

Phase 2: Org Setup & Configuration

1. Salesforce Edition

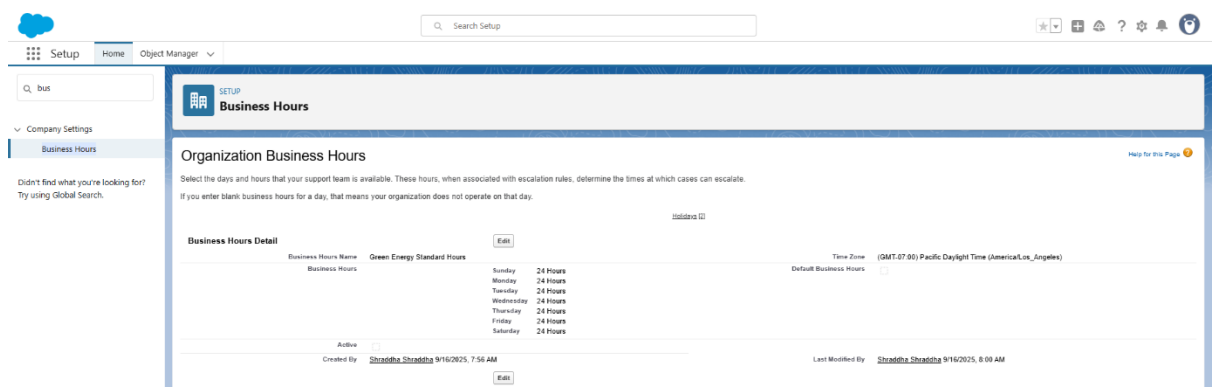
- Using Developer Edition
- Supports **Custom Objects** like Subscription__c and CarbonFootprint__c, Apex, Flows, and LWC.

2. Company Profile Setup

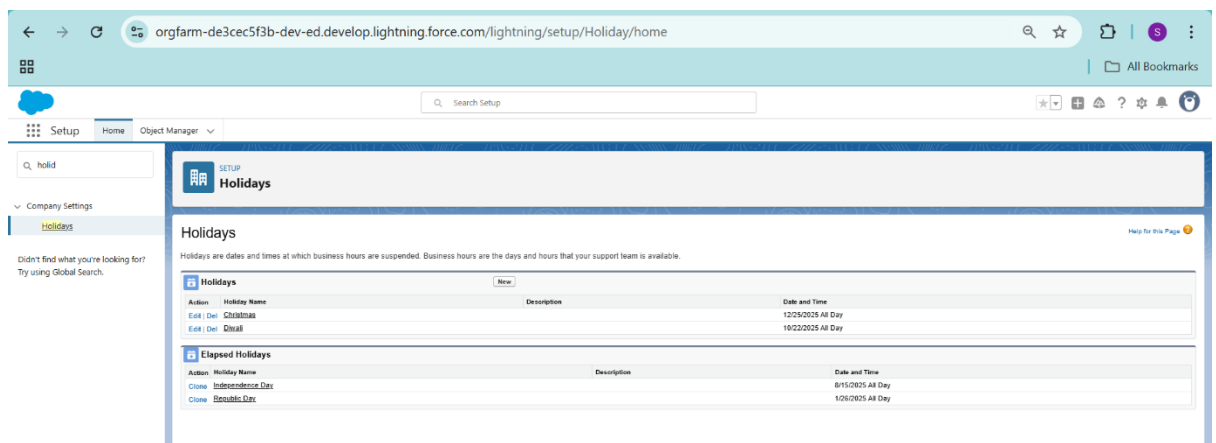
- Navigated to Setup → Company Information.
- Verified and updated the Company Name, Default Locale, Language, Currency, and Time Zone.

3. Business Hours & Holidays

- Created Default Business Hours for 24 hours, Monday to Friday.



- Added National Holidays to exclude SLA timelines during holidays.



4. Fiscal Year Settings

- Confirmed Standard Fiscal Year (Jan–Dec).

5. User Setup & Licenses

- Created additional test users with Salesforce Platform License.
- Assigned appropriate Profiles (System Admin, Standard User).

The screenshot shows the Salesforce Setup page for Users. The left sidebar contains navigation links for Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings. The main content area is titled 'All Users' and includes a table of users with columns for Action, Full Name, Alias, Username, Role, and Profile. The table lists several users, including 'System Administrator', 'Chatter Free User', 'Developer', 'TCS Profile', 'Standard Platform User', 'Analytics Cloud Integration User', and 'Analytics Cloud Security User'.

