

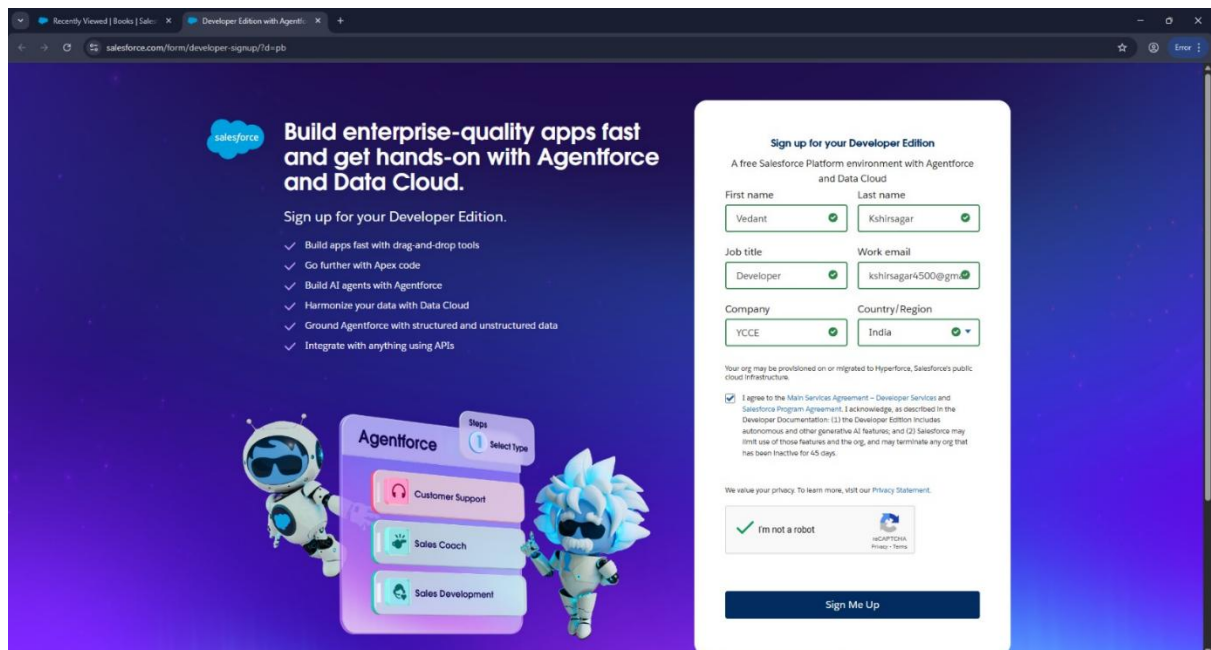
Phase 2

This phase discusses about the Org and the configurations for the Library Management System

❖ Salesforce Edition :

Creating a new developer org to proceed with the project at developer.salesforce.com using a new email.

