

# Phase II: Org Setup and Configuration

## AURA EVENTS & SPONSOR: College Events & Sponsor Management

### Company Profile Setup

- **Explanation:** Configured the basic information for the organization to ensure that all system-generated data, such as addresses, currency, and time, is accurate.
- **Salesforce Path:** Setup → Quick Find → Company Information
- **Procedure:** Updated the organization details to reflect the cell's information of the college.
- **Final Configuration:**
  - **Organization Name:** AURA: Events and Sponsor
  - **Time Zone:** (GMT+05:30 Kolkata) India Standard Time
  - **Locale:** English (India)

The screenshot displays the Salesforce Setup interface for 'Company Information'. The left sidebar shows the 'Setup' menu with 'Company Information' selected. The main content area is titled 'Company Information' and contains two sections: 'Organization Edit' and 'Locale Settings'.

**Organization Edit**

**General Information**

- Organization Name: Aura: Events and Sponsor
- Primary Contact: OrgFarm EPIC
- Division:
- Phone: (912) 345-6789
- Fax:

**Address**

- Country: India
- Street: 12, Marine street
- City: India
- State/Province: Maharashtra
- Zip/Postal Code:

**Locale Settings**

- Default Locale: English (India)
- Default Language: English
- Default Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)

**Currency Settings**

- Currency Locale: English (United States) - USD

**Translation Settings**

- Enable Data Translation:

**Salesforce Newsletter Settings**

A warning message is displayed: "Turning on multiple currencies introduces permanent changes in your org. This feature can't be turned off. Review the Implications of Enabling Multiple Currencies before enabling." Below this, there are checkboxes for 'Activate Multiple Currencies' and 'Enable Data Translation', both of which are currently unchecked.

# Business Hours & Holidays

- **Explanation:** Defined the standard working hours and holidays to ensure that future automation and task reminders only occur during operational periods, preventing notifications on non-working days.
- **Salesforce Path:** Setup → Quick Find → Business Hours and Holidays
- **Procedure:**
  1. Created a new Business Hours record (College Event Weeks) with a continuous Monday-Friday schedule.
  2. Created separate Holiday records for each day of the semester break and other major holidays.
  3. Linked the Holiday records to the College Event Weeks Business Hours record.
- **Final Configuration:**
  - **Business Hours:** Mon-Fri, 10:00 AM - 5:00 PM
  - **Holidays:** Specific dates were added for festivals and semester breaks.

Setup

Home

Object Manager

business

Company Settings

Business Hours

Didn't find what you're looking for?

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SETUP

Business Hours

Step 1. Business Hours Name

Business Hours Name College Event Weeks

Active ☒

Use these business hours as the default ☐

Step 2. Time Zone

Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata)

Step 3. Business Hours

Sunday	HH:MM	to	HH:MM	<input type="checkbox"/> 24 hours
Monday	10:00 AM	to	5:00 PM	<input type="checkbox"/> 24 hours
Tuesday	10:00 AM	to	5:00 PM	<input type="checkbox"/> 24 hours
Wednesday	10:00 AM	to	5:00 PM	<input type="checkbox"/> 24 hours
Thursday	10:00 AM	to	5:00 PM	<input type="checkbox"/> 24 hours
Friday	10:00 AM	to	5:00 PM	<input type="checkbox"/> 24 hours
Saturday	HH:MM	to	HH:MM	<input type="checkbox"/> 24 hours

Home

Object Manager

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SETUP

Holidays

Holiday Detail

Save

Cancel

Holiday Name Republic Day

Description College closed for the festival

Date 1/26/2026

Time from to ☒ All Day

Recurring Holiday ☒

Frequency ☐ Daily ☒ On every January 26 ☐ On the 1st day of January ☐ Monthly ☒ Yearly

