


Phase 2: Org Setup & Configuration

»» Salesforce Edition

- Salesforce Developer Edition (free, full-featured for development & learning)
- No access to some advanced products like Data Cloud or Agentforce
- Ideal environment for my GreenCity project

»» Company Profile Setup

- Navigated to Setup → Company Information
- Entered:
 - ✓ Organization Name: **GreenCity CRM**
 - ✓ Address: 123 Main Street, Mumbai, Maharashtra, India
 - ✓ Currency: **INR - Indian Rupee**
 - ✓ Locale: **English (India)**
 - ✓ Time Zone: **Asia/Kolkata**
- Saved the changes

 **SETUP**
Company Information

Company Information

GreenCity CRM

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	GreenCity CRM	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (India)
Address	123 Main Street Mumbai 400001 Maharashtra India	Default Language	English
Fiscal Year Starts In	January	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	342 KB (7%) [View]
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) [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	00DgL00000BY0P4
		Organization Edition	Developer Edition
		Instance	CAN98

»» Business Hours & Holidays

- Setup → Business Hours → Created **GreenCity Office Hours**
- Monday–Friday: 09:00 AM – 05:00 PM; unchecked Saturday & Sunday
- Checked **Active** → Saved
- Setup → Holidays → Added holidays:
 - ✓ Republic Day: 26 Jan 2025
 - ✓ Independence Day: 15 Aug 2025
 - ✓ Gandhi Jayanti: 02 Oct 2025
 - ✓ Diwali: 20 Oct 2025
 - ✓ Christmas: 25 Dec 2025
- Saved each holiday

 **SETUP**
Business Hours

Organization Business Hours

[Help for this Page](#) 

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z
Other **All**

New Business Hours

Action	Business Hours Name ↑	Active	Time Zone	Default
Edit	<u>Default</u>	<input checked="" type="checkbox"/>	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	<input type="checkbox"/>
Edit	<u>GreenCity Office Hours</u>	<input checked="" type="checkbox"/>	(GMT+05:30) India Standard Time (Asia/Kolkata)	<input checked="" type="checkbox"/>

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z
Other **All**



SETUP Holidays

Holidays

[Help for this Page](#) ?

Holidays are dates and times at which business hours are suspended. Business hours are the days and hours that your support team is available.

Holidays New			
Action	Holiday Name	Description	Date and Time
Edit Del	Christmas		12/25/2025 All Day ↻
Edit Del	Diwali		10/20/2025 All Day
Edit Del	Gandhi Jayanti		10/2/2025 All Day ↻
Edit Del	Independence Day		8/15/2026 All Day ↻
Edit Del	Republic Day		1/21/2026 All Day ↻

Elapsed Holidays	
No records to display	

»» Fiscal Year Settings

- Setup → Fiscal Year → Confirmed calendar year (Jan–Dec)
- Left default as not specifying custom fiscal periods



SETUP Fiscal Year

Setup

Organization Fiscal Year Edit: GreenCity CRM

[Help for this Page](#) ?