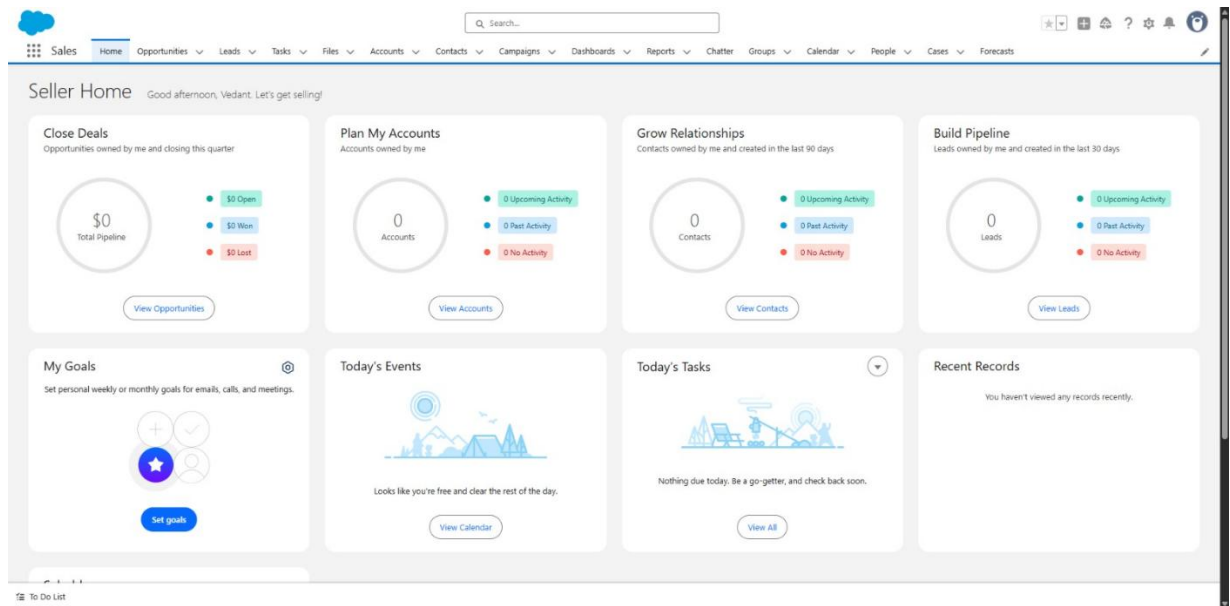
- Verifying the account from the mail and resetting the password.



The screenshot shows the Salesforce Developer Edition sign-up page. On the left, there's a blue header with the Salesforce logo and the text "Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud." Below this, it says "Sign up for your Developer Edition." and lists several benefits with checkmarks: "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", and "Integrate with anything using APIs". There's also an illustration of two robot characters, one with a blue helmet and one with a blue spiky head, standing next to a purple box labeled "Agentforce" which contains buttons for "Customer Support", "Sales Coach", and "Sales Development".

On the right, there's a white sign-up form titled "Sign up for your Developer Edition". It includes a sub-header "A free Salesforce Platform environment with Agentforce and Data Cloud". The form has fields for "First name" (Vedant), "Last name" (Kshirsagar), "Job title" (Developer), "Work email" (kshirsagar4500@gmail.com), "Company" (YCC), and "Country/Region" (India). Below these fields, there's a checkbox for "I agree to the Main Services Agreement - Developer Services and Salesforce Program Agreement" which is checked. A small disclaimer text is present below the checkbox. At the bottom of the form, there's a "Sign Me Up" button and a "I'm not a robot" checkbox with a CAPTCHA icon.

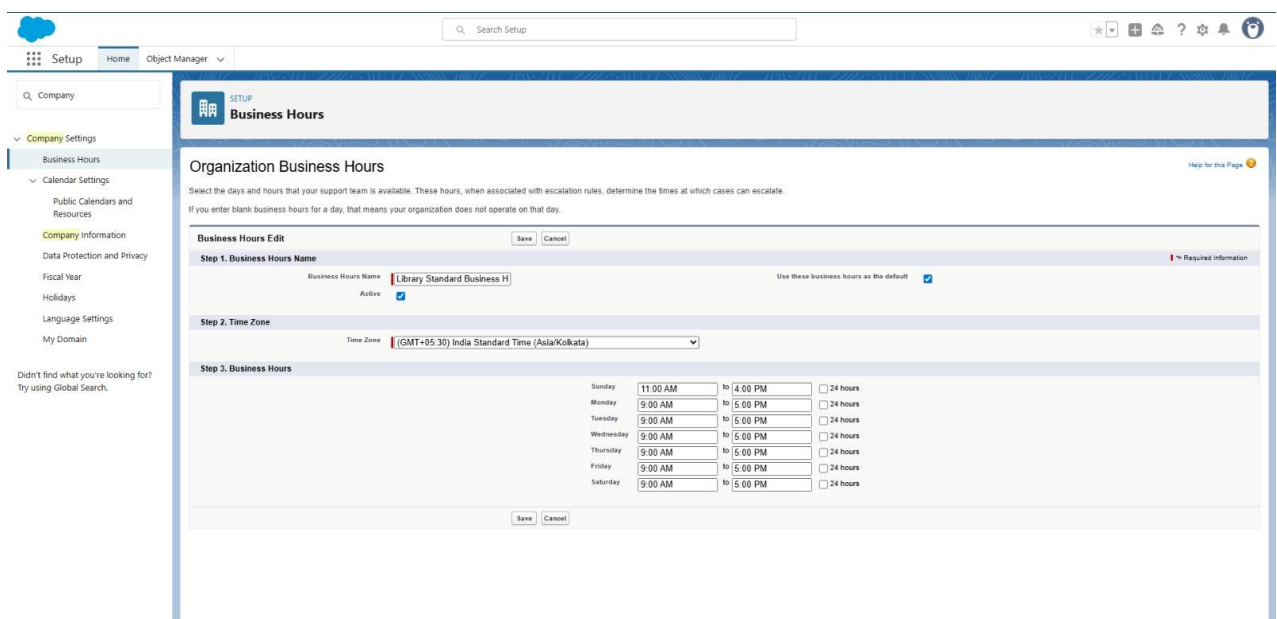
- Logging into the new Developer Org and further let's proceed setting up and configuring the Org for the project.