Recurrence Start 1/26/2026

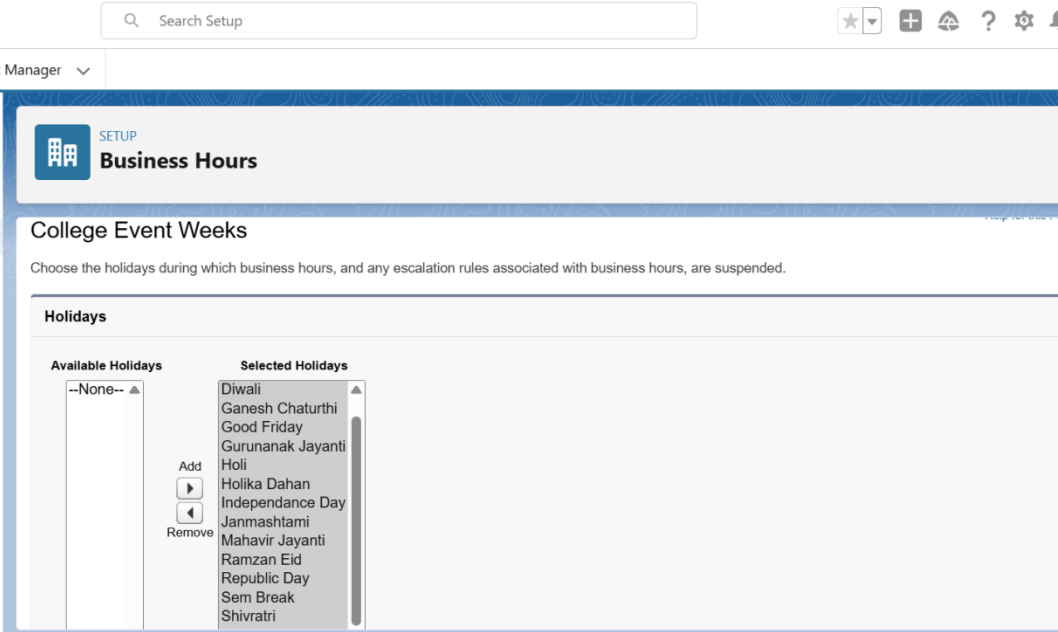
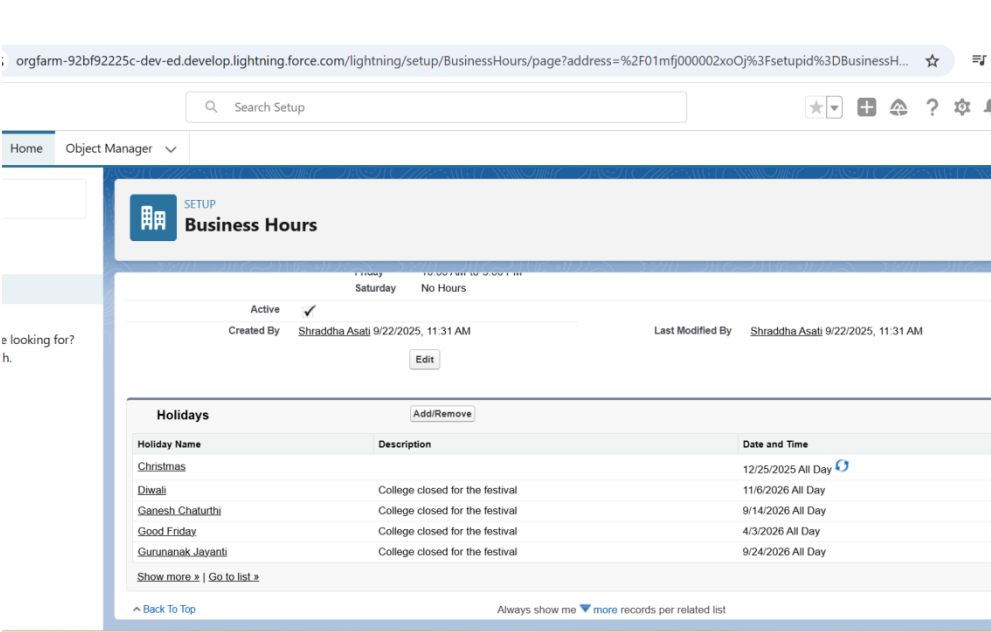
Recurrence End ☒ No End Date

