

# PHASE 2 – Org Setup & Configuration (Online Appointment Booking for Legal Services in INDIA )

## Company Profile Setup

Set up the org details under **Setup → Company Information → Edit**:

- **Name:** Online Legal Appointment Booking – Dev.
- **Time Zone:** GMT+05:30 (Asia/Kolkata).
- **Locale:** English (India) – controls date/number formats.
- **Language:** English.
- **Currency:** INR (Corporate Currency).

The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is open, and 'Company Information' is selected under 'Company Settings'. The main content area displays the 'Company Information' page for the organization 'Online Legal Appointment Booking – Dev'. The page includes a search bar at the top, a navigation menu on the left, and a main content area with various settings. The 'Organization Detail' section is expanded, showing fields for Organization Name, Primary Contact, Division, Address, Fiscal Year Starts In, Activate Multiple Currencies, Enable Data Translation, Newsletter, Admin Newsletter, Hide Notices About System Maintenance, Hide Notices About System Downtime, and Locale Formats. The 'Organization Information' section is also visible, showing fields for Phone, Fax, Default Locale, Default Language, Default Time Zone, Currency Locale, Used Data Space, Used File Space, API Requests, Last 24 Hours, Streaming API Events, Last 24 Hours, Restricted Logins, Current Month, Salesforce.com Organization ID, Organization Edition, and Instance. The page is created by SIDDARTHA B.V. on 23/08/2025, 10:20 pm and modified by SIDDARTHA B.V. on 24/09/2025, 12:08 am.

Organization Detail	
Organization Name	Online Legal Appointment Booking – Dev
Primary Contact	SIDDARTHA B V
Division	
Address	IN
Fiscal Year Starts In	January
Activate Multiple Currencies	<input type="checkbox"/>
Enable Data Translation	<input type="checkbox"/>
Newsletter	<input checked="" type="checkbox"/>
Admin Newsletter	<input checked="" type="checkbox"/>
Hide Notices About System Maintenance	<input type="checkbox"/>
Hide Notices About System Downtime	<input type="checkbox"/>
Locale Formats	ICU

Organization Information	
Phone	
Fax	
Default Locale	English (India)
Default Language	English
Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Currency Locale	English (India) - INR
Used Data Space	426 KB (8%) <a href="#">View</a>
Used File Space	13 KB (0%) <a href="#">View</a>
API Requests, Last 24 Hours	0 (15,000 max)
Streaming API Events, Last 24 Hours	0 (10,000 max)
Restricted Logins, Current Month	0 (0 max)
Salesforce.com Organization ID	000DL00000bFz7
Organization Edition	Developer Edition
Instance	IND134

## Business Hours Setup

These working hours will be used for appointment scheduling and lawyer availability tracking.

- **Path:** Setup → Business Hours → New.
- **Name:** Standard Legal Service Hours.
- **Time Zone:** Asia/Kolkata (GMT+05:30).
- **Working Hours:** Mon–Sat (9:00 AM – 7:00 PM), Sunday closed.
- **Save:** Apply as default.

**Organization Business Hours**

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.

**Business Hours Detail**

Business Hours Name	Standard Legal Service Hours	Time Zone
Business Hours	Sunday: No Hours Monday: 9:00 am to 7:00 pm Tuesday: 9:00 am to 7:00 pm Wednesday: 9:00 am to 7:00 pm Thursday: 9:00 am to 7:00 pm Friday: 9:00 am to 7:00 pm Saturday: 9:00 am to 7:00 pm	(GMT+05:30) India Standard Time (Asia/Kolkata)

Default Business Hours: ☐

Active: ☐

Created By: SIDDARTHA B V 24/09/2025, 12:12 am

Last Modified By: SIDDARTHA B V 24/09/2025, 12:13 am

**Holidays**

No records to display

## Fiscal Year Setup

Required for reporting trends of appointments and revenue.

- **Path:** Setup → Fiscal Year.
- **Type:** Standard Fiscal Year (Jan–Dec).
- **Configuration:** Starting month – January.
- **Save:** Apply settings to define fiscal periods.

**Organization Fiscal Year Edit: Online Legal Appointment Booking – Dev**

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

**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**

Name: Online Legal Appointment Booking – Dev

Fiscal Year Start Month:

Fiscal Year is Based On: ☒ The ending month ☐ The starting month

## User Setup (Profiles, Roles, Permission Sets, Users)

## Profiles

Clone standard profiles to customize object access. Example:

- **Lawyer\_Profile** – Access to Lawyer, Appointment, and Service Category objects.
- **Client\_Profile** – Minimal access to book and view appointments.
- **Admin\_Profile** – Full system access for configuration.

## Roles

Defines visibility for data sharing and hierarchy. Example:

- **CEO/Admin** (Top level).
- **Manager** (supervises lawyers).
- **Lawyer** (access to own appointments).
- **Client** (basic access).

## Permission Sets

- **Appointment\_Access\_PS** – Permission to create/read/update Appointment records (for clients and lawyers).
- **ServiceCategory\_Access\_PS** – Permission to manage Service Categories (for admins).

## Users

Create sample users:

- **lawyer1** → Lawyer\_Profile, Role: Lawyer.
- **client1** → Client\_Profile, Role: Client.
- **admin1** → Admin\_Profile, Role: CEO/Admin.

## Role Hierarchy Setup

Defines visibility of appointments and lawyer records.

- **CEO/Admin → Manager → Lawyer → Client**
- Managers can see all lawyers under them.
- Lawyers can see their own appointments.
- Clients can see only their own bookings.

## OWD (Org Wide Defaults)

To be done in **Phase 3** since OWD applies to objects (Appointment, Lawyer, Service Category) which will be fully configured in the next phase.

## Sharing Rules

Also to be configured in **Phase 3** after OWD setup. Example:

- Share appointment data with lawyers based on role.
- Managers get access to all appointments under their team.

## Assign Permission Sets

After creating users, assign sets as needed:

- Setup → Users → Select user → **Permission Set Assignments** → **Edit Assignments** → **Add Appointment\_Access\_PS** → Save.

## Dev Org Setup

- Created a Salesforce Developer Edition org for implementation.
- Configured **GitHub repository** for source control.
- Installed & set up **VS Code + Salesforce CLI (SFDX)**.
- Verified LWC creation setup for building front-end components.