Action	Full Name	Alias	Username	Role	Profile
<input type="checkbox"/> Edit Login	Admin	Admin	admin@test.com		System Administrator
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter.800ak0000074c5uao.azcm7@stake.salesforce.com		Chatter Free User
<input type="checkbox"/> Edit Login	EPIC_OrgFarm	OEPMC	epic.0193a0d2b056@orgfarm.salesforce.com		System Administrator
<input type="checkbox"/> Edit Login	Admin	Admin	admin@test.com	Developer	TCS Profile
<input type="checkbox"/> Edit	Shradha Shradha	shr	shradha@stake0228437@apexforce.com		System Administrator
<input type="checkbox"/> Edit Login	Sustainability Manager	sust	sustainability@stake.com		Standard Platform User
<input type="checkbox"/> Edit	User Integration	intre	integration@00ak0000074c5uao.com		Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	security@00ak0000074c5uao.com		Analytics Cloud Security User

6. Profiles

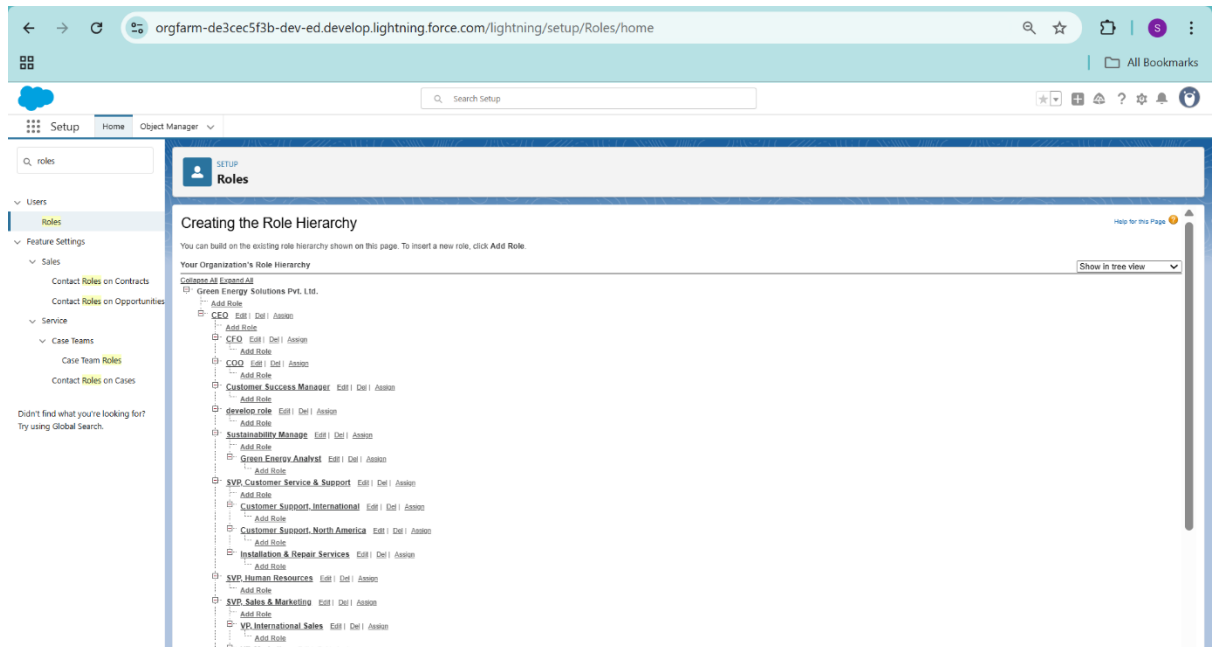
- System Admin – Full access.
- Energy Manager Profile** – Read/Write on Subscription__c & CarbonFootprint__c.
- Citizen Profile** – Read-only on Subscription, Read/Write on their own Carbon Footprint.

The screenshot shows the Salesforce Setup page for Profiles. The left sidebar contains navigation links for Profiles, Users, and other setup options. The main content area is titled 'Profiles' and includes a table of profiles with columns for Action, Profile Name, and User License. The table lists several profiles, including 'Salesforce API Only System Integrations', 'Silver Partner User', 'Solution Manager', 'Standard Platform User', 'Standard User', and 'System Administrator'.

Action	Profile Name	User License
<input type="checkbox"/> Edit Del New	Salesforce API Only System Integrations	Salesforce Integration
<input type="checkbox"/> Edit Clone	Silver Partner User	Silver Partner
<input type="checkbox"/> Edit Clone	Solution Manager	Salesforce
<input type="checkbox"/> Edit Clone	Standard Platform User	Salesforce Platform
<input type="checkbox"/> Edit Clone	Standard User	Salesforce
<input type="checkbox"/> Edit Clone	System Administrator	Salesforce