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SETUP

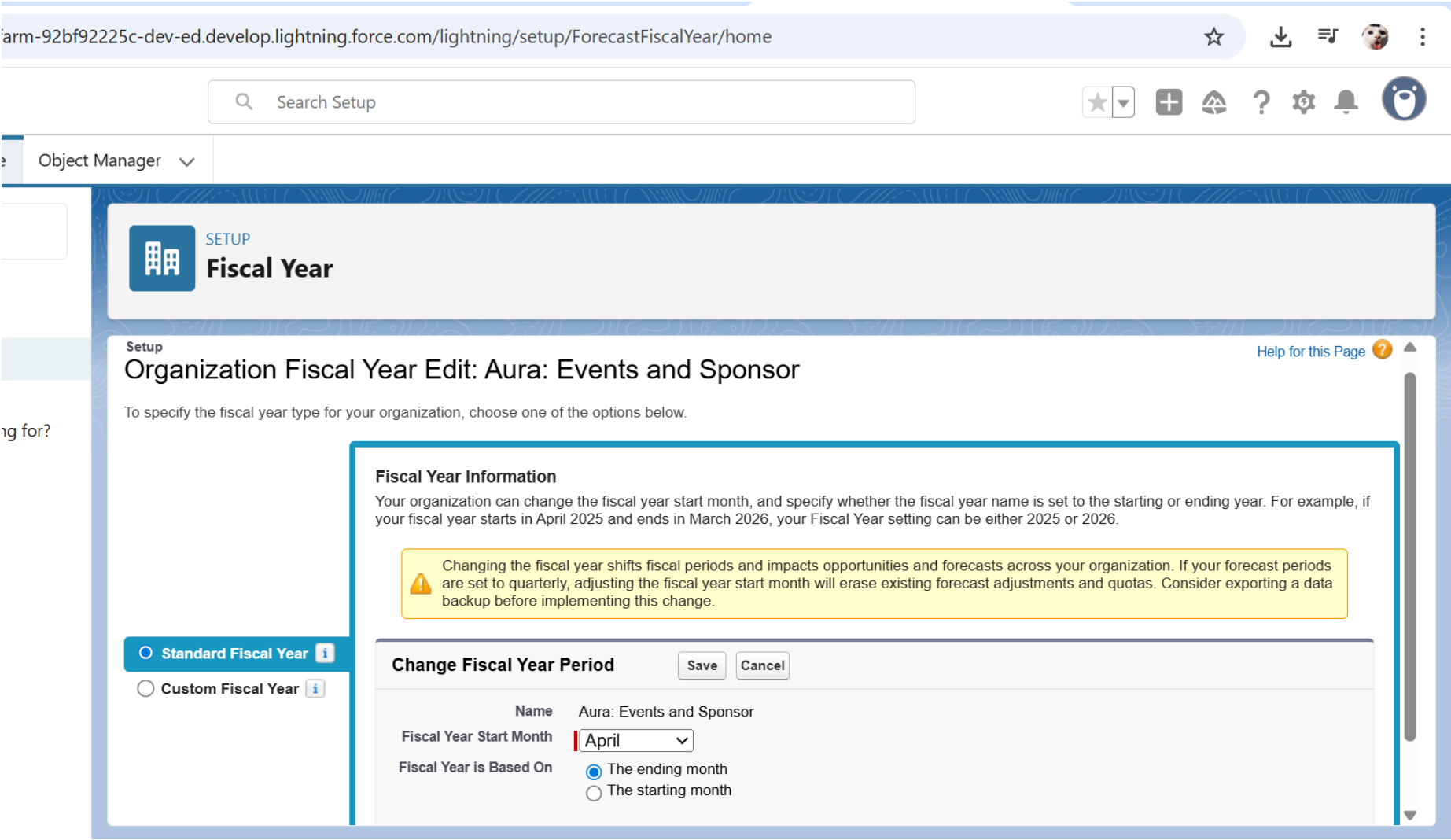
Holidays

Action	Holiday Name	Description	Date and Time
<a href="#">Edit</a>   <a href="#">Del</a>	Christmas		12/25/2025 All Day
<a href="#">Edit</a>   <a href="#">Del</a>	Diwali	College closed for the festival	11/6/2026 All Day
<a href="#">Edit</a>   <a href="#">Del</a>	Ganesh Chaturthi	College closed for the festival	9/14/2026 All Day
<a href="#">Edit</a>   <a href="#">Del</a>	Good Friday	College closed for the festival	4/3/2026 All Day
<a href="#">Edit</a>   <a href="#">Del</a>	Holi	College closed for the festival	3/4/2026 All Day
<a href="#">Edit</a>   <a href="#">Del</a>	Holika Dahan	College closed for the festival	3/3/2026 All Day
<a href="#">Edit</a>   <a href="#">Del</a>	Independance Day	College closed for the occasion	8/15/2026 All Day
<a href="#">Edit</a>   <a href="#">Del</a>	Janmashtami	College closed for the festival	9/4/2026 All Day
<a href="#">Edit</a>   <a href="#">Del</a>	Mahavir Jayanti	College closed for the festival	3/31/2026 All Day
<a href="#">Edit</a>   <a href="#">Del</a>	Ramzan Eid	College closed for the festival	3/21/2026 All Day
<a href="#">Edit</a>   <a href="#">Del</a>	Republic Day	College closed for the festival	1/26/2026 All Day
<a href="#">Edit</a>   <a href="#">Del</a>	Sem Break		7/1/2026 All Day
<a href="#">Edit</a>   <a href="#">Del</a>	Shivratri	College closed for the festival	2/15/2026 All Day
<a href="#">Edit</a>   <a href="#">Del</a>	Winter break		12/12/2026 All Day



