

Phase-2: Org Setup & Configuration

1. Company Configuration

- **Salesforce Org Edition**
 - **Action Taken:** Selected and signed up for a **Developer Edition Org**.
 - **Purpose:** To have a free, full-featured, and safe environment for building the entire application from scratch.
- **Company Information**
 - **Action Taken:**
 1. Navigated to **Setup > Company Information**.
 2. Updated the company name, address, and phone number.
 3. Set the **Default Time Zone** to (GMT+05:30) India Standard Time.
 - **Purpose:** To ensure the org's core identity and location settings were correct for all users and system functions.

The screenshot shows the 'Company Information' setup page in Salesforce. The page title is 'Company Information' with a sub-header 'Vanity Makeup Salon'. Below the title, it states 'The organization's profile is below.' and provides links for 'User Licenses (10)', 'Permission Set Licenses (10)', 'Feature Licenses (11)', and 'Usage-based Entitlements (10)'. The 'Organization Detail' section is expanded, showing fields for Organization Name, Primary Contact, Division, Address, Phone, Fax, Default Locale, Default Language, Fiscal Year Starts In, Activate Multiple Currencies, Enable Data Translation, Newsletter, Admin Newsletter, Hide Notices About System Maintenance, Hide Notices About System Downtime, Locale Formats, Default Time Zone, Currency Locale, Used Data Space, Used File Space, API Requests, Last 24 Hours, Streaming API Events, Last 24 Hours, Restricted Logins, Current Month, Salesforce.com Organization ID, Organization Edition, and Instance. The 'Created By' field shows 'OrgFarm EPIC, 17/07/2025, 9:07 pm' and the 'Modified By' field shows 'Ayush Kumar Dewan, 23/09/2025, 8:12 am'. The 'User Licenses' section is partially visible at the bottom.

Organization Detail	
Organization Name	Vanity Makeup Salon
Primary Contact	OrgFarm EPIC
Division	
Address	359 phase-2 jesuja city dhanmantri nagar Jabalpur 482002 Madhya Pradesh India
Phone	08269939829
Fax	
Default Locale	English (United States)
Default Language	English
Fiscal Year Starts In	January
Activate Multiple Currencies	<input type="checkbox"/>
Enable Data Translation	<input type="checkbox"/>
Newsletter	<input checked="" type="checkbox"/>
Admin Newsletter	<input checked="" type="checkbox"/>
Hide Notices About System Maintenance	<input type="checkbox"/>
Hide Notices About System Downtime	<input type="checkbox"/>
Locale Formats	ICU
Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Currency Locale	English (India) - INR
Used Data Space	554 KB (11%) View
Used File Space	225 KB (1%) View
API Requests, Last 24 Hours	12 (15,000 max)
Streaming API Events, Last 24 Hours	0 (10,000 max)
Restricted Logins, Current Month	0 (0 max)
Salesforce.com Organization ID	00Dgl000007S7Ab
Organization Edition	Developer Edition
Instance	CAN98

Created By: OrgFarm EPIC, 17/07/2025, 9:07 pm
Modified By: Ayush Kumar Dewan, 23/09/2025, 8:12 am

- **Business Hours & Holidays**
 - **Action Taken:**
 1. Navigated to **Setup > Business Hours** and created a new record for the salon's schedule (e.g., 9 AM - 7 PM, Mon-Sat).
 2. Navigated to **Setup > Holidays** and added relevant public holidays.
 - **Purpose:** To define the salon's official working schedule, which can be used later for automation and scheduling rules.

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

Business Hours Detail

Edit

Business Hours Name	Salon Operating Hours	Time Zone
Business Hours	<div> <div>Sunday</div> <div>11:00 am to 11:00 pm</div> </div> <div> <div>Monday</div> <div>10:00 am to 8:00 pm</div> </div> <div> <div>Tuesday</div> <div>10:00 am to 8:00 pm</div> </div> <div> <div>Wednesday</div> <div>10:00 am to 8:00 pm</div> </div> <div> <div>Thursday</div> <div>10:00 am to 8:00 pm</div> </div> <div> <div>Friday</div> <div>10:00 am to 8:00 pm</div> </div> <div> <div>Saturday</div> <div>10:00 am to 8:00 pm</div> </div>	<div>(GMT+05:30) India Standard Time (Asia/Kolkata)</div> <div>Default Business Hours</div> <div></div>

Active

✓

Created By

Ayush Kumar Dewan

16/09/2025, 6:19 pm

Last Modified By

Ayush Kumar Dewan

21/09/2025, 1:32 am

Edit

Holidays

Add/Remove

No records to display

Back To Top

Always show me fewer / more records per related list

- Fiscal Year**
 - Action Taken:**
 - Navigated to **Setup > Fiscal Year**.
 - Set the fiscal year start month to **April**.
 - Purpose:** To align the org's financial reporting and forecasting tools with the Indian financial year.

