

Salon Management System

Phase 2 Implementation Summary

This document provides a step-by-step summary of all configuration tasks completed for Phase 2 of the Salon Management System project, following the official project roadmap.



Company Profile Setup

01

Navigate to Setup

Navigated to Setup > Company Information

03

Time Zone Configuration

Set Default Time Zone: (GMT+05:30) India Standard Time
(Asia/Kolkata)

02

Organization Name

Set Organization Name: **Vanity Salon**

04

Currency Settings

Set Currency Locale: English (India) - INR



Search Setup



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Resources

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Holidays

Language Settings

My Domain

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SETUP

Company Information

Company Information

Vanity Makeup Salon

The organization's profile is below.

Help for this Page

[User Licenses \[10+\]](#) | [Permission Set Licenses \[10+\]](#) | [Feature Licenses \[11\]](#) | [Usage-based Entitlements \[10+\]](#)

Organization Detail

Edit

Organization Name	Vanity Makeup Salon	Phone	08269939829
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (United States)
Address	359 phase-2 jasuja city dhanmantri nagar 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	420 KB (8%) [View]
Newsletter	<input checked="" type="checkbox"/>	Used File Space	40 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	00DgL000007S7Ab
		Organization Edition	Developer Edition
		Instance	CAN98

Created By [OrgFarm EPIC](#), 7/17/2025, 8:37 AM

Modified By [Ayush Kumar Dewan](#), 9/18/2025, 9:19 AM

Edit

Business Hours & Holidays

Configuration Steps

1. Navigated to Setup > Business Hours
2. Created a new record named **Salon Operating Hours**
3. Set hours to **11:00 AM to 8:00 PM** for Monday through Saturday



compan

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SETUP

Business Hours

Organization Business Hours

Help for this Page

Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate.

If you enter blank business hours for a day, that means your organization does not operate on that day.

Holidays [0]

Business Hours Detail

Edit

Business Hours Name	Salon Operating Hours	Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Business Hours	<div>Sunday24 Hours</div> <div>Monday10:00 AM to 8:00 PM</div> <div>Tuesday11:00 AM to 8:00 PM</div> <div>Wednesday11:00 AM to 8:00 PM</div> <div>Thursday11:00 AM to 8:00 PM</div> <div>Friday11:00 AM to 8:00 PM</div> <div>Saturday11:00 AM to 8:00 PM</div>	Default Business Hours	<input type="checkbox"/>
Active	<input type="checkbox"/>		
Created By	Ayush Kumar Dewan 9/16/2025, 5:49 AM	Last Modified By	Ayush Kumar Dewan 9/16/2025, 5:50 AM

Edit

Holidays

Add/Remove

No records to display

Back To Top

Always show me fewer / more records per related list



Fiscal Year Settings



Standard Configuration Maintained

The standard Gregorian calendar (January 1st start date) was reviewed and kept as the fiscal year, as it meets the needs of the business.

User Setup & Licenses

Three representative users were created in Setup > Users, with each being assigned a Salesforce License:

Ayush Dewan (Owner)

Assigned the **System Administrator Profile**

Anita Marawi (Receptionist)

Assigned the **custom Receptionist Profile**

Priya Singh (Stylist)

Assigned the custom Stylist Profile

Search Setup

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Setup

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Object Manager

user

Users

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Users

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Messaging for In-App and Web

User Interface

Action Link Templates

Actions & Recommendations

SETUP

Users

User

Satpreet Dewan

Permission Set Assignments [0]

Permission Set Assignments: Activation Required [0]

Permission Set Group Assignments [0]

Permission Set License Assignments [0]

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 [0+]

User Provisioning Accounts [0]