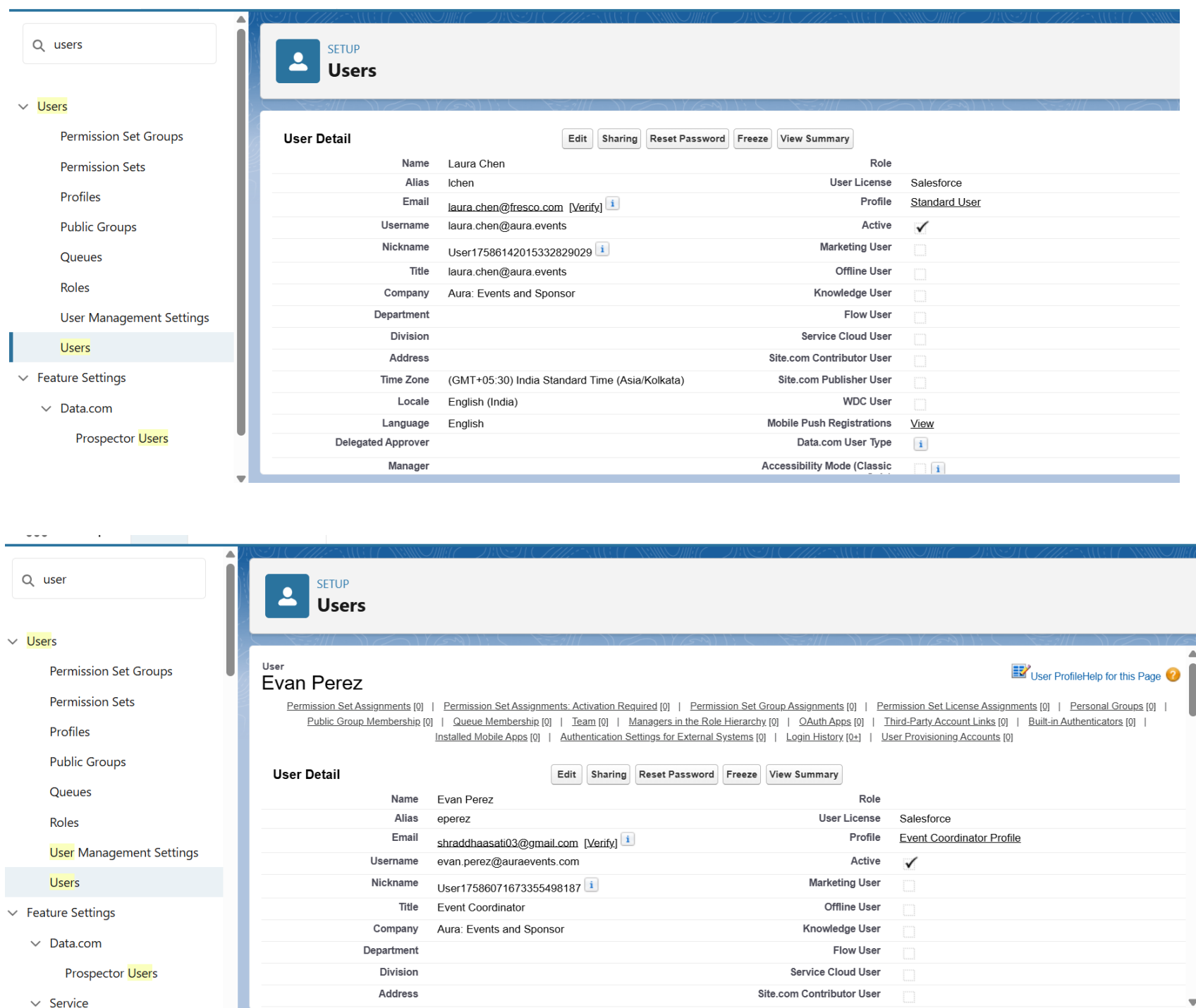
## Fiscal Year Settings

- **Explanation:** Aligned the Salesforce financial reporting period with the college's fiscal calendar, which is essential for accurate budget and ROI calculations.
- **Salesforce Path:** Setup → Quick Find → Fiscal Year
- **Procedure:** Set the standard fiscal year to start on a month that corresponds with the college's financial year.
- **Final Configuration:** Fiscal year set to the appropriate start month (April) for accurate



