

Phase 2 – Org Setup & Configuration

Objective

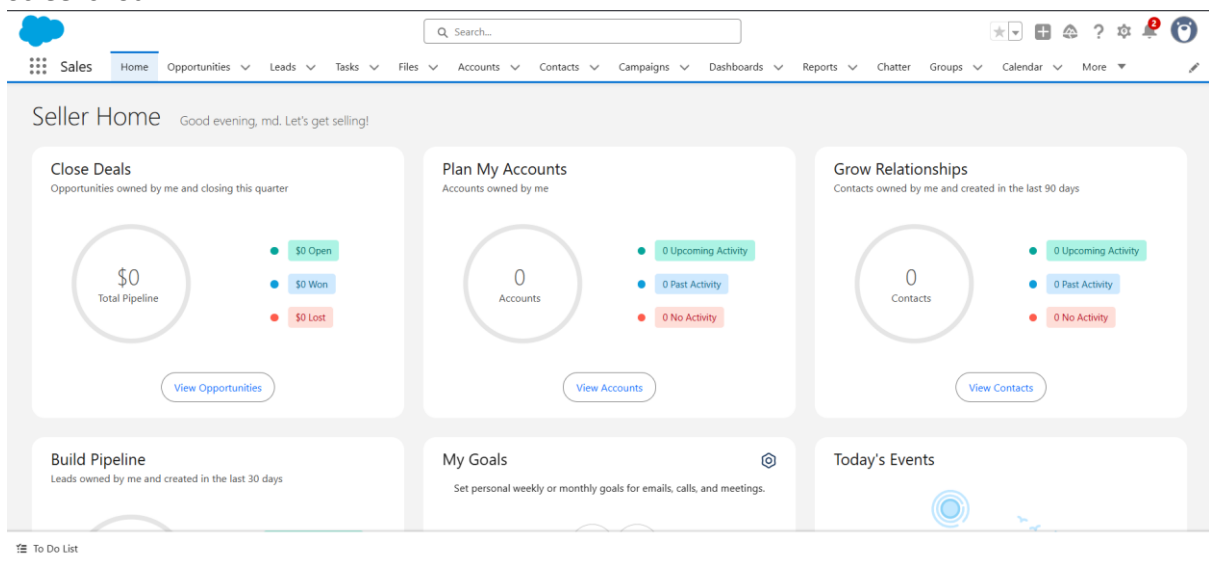
The purpose of this phase is to **set up the Salesforce organization**, create users, assign roles and profiles, and prepare the system for further customization. This ensures that the organization structure and user access are defined before creating objects and automation.

1. Salesforce Organization

Description:

A Salesforce Developer Org was used for the project to perform all configurations and customizations.

Screenshot:



2. Company Information

Steps:

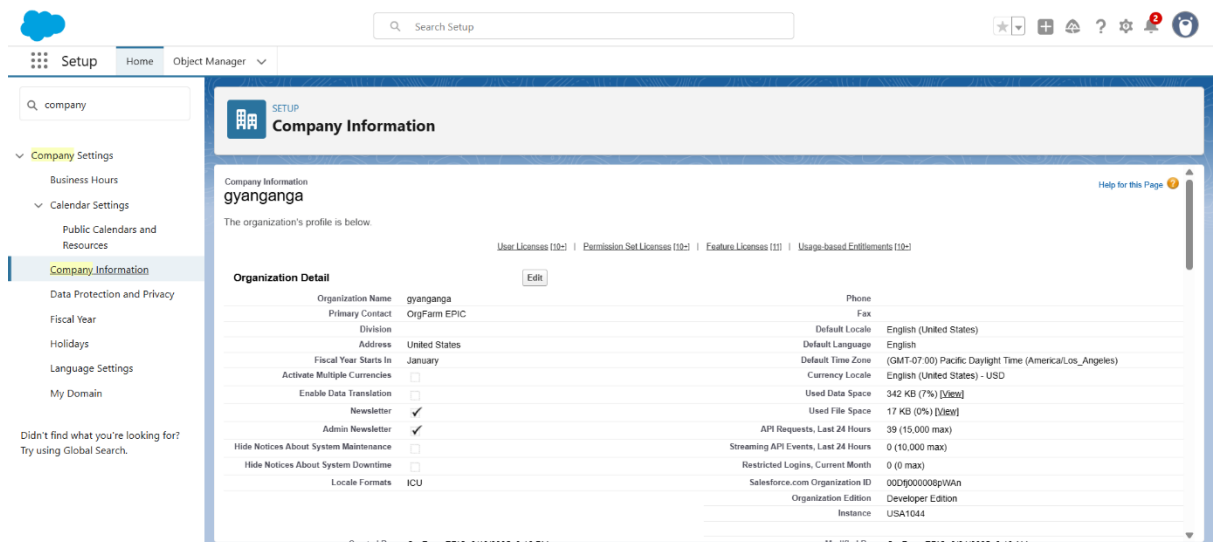
Navigated to **Setup → Company Information**