User Detail

Edit

Sharing

Reset Password

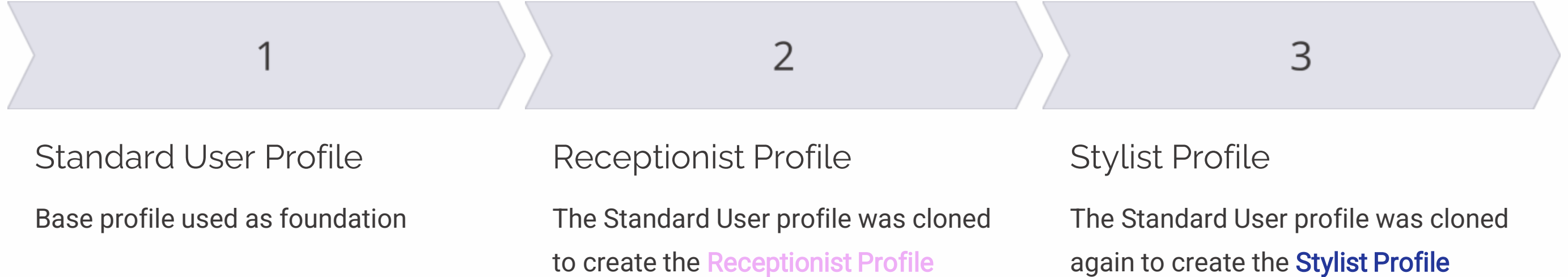
Login

Freeze

View Summary

Name	Satpreet Dewan	Role	Salon Owner
Alias	sdewa	User License	Salesforce Platform
Email	satpreet1976@gmail.com [Verify]	Profile	Standard Platform User
Username	satpreet1976@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User17580288417063651671	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company	Vanity Makeup Salon	Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address	359 phase-2 jasuja city dhanmantri nagar Jabalpur 482002 Madhya Pradesh India	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 (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	
Manager		Accessibility Mode (Classic Only)	
Receive Approval Request Emails	Only if I am an approver	Debug Mode	
Federation ID		High-Contrast Palette on Charts	

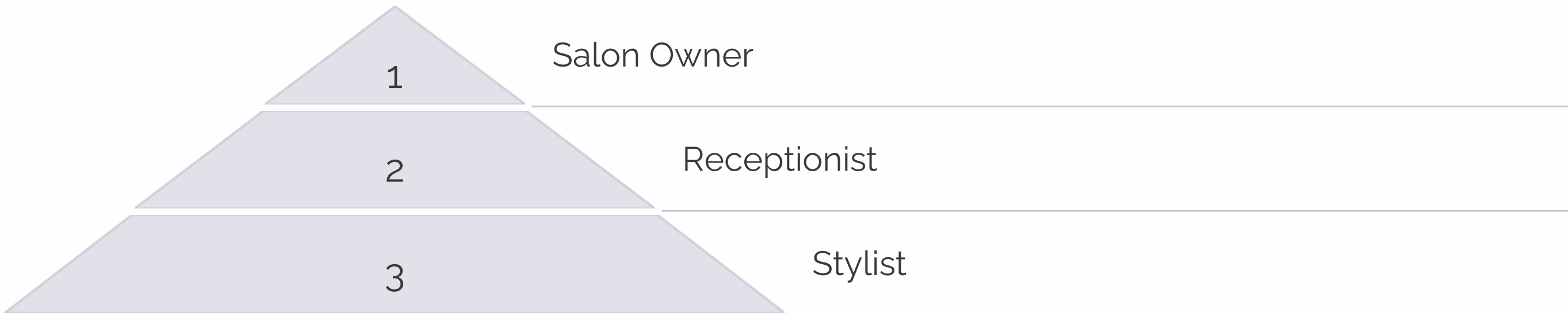
Profiles Configuration



Two custom profiles were created in Setup > Profiles to manage user permissions.

Role Hierarchy Structure

A role hierarchy was created in Setup > Roles to define the data access structure:





Setup

Home

Object Manager ▾

▾ Users

Roles

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▾ Sales

Contact Roles on Contracts

Contact Roles on Opportunities

▾ Service

▾ Case Teams

Case Team Roles

Contact Roles on Cases

Didn't find what you're looking for?
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Roles

Creating the Role Hierarchy

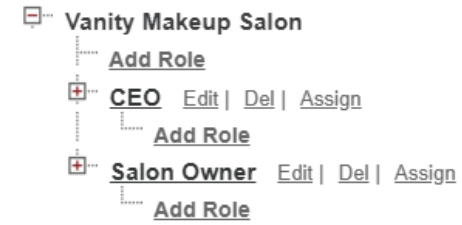
[Help for this Page](#) ?

