titled 'Organization Detail' and contains the following data:

Organization Detail		Edit
Organization Name	RenewSure Demo Corp	Phone (555) 123-4567
Primary Contact	OrgFarm EPIC	Fax (555) 123-4567
Division		Default Locale English (India)
Address	123 Business Avenue Amaravati 12345 Maharashtra India	Default Language English
Fiscal Year Starts In	January	Default Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale English (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space 342 KB (7%) [View]
Newsletter	<input checked="" type="checkbox"/>	Used File Space 17 KB (0%) [View]
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours 29 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours 0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month 0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID 00DgLO00000BJUTt
		Organization Edition Developer Edition
		Instance CAN98

At the bottom, it shows 'Created By OrgFarm EPIC, 9/10/2025, 5:06 AM' and 'Modified By Runal Parlewar, 9/17/2025, 11:49 AM' with an 'Edit' button.

❖ 2. Company Profile Setup

- Updated **Company Information** (Company Name = *RenewSure*).
- Set **Fiscal Year = Standard (Jan-Dec)**.
- Configured **Business Hours**:
 - Default = **Mon-Fri, 09:00 AM -6:00 PM IST**
 - Holidays = Added placeholder holiday list.

If you enter blank business hours for a day, that means your organization does not operate on that day.

Holidays [3]

Business Hours Detail		Edit															
Business Hours Name	RenewSure Business Hours	Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)														
Business Hours	<table border="1"> <tr><td>Sunday</td><td>24 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>24 Hours</td></tr> </table>	Sunday	24 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	24 Hours	Default Business Hours	<input checked="" type="checkbox"/>
Sunday	24 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	24 Hours																
Active	<input checked="" type="checkbox"/>																
Created By	OrgFarm_EPIC	Created Date	9/10/2025, 5:06 AM														
Last Modified By	Runal Parlewar	Last Modified Date	9/17/2025, 6:15 AM														
Holidays		Add/Remove															
Holiday Name	Description	Date and Time															
Independence Day		8/15/2026 All Day															
Republic Day		1/26/2026 All Day															
Rest Day		9/20/2025 All Day															

[^ Back To Top](#) Always show me fewer ▲ / ▼ more records per related list

❖ 3. User Setup & Licenses

- Created initial project users with **Standard Salesforce Licenses**:
 - CEO (System Administrator)
 - Head of Legal
 - Contract Manager
 - Associate

All Users

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

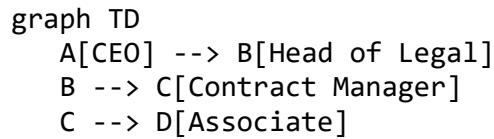
To get more licenses, use the Your Account app. [Let's Go](#)

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

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter_Expert	Chatter	chatty_00dg10000bjuttuaap_yfttnbnznvzj6@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit Login	EPIC_OrgFarm	EPIC	epic_1db1ec9ac90b@orgfarm.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
Edit Login	Mehta_Rohan	rmeht	rohan.mehta@renewsure.com.legal	Contract Associate	<input checked="" type="checkbox"/>	Legal_Profile
Edit Login	Naire_Priya	pnaire	priya.naire@renewsure.com	CEO/Business Owner	<input checked="" type="checkbox"/>	ReadOnly_Profile
Edit Login	Parlewar_Runal	par	parlewarraunali221656@agentforce.com		<input checked="" type="checkbox"/>	System Administrator
Edit Login	Sharma_Ananya	ashar	ananya.sharma@renewsure.com.contract	Contract Manager	<input checked="" type="checkbox"/>	Contract_Manager_Profile
Edit	User_Integration	integ	integration@00dg10000bjuttuaap.com		<input checked="" type="checkbox"/>	Analytics_Cloud_Integration_User
Edit	User_Security	sec	insightssecurity@00dg10000bjuttuaap.com		<input checked="" type="checkbox"/>	Analytics_Cloud_Security_User

◊ 4. Role Hierarchy

Configured **Role Hierarchy** for visibility:



- **CEO** → Full visibility
- **Head of Legal** → Access to all Contract Managers' records
- **Contract Manager** → Access to Associates' records
- **Associates** → Access only to their own records

The screenshot shows the 'Your Organization's Role Hierarchy' page. At the top, there are buttons for 'SETUP' and 'Roles'. Below the title, it says 'Creating the Role Hierarchy' and provides instructions: 'You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.' There is a 'Help for this Page' link and a 'Show in tree view' dropdown.