# User Setup & Licenses

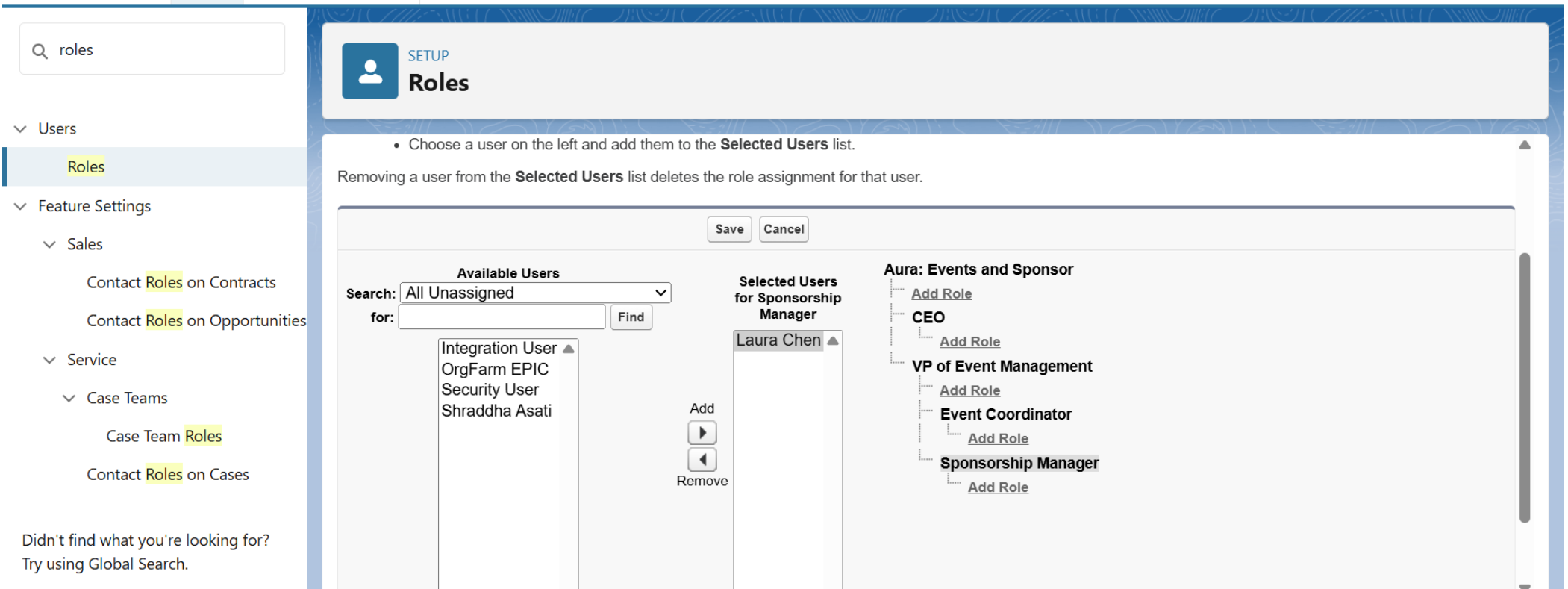
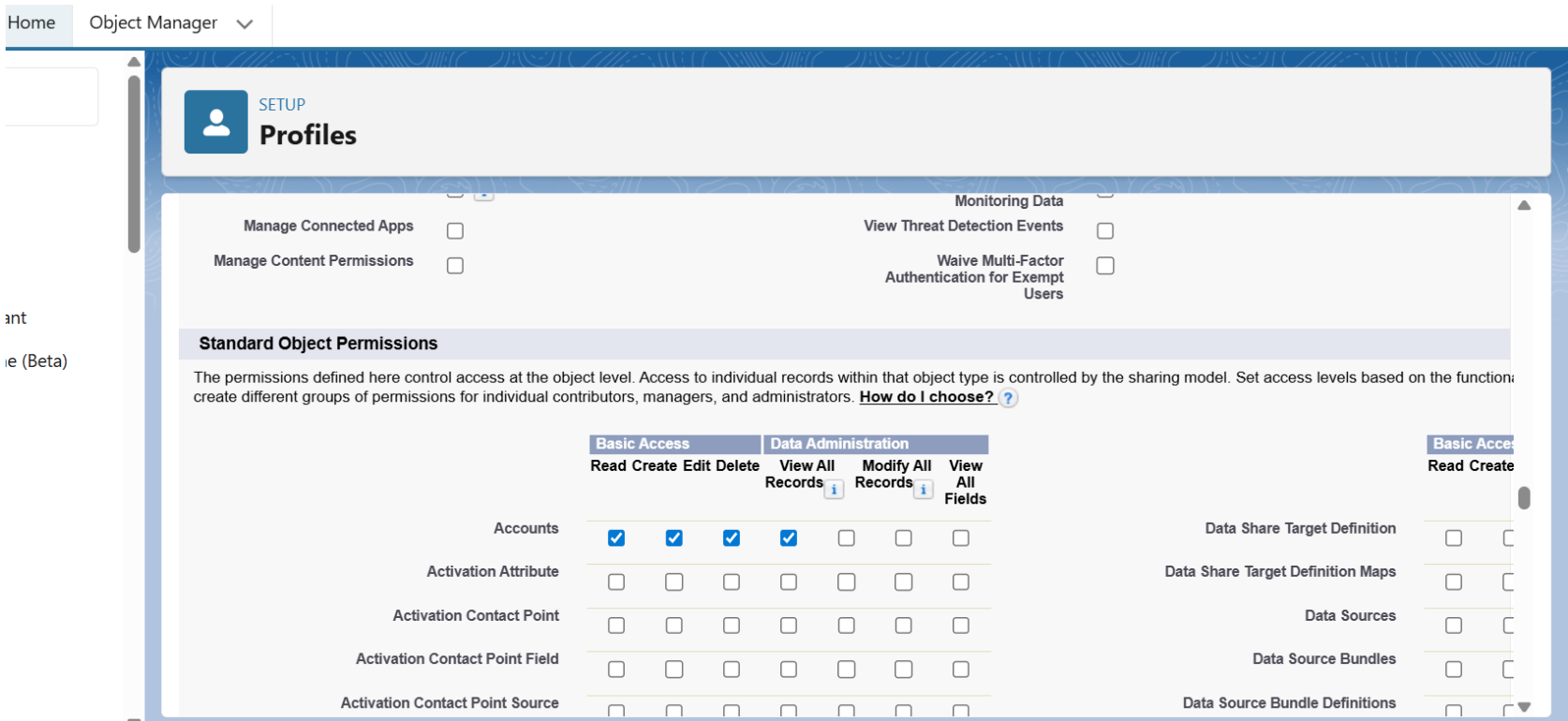
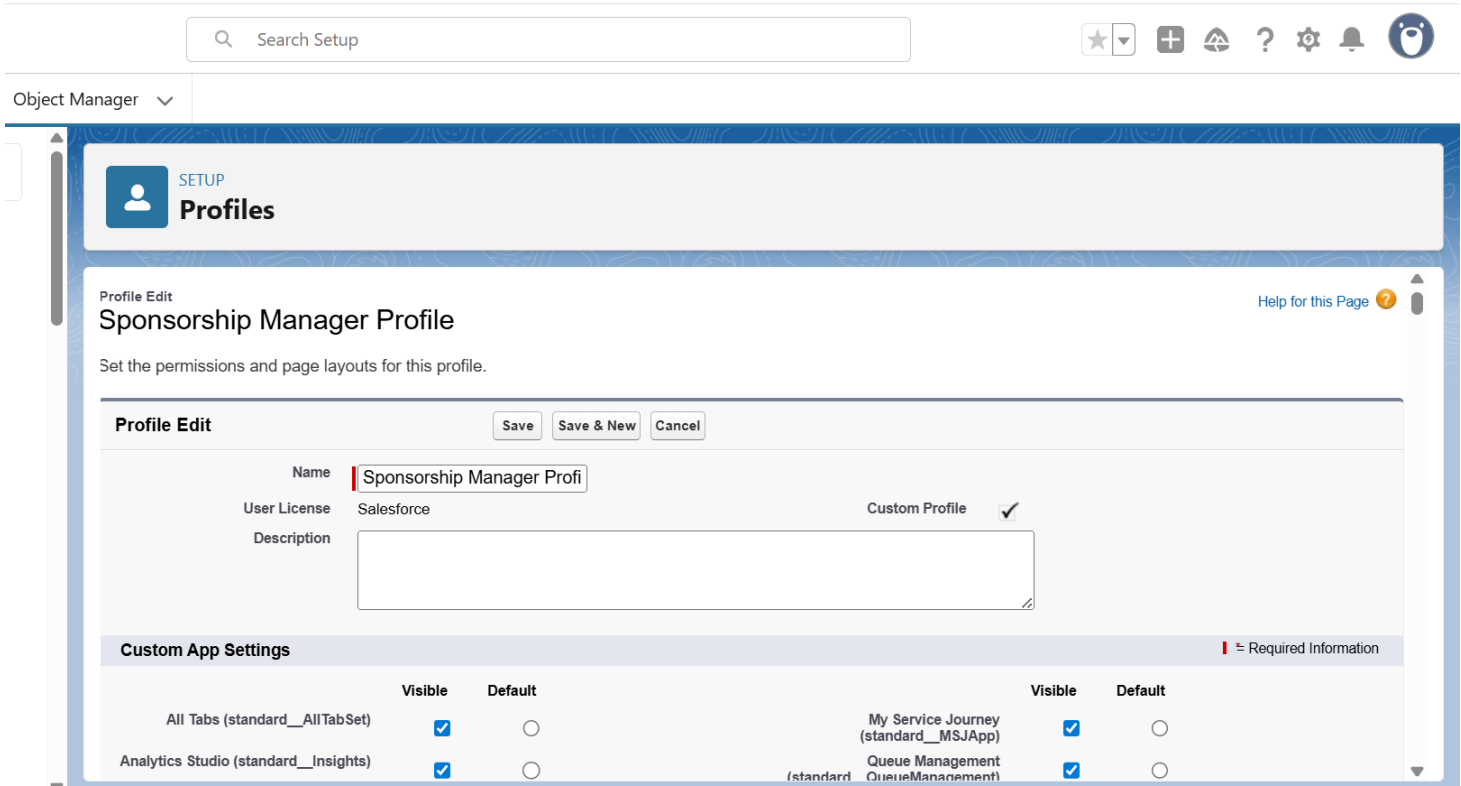
- **Explanation:** Created user accounts for the key project team members to provide them with login access to the Salesforce org.
- **Salesforce Path:** Setup → Quick Find → Users
- **Procedure:** Created two new users with limited Salesforce licenses to represent the core operational roles.
- **Final Configuration:**
  - **User 1:** Laura Chen(Sponsorship Manager)
  - **User 2:** Evan Perez(Event Coordinator)



