

Phase 2: System Setup & Configuration

Project: Training Management System

1. Connect VS Code to Salesforce Org

We created a local folder called TrainingManagementSystem and set up the Salesforce DX project in VS Code. The Developer Org was authorized and linked with VS Code using the alias TrainingOrg. Connection was successfully verified.

```
OUTPUT ... Filter Salesforce CLI
Salesforce metadata XML IntelliSense is now available.
Starting SFDX: Refresh SObject Definitions

16:05:05.277 sf sobject definitions refresh
Processed 19 Standard sObjects
Processed 0 Custom sObjects
16:05:05.491 sf sobject definitions refresh
ended with exit code 0

Starting SFDX: Authorize an Org

16:06:06.291 sf org:login:web --alias TrainingOrg --instance-url https://login.salesforce.com --set-default
Successfully authorized kshithi9615719@agentforce.com with org ID 00DgK0000071Z09UAM
16:10:49.346 sf org:login:web --alias TrainingOrg --instance-url https://login.salesforce.com --set-default
ended with exit code 0
```

2. Company Profile Setup

We updated Company Information with details like company name (Learning & Development Org), time zone (IST), currency (INR), and language (English). This ensures the org settings match our training department context.

The screenshot shows the Salesforce Setup interface for 'Company Information'. The page title is 'Learning & Development Org'. Below the title, it states 'The organization's profile is below.' and provides links for 'User Licenses (10)', 'Permission Set Licenses (10)', 'Feature Licenses (10)', and 'Usage-based Entitlements (10)'. The 'Organization Detail' section includes fields for Organization Name, Primary Contact, Division, Address, Phone, Fax, Default Locale, and Default Language. The 'Fiscal Year Starts In' field is set to 'January'. The 'Activate Multiple Currencies' field is checked. The 'Enable Data Translation' field is checked. The 'Newsletters' section shows 'Admin Newsletter' checked. The 'Hide Notices About System Maintenance' and 'Hide Notices About System Downtime' fields are checked. The 'Locale Formats' field is set to 'ICU'. The 'Created By' field is 'OrgEam.EPIC' and the 'Modified By' field is 'Sahithi Karise'.

Organization Detail	
Organization Name	Learning & Development Org
Primary Contact	Sahithi Karise
Division	
Address	SVN Colony Guntur 522002 Andhra Pradesh India
Phone	1234567890
Fax	
Default Locale	English (India)
Default Language	English
Fiscal Year Starts In	January
Activate Multiple Currencies	<input checked="" type="checkbox"/>
Enable Data Translation	<input checked="" type="checkbox"/>
Newsletters	<input checked="" type="checkbox"/>
Admin Newsletter	<input checked="" type="checkbox"/>
Hide Notices About System Maintenance	<input checked="" type="checkbox"/>
Hide Notices About System Downtime	<input checked="" type="checkbox"/>
Locale Formats	ICU

Created By: OrgEam.EPIC 7/21/2025, 8:05 AM
Modified By: Sahithi Karise 10/3/2025, 4:29 AM

3. Business Hours & Holidays

We defined Training Department Hours as Monday to Friday (9 AM – 6 PM) with Saturday and Sunday closed. Holidays like Republic Day, Independence Day, and Diwali were added so the system respects non-working days.

The screenshot shows the Salesforce Setup page for Business Hours. The left sidebar contains the Setup menu with 'Business Hours' selected. The main content area is titled 'Organization Business Hours' and includes a description: '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.' Below this, there is a 'Business Hours Detail' section with a table showing the hours for each day of the week. The table is titled 'Training Department Hours' and shows 24 hours for Sunday and Saturday, and 9:00 AM to 6:00 PM for Monday through Friday. The 'Active' checkbox is checked. The 'Created By' field shows 'Sahithi Karise' and the 'Last Modified By' field also shows 'Sahithi Karise'. There is an 'Add/Remove' button for holidays, and a 'Back To Top' link at the bottom.

