

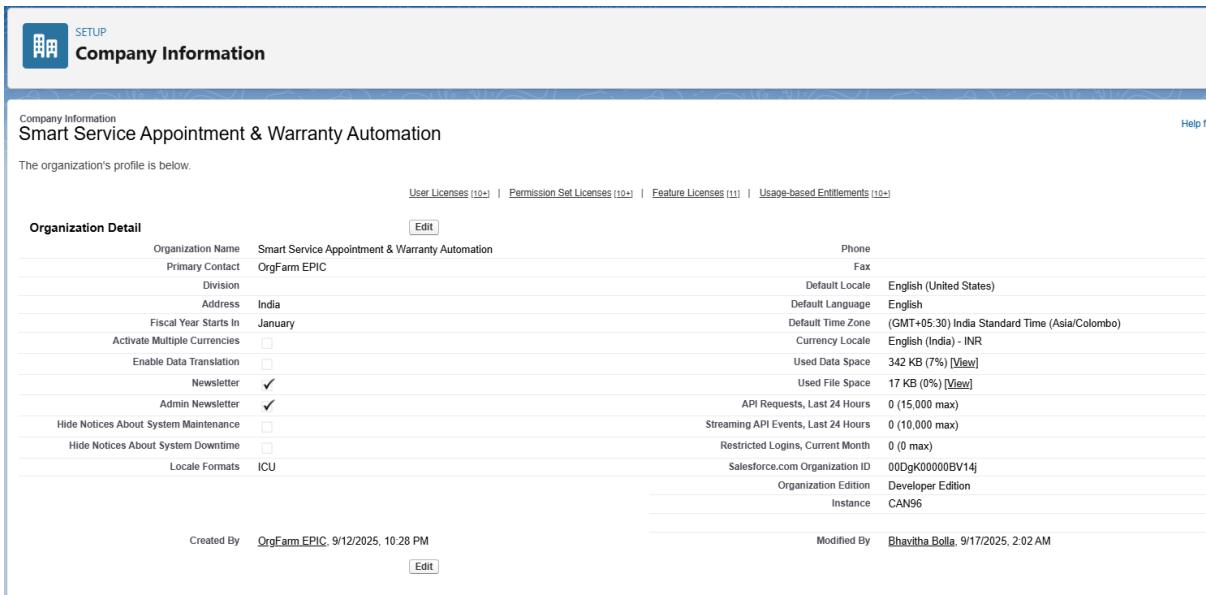
Project Title – “Smart Subscription Tracker”

PHASE 2 - Org Setup & Configuration

Company Profile Setup

Set basic org details under *Setup → Company Information → Edit*:

- **Name:** Smart Service Appointment & Warranty Automation
- **Time Zone:** Default working timezone (e.g., *GMT+05:30 Kolkata*).
- **Locale:** Controls date/number formats (e.g., *English (India/US)*).
- **Language:** English (India)
- **Currency:** Corporate currency (e.g., *INR, USD*).



The screenshot shows the 'Company Information' page in the Salesforce setup. The organization's profile is displayed, including its name, address, and various configuration settings. Key details shown include:

Organization Detail	Value	Setting	
Organization Name	Smart Service Appointment & Warranty Automation	Primary Contact	
Division	OrgFarm EPIC	Phone	Default Locale
Address	India	Fax	English (United States)
Fiscal Year Starts In	January	Default Language	English
Activate Multiple Currencies	<input type="checkbox"/>	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Colombo)
Enable Data Translation	<input type="checkbox"/>	Currency Locale	English (India) - INR
Newsletter	<input checked="" type="checkbox"/>	Used Data Space	342 KB (7%) [View]
Admin Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) [View]
Hide Notices About System Maintenance	<input type="checkbox"/>	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Locale Formats	ICU	Restricted Logins, Current Month	0 (max)
		Salesforce.com Organization ID	00DgK00000BV14j
		Organization Edition	Developer Edition
		Instance	CAN96

Created By: OrgFarm EPIC, 9/12/2025, 10:28 PM Modified By: Bhavitha Bolla, 9/17/2025, 2:02 AM

Business Hours Setup

Configure working hours for escalation rules and SLA tracking:

- **Path:** *Setup → Business Hours → New*.
- **Name:** Define (e.g., *Standard Business Hours*).
- **Time Zone:** Select org or regional timezone (e.g., *GMT+05:30 Asia/Kolkata*).
- **Working Hours:** Set daily schedule (e.g., Mon–Sat 9:00 AM–6:00 PM; Sunday closed).
- **Save:** Apply as default if needed.

Organization Business Hours

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.

Business Hours Edit

Step 1. Business Hours Name

Business Hours Name: Standard Business Hours

Step 2. Time Zone

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

Step 3. Business Hours

Day	From	To	24 hours
Sunday	9:00 AM	6:00 PM	<input type="checkbox"/>
Monday	9:00 AM	6:00 PM	<input type="checkbox"/>
Tuesday	9:00 AM	6:00 PM	<input type="checkbox"/>
Wednesday	9:00 AM	6:00 PM	<input type="checkbox"/>
Thursday	9:00 AM	6:00 PM	<input type="checkbox"/>
Friday	9:00 AM	6:00 PM	<input type="checkbox"/>
Saturday	9:00 AM	6:00 PM	<input type="checkbox"/>

Fiscal Year Setup

Defines reporting boundaries for forecasts and opportunities.

- **Path:** *Setup → Fiscal Year.*
- **Type:** Choose *Standard Fiscal Year (Jan–Dec)* or *Custom Fiscal Year* if months differ.
- **Configuration:** Select the starting month (e.g., *January*).
- **Save:** Apply settings to define fiscal periods.

 **SETUP**

Fiscal Year

Setup Organization Fiscal Year Edit: Smart Service Appointment & Warranty Automation **Help for this Page** 

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

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.

Standard Fiscal Year 
 Custom Fiscal Year 

Change Fiscal Year Period

Name	Smart Service Appointment & Warranty Automation
Fiscal Year Start Month	January <input type="button" value="Save"/> <input type="button" value="Cancel"/>
Fiscal Year Is Based On	<input type="radio"/> The ending month <input checked="" type="radio"/> The starting month

User Setup (Profiles, Roles, Permission Sets, Users)

a) Profiles

Profiles control what users can do (object-level permissions)

1. **Service_Agent_Profile**

- For service reps handling appointments & customer issues.

2. **Warranty_Manager_Profile**

- For users who manage warranty claims and approvals.

3. **Admin_Profile**

- For project manager/system admin who has wider control.

(Later in Phase 3, when you create objects like Appointment, Warranty, Claim, etc., you'll adjust permissions here).

b) Roles

Create the following hierarchy:

CEO

 └— Service Manager

 └— Service Agent

 └— Warranty Manager

- **CEO** → Top-level (sees everything).
 - **Service Manager** → Supervises service agents.
 - **Service Agent** → Handles appointments and service requests.
 - **Warranty Manager** → Approves/rejects warranty claims, works parallel to service team.
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c) Permission Sets

Permission sets provide **extra permissions** beyond profile.

👉 Create one for Phase 3 (leave empty for now):

- **Warranty_Access_PS** → will grant extra access to Warranty object later.
 - **Appointment_Access_PS** → will grant extra access to Appointment object later.
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d) Users

Create sample users for testing the flow:

1. **agent1** → Profile: Service_Agent_Profile → Role: Service Agent

- Example: Handles new customer appointment bