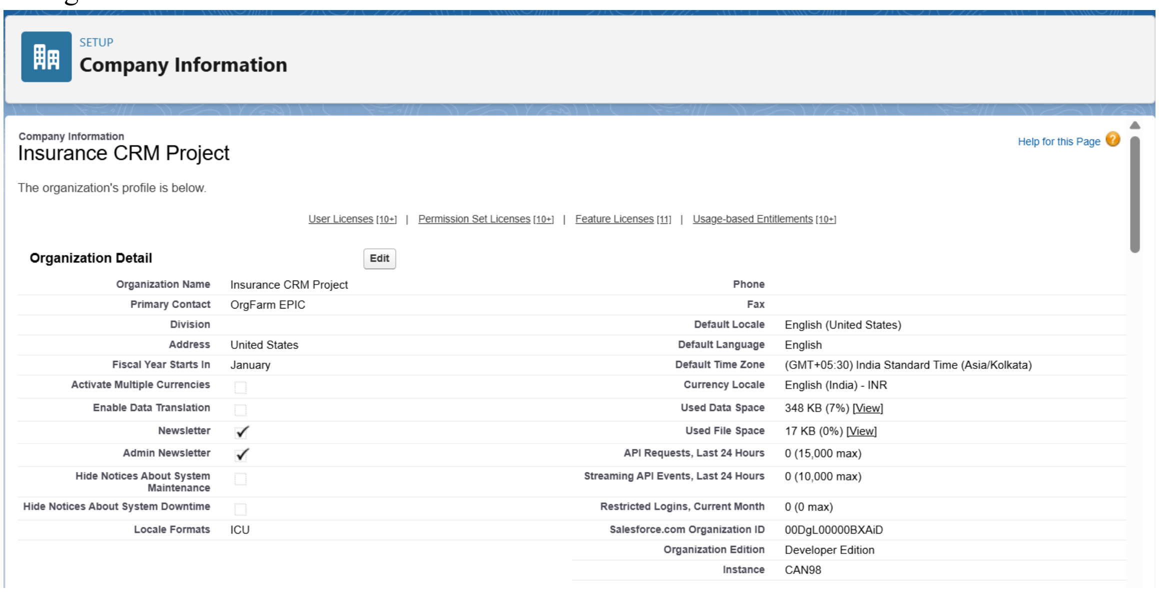
Phase 2: Org Setup & Configuration Documentation