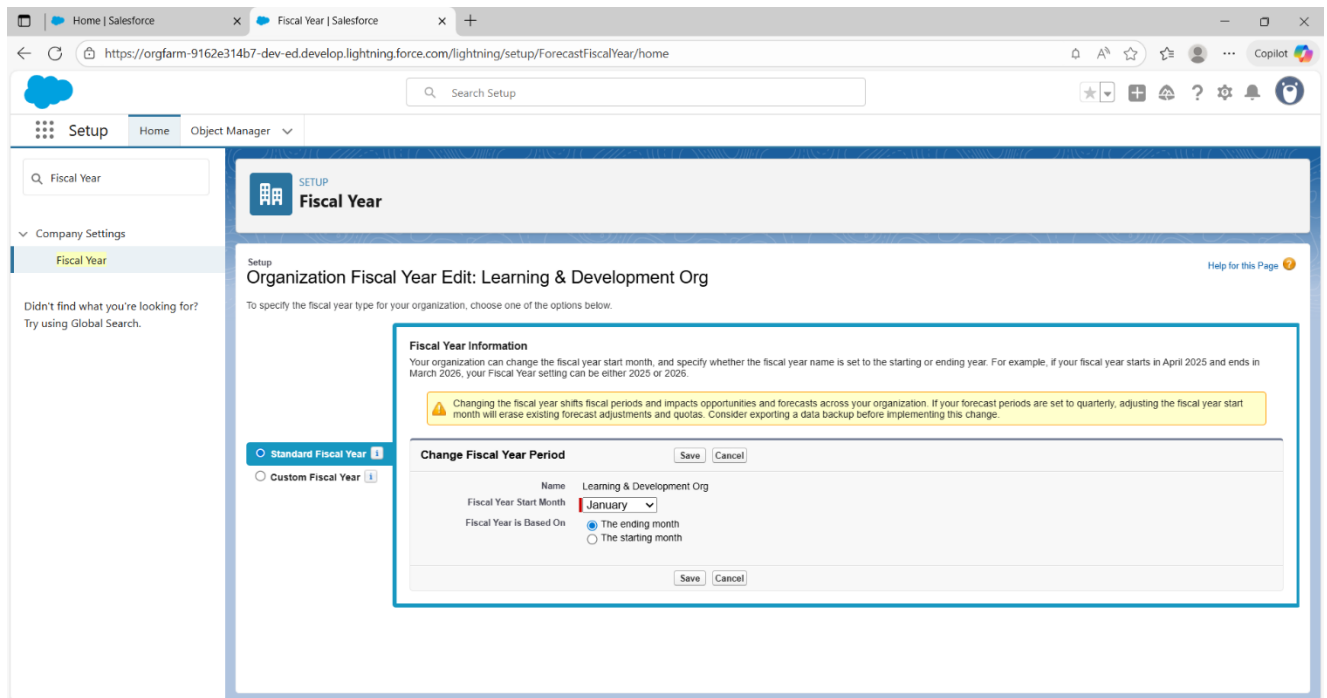
Business Hours Name	Training Department Hours	Time Zone
Business Hours	Sunday 24 Hours Monday 9:00 AM to 6:00 PM Tuesday 9:00 AM to 6:00 PM Wednesday 9:00 AM to 6:00 PM Thursday 9:00 AM to 6:00 PM Friday 9:00 AM to 6:00 PM Saturday 24 Hours	(GMT+05:30) India Standard Time (Asia/Kolkata)

The screenshot shows the Salesforce Setup page for Business Hours, similar to the previous one, but with additional holiday information. The 'Business Hours Detail' section is the same, but the 'Holidays' section now displays a table of holidays. The table has columns for 'Holiday Name', 'Description', and 'Date and Time'. The holidays listed are Diwali (10/21/2025 All Day), Independence Day (8/15/2026 All Day), and Republic Day (1/26/2026 All Day). The 'Active' checkbox is checked, and the 'Created By' and 'Last Modified By' fields show 'Sahithi Karise'.