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

- ☒ Standard Fiscal Year i
- ☐ Custom Fiscal Year i

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

Save Cancel

Name GreenCity CRM

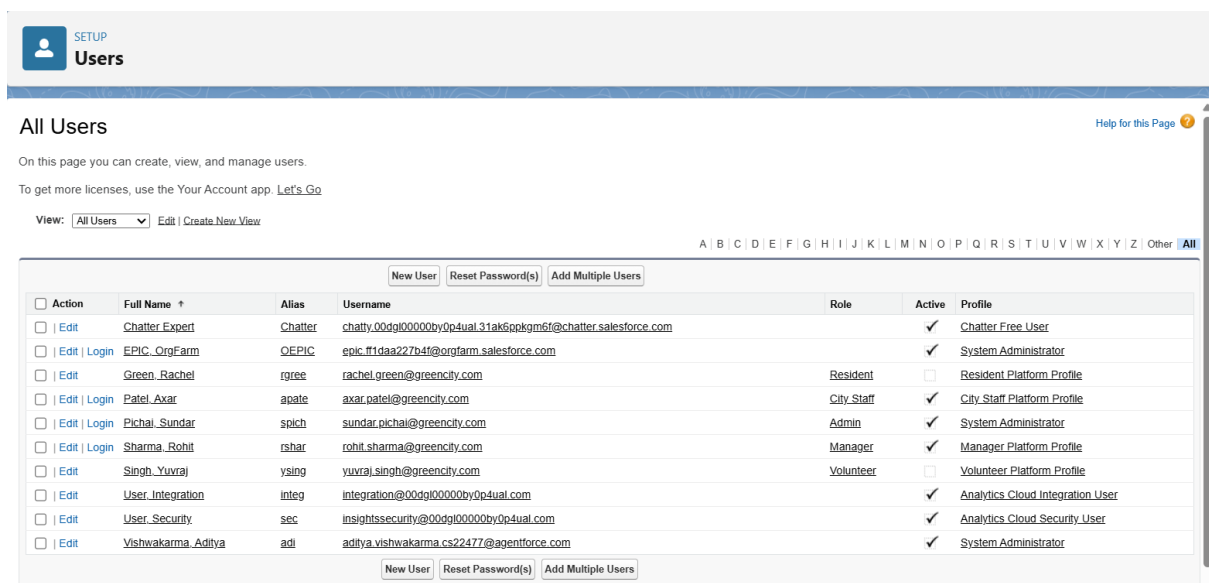
Fiscal Year Start Month January ▼

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

Save Cancel

»» User Setup & Licenses

- Setup → Users → New User
- Created 5 users:
 - ✓ Rachel Green: Profile → Resident Platform Profile, Role → Resident
 - ✓ Yuvraj Singh: Profile → Volunteer Platform Profile, Role → Volunteer
 - ✓ Axar Patel: Profile → Staff Platform Profile, Role → City Staff
 - ✓ Rohit Sharma: Profile → Manager Profile, Role → Manager
 - ✓ Sundar Pichai: Profile → System Administrator, Role → Admin
- Assigned **User License**: Salesforce Platform or Salesforce accordingly
- Unchecked "Send notification email" for testing
- Set passwords accordingly (system generates or manually if allowed)
- Activated users

A screenshot of the Salesforce 'Users' setup page. The page title is 'All Users'. Below the title, there is a brief description: 'On this page you can create, view, and manage users.' and a link 'To get more licenses, use the Your Account app. Let's Go'. The 'View:' dropdown is set to 'All Users'. A table lists 12 users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The users listed are Chatter Expert, EPIC_OrgFarm, Green_Rachel, Patel_Axar, Pichai_Sundar, Sharma_Rohit, Singh_Yuvraj, User_Integration, User_Security, and Vishwakarma_Adiya. The table also includes system-generated users like Chatter Free User, System Administrator, Resident Platform Profile, City Staff Platform Profile, Manager Platform Profile, Volunteer Platform Profile, Analytics Cloud Integration User, Analytics Cloud Security User, and System Administrator. At the bottom of the table, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

»» Profiles & Object Permissions

- Setup → Profiles → Cloned **Standard Platform User** for each role
- Named as **Resident Platform Profile**, **Volunteer Platform Profile**, etc.
- Edited each profile:
 - ❖ **Object Settings**:

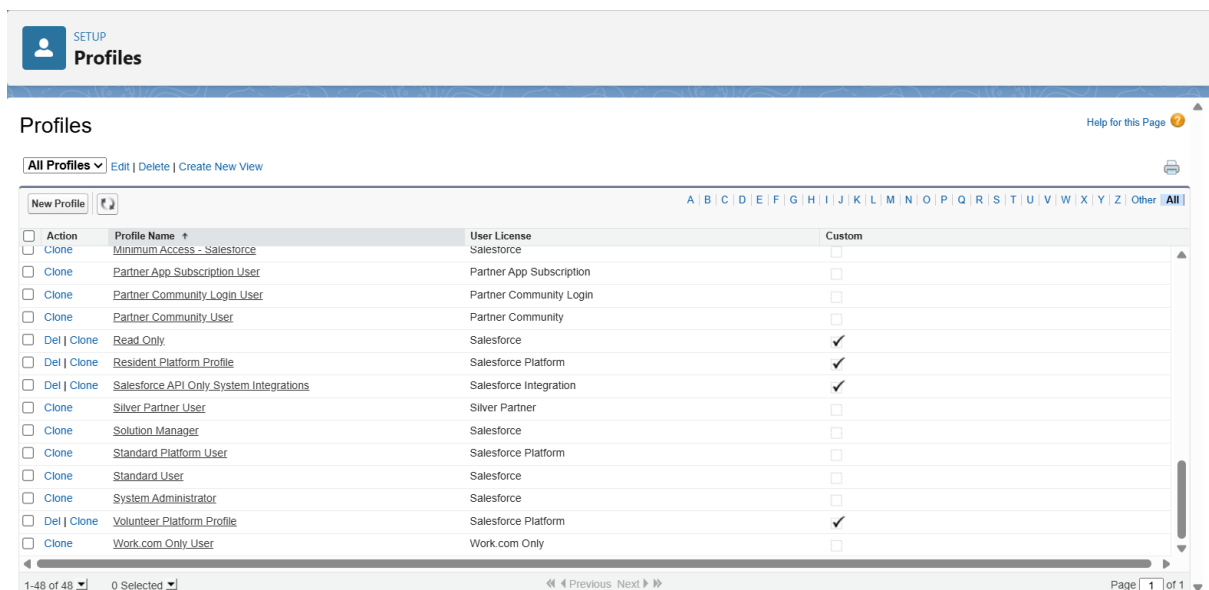
Service Request:

