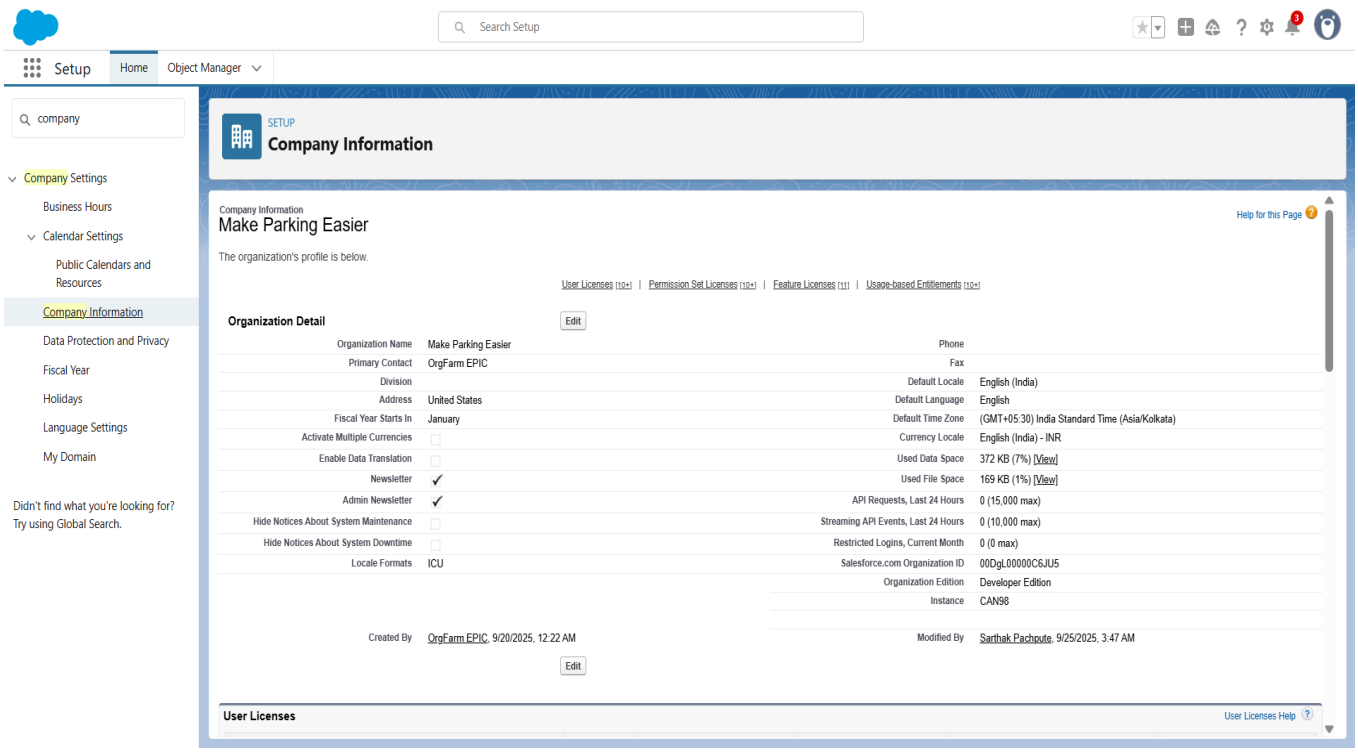
Phase 2: Org Setup & User Configuration

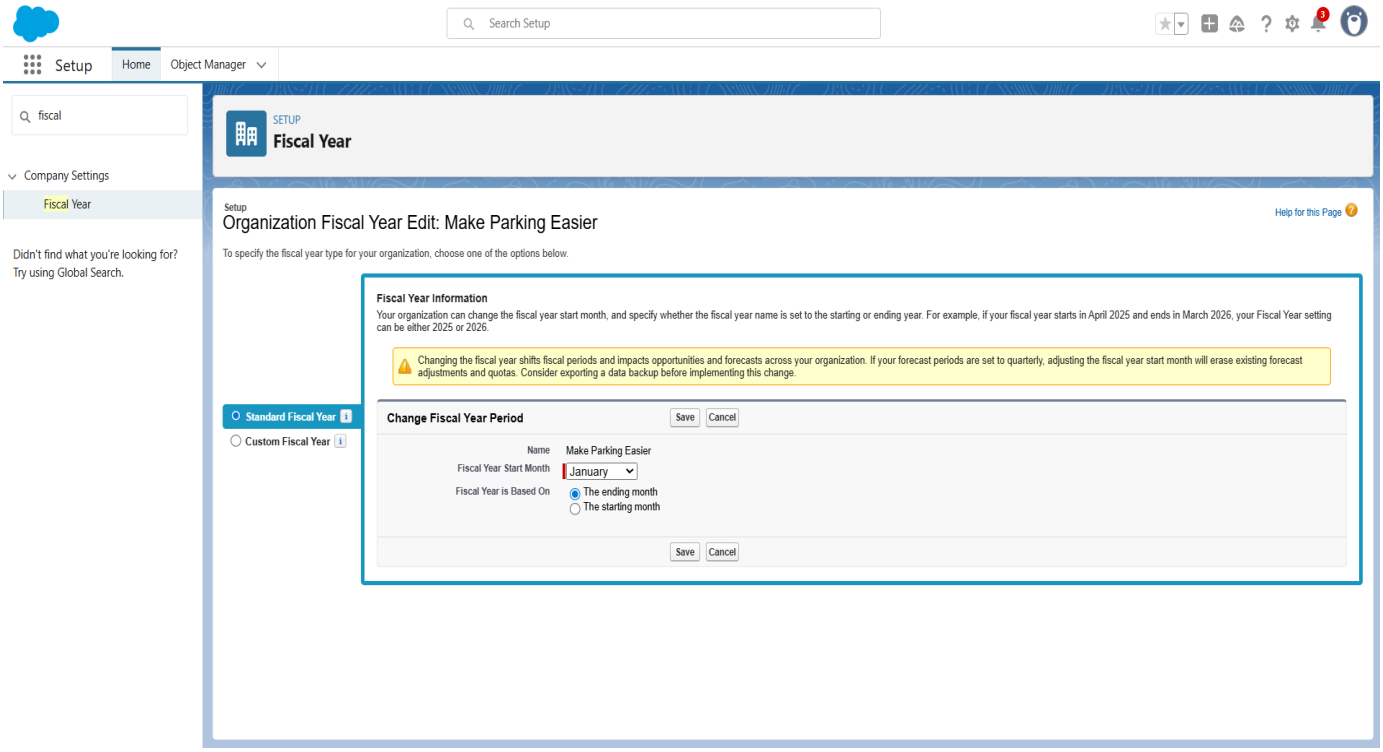
Objective

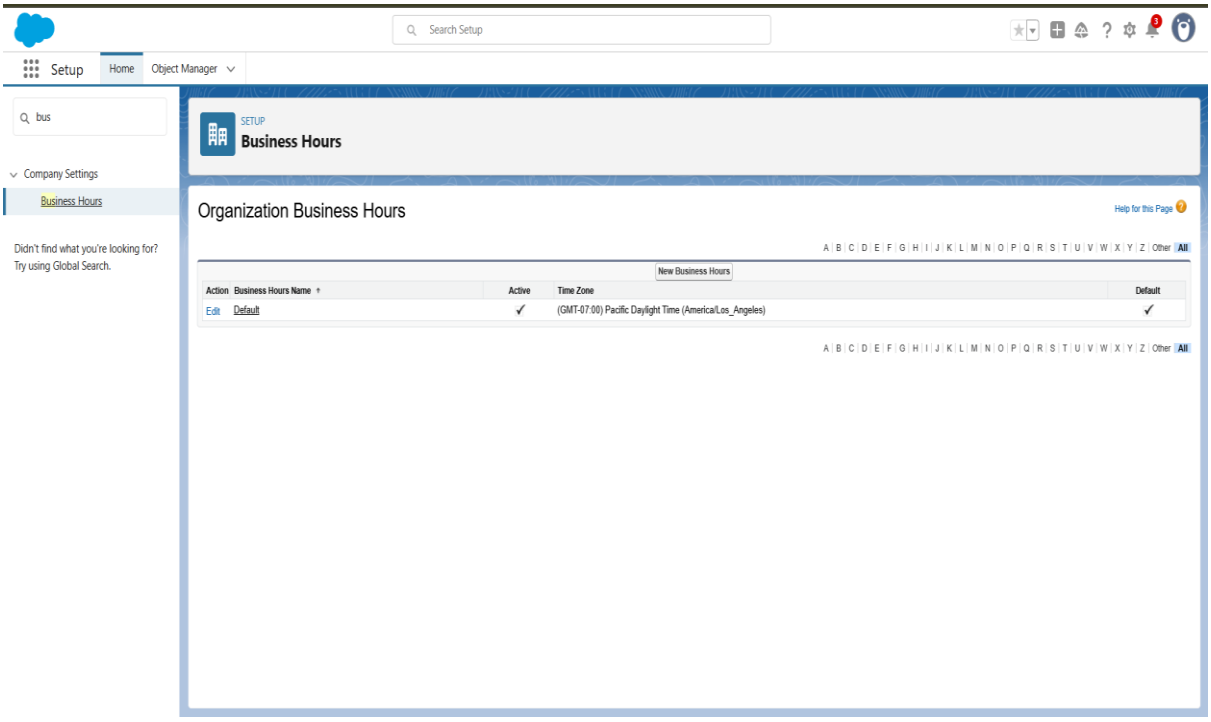
To establish the foundational settings for the **Make Parking Easier** application. This phase configures the core company profile and creates a logical user access structure based on operational roles within a parking service.