Holiday Name	Description	Date and Time
Diwali		10/21/2025 All Day
Independence Day		8/15/2026 All Day
Republic Day		1/26/2026 All Day

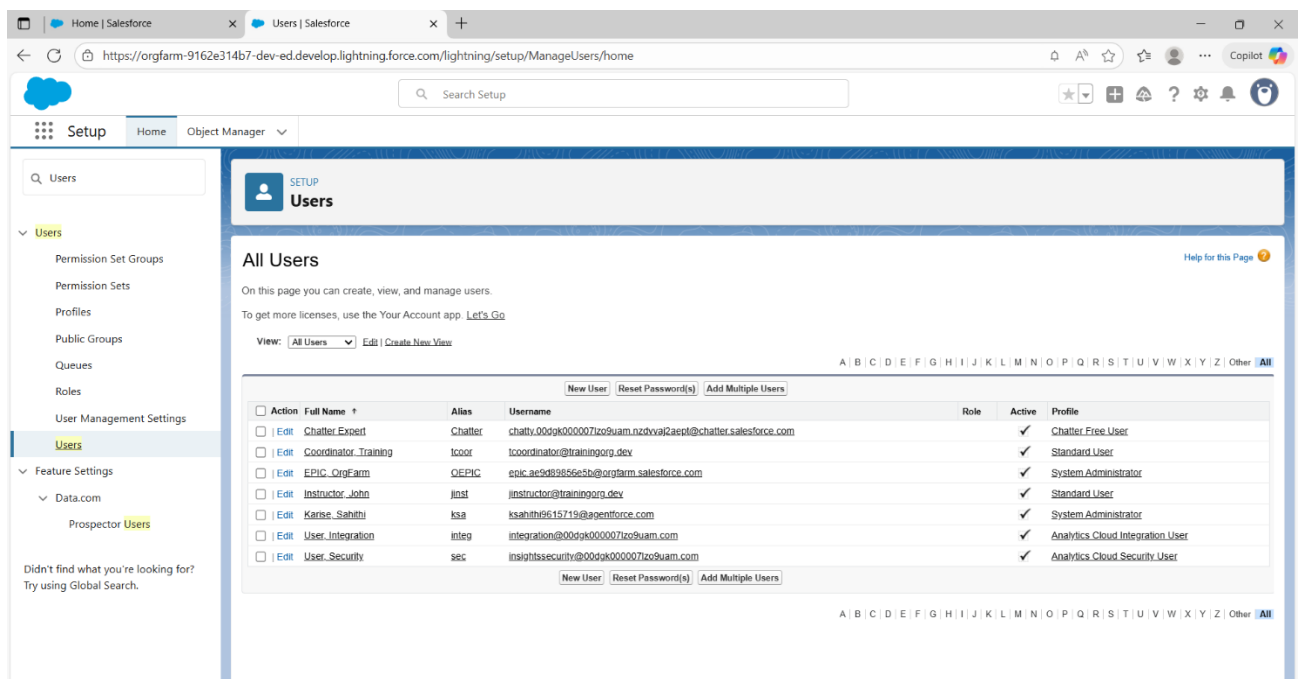
4. Fiscal Year Settings

We configured a Standard Fiscal Year starting in January. This aligns reporting and analytics with business cycles.



5. User Setup

We created new users such as Training Coordinator and Instructor in addition to the Admin. Each user was given the Standard User profile for appropriate access.



6. Profiles

We reviewed the Standard User profile to understand the default permissions available to coordinators, instructors, and participants.

Profiles

Profile: **Standard User**

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges (0) | Enabled Apex Class Access (0) | Enabled Visualforce Page Access (0) | Enabled External Data Source Access (0) | Enabled Named Credential Access (0) | Enabled External Credential Principal Access (0) | Enabled Custom Metadata Type Access (0) | Enabled Custom Setting Definitions Access (0) | Enabled Flow Access (0) | Enabled Service Presence Status Access (0) | Enabled Custom Permissions (0)

Profile Detail

Name	Standard User	Custom Profile	<input type="checkbox"/>
User License	Salesforce	Created By	salesforce.com, inc., 7/21/2025, 8:05 AM
Modified By	salesforce.com, inc., 7/21/2025, 8:10 AM		