❖ Company Profile Setup :

For further setup of company related details proceed to Setup then type “Company Settings”.

- Business hours & Holidays :



- Per day business hours are set as shown in the screenshot and selecting the Time Zone as Indian Standard Time (Asia/Kolkata).

- Putting the name for the Business Hours as “Library Standard Business Hours”.
- Hitting Save.
- In the Holidays section setting the holiday for Sunday as a weekly weekend holiday for the library.
- Since Sunday is a recurring holiday selecting the checkbox, recurring every one week and then selecting Sunday, with no end date from the date of creation.
- Below is a screenshot

The screenshot shows the Microsoft Dynamics 365 Setup interface. The left sidebar contains the navigation menu with 'Setup' selected. The main area displays the 'Holidays' section. The 'Holiday Detail' form is open, showing the following fields:

- Holiday Name:** Sunday
- Description:** Weekly Weekend Holiday
- Date:** 9/15/2025
- Time:** From [] to [] All Day
- Recurring Holiday:** ☒
- Frequency:** ☒ Weekly
- Recurs every:** 1 week(s) on
- Days:** ☒ Sunday ☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday
- Recurrence Start:** 9/15/2025
- Recurrence End:** ☒ No End Date

The 'Save' and 'Cancel' buttons are visible at the bottom of the form.

- **Fiscal Year** is set as following
- Starts from “March”

Organization Fiscal Year Edit: Shelf Sync Technologies

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

Standard Fiscal Year ☒ Custom Fiscal Year ☐

Name: Shelf Sync Technologies

Fiscal Year Start Month: March

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

❖ Setting up the company information :

Company Information

Edit Organization Profile
Shelf Sync Technologies

Use the form below to edit your organization profile.

Organization Edit

General Information

Organization Name: Shelf Sync Technologies

Primary Contact: OrgFarm EPIC

Division:

Phone: (853) 018-9966

Fax:

Address

Country: India

Street:

City: Nagpur

State/Province: Maharashtra

Zip/Postal Code: 441110

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 (India) - INR

- Organization name is : Shelf Sync Technologies.
- And the other Information

- Created a customized logo which will be used for the lightning apps and various branding purpose



Setup Home Object Manager

Search Setup

Company

Company Settings

Business Hours

Calendar Settings

Public Calendars and Resources

Company Information

Data Protection and Privacy

Fiscal Year

Holidays

Language Settings

My Domain

Didn't find what you're looking for? Try using Global Search.

SETUP Company Information

Company Information Shelf Sync Technologies

The organization's profile is below.

