

# Phase 2: Org Setup & Configuration Documentation

## Salesforce Edition

The project uses a Salesforce Developer Edition to implement and test all required configurations.

## Company Profile Setup

Company information including name, contact, locale, time zone, and currency has been configured in Salesforce.

SETUP

Company Information

Company Information

Insurance CRM Project

Help for this Page

The organization's profile is below.

User Licenses (10+)

Permission Set Licenses (10+)

Feature Licenses (11)

Usage-based Entitlements (10+)

Organization Detail

Edit

Organization Name	Insurance CRM Project	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (United States)
Address	United States	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	348 KB (7%) <a href="#">View</a>
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) <a href="#">View</a>
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	0 (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	00DgL00000BXaID
		Organization Edition	Developer Edition
		Instance	CAN98

## Business Hours & Holidays

Created business hours (Mon–Fri, 9 AM – 6 PM) and added holidays. Business hours and holidays are set up to reflect organizational work schedules and non-working days.

SETUP

Business Hours

Organization Business Hours

Help for this Page

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.

Holidays (0)

Business Hours Detail

Edit

Business Hours Name	Insurance CRM Project	Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Business Hours	<div><div>Sunday</div><div>Monday</div><div>Tuesday</div><div>Wednesday</div><div>Thursday</div><div>Friday</div><div>Saturday</div></div>	Default Business Hours	<input type="checkbox"/>
	<div><div>24 Hours</div><div>9:00 AM to 6:00 PM</div><div>9:00 AM to 6:00 PM</div><div>9:00 AM to 6:00 PM</div><div>9:00 AM to 6:00 PM</div><div>9:00 AM to 6:00 PM</div><div>24 Hours</div></div>		
Active	<input checked="" type="checkbox"/>		
Created By	Shilpa Shilpa 9/16/2025, 7:55 AM	Last Modified By	Shilpa Shilpa 9/16/2025, 7:55 AM

Edit

## Fiscal Year Settings

Configured Fiscal Year (Standard/Custom). Fiscal year settings are configured according to project requirements.

SETUP

Fiscal Year

Setup

Organization Fiscal Year Edit: Insurance CRM Project

Help for this Page

To specify the fiscal year type for your organization, choose one of the options below.

Standard Fiscal Year

Custom Fiscal Year

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.

Change Fiscal Year Period

NameInsurance CRM Project

Fiscal Year Start MonthJanuary

Fiscal Year is Based On

The ending month

The starting month

Save

Cancel

All Users

Edit

Create New View

A

B

C

D

E

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V

W

X

Y

Z

Other

All

New User

Reset Password(s)

Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00dgl00000bxaiduax.2pcj0e3kkeeu@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	EPIC_OrgFarm	OEPIIC	epic.963911e80a08@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/> Edit	Rai, Meha	mrail	meharai12@gmail.com	Claims Officer	✓	Salesforce API Only System Integrations
<input type="checkbox"/> Edit	Sharma, Kiran	kshar	kiranmanager@gmail.com	Manager	✓	Standard User
<input type="checkbox"/> Edit	Sharma, Kiran	kshar	kiransharma12@gmail.com	Agent	✓	Standard User
<input type="checkbox"/> Edit	Shilpa, Shilpa	shi	shilpalagumbe717@agentforce.com		✓	System Administrator
<input type="checkbox"/> Edit	User Integration	integ	integration@00dgl00000bxaiduax.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00dgl00000bxaiduax.com		✓	Analytics Cloud Security User

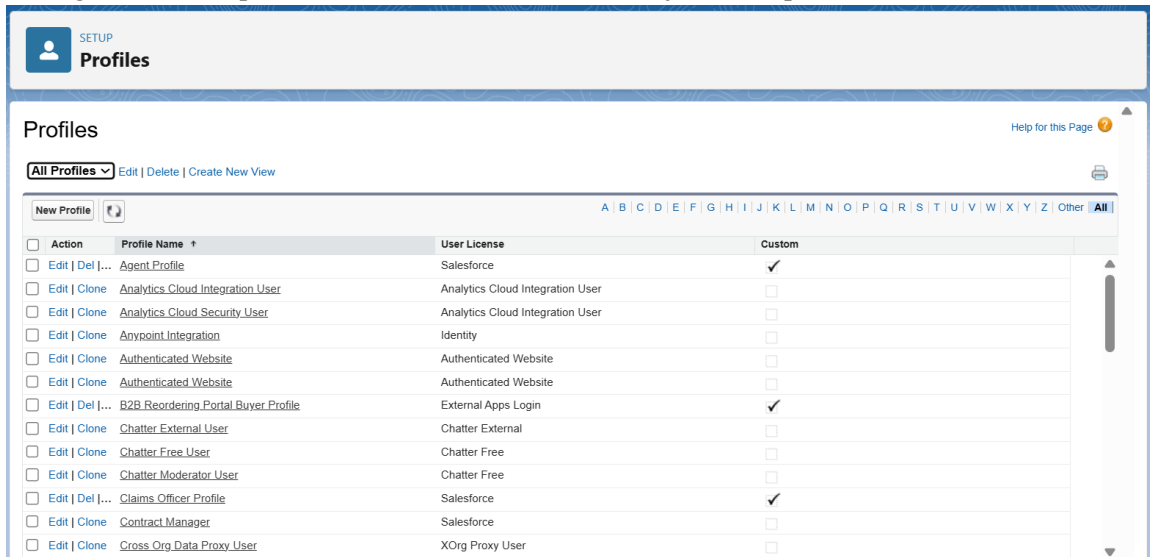
New User

Reset Password(s)