SETUP

Fiscal Year

Setup

Organization Fiscal Year Edit: Vanity Makeup Salon

Help for this Page

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

Standard Fiscal Year

Custom Fiscal Year

Fiscal Year Information

Warning

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

Vanity Makeup Salon

Fiscal Year Start Month

January

Fiscal Year is Based On

The ending month

The starting month

Save

Cancel

2. User & Security Setup

- **User Creation & Licenses**

- **Action Taken:**

1. Navigated to **Setup > Users > New User**.
2. Created user records for the Owner, Receptionist, and Stylist roles.
3. Assigned a **Salesforce** license to each user.

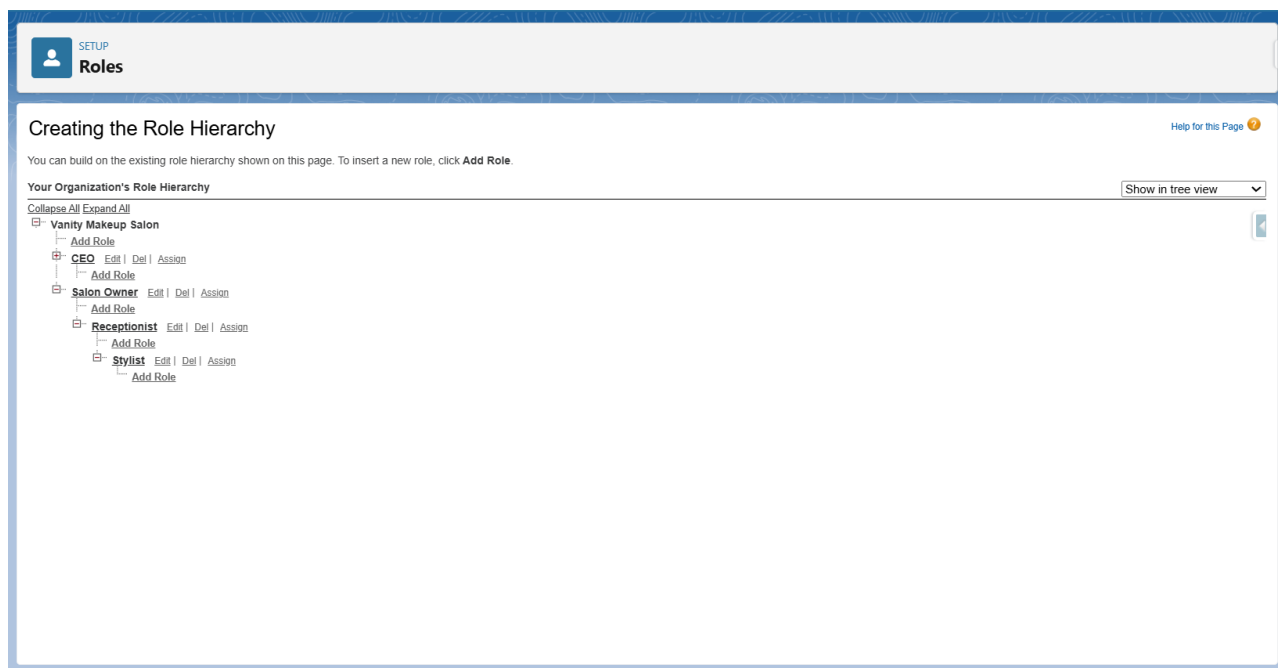
- **Purpose:** To create individual and secure login accounts for all employees who will use the app.

- **Role Hierarchy**

- **Action Taken:**

1. Navigated to **Setup > Roles**.
2. Created three roles: **Salon Owner** (top level), **Receptionist** (reporting to Owner), and **Stylist** (reporting to Owner).

- **Purpose:** To create a data access hierarchy where management can automatically see and report on the records of their staff.



- **Custom Profiles**

- **Action Taken:**

1. Navigated to **Setup > Profiles**.
2. Cloned the **Standard User** profile to create two new profiles: **Receptionist** and **Stylist**.

- **Purpose:** To create unique and editable sets of permissions for different job functions, which is a security best practice.

SETUP

Profiles

Profile

Stylist Profile

Help for this Page

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges (0) | Enabled Apex Class Access (0) | Enabled Visualforce Page Access (0) | Enabled External Data Source Access (0) | Enabled Named Credential Access (0) | Enabled External Credential Principal Access (0) | Enabled Custom Metadata Type Access (0) | Enabled Custom Setting Definitions Access (0) | Enabled Flow Access (0) | Enabled Service Presence Status Access (0) | Enabled Custom Permissions (0)

Profile Detail

EditCloneDeleteView Users

Name	Stylist Profile		
User License	Salesforce	Custom Profile	✓
Description			
Created By	Ayush Kumar Dewan, 16/09/2025, 6:44 pm	Modified By	Ayush Kumar Dewan, 24/09/2025, 2:48 pm

Page Layouts

Standard Object Layouts			
Global	Global Layout [View Assignment]	Location Group Assignment	Location Group Assignment Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Macro	Macro Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Account	Account Layout [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Opportunity	Opportunity Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Opportunity Product	Opportunity Product Layout [View Assignment]
Asset	Asset Layout [View Assignment]	Order	Order Layout [View Assignment]
Asset Action	Asset Action Layout [View Assignment]	Order Product	Order Product Layout [View Assignment]
Asset Action Source	Asset Action Source Layout	Payment	Payment Layout