User Licenses (10) | Permission Set Licenses (10) | Feature Licenses (11) | Usage-based Entitlements (10)

Organization Detail Edit

Organization Name	Shelf Sync Technologies	Phone	(853) 018-9966
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (India)
Address	Nagpur 441110 Maharashtra India	Default Language	English
Fiscal Year Starts In	March	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	352 KB (7%) [View]
Newsletter	<input checked="" type="checkbox"/>	Used File Space	1.4 MB (7%) [View]
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00DgLO0000B0INF
		Organization Edition	Developer Edition
		Instance	CAN96

Created By OrgFarm EPIC 9/11/2025, 4:34 AM

Modified By Vedant Kohersagar 9/17/2025, 6:38 AM

- Setting up the role hierarchy for the library :

The screenshot shows the 'Setup Roles' page. The left sidebar has a search bar with 'users' and a list of categories: Users, Feature Settings, and Data.com. Under 'Users', there are links for Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles (highlighted), and User Management Settings. Under 'Feature Settings', there is a link for Data.com, which has a link for Prospector Users. The main content area is titled 'Creating the Role Hierarchy' and contains the text: 'You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.' Below this is a section titled 'Your Organization's Role Hierarchy' with links for 'Collapse All' and 'Expand All'. The hierarchy is shown as a tree structure for 'Shelf Sync Technologies':

- Shelf Sync Technologies
 - Add Role
 - CEO (Edit | Del | Assign)
 - Add Role
 - Librarian (Edit | Del | Assign)
 - Add Role
 - Library Staff (Edit | Del | Assign)
 - Add Role
 - Member (Edit | Del | Assign)
 - Add Role

At the bottom of the sidebar, there is a message: 'Didn't find what you're looking for? Try using Global Search.'

- Librarian ← Library Staff ← Members
- The arrow represents the “reports to” in the hierarchy.

❖ Now for the Roles, Profiles and the Users :

- There is an Existing System Administrator i.e. Myself (Vedant Kshirsagar) so I decided to make that user profile as the Librarian or the head of the Library.
- Then creating two more profiles i.e. for the Library staff and then the Members
- Keeping it opted as the admin can login as any user for further testing and keeping access to everything for the Admin.

- The Staff User (Salesforce Platform User):

SETUP Users

User: **Library Staff** [User Profile Help for this Page](#)

[Permission Set Assignments](#) | [Permission Set Assignments: Activation Required](#) | [Permission Set Group Assignments](#) | [Permission Set License Assignments](#) | [Personal Groups](#) | [Public Group Membership](#) | [Queue Membership](#) | [Team](#) | [Managers in the Role Hierarchy](#) | [OAuth Apps](#) | [Third-Party Account Links](#) | [Built-in Authenticators](#) | [Installed Mobile Apps](#) | [Authentication Settings for External Systems](#) | [Login History](#) | [User Provisioning Accounts](#)

User Detail [Edit](#) [Sharing](#) [Reset Password](#) [Login](#) [Freeze](#) [View Summary](#)

Name	Library Staff	Role	Library Staff
Alias	Istaf	User License	Salesforce Platform
Email	kshirsagar500@gmail.com Verify	Profile	Library Staff
Username	kshirsagar@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User17579267939159691000 i	Marketing User	<input type="checkbox"/>
Title	Staff	Offline User	<input type="checkbox"/>
Company	Shelf Sync Technologies	Knowledge User	<input type="checkbox"/>
Department	Administration	Flow User	<input type="checkbox"/>
Division	Management	Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	i
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> i
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> i
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> i
App Registration: One-Time Password Authenticator	i	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> i
App Registration: Salesforce Authenticator	i	Salesforce CRM Content User	<input checked="" type="checkbox"/>
Security Key (U2F or WebAuthn)	i	Receive Salesforce CRM Content Email Alerts	<input checked="" type="checkbox"/>
Lightning Login	i	Receive Salesforce CRM Content Alerts as Daily Digest	<input checked="" type="checkbox"/>
Temporary Verification Code (Expires in 1 to 24 Hours)	Generate i	Make Setup My Default Landing Page	<input type="checkbox"/>

