Phase 2: Salesforce Org Setup & Configuration

The **Org Setup & Configuration phase** is a critical part of Salesforce implementation. It involves preparing the Salesforce environment to meet the business requirements, setting up the foundation for users, data security, and operational processes. A well-configured org ensures smooth workflows, proper data access, and scalability for future business needs.

1. Salesforce Editions

Salesforce offers different **editions** tailored to business size, requirements, and budget. Choosing the right edition is crucial because it determines available features, storage limits, user licenses, and integration capabilities. Common editions include:

- **Essentials:** Designed for small businesses; limited customization, mainly for basic CRM functions.
- **Professional:** For small to medium businesses; includes standard CRM features and more automation.
- **Enterprise:** Suitable for large organizations; offers advanced automation, extensive customization, API access, and integration options.
- **Unlimited:** Provides maximum flexibility, unlimited customizations, premium support, and full platform capabilities.

2. Company Profile Setup

Setting up the company profile ensures the organization's details are properly configured in Salesforce, which affects processes like reporting, currency management, and compliance. Key components include:

- **Company Information:** Name, address, primary contact details, default locale, default language.
- **Currency Setup:** Single or multiple currencies for global operations.
- **Default Time Zone & Locale:** Ensures accurate scheduling, date, and currency formatting.
- **Fiscal Year Settings:** Determines the organization's financial reporting period.

3. Business Hours & Holidays

Business hours and holidays are critical for case management, automation, and service-level agreements (SLAs).

- **Business Hours:** Define working days and hours for teams; essential for calculating case escalation and automation triggers.
- **Holidays:** Non-working days where business rules like workflow or escalation do not apply.

Proper setup ensures customer support operations and reporting are aligned with real-world business schedules.

4. Fiscal Year Settings

Fiscal year settings define the organization's financial reporting cycle. Salesforce supports:

- **Standard Fiscal Year:** Aligns with calendar months.
- **Custom Fiscal Year:** For organizations with non-standard reporting cycles (e.g., 4-4-5 weeks).

Accurate fiscal year configuration is essential for sales forecasting, reporting, and financial dashboards.

5. User Setup & Licenses

Salesforce users are granted access based on their roles, profiles, and licenses.

- **User Creation:** Add users with necessary personal and organizational details.
- **User Licenses:** Determine the baseline of available features for a user (e.g., Salesforce, Platform, Chatter).
- **Feature Licenses:** Additional features like Marketing Cloud, Service Cloud, or Knowledge Base access.

Correct license allocation optimizes cost and ensures users have the functionality they need.

6. Profiles

Profiles define **what users can see and do** within Salesforce. Each user is assigned a profile that controls:

- **Object Permissions:** Create, Read, Edit, Delete access to objects.
- **Field-Level Security:** Control visibility and editability of fields.
- **Page Layouts:** Determine which fields, related lists, and actions appear on object pages.
- **App Access:** Restrict access to specific apps in Salesforce.

Profiles act as a baseline security model for all users.

7. Roles

Roles determine the **hierarchical visibility of records** in Salesforce. Key points:

- Users at a higher role in the hierarchy can see and report on records owned by users below them.
- Helps enforce **data sharing policies** without giving excessive access.
- Roles work with **OWD (Organization-Wide Defaults)** and sharing rules for flexible data security.

Roles are essential for maintaining proper **data access governance** within an organization.

8. Permission Sets

Permission sets provide **additional permissions** to users without changing their profile.

- Allow users to access extra objects, fields, or apps.
- Enable temporary or project-based access without creating new profiles.
- Can be assigned individually or in bulk.

This flexibility ensures granular control over user capabilities.

9. Organization-Wide Defaults (OWD)

OWD settings define the **baseline level of access** to data for all users in the org.

- Types of OWD settings include: Private, Public Read-Only, Public Read/Write.
- Determines how much visibility users have on records they don't own.
- Works in conjunction with roles and sharing rules to enforce a **security hierarchy**.

OWD is the foundation of Salesforce's **data security model**.

10. Sharing Rules

Sharing rules allow **exceptions to OWD** by providing broader access to specific groups of users.