SETUP

Profiles

Profile

Receptionist Profile

Help for this Page

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges (1) | Enabled Apex Class Access (0) | Enabled Visualforce Page Access (0) | Enabled External Data Source Access (0) | Enabled Named Credential Access (0) | Enabled External Credential Principal Access (0) | Enabled Custom Metadata Type Access (0) | Enabled Custom Setting Definitions Access (0) | Enabled Flow Access (0) | Enabled Service Presence Status Access (0) | Enabled Custom Permissions (0)

Profile Detail

EditCloneDeleteView Users

Name	Receptionist Profile		
User License	Salesforce	Custom Profile	✓
Description			
Created By	Ayush Kumar Dewan, 16/09/2025, 6:43 pm	Modified By	Ayush Kumar Dewan, 24/09/2025, 2:48 pm

Page Layouts

Standard Object Layouts			
Global	Global Layout [View Assignment]	Location Group Assignment	Location Group Assignment Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Macro	Macro Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Account	Account Layout [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Opportunity	Opportunity Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Opportunity Product	Opportunity Product Layout [View Assignment]
Asset	Asset Layout [View Assignment]	Order	Order Layout [View Assignment]
Asset Action	Asset Action Layout [View Assignment]	Order Product	Order Product Layout [View Assignment]
Asset Action Source	Asset Action Source Layout	Payment	Payment Layout

Profiles

Profile
Salon Owner

Help for this Page

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges](#) | [Enabled Apex Class Access](#) | [Enabled Visualforce Page Access](#) | [Enabled External Data Source Access](#) | [Enabled Named Credential Access](#) | [Enabled External Credential Principal Access](#) | [Enabled Custom Metadata Type Access](#) | [Enabled Custom Setting Definitions Access](#) | [Enabled Flow Access](#) | [Enabled Service Presence Status Access](#) | [Enabled Custom Permissions](#)

Profile Detail

Edit Clone Delete View Users

Name	Salon Owner		
User License	Salesforce	Custom Profile	✓
Description			
Created By	Ayush Kumar Dewan	25/09/2025, 8:05 am	Modified By Ayush Kumar Dewan 25/09/2025, 8:09 am

Page Layouts

Standard Object Layouts			
Global	Global Layout [View Assignment]	Location Group Assignment	Location Group Assignment Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Macro	Macro Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Account	Account Layout [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Opportunity	Opportunity Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Opportunity Product	Opportunity Product Layout [View Assignment]
Asset	Asset Layout [View Assignment]	Order	Order Layout [View Assignment]
Asset Action	Asset Action Layout [View Assignment]	Order Product	Order Product Layout [View Assignment]
Asset Action Source	Asset Action Source Layout	Payment	Payment Layout

Permission Sets

- **Action Taken:** Reviewed the functionality of **Permission Sets** in Setup.
- **Purpose:** To understand how to grant extra, specific permissions to individual users in the future without having to create a new profile.
- **Organization-Wide Defaults (OWD)**
 - **Action Taken:**
 1. Navigated to **Setup > Sharing Settings**.
 2. Set the OWD for all custom salon objects to **Private**.
 - **Purpose:** To create the most secure data foundation where, by default, users can only see their own records, protecting data privacy.
- **Sharing Rules**
 - **Action Taken:** Reviewed the functionality of **Sharing Rules** in Setup.
 - **Purpose:** To understand how to open up record access between users (e.g., let all stylists see each other's schedules) when the OWD is set to Private.

SETUP

Sharing Settings

Sharing Settings

Help for this Page

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: Appointment

[Disable External Sharing Model](#)

Default Sharing Settings

Organization-Wide Defaults

Edit

Organization-Wide Defaults Help

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Appointment	Public Read/Write	Private	<input checked="" type="checkbox"/>

Other Settings

Other Settings Help

Manager Groups

☐

Secure guest user record access

☒

Require permission to view record names in lookup fields

☐

Sharing Rules

Appointment Sharing Rules

New

Recalculate

Appointment Sharing Rules Help

No sharing rules specified.

Sharing Overrides

Profiles That Override Appointment Sharing

Sharing Overrides Help

- Login Access Policies**
 - Action Taken:**
 - Navigated to the `Receptionist` profile and configured **Login IP Ranges**.
 - Reviewed **Session Settings** in Setup to understand session timeout values.
 - Purpose:** To secure the application by controlling *where* and for *how long* users can be logged in.

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

☒

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

Save

Cancel

3. Deployment & Environment Review

- **Sandbox Usage**
 - **Action Taken:** Reviewed the concept of **Sandboxes** in Setup.
 - **Purpose:** To learn the best practice for how development is managed in a real company, where changes are made in a copy (sandbox) before being moved to the live environment.
- **Deployment Basics**
 - **Action Taken:** Reviewed the functionality of **Change Sets** in Setup.
 - **Purpose:** To understand the standard tool used to move customizations from a sandbox to a live production org.