Key Activities & Screenshots

1. **Company Settings (Company Information, Fiscal Year, Business Hours):**
    - The organization's name was set to "Make Parking Easier".
    - The default locale, time zone, and fiscal year were configured to align with the business's operational calendar.
    - Standard business hours were defined.

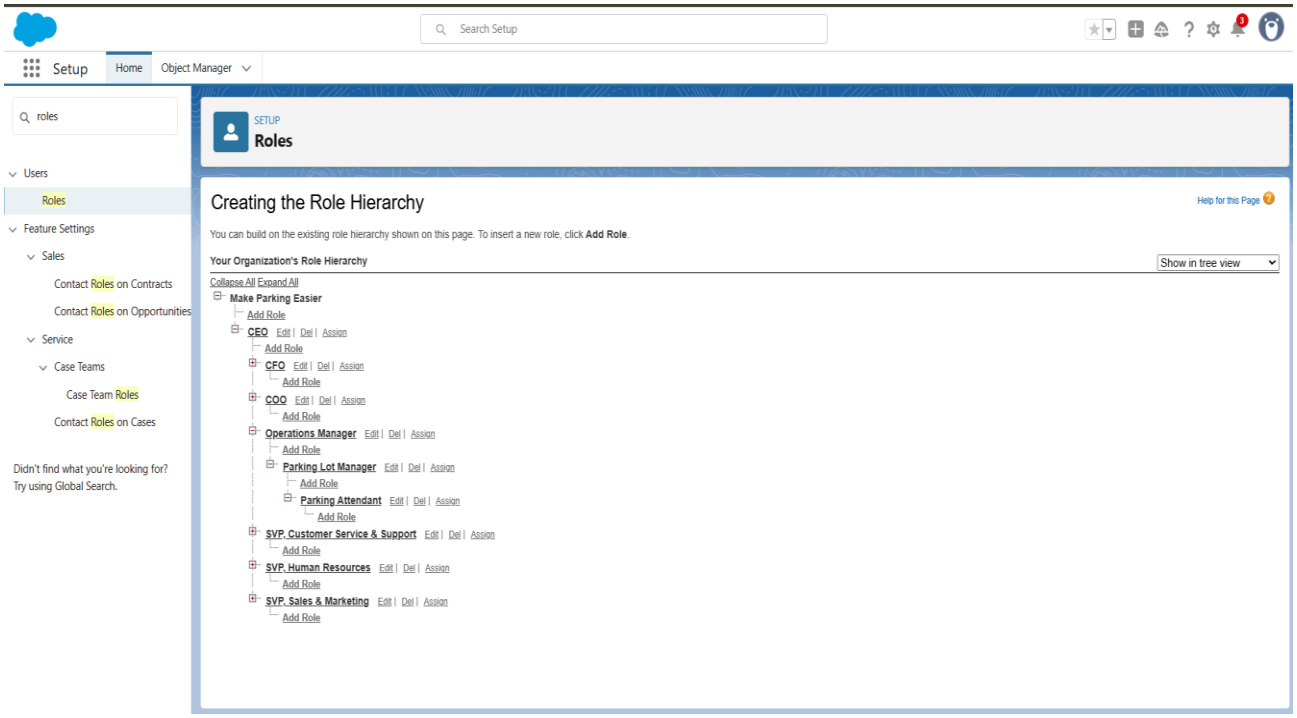



Search Setup
Setup
Home
Object Manager
fiscal
Company Settings
Fiscal Year
Didn't find what you're looking for?
Try using Global Search.
SETUP
Fiscal Year
Setup
Organization Fiscal Year Edit: Make Parking Easier
Help for this Page
To specify the fiscal year type for your organization, choose one of the options below.
Fiscal Year Information
Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example, if your fiscal year starts in April 2025 and ends in March 2026, your Fiscal Year setting can be either 2025 or 2026.
Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing this change.
Standard Fiscal Year
Custom Fiscal Year
Change Fiscal Year Period
Save
Cancel
Name
Make Parking Easier
Fiscal Year Start Month
January
Fiscal Year is Based On
The ending month
The starting month
Save
Cancel


Search Setup
Setup
Home
Object Manager
bus
Company Settings
Business Hours
Didn't find what you're looking for?
Try using Global Search.
SETUP
Business Hours
Organization Business Hours
Help for this Page
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All
New Business Hours
Action
Business Hours Name
Active
Time Zone
Default
Edit
Default
(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Role Hierarchy Configuration:

- A role hierarchy was designed and implemented to control data visibility and reporting structure. The following roles were created to mirror the operational command chain:
    - **Operations Manager**
    - **Parking Lot Manager**
    - **Parking Attendant**



Outcome

The Salesforce organization is now correctly configured with the company's details and a user hierarchy that supports the business processes of the parking management system. This provides a secure and structured foundation for building the application.

(Place your screenshots of Company Information, Fiscal Year,