

Phase 2: Org Setup & Configuration

Project: TaskFlow Pro - Project Management System

1. Salesforce Edition

Edition Used: Salesforce Developer Edition

Purpose: Development, testing, and customization for project management system

Reason: Full platform capabilities with complete feature access for prototype development

2. Company Profile Setup

Field	Value
Organization Name	TaskFlow Pro Project Management
Primary Contact	Admin User
Country	India
State/Province	Karnataka
Default Locale	English (India)
Default Language	English
Default Time Zone	(GMT+05:30) India Standard Time
Currency	INR - Indian Rupee

Procedure:

1. Setup → Company Settings → Company Information
2. Click Edit and enter details
3. Save configuration

3. Business Hours & Holidays

Day	Working Hours
Monday - Friday	9:00 AM - 6:00 PM
Saturday	10:00 AM - 2:00 PM
Sunday	Closed

Time Zone: (GMT+05:30) India Standard Time

Default Business Hours: ✓ Checked

Active: ✓ Checked

Procedure:

1. Setup → Company Settings → Business Hours
2. Create Default Business Hours record
3. Enter open/close timings
4. Check Active and Default
5. Save

4. Fiscal Year Settings

Type: Standard Fiscal Year

Start Month: April

End Month: March

5. User Setup & Licenses

User 1: System Administrator

Field	Value
Name	Admin User
Role	Project Director
Profile	System Administrator
User License	Salesforce
Email	admin@taskflowpro.com
Active	Yes

User 2: Project Manager

Field	Value
Name	Manager User
Role	Project Manager
Profile	Project Manager
User License	Salesforce
Email	manager@taskflowpro.com
Active	Yes

User 3: Team Member

Field	Value
Name	Team User
Role	Team Member

Field	Value
Profile	Team Member
User License	Salesforce Platform
Email	team@taskflowpro.com
Active	Yes

Procedure:

1. Setup → Users → Users → New User
2. Fill in details
3. Assign User License and Profile
4. Assign Role
5. Check Active → Save

6. Profiles

Profile 1: System Administrator

Role: Project Director

Permissions:

- Full access to all objects
- Create, edit, delete all records
- Manage users and security
- Complete system visibility

Profile 2: Project Manager (Custom)

Base Profile: Standard User

Permissions:

- Create/Edit/View Projects, Tasks, Milestones
- Assign resources and track time
- Generate reports and dashboards
- Limited admin access

Profile 3: Team Member (Custom)

Base Profile: Standard User

Permissions:

- View assigned tasks only
- Update own task status

- Log time entries
- Upload attachments
- No delete permissions

Procedure:

1. Setup → Profiles → Clone Standard User
2. Rename as Project Manager / Team Member
3. Customize object-level permissions
4. Save and assign to users

7. Roles

Role Hierarchy:

```
Project Director
  ↓
Project Manager
  ↓
Team Lead
  ↓
Team Member
```

Procedure:

1. Setup → Roles → Set Up Roles
2. Create hierarchy from top to bottom
3. Assign users to appropriate roles

8. Org-Wide Defaults (OWD)

Object	Default Internal Access	Default External Access
Project	Public Read Only	Private
Task	Private	Private
Milestone	Public Read Only	Private
Time Entry	Private	Private
Resource Allocation	Private	Private

Procedure:

1. Setup → Security → Sharing Settings
2. Scroll to Organization-Wide Defaults
3. For each object, set access levels

4. Save changes

9. Permission Sets

Permission Set: Project Management Access

Purpose: Grant additional permissions to Project Managers

Configuration:

Field	Details
Permission Set Name	Project Management Access
Purpose	Manage Projects, Tasks, Resources
App Access	TaskFlow Pro App
Object Access	Project, Task, Milestone, Time Entry (CRED)
Assigned To	Project Manager users

Procedure:

1. Setup → Permission Sets → New
2. Enter Label and License
3. Save
4. Configure Object Settings → Enable CRUD
5. App Permissions → Assign TaskFlow Pro App
6. Manage Assignments → Add Users

10. Login Access Policies

Purpose: Control admin login capabilities

Configuration:

- Administrators Can Log in as Any User: ✓ Enabled
- Users Can Grant Access to Administrators: ✓ Enabled

Procedure:

1. Setup → Security → Login Access Policies
2. Configure settings
3. Save

11. Developer Org Setup

- Created Salesforce Developer Edition org
- Enabled Lightning Experience
- Linked VS Code with SFDX for development
- Connected GitHub for version control
- Configured sandbox for testing

12. Sandbox Usage

Environment Strategy:

- **Developer Sandbox:** Configuration and initial testing
- **Partial Copy Sandbox:** UAT with sample data
- **Full Sandbox:** Complete UAT before production

Deployment Flow: Dev Org → Sandbox → Production

13. Deployment Basics

Deployment Methods:

- Change Sets for configuration (objects, roles, flows)
- GitHub for version control (Apex, LWC)
- SFDX CLI for automated deployments
- Validation of permissions and data after each deployment