Page Layouts

Standard Object Layouts	Global	Location Group Assignment
Email Application	Global Layout [View Assignment]	Macro [View Assignment]
Home Page Layout	Not Assigned [View Assignment]	Object Milestone [View Assignment]
Account	Account Layout [View Assignment]	Operating Hours [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Opportunity [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Opportunity Product [View Assignment]

7. Roles Setup

We created a role hierarchy: CEO at the top, under which we added L&D Manager, and below that Training Coordinator and Instructor. Roles were assigned to users to manage data visibility and approvals.

Roles

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

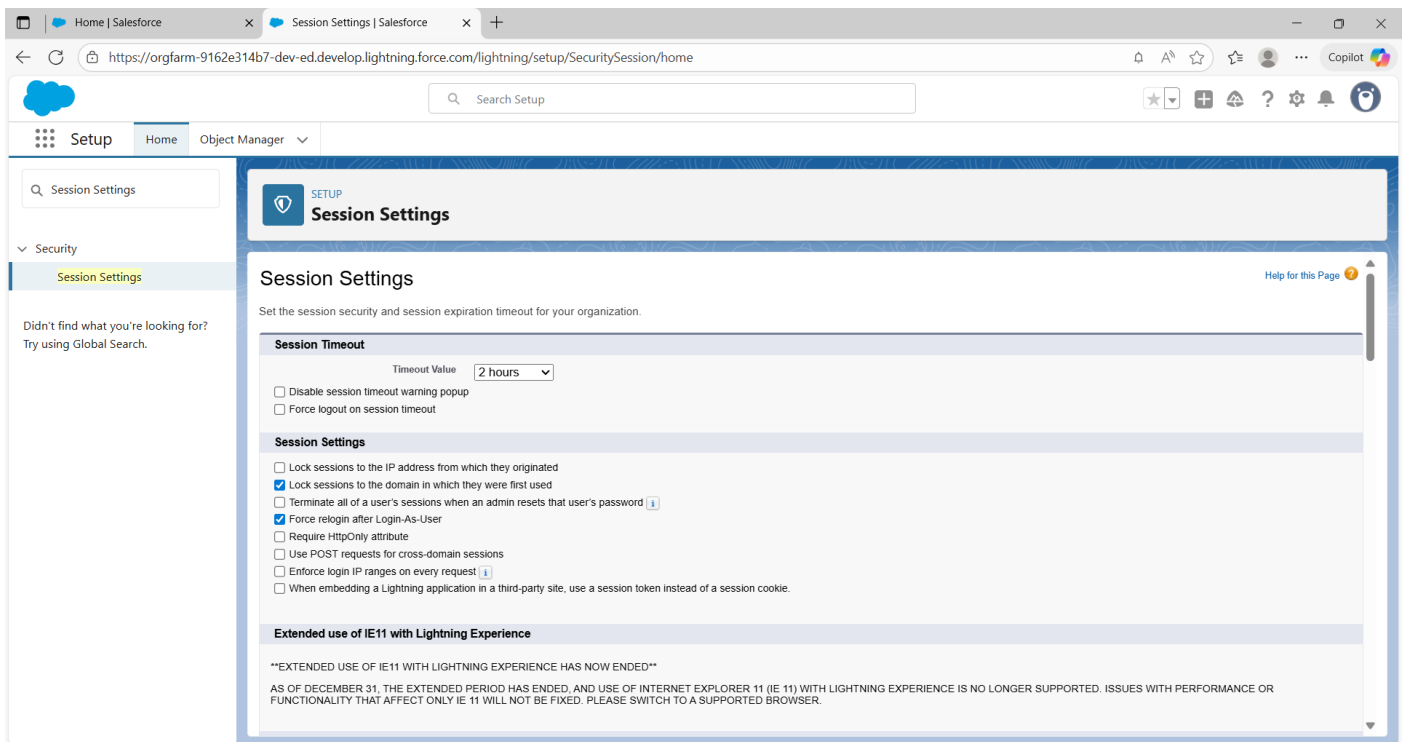
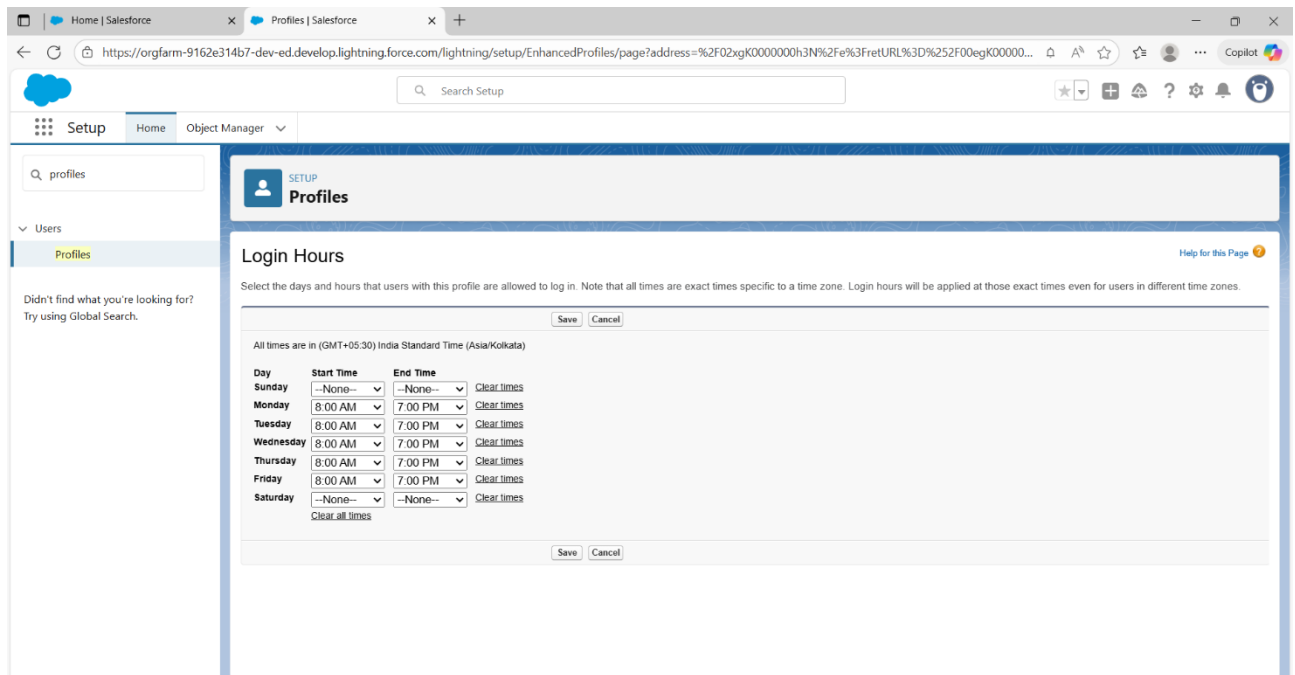
Your Organization's Role Hierarchy