Add Multiple Users

## Profiles

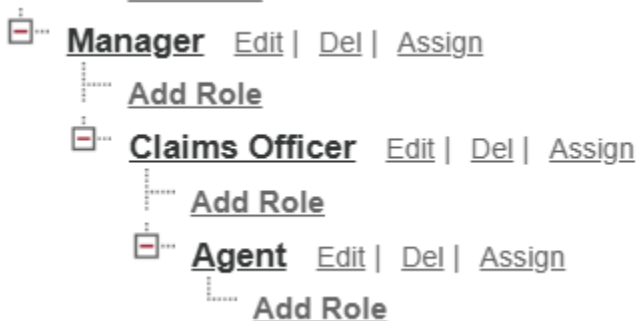
Configured/Cloned profiles for each user role and set object-level permissions.



Action	Profile Name	User License	Custom
<a href="#">Edit</a>   <a href="#">Del</a>   ...	Agent Profile	Salesforce	✓
<a href="#">Edit</a>   <a href="#">Clone</a>	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Anypoint Integration	Identity	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   ...	B2B Reordering Portal Buyer Profile	External Apps Login	✓
<a href="#">Edit</a>   <a href="#">Clone</a>	Chatter External User	Chatter External	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Chatter Free User	Chatter Free	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   ...	Claims Officer Profile	Salesforce	✓
<a href="#">Edit</a>   <a href="#">Clone</a>	Contract Manager	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>

## Roles

Created a Role Hierarchy (Manager > Claims Officer > Agent). Role hierarchy was created to define data visibility and reporting structure in Salesforce.



## Permission Sets

Created permission sets for additional access.

- **Purpose:** Provide additional permissions without changing profiles.
- **Assignments:** Users assigned permission sets for Reports/Dashboards access.

## Organization-Wide Defaults (OWD)

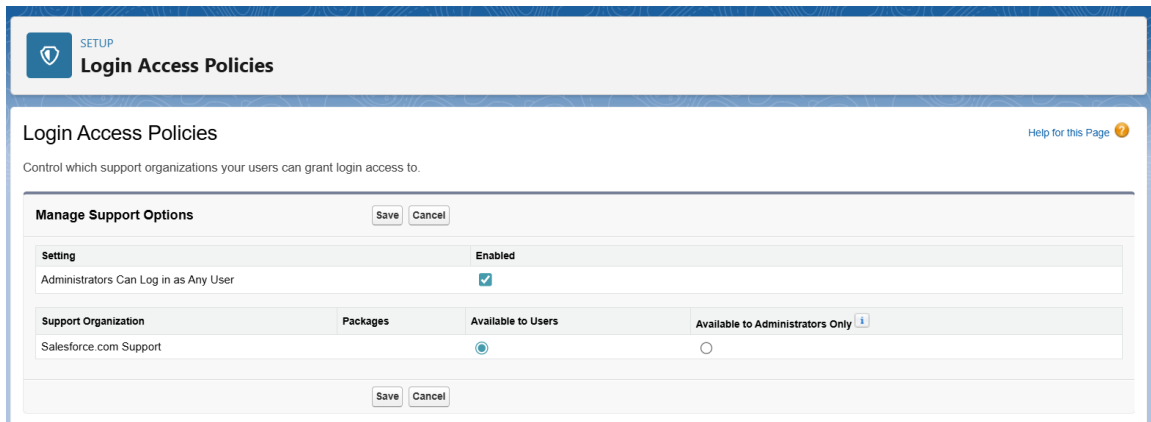
Set OWD for Policy = Private, Claim = Controlled by Parent. OWD settings were configured to control access at the object level.

## Sharing Rules

Created sharing rules to share policies/claims with relevant groups or roles.

## Login Access Policies

Enabled 'Administrators Can Log in as Any User.' Add screenshot of Setup → Login Access Policies page.



The screenshot shows the 'Login Access Policies' page in the Salesforce Setup interface. The page title is 'Login Access Policies' with a 'Help for this Page' link. Below the title is a subtitle: 'Control which support organizations your users can grant login access to.' The main section is titled 'Manage Support Options' and contains two tables. The first table, 'Setting', has two columns: 'Setting' and 'Enabled'. The second table, 'Support Organization', has four columns: 'Support Organization', 'Packages', 'Available to Users', and 'Available to Administrators Only'. The 'Available to Users' column has a radio button selected for 'Salesforce.com Support'. The 'Available to Administrators Only' column has a radio button selected for 'Salesforce.com Support'.

Setting	Enabled
Administrators Can Log in as Any User	<input checked="" type="checkbox"/>

Support Organization	Packages	Available to Users	Available to Administrators Only
Salesforce.com Support		<input checked="" type="radio"/>	<input type="radio"/>

## Dev Org Setup

Project implemented in a Developer Org to allow full configuration and testing capabilities.