- Can be defined for **roles, roles and subordinates, or public groups**.
- Applied to objects to allow read/write or read-only access to records.
- Ensures business flexibility while maintaining data security.

Sharing rules are especially useful for cross-department collaboration or project-specific data sharing.

11. Login Access Policies

Login access policies help control **who can log in and under what conditions**.

- **IP Restrictions:** Limit login from specific IP ranges for security.
- **Login Hours:** Restrict users to log in during designated times.
- **Two-Factor Authentication (2FA):** Adds an extra security layer.

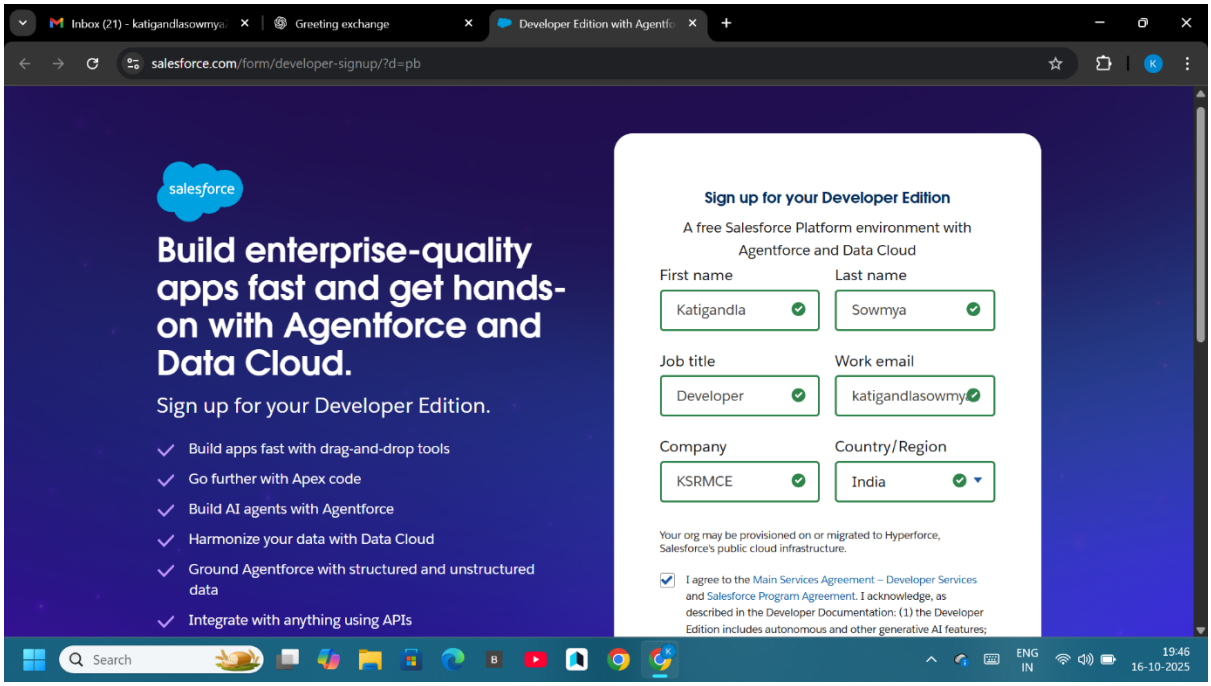
These policies protect sensitive data and prevent unauthorized access.