3Fnoredirect%3D1%26isUserEntityOverride%3D1%26isotp%3Dp1%27-

- The Member User (Salesforce Platform User):

SETUP Users

User: **Members (Library)** [User Profile Help for this Page](#)

[Permission Set Assignments](#) | [Permission Set Assignments: Activation Required](#) | [Permission Set Group Assignments](#) | [Permission Set License Assignments](#) | [Personal Groups](#) | [Public Group Membership](#) | [Queue Membership](#) | [Team](#) | [Managers in the Role Hierarchy](#) | [OAuth Apps](#) | [Third-Party Account Links](#) | [Built-in Authenticators](#) | [Installed Mobile Apps](#) | [Authentication Settings for External Systems](#) | [Login History](#) | [User Provisioning Accounts](#)

User Detail [Edit](#) [Sharing](#) [Reset Password](#) [Login](#) [Freeze](#) [View Summary](#)

Name	Members (Library)	Role	Member
Alias	m/lib	User License	Salesforce Platform
Email	kshirsagar14500@gmail.com Verify i	Profile	Members
Username	kshirsagar423500@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User17579276997511977656 i	Marketing User	<input type="checkbox"/>
Title	Members	Offline User	<input type="checkbox"/>
Company	Shelf Sync Technologies	Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	i
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> i
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> i
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> i
App Registration: One-Time Password Authenticator	i	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> i
App Registration: Salesforce Authenticator	i	Salesforce CRM Content User	<input type="checkbox"/>
Security Key (U2F or WebAuthn)	i	Receive Salesforce CRM Content Email Alerts	<input type="checkbox"/>
Lightning Login	i	Receive Salesforce CRM Content Alerts as Daily Digest	<input type="checkbox"/>
Temporary Verification Code (Expires in 1 to 24 Hours)	Generate i	Make Setup My Default Landing Page	<input type="checkbox"/>

- The Librarian (The System Administrator):

User Profile Help for this Page

Permission Set Assignments (0) | Permission Set Assignments: Activation Required (0) | Permission Set Group Assignments (0) | Permission Set License Assignments (1) | Personal Groups (0) | Public Group Membership (0) | Queue Membership (0) | Team (0) | Managers in the Role Hierarchy (0) | OAuth Apps (0) | Third-Party Account Links (0) | Built-In Authenticators (0) | Installed Mobile Apps (0) | Authentication Settings for External Systems (0) | Login History (1) | User Provisioning Accounts (0)

User Detail [Edit](#) [Sharing](#) [Change Password](#) [View Summary](#)

Name	Vedant Kshirsagar	Role	Librarian
Alias	Librarian	User License	Salesforce
Email	kshirsagar4500@gmail.com [Verified]	Profile	System Administrator
Username	kshirsagar4500149@agentforce.com	Active	<input checked="" type="checkbox"/>
Nickname	User17579201075419577034 [i]	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company	Shelf Sync Technologies	Knowledge User	<input checked="" type="checkbox"/>
Department	Administration	Flow User	<input type="checkbox"/>
Division	Librarian	Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	[i]
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> [i]
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> [i]
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> [i]
App Registration: One-Time Password Authenticator	[Connect] [i]	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> [i]
App Registration: Salesforce Authenticator	[Disconnect] [i]	Send Apex Warning Emails	<input type="checkbox"/>
Security Key (U2F or WebAuthn)	[Register] [i]	Salesforce CRM Content User	<input checked="" type="checkbox"/>
Lightning Login	[Enroll] [i]	Receive Salesforce CRM Content Email Alerts	<input checked="" type="checkbox"/>
Temporary Verification Code (Expires in 1 to 24 Hours)	[Generate] [i]	Receive Salesforce CRM Content Alerts as Daily Digest	<input checked="" type="checkbox"/>

More... Custom My Default Location Data

- The Role Hierarchy was assigned accordingly to each user.

Note : The Permission sets, Sharing Settings/Rules : OWD, Login Access Policies will be set in the next phase of this project after the creation of custom objects and fields for it.