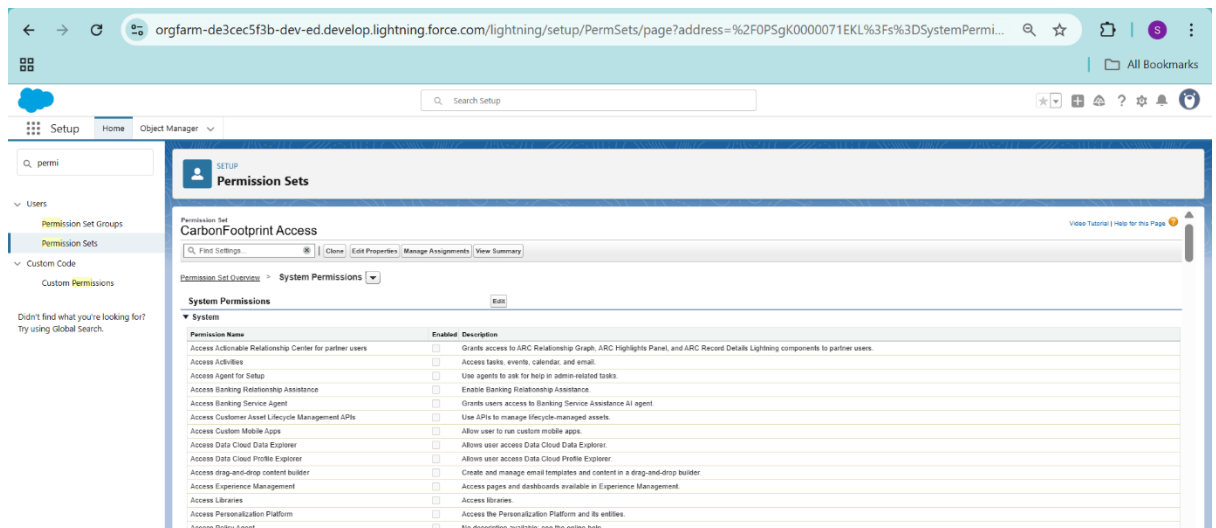
7.Roles

- Defined a Role Hierarchy:
- CEO → Sustainability Manager → Green Energy Analyst



8. Permission Sets

- Created CarbonFootprint Permission Set



9. OWD (Org-Wide Defaults)

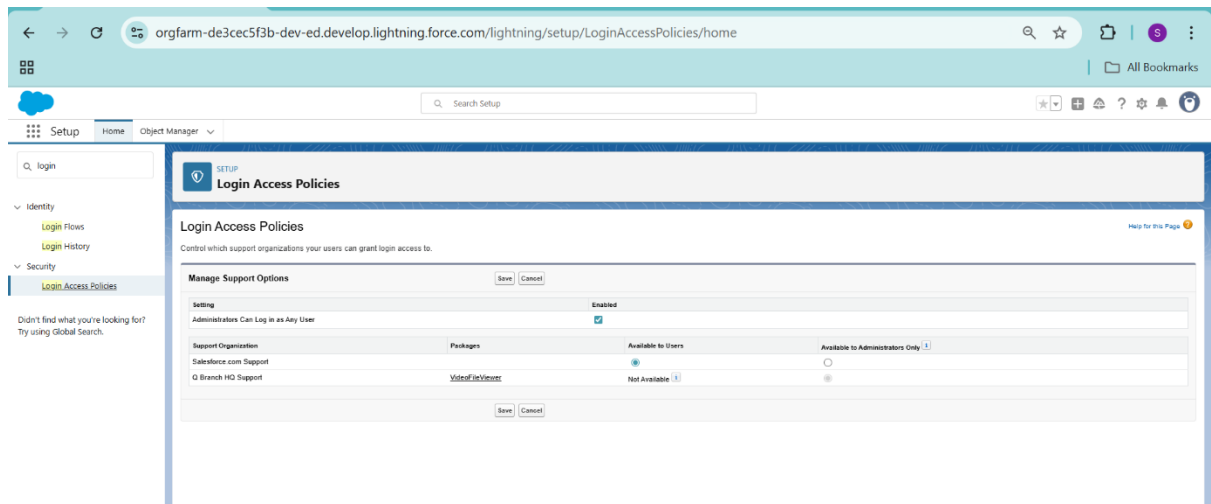
- Subscription__c = Public Read Only.
- CarbonFootprint__c = Private (users see only their own entries).

10. Sharing Rules

- Example: Share all **CarbonFootprint__c** owned by *Citizens* with *Energy Managers*.
- Type = *Based on record owner*.
- Access Level = *Read/Write*.

11. Login Access Policies

- Enabled Grant Account Login Access for Admins and Salesforce Support.



12. Dev Org Setup

- Created a Developer Edition Org (e.g., GreenEnergyTracker) and connected it to VS Code using Salesforce CLI (sf).
- This org serves as the main development environment where all metadata (objects like CarbonFootprint__c, Subscription__c, tabs, layouts, and permission sets) is stored.
- Create a Scratch Org (temporary org) for testing new features such as new fields, layouts, or Lightning pages before pushing them back to the main org.

13. Sandbox Usage

- Since Developer Edition does not provide Sandboxes, you use a Scratch Org as a substitute.
- Example: Before making big changes to the CarbonFootprint__c object (adding fields or layouts), you test it in the Scratch Org.
- This prevents breaking the main Dev Org and allows experimentation with Flows, Apex, and Lightning App Builder changes.

- Once tested, you push only stable metadata from Scratch Org → Dev Org.

14. Deployment Basics

- Salesforce CLI (SFDX) used as the primary deployment method:
 1. sf project deploy start for pushing metadata.
 2. sf project retrieve start for pulling changes from org to local.
- Awareness of Change Sets (admin-friendly) as an alternative deployment option.
- Queues, Flows, Profiles, and LWC successfully deployed between scratch and main org.