Collapse All Expand All Show in tree view

- Learning & Development Org
 - CEO Edit | Del | Assign
 - Add Role
 - L&D Manager Edit | Del | Assign
 - Add Role
 - Instructor Edit | Del | Assign
 - Add Role
 - Training Coordinator Edit | Del | Assign
 - Add Role

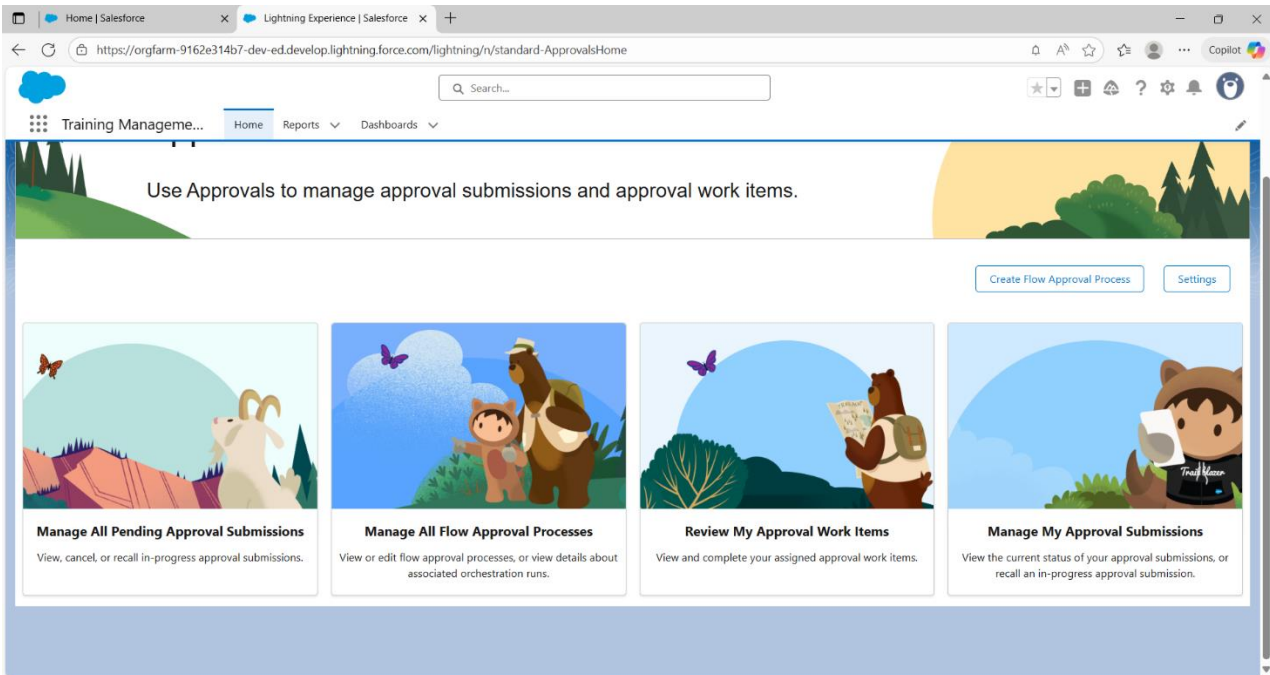
8. Login Access Policies

We set login hours so users can only log in Monday to Friday (8 AM – 7 PM) and are restricted on weekends. Session settings were updated to a 2-hour timeout.