# Profiles & Roles

- **Explanation:** Defined user permissions and data visibility. Profiles control what a user can do, and Roles control what records they can see based on a hierarchy.
- **Salesforce Path:** Setup → Quick Find → Profiles and Roles
- **Procedure:**
  1. **Profiles:** Cloned the Standard User profile to create custom profiles (Sponsorship Manager Profile and Event Coordinator Profile). These will be configured later to grant specific object and field permissions.
  2. **Roles:** Created a simple hierarchy (VP of Event Management at the top, with Sponsorship Manager and Event Coordinator reporting to it).
  3. **Assignment:** Assigned the new profiles and roles to their respective users.

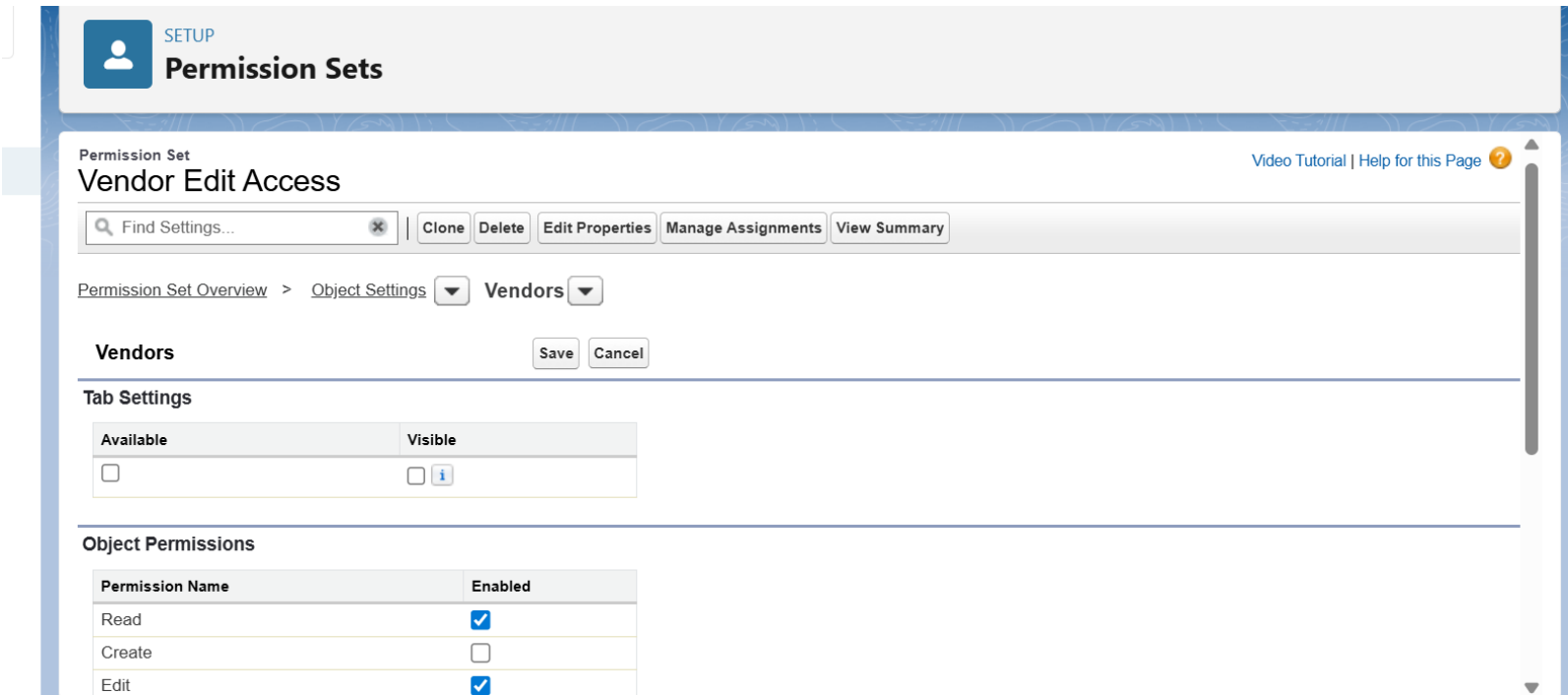
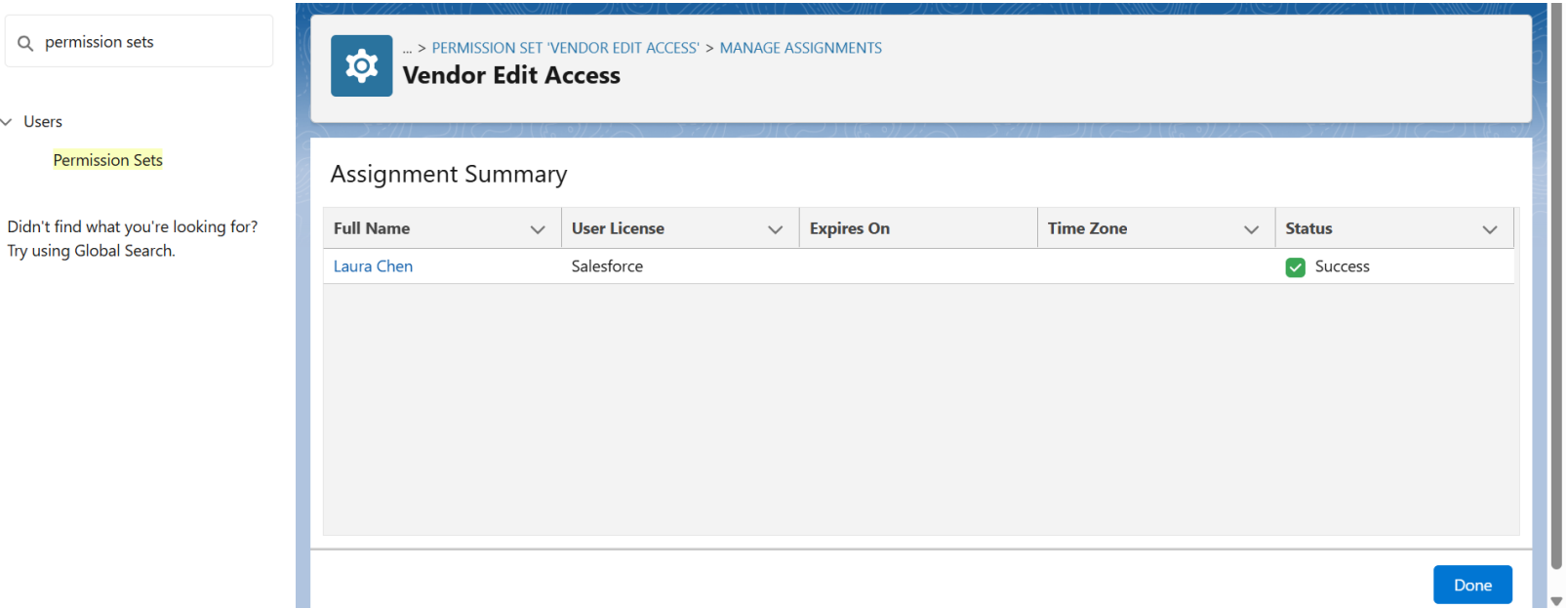
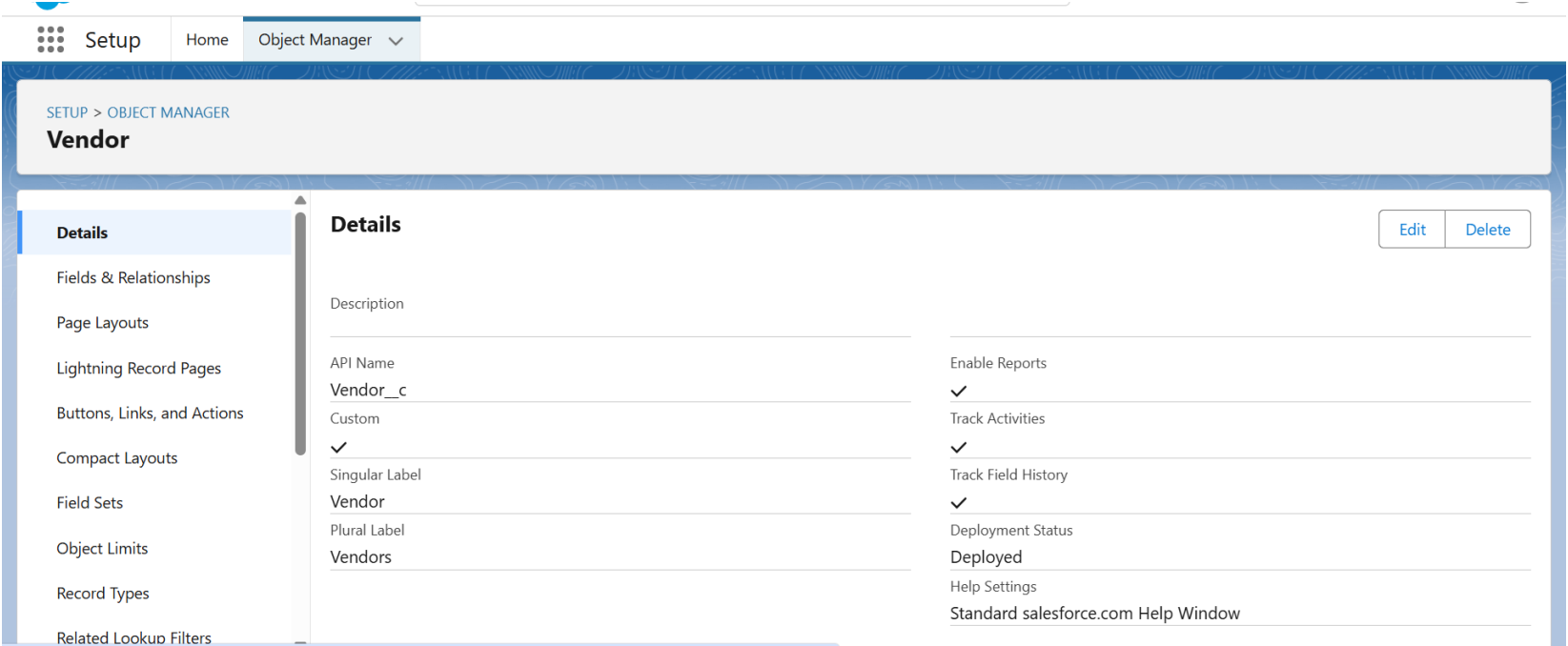
- **Final Configuration:**
  - **Profiles:** Sponsorship Manager Profile, Event Coordinator Profile
  - **Roles:** VP of Event Management, Sponsorship Manager, Event Coordinator