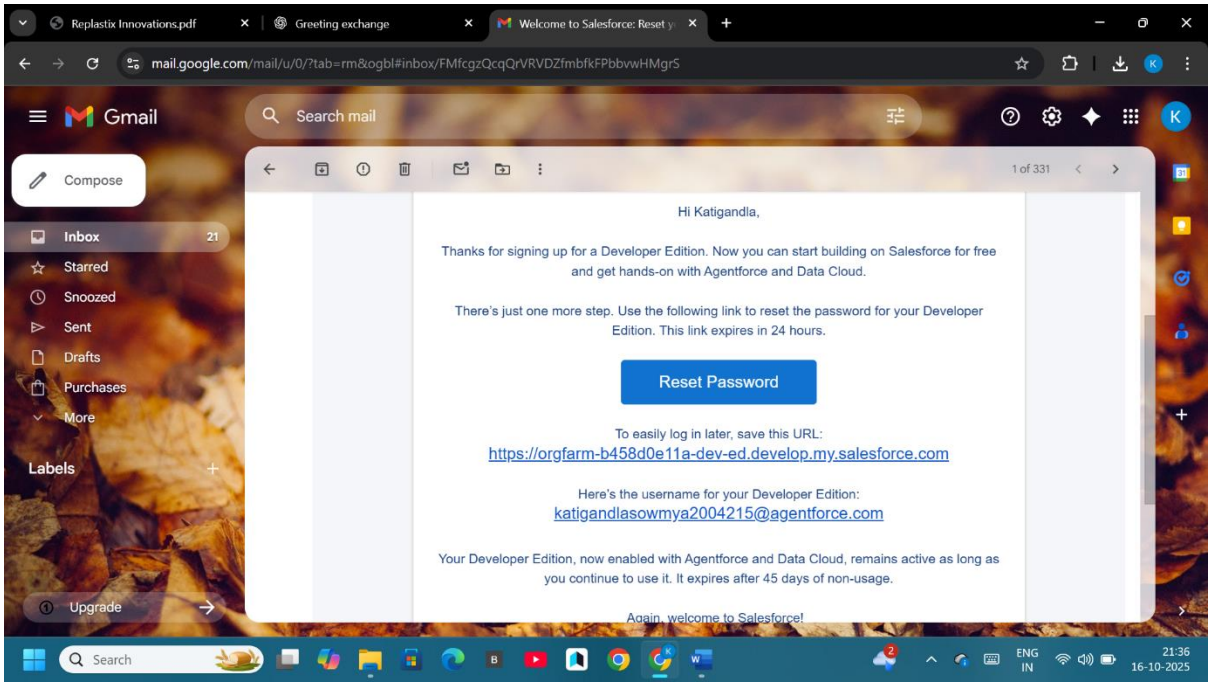
12. Developer Org Setup

A **Developer Org** is a free Salesforce environment for testing, learning, and development.

- Provides access to most Salesforce features.
- Ideal for creating and testing custom objects, apps, workflows, and integrations.
- Does not affect production data, ensuring a safe development environment.

Developer orgs are crucial for experimentation before deploying changes to production.


Inbox (21) - katigandlasowmya
Greeting exchange
Developer Edition with Agentfo
salesforce.com/form/developer-signup/?d=pb
salesforce
Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud.
Sign up for your Developer Edition.
Build apps fast with drag-and-drop tools
Go further with Apex code
Build AI agents with Agentforce
Harmonize your data with Data Cloud
Ground Agentforce with structured and unstructured data
Integrate with anything using APIs
Sign up for your Developer Edition
A free Salesforce Platform environment with Agentforce and Data Cloud
First name
Katigandla
Last name
Sowmya
Job title
Developer
Work email
katigandlasowmya
Company
KSRMCE
Country/Region
India
Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.
I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement. I acknowledge, as described in the Developer Documentation: (1) the Developer Edition includes autonomous and other generative AI features;
Search
ENG IN
19:46
16-10-2025


Replastix Innovations.pdf
Greeting exchange
Welcome to Salesforce: Reset y
mail.google.com/mail/u/0/?tab=rm&ogbl#inbox/FMfcgzQcqQrVRVDZfmbfkFPbbvwHMgrS
Gmail
Search mail
Compose
Inbox 21
Starred
Snoozed
Sent
Drafts
Purchases
More
Labels
Upgrade
1 of 331
Hi Katigandla,
Thanks for signing up for a Developer Edition. Now you can start building on Salesforce for free and get hands-on with Agentforce and Data Cloud.
There's just one more step. Use the following link to reset the password for your Developer Edition. This link expires in 24 hours.
Reset Password
To easily log in later, save this URL:
https://orgfarm-b458d0e11a-dev-ed.develop.my.salesforce.com
Here's the username for your Developer Edition:
katigandlasowmya2004215@agentforce.com
Your Developer Edition, now enabled with Agentforce and Data Cloud, remains active as long as you continue to use it. It expires after 45 days of non-usage.
Again, welcome to Salesforce!
Search
ENG IN
21:36
16-10-2025