The main area displays a hierarchical tree of roles under 'RenewSure Demo Corp':

- CEO (Edit | Del | Assign)
 - Add Role
- Admin User (Edit | Del | Assign)
 - Add Role
- CEO/Business Owner (Edit | Del | Assign)
 - Add Role
- CFO (Edit | Del | Assign)
 - Add Role
- COO (Edit | Del | Assign)
 - Add Role
- Head of Legal (Edit | Del | Assign)
 - Add Role
- Contract Manager (Edit | Del | Assign)
 - Add Role
 - Contract Associate (Edit | Del | Assign)
 - Add Role

◊ 5. Organization-Wide Defaults (OWD)

- Contract__c object → **Private**
- Grant Access Using Hierarchies → Enabled

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	<input type="checkbox"/>
Account and Contract	Public Read Only	Private	<input checked="" type="checkbox"/>
Order	Controlled by Parent	Controlled by Parent	<input type="checkbox"/>
Contact	Controlled by Parent	Controlled by Parent	<input type="checkbox"/>
Asset	Controlled by Parent	Controlled by Parent	<input type="checkbox"/>
Opportunity	Private	Private	<input type="checkbox"/>
Case	Private	Private	<input type="checkbox"/>
Campaign	Public Full Access	Private	<input type="checkbox"/>
Campaign Member	Controlled by Campaign	Controlled by Campaign	<input type="checkbox"/>
User	Public Read Only	Private	<input type="checkbox"/>
Individual	Public Read/Write	Private	<input type="checkbox"/>
Voice Call	Private	Private	<input type="checkbox"/>
Activity	Private	Private	<input type="checkbox"/>
Calendar	Hide Details and Add Events	Hide Details and Add Events	<input type="checkbox"/>
Price Book	Use	Use	<input type="checkbox"/>

◊ 6. Login & Security Policies

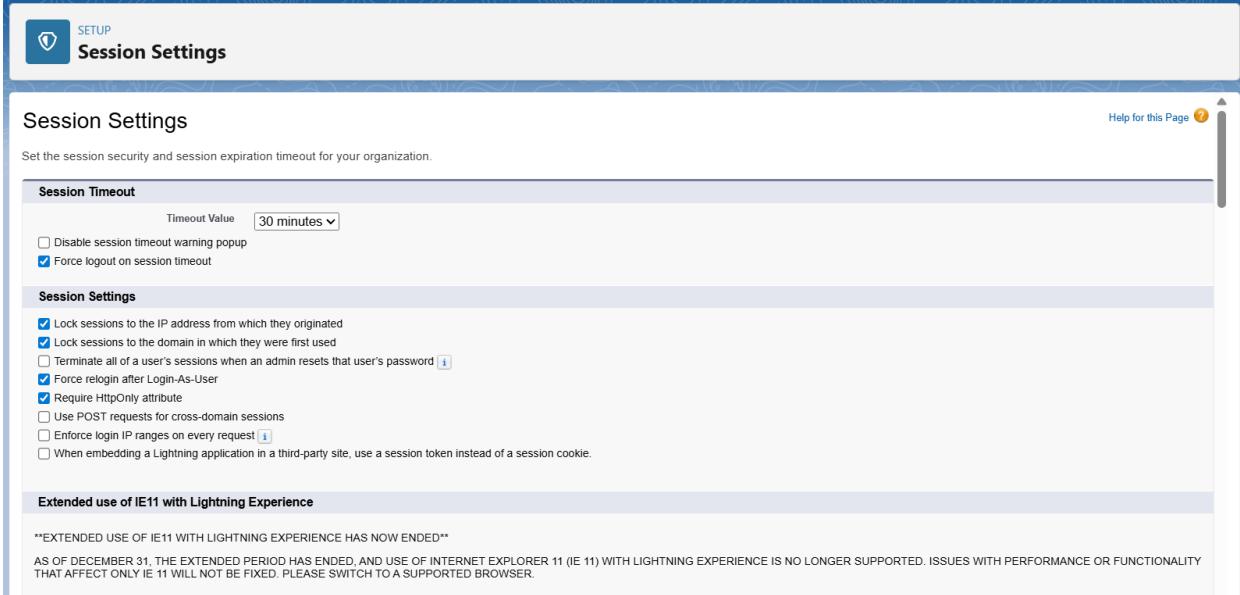
6.1 Trusted IP Ranges (Network Access)