# Permission Sets

- **Explanation:** Created a permission set to grant granular, specific permissions to users without altering their core profile. This is a best practice for flexible and secure access control.
- **Salesforce Path:** Setup → Quick Find → Permission Sets
- **Procedure:**
  1. Created a permission set named Vendor Edit Access.
  2. Configured the permission set to grant Edit access to the Vendor object.
  3. Assigned the permission set to the Sponsorship Manager user.
- **Final Configuration:** The Sponsorship Manager user now has all permissions from their profile, plus the ability to edit vendor records.



# Organization-Wide Defaults (OWD) & Sharing Rules

- **Explanation:** Set the baseline security for the org by making all custom objects private. Sharing rules were then created as exceptions to this private setting to facilitate collaboration.
- **Salesforce Path:** Setup → Quick Find → Sharing Settings
- **Procedure:**
  - **OWD:** Set the default access for the Event, Sponsor, and Vendor custom objects to **Private**.
  - **Sharing Rules:** Created two sharing rules after the OWD update was complete:
    - **Event Coordinator Collaboration:** Shares all Event records owned by Event Coordinators with other Event Coordinators, granting Read/Write access.
    - **VP of Event Management Visibility:** Shares all Sponsor records with the VP of Event Management role, granting Read Only access.

**Final Configuration:** Data is private by default, with access opened up only for specific roles and for specific purposes.

Setup

Home

Object Manager

Q sharing

Security

Guest User Sharing Rule Access Report

Sharing Settings

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Try using Global Search.

SETUP

Sharing Settings

Web Cart Document	Private	Private	<input checked="" type="checkbox"/>
Work Order	Private	Private	<input checked="" type="checkbox"/>
Work Plan	Private	Private	<input checked="" type="checkbox"/>
Work Plan Template	Private	Private	<input checked="" type="checkbox"/>
Work Step Template	Private	Private	<input checked="" type="checkbox"/>
Work Type	Private	Private	<input checked="" type="checkbox"/>
Work Type Group	Public Read/Write	Private	<input checked="" type="checkbox"/>
Event	Private	Private	<input checked="" type="checkbox"/>
Sponsor	Private	Private	<input checked="" type="checkbox"/>
Vendor	Private	Private	<input checked="" type="checkbox"/>

Other Settings

Standard Report Visibility☒

Manual User Record Sharing☐

Manager Groups☐

Secure guest user record access☒

Require permission to view record names in lookup fields☐

Search Setup

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SETUP

Sharing Settings

Step 1: Rule Name

Label

VP of Event Management S

Rule Name

VP\_of\_Event\_Management

Description

This rule ensures that the top-level user (VP of Event Management) can see all sponsor records, regardless of who owns them, which is

Step 2: Select your rule type

Rule Type

☒ Based on record owner ☐ Based on criteria

Step 3: Select which records to be shared

Sponsor: owned by members of

Roles

Sponsorship Manager

Step 4: Select the users to share with

Share with

Roles

VP of Event Management

Step 5: Select the level of access for the users

## Dev Org Setup & Deployment Basics

- **Explanation:** This served as a conceptual checkpoint. It confirmed that the Developer Org is the single environment for building and testing, and that no additional configuration for login policies or deployment is required at this phase.
- **Procedure:** No action was needed as all necessary configurations were already performed in the previous steps.