- Residents: Read, Create
- Volunteers: Read, Create, Edit
- Staff/Manager: Read, Create, Edit, Delete

Volunteer Event:

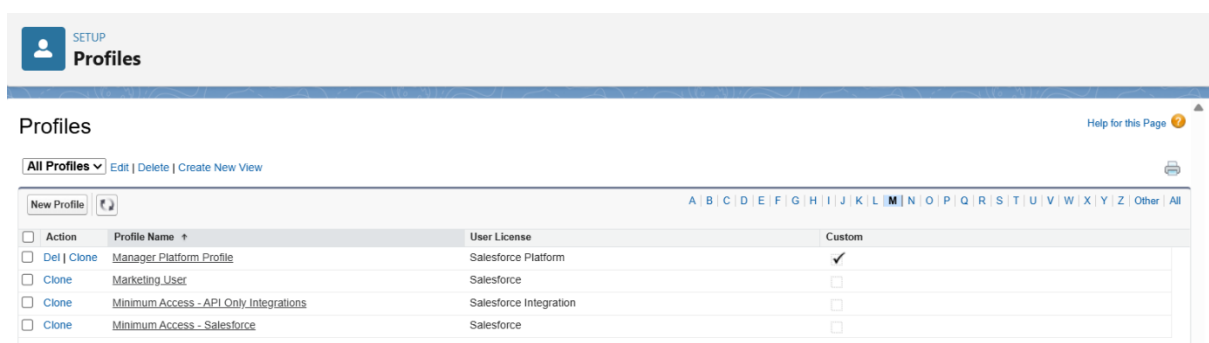
- Volunteers & Staff: Read, Create, Edit

➤ Saved each profile



The screenshot shows the Salesforce Setup page for Profiles. The header includes a user icon, the word 'SETUP', and the title 'Profiles'. Below the header, there's a 'Profiles' section with a 'Help for this Page' link. A dropdown menu shows 'All Profiles' with options to 'Edit', 'Delete', or 'Create New View'. A 'New Profile' button is also visible. The main table lists various profiles with columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The table is filtered to show profiles starting with 'M'. The bottom of the page shows '1-48 of 48' items, '0 Selected', and navigation links for 'Previous' and 'Next'.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Clone	Minimum Access - Salesforce	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Clone	Partner App Subscription User	Partner App Subscription	<input type="checkbox"/>
<input type="checkbox"/> Clone	Partner Community Login User	Partner Community Login	<input type="checkbox"/>
<input type="checkbox"/> Clone	Partner Community User	Partner Community	<input type="checkbox"/>
<input type="checkbox"/> Del Clone	Read Only	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Del Clone	Resident Platform Profile	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/> Del Clone	Salesforce API Only System Integrations	Salesforce Integration	<input checked="" type="checkbox"/>
<input type="checkbox"/> Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/> Clone	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/> Clone	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Clone	System Administrator	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Del Clone	Volunteer Platform Profile	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/> Clone	Work.com Only User	Work.com Only	<input type="checkbox"/>



The screenshot shows the Salesforce Setup page for Profiles. The header includes a user icon, the word 'SETUP', and the title 'Profiles'. Below the header, there's a 'Profiles' section with a 'Help for this Page' link. A dropdown menu shows 'All Profiles' with options to 'Edit', 'Delete', or 'Create New View'. A 'New Profile' button is also visible. The main table lists various profiles with columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The table is filtered to show profiles starting with 'M'. The bottom of the page shows '1-48 of 48' items, '0 Selected', and navigation links for 'Previous' and 'Next'.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Del Clone	Manager Platform Profile	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/> Clone	Marketing User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Clone	Minimum Access - API Only Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/> Clone	Minimum Access - Salesforce	Salesforce	<input type="checkbox"/>