Salesforce Edition

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

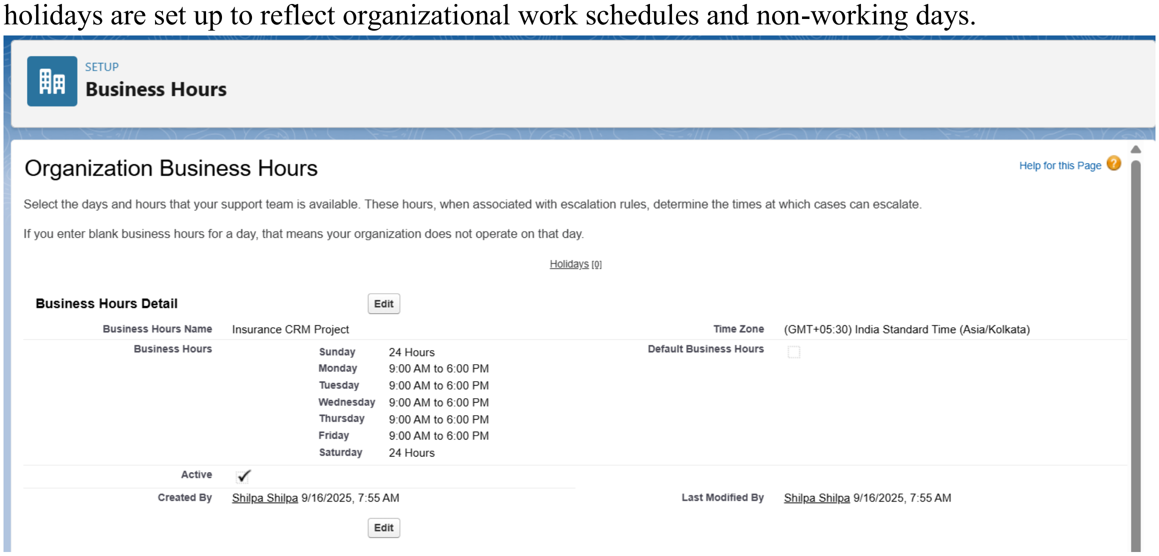
Company Profile Setup

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



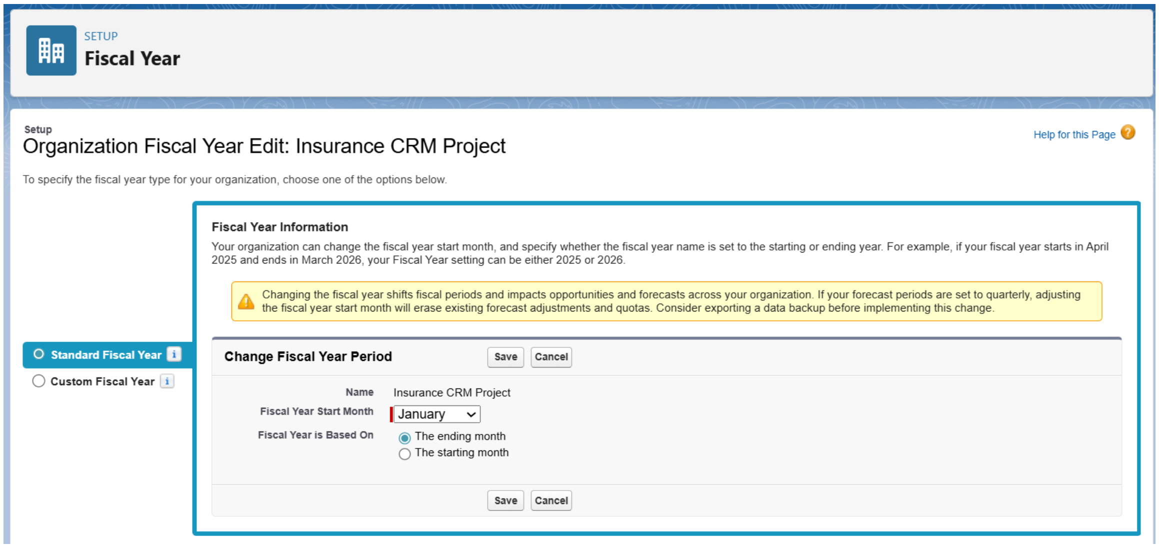
Business Hours & Holidays

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.