Filled in organization details as follows:

Description:

Configured company details to reflect a real-world organization.

Screenshot:



3. Users

Steps:

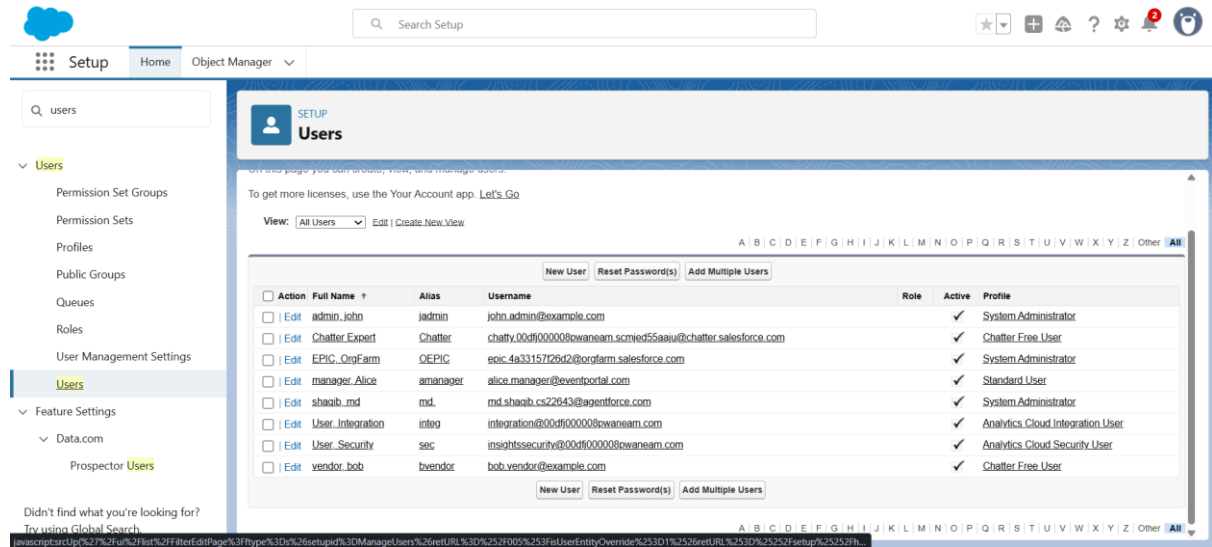
- Navigated to **Setup → Users → New User**
- Created three users for the project:

User	First Name	Last Name	Email	Username	Alias	Profile	Role
Admin	John	Admin	john.admin@example.com	john.admin@example.com	jadmin	System Administrator	Admin
Event Manager	Alice	Manager	alice.manager@example.com	alice.manager@example.com	amanager	Standard User	Event Manager
Vendor Manager	Bob	Vendor	bob.vendor@example.com	bob.vendor@example.com	bvendor	Standard User / Chatter Free	Vendor Manager

Description:

Users were created with appropriate profiles and roles to define access permissions and reporting hierarchy.

Screenshot:



4. Roles & Hierarchy

Steps:

- Navigated to **Setup → Users → Roles → Set Up Roles**
- Created the following role hierarchy:

CEO

└ Admin

└ Event Manager

└ Vendor Manager

Role Details:

Role	Reports To	Description
Admin	CEO	Admin user with full access
Event Manager	Admin	Manages events and tickets
Vendor Manager	Event Manager	Manages vendors and sponsorships

Description:

Roles were created to define the reporting hierarchy and record visibility.

Screenshot:

