

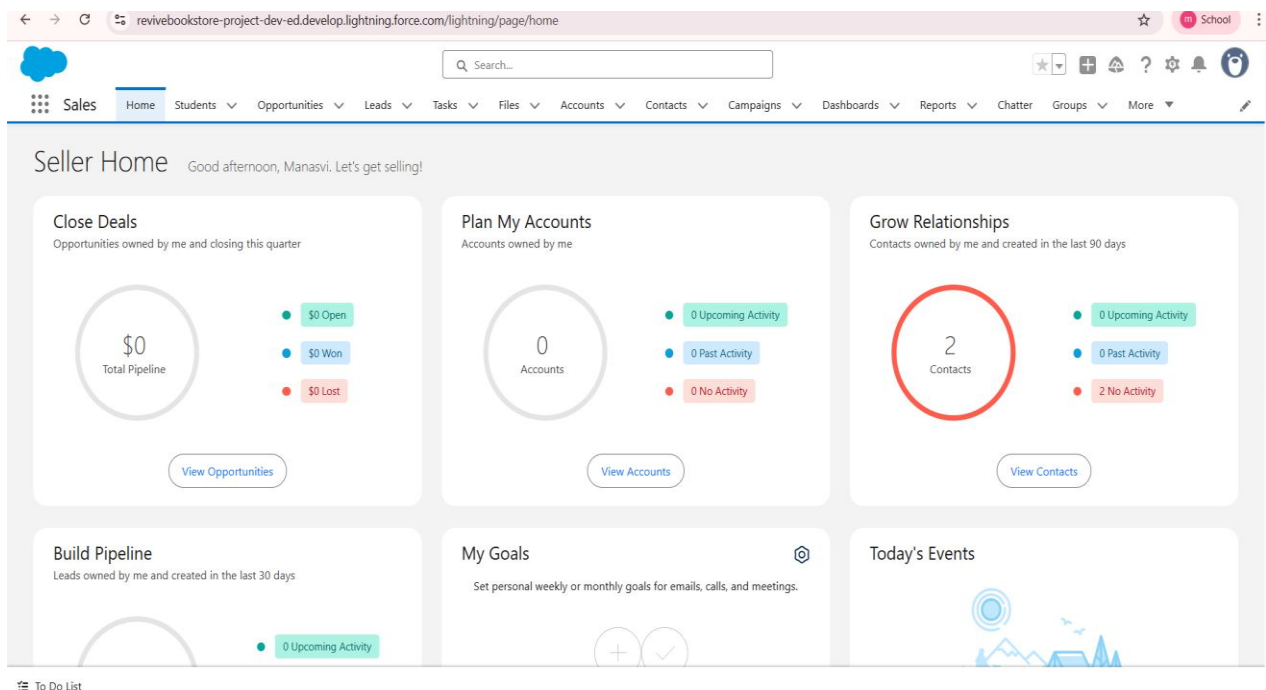
PHASE 2

Org Setup & Configuration

Goal: To prepare the Salesforce environment with the foundational settings that will support the Bookstore CRM application. This phase ensures the org reflects the bookstore's operational, branding, and security requirements before any custom development begins.

1. Dev Org Setup & My Domain

- **Use Case:** The Salesforce Developer Edition provides a free, full-featured environment to build and test the CRM. As a required security and branding step, a custom "My Domain" was created to provide a unique login URL for the project.
- **Implementation Evidence:** The screenshot below confirms that the custom domain `revivebookstore-project-dev-ed.develop.lightning.force.com` has been successfully set up and is active, as shown in the browser's URL bar.



2. Company Profile Setup

- **Use Case:** The Company Profile personalizes the org with the bookstore's identity. The name has been set to "Bookmarked," and the default language, timezone (IST), and currency locale (INR) have been configured to match the store's operational context.
- **Implementation Evidence:** The screenshot below displays the configured Company Information page.

SETUP

Company Information

Company Information

Bookmarked

The organization's profile is below.

[User Licenses \(10+\)](#) |
 [Permission Set Licenses \(10+\)](#) |
 [Feature Licenses \(1\)](#) |
 [Usage-based Entitlements \(10+\)](#)

Organization Detail

Edit

Organization Name	Bookmarked	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (India)
Address	114 shivnagar colony jabalpur 482002 Madhya Pradesh 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	392 KB (8%) 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	00DgK000007jz3J
		Organization Edition	Developer Edition
		Instance	CAN96

Created By

OrgFarm EPIC, 7/21/2025, 12:12 AM

Modified By

Manasvi Agrawal, 9/25/2025, 3:23 AM

3. Business Hours & Holidays

- Use Case: Defining business hours and holidays is critical for a retail business. These settings ensure that time-dependent automations, such as case escalation rules for customer inquiries, only run when the store is actually open.

4. Fiscal Year Settings

- Use Case: The fiscal year setting allows the Bookstore Manager to generate financial reports and dashboards that align with the company's accounting periods. The Company Information screenshot shows this is set to start in January.

5. User Setup & Licenses

- Use Case: This step involves creating user records for the bookstore's staff (e.g., a manager and a staff member). Each user is assigned a license and a profile to control their access rights.

6. Deployment Basics

- Use Case: Understanding the professional deployment lifecycle is key. The Deployment Settings page is used to authorize connections between a Sandbox (development environment) and a Production (live) org, allowing for the safe transfer of completed features via Change Sets.



SETUP

Deployment Settings

Deployment Settings

[Video Tutorial](#) | [Help for this Page](#) 

Deployment Options

- ☐ Allow deployments of components when corresponding Apex jobs are pending or in progress.
Caution: Enabling this option may cause Apex jobs to fail.
- ☐ Enable Pilot Metadata Types usage [i](#)

Save