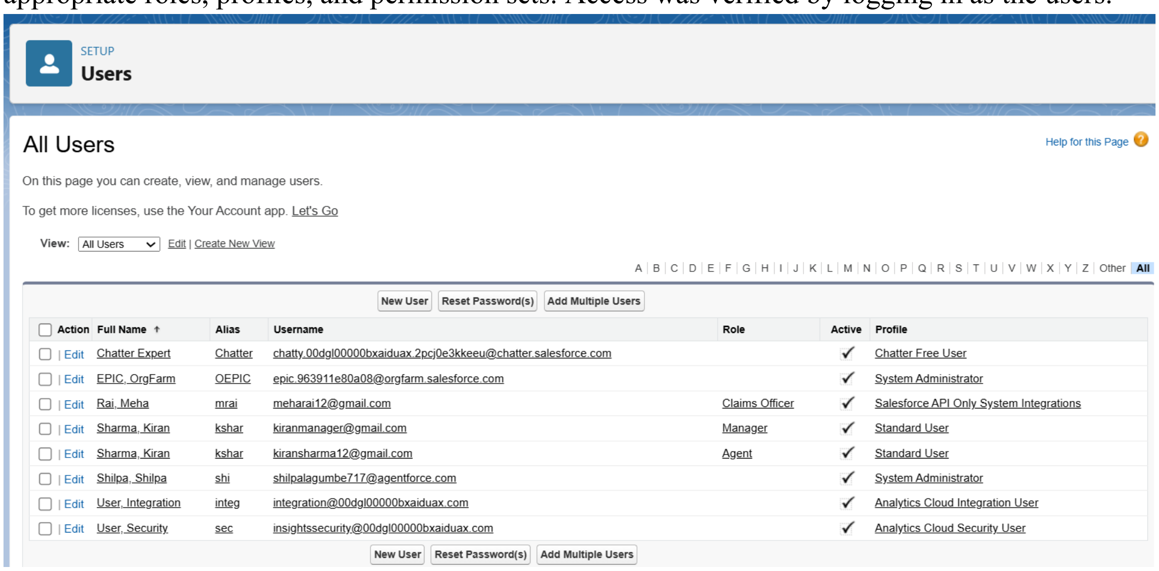
Fiscal Year Settings

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



User Setup & Licenses

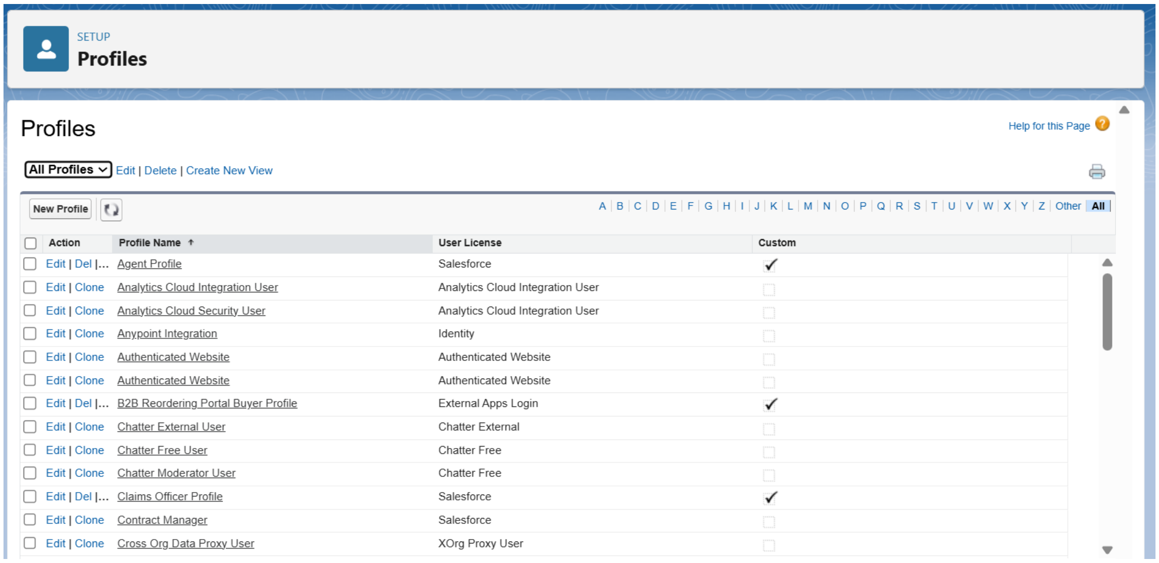
Created users for Agent, Claims Officer, Manager roles. Three users were created with appropriate roles, profiles, and permission sets. Access was verified by logging in as the users.



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

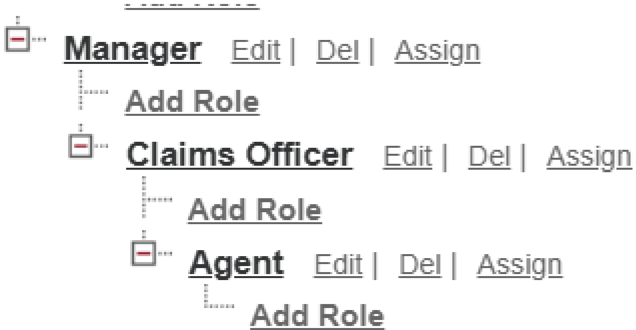
Profiles

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



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)

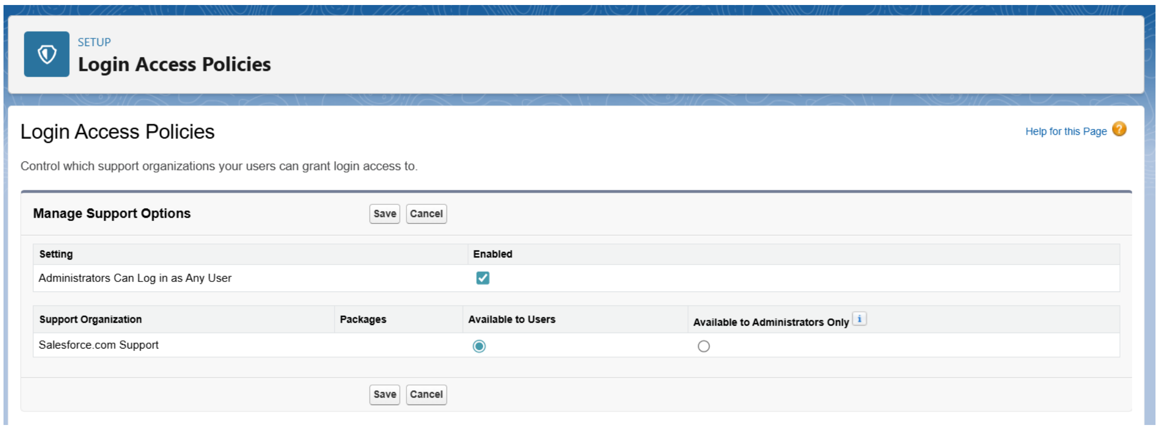
Set OWD for Policy = Private, Claim = Controlled by Parent. OWD settings were configured to control access at the object level.

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.



Dev Org Setup

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