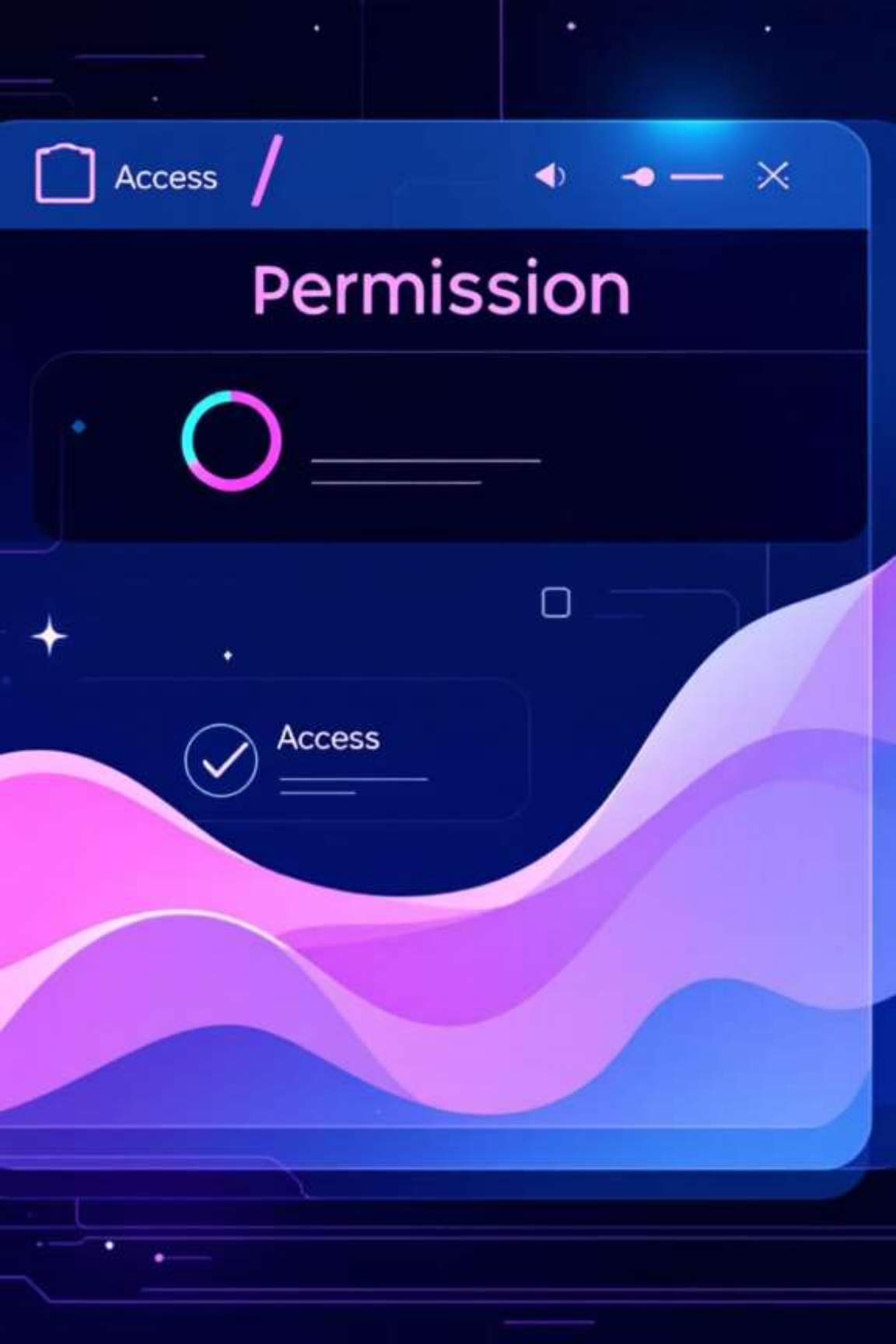
You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

Show in tree view ▾

[Collapse All](#) [Expand All](#)





Permission Sets

Reserved for Future Implementation

No permission sets were created in this phase. This tool will be reserved for granting special, one-off permissions in later phases if needed.