»» Role Hierarchy

➤ Setup → Roles → Set hierarchy:

✓ Admin (top)

- ✓ Manager (reports to Admin)
 - ✓ City Staff (reports to Manager)
 - ✓ Volunteer (reports to City Staff)
 - ✓ Resident (reports to Volunteer)
- Saved each role

SETUP Roles

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy Show in tree view

GreenCity CRM

- Add Role**
- Admin** Edit | Del | Assign
 - Add Role**
 - Manager** Edit | Del | Assign
 - Add Role**
 - City Staff** Edit | Del | Assign
 - Add Role**
 - Volunteer** Edit | Del | Assign
 - Add Role**
 - Resident** Edit | Del | Assign
 - Add Role**
- CEO** Edit | Del | Assign
 - Add Role**

»» Permission Sets

- Setup → Permission Sets → New permission set
- Named: "Volunteer Extra Access"
- Assigned specific object permissions (e.g., Edit for Service Requests)
- Managed assignments to users

SETUP Permission Sets

Permission Sets

On this page you can create, view, and manage permission sets.

All Permission Sets Edit | Delete | Create New View

New

A B C D E F G H I J K L M N O P Q R S T U **V** W X Y Z Other All

Action	Permission Set Name ↑	Description	License
<input type="checkbox"/> Del Clone	Volunteer Extra Access		Salesforce Platform

»» Organization-Wide Defaults (OWD)

- Setup → Sharing Settings

- Set:
 - ✓ Service Request: **Private**
 - ✓ Volunteer Event: **Private**
- Saved

SETUP Sharing Settings			
Work Plan	Private	Private	✓
Work Plan Template	Private	Private	✓
Work Step Template	Private	Private	✓
Work Type	Private	Private	✓
Work Type Group	Public Read/Write	Private	✓
Service Request	Private	Private	<input type="checkbox"/>
Volunteer Event	Private	Private	<input type="checkbox"/>

»» Sharing Rules

- Setup → Sharing Settings
- Created sharing rule:
 - 🎨 For **Service Request**:
 - Share with **Role**: Manager
 - Access Level: **Read/Write**
 - 🎨 For **Volunteer Event**:
 - Share with **Role**: Manager
 - Access Level: **Read/Write**
- Saved each rule

Sharing Rules

Service Request Sharing Rules

New

Recalculate

Service Request Sharing Rules Help

?

Action	Criteria	Shared With	Access Level
Edit Del	Owner in Role: Manager	Role: Manager	Read/Write

Sharing Overrides

Profiles That Override Service Request Sharing

Sharing Overrides Help

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Organization-wide permissions affect all objects in the organization. Object permissions affect only the given object.

[Tell me more!](#)


[Don't show this message again](#)

Profile	Custom Profile	Organization-Wide Permissions		Service Request Permissions	
		View All Data	Modify All Data	View All Records	Modify All Records
Analytics Cloud Integration User	<input type="checkbox"/>	✓	<input type="checkbox"/>	✓	<input type="checkbox"/>
System Administrator	<input type="checkbox"/>	✓	✓	✓	✓

»» Login Access Policies

- Setup → Session Settings

- Enabled: Administrators Can Log in as Any User
- Configured login timeout (2 hours)
- Saved


Setup
Login Access Policies

Login Access Policies
[Help for this Page](#)

Control which support organizations your users can grant login access to.

Manage Support Options
Save Cancel


Setting	Enabled
Administrators Can Log in as Any User	<input checked="" type="checkbox"/>

Support Organization	Packages	Available to Users	Available to Administrators Only
Salesforce.com Support		<input checked="" type="radio"/>	<input type="radio"/>

Save Cancel

» Custom Objects Creation

- Setup → Object Manager → Create custom objects:
 - ✓ Service Request
 - ✓ Volunteer Event
- Configured object labels, reportability, track field history
- Configured object permissions in profiles


Setup
Object Manager
 1 Items, Sorted by Label

Schema Builder
Create

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Service Request	Service_Request_c	Custom Object		9/18/2025	✓


Setup
Object Manager
 1 Items, Sorted by Label

Schema Builder
Create

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Volunteer Event	Volunteer_Event_c	Custom Object		9/21/2025	✓