Name	Start IP	End IP	Description
Office HQ – India	47.11.15.0	47.11.15.255	Primary Office IP Range
Admin Home	47.11.15.0	47.11.15.255	Temporary Admin IP (example)

Please specify IP range		! = Required Information	
Start IP Address	47.11.15.0	End IP Address	47.11.15.255
Description	Admin's home ISP range		
<input type="button" value="Save"/> <input type="button" value="Cancel"/>			

6.2 Session Settings

- **Session Timeout:** 30 minutes
- **Lock sessions to originating IP:**  Disabled (kept flexible)



The screenshot shows the 'Session Settings' page under the 'SETUP' tab. It includes sections for 'Session Timeout' (set to 30 minutes), 'Session Settings' (with several checkboxes like 'Lock sessions to the IP address from which they originated' and 'Force logout after Login-As-User' checked), and a note about the extended use of IE11 with Lightning Experience.

Session Timeout
Timeout Value: 30 minutes
 Disable session timeout warning popup
 Force logout on session timeout

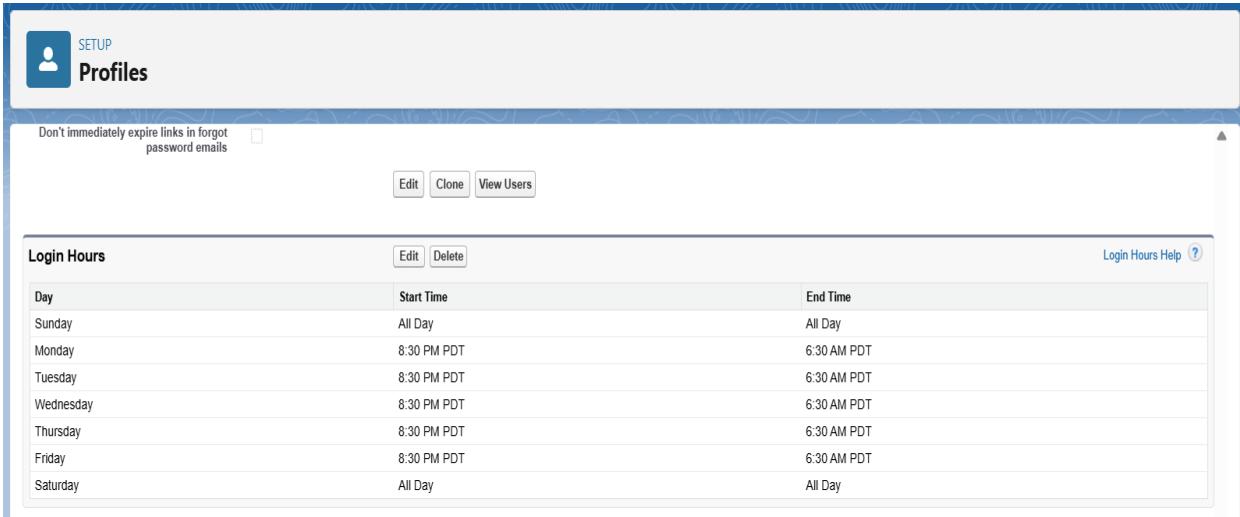
Session Settings

- Lock sessions to the IP address from which they originated
- Lock sessions to the domain in which they were first used
- Terminate all of a user's sessions when an admin resets that user's password ?
- Force reload after Login-As-User
- Require HttpOnly attribute
- Use POST requests for cross-domain sessions
- Enforce login IP ranges on every request ?
- When embedding a Lightning application in a third-party site, use a session token instead of a session cookie.

Extended use of IE11 with Lightning Experience
EXTENDED USE OF IE11 WITH LIGHTNING EXPERIENCE HAS NOW ENDED
AS OF DECEMBER 31, THE EXTENDED PERIOD HAS ENDED, AND USE OF INTERNET EXPLORER 11 (IE 11) WITH LIGHTNING EXPERIENCE IS NO LONGER SUPPORTED. ISSUES WITH PERFORMANCE OR FUNCTIONALITY THAT AFFECT ONLY IE 11 WILL NOT BE FIXED. PLEASE SWITCH TO A SUPPORTED BROWSER.