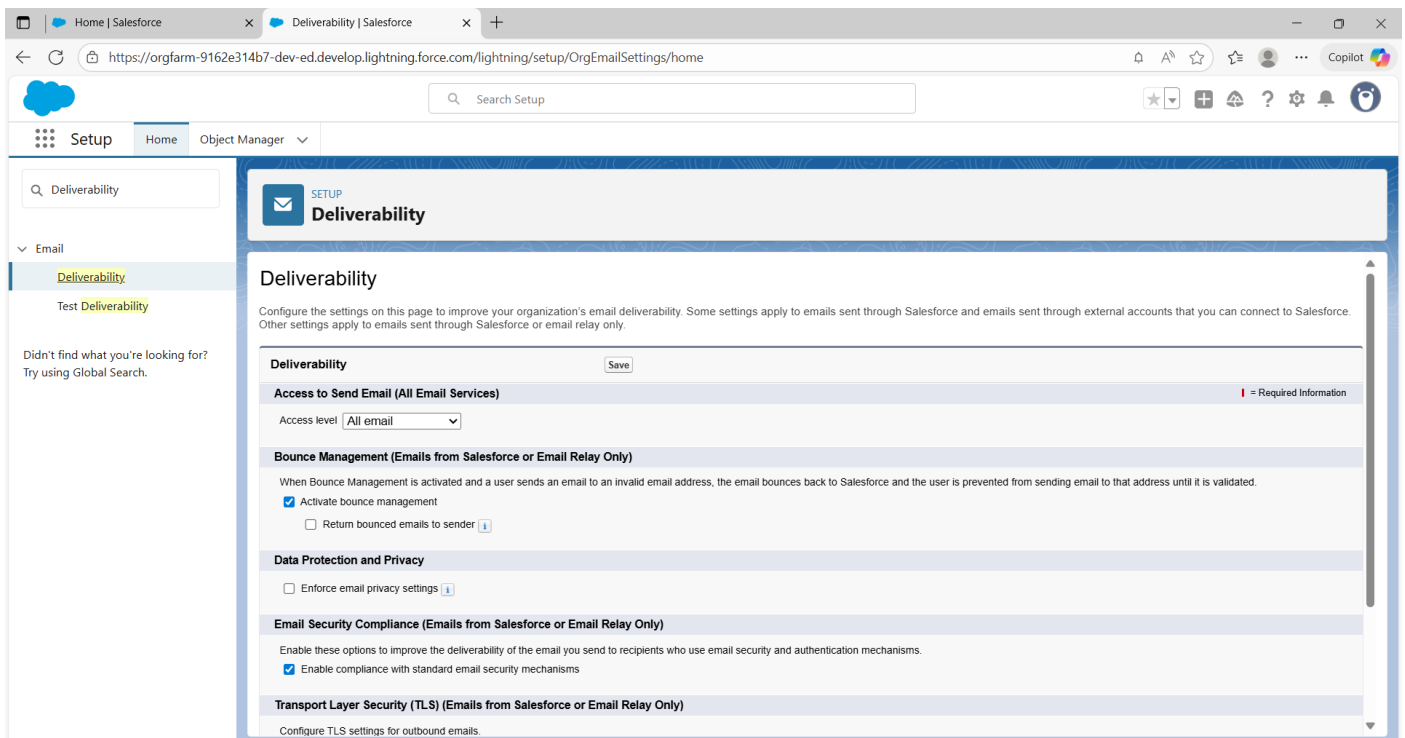
9. Create Custom App

We built a new Lightning app named Training Management. It includes Home, Reports, and Dashboards tabs. The app was assigned to Admin and Standard User profiles, giving users a dedicated workspace.



10. Email Deliverability

We changed the email deliverability setting to All Email. This ensures the system can send notifications, confirmations, and reminders.



11. Development Mode

We enabled Development Mode for the org to simplify editing and debugging during development.

Home | Salesforce

Advanced User Details | Salesforce

https://orgfarm-9162e314b7-dev-ed.develop.lightning.force.com/lightning/settings/personal/AdvancedUserDetails/home?url=%2F005gK000005Ggq1%3Fnoredirect%3D1%26isUs...

Search Setup

Star Plus App ? Settings User Avatar Copilot

Setup Home Object Manager

Quick Find

My Personal Information

- Advanced User Details
- Approver Settings
- Authentication Settings for External Systems
- Change My Password
- Connections
- External Credentials
- Grant Account Login Access
- Language & Time Zone
- Login History
- Personal Information
- Reset My Security Token

Display & Layout

Email

Chatter

Calendar & Reminders

Advanced User Details

App Registration: One-time Password Authenticator

Connect

App Registration: Salesforce Authenticator

Connect

Security Key (U2F or WebAuthn)

Register

Lightning Login

Enroll

Temporary Verification Code (Expires in 1 to 24 Hours)

Generate

Load Lightning Pages Home Screening

1

Send Apex Warning Emails

Salesforce CRM Content User

Receive Salesforce CRM Content Email Alerts

Receive Salesforce CRM Content Alerts as Daily Digest

Make Setup My Default Landing Page

Quick Access Menu

Development Mode

Show View State in Development Mode

Cache Diagnostics

Allow Forecasting

No MRU Updates

Call Center

Phone

Extension

Fax

Mobile

Add

Email Encoding

Unicode (UTF-8)

Employee Number

Start of day

6:00 AM

End of day

11:00 PM

Used Data Space

0 B View

Used File Space

0 B View