Search Setup



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Permission Sets

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Salesforce

Mobile Builder for the
Seller-Focused
Experience

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Salesforce CMS

Settings

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Sales

Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler
Settings

Scheduling Policies



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

<input type="checkbox"/>	Action	Permission Set Name ↑	Description	License
<input type="checkbox"/>	Clone	(Legacy) Data Cloud Data Aware Specialist	This Data Cloud permission set will be deprecated in Spring '24. Learn more at sfd...	Customer Data Platform
<input type="checkbox"/>	Clone	(Legacy) Data Cloud Marketing Admin	Allows access to Data Cloud Setup if the user is also a Salesforce admin, manage...	Customer Data Cloud for Marketing
<input type="checkbox"/>	Clone	(Legacy) Data Cloud Marketing Manager	This Data Cloud permission set will be deprecated in Spring '24. Learn more at sfd...	Customer Data Platform
<input type="checkbox"/>	Clone	(Legacy) Data Cloud Marketing Specialist	This Data Cloud permission set will be deprecated in Spring '24. Learn more at sfd...	Customer Data Platform
<input type="checkbox"/>	Clone	(Legacy) Data Cloud for Marketing Data Aware Specialist	This Data Cloud permission set will be deprecated in Spring '24. Learn more at sfd...	Customer Data Cloud for Marketing
<input type="checkbox"/>	Clone	(Legacy) Data Cloud for Marketing Manager	This Data Cloud permission set will be deprecated in Spring '24. Learn more at sfd...	Customer Data Cloud for Marketing
<input type="checkbox"/>	Clone	(Legacy) Data Cloud for Marketing Specialist	This Data Cloud permission set will be deprecated in Spring '24. Learn more at sfd...	Customer Data Cloud for Marketing
<input type="checkbox"/>	Clone	Access Agentforce Default Agent	Gives users access to the default Agentforce agent in Salesforce.	Agentforce (Default)
<input type="checkbox"/>	Clone	Agent Platform Builder	Allow access to agent platform.	Agent platform builder
<input type="checkbox"/>	Clone	Agentforce Default Admin	Allows users to build and manage in-org copilots.	Agentforce (Default)
<input type="checkbox"/>	Clone	Agentforce Service Agent Configuration	Build and manage autonomous AI service agents.	Agentforce Service Agent Builder
<input type="checkbox"/>	Clone	Agentforce Service Agent Object Access	Access knowledge articles and manage cases and contacts as an autonomous AI ...	Agentforce Service Agent User
<input type="checkbox"/>	Clone	Agentforce Service Agent Secure Base	Set up and use Agentforce Service Agent actions with enhanced data security.	Agentforce Service Agent User
<input type="checkbox"/>	Clone	Agentforce Service Agent User	Analyze topics and perform actions as an autonomous AI service agent.	Agentforce Service Agent User
<input type="checkbox"/>	Clone	Authenticated Payer	An authenticated external user with the ability to make and manage their payments.	Salesforce Payments External
<input type="checkbox"/>	Clone	Buyer	Allows access to the store. Lets users see products and categories, make purchas...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to manage carts and orders relat...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Clone	C360 High Scale Flow Integration User	Allows integration user to access features specific to C360 High Scale Flow.	Cloud Integration User
<input type="checkbox"/>	Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/>	Clone	Code Builder User	Enables the user to create and access Code Builder environments.	Code Builder

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Organization-Wide Defaults (OWD)

Security Configuration

1. Navigated to Setup > Sharing Settings
2. Set the Default Internal Access for both **Contact** and **Account** to **Private** to establish a secure, restrictive baseline



Sharing Rules & Login Access Policies

Sharing Rules

No sharing rules were created in this phase. They will be implemented in later phases as specific business needs for broader data access are identified.

Login Access Policies

1. Navigated to Setup > Login Access Policies. 2. Enabled the policy "**Administrators Can Log in as Any User**" to allow for effective testing and debugging.



Setup

Home

Object Manager ▾

Identity

Login Flows

Login History

Security

Login Access Policies

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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 i
Salesforce.com Support		<input checked="" type="radio"/>	<input type="radio"/>

Save Cancel