6.3 Login Hours (Profiles)

Profile	Mon-Fri	Sat	Sun
Contract Manager	09:00–18:00	No access	No access
Legal Team	09:00–18:00	10:00–14:00	No access



The screenshot shows the 'Profiles' page under the 'SETUP' tab. It includes a note about not expiring password emails immediately and a table of 'Login Hours'.

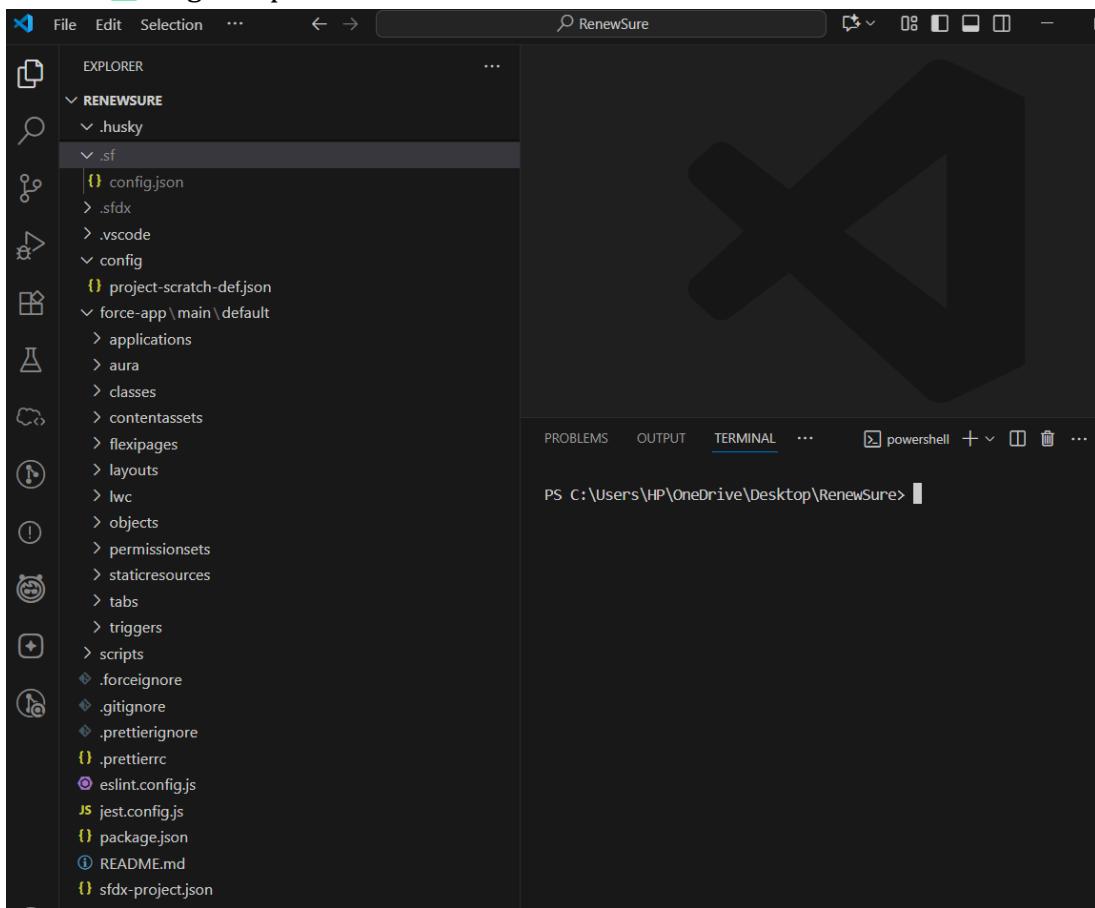
Don't immediately expire links in forgot password emails

Edit **Clone** **View Users**

Day	Start Time	End Time
Sunday	All Day	All Day
Monday	8:30 PM PDT	6:30 AM PDT
Tuesday	8:30 PM PDT	6:30 AM PDT
Wednesday	8:30 PM PDT	6:30 AM PDT
Thursday	8:30 PM PDT	6:30 AM PDT
Friday	8:30 PM PDT	6:30 AM PDT
Saturday	All Day	All Day

❖ 7. Deliverables Produced

- Role Hierarchy Diagram
- Access Rules Documentation
- Login & Security Policy Document
- Org Setup Verification



❖ Phase 2 Status: Completed Successfully

Next Step → **Phase 3: Data Modeling & Object Configuration** (Custom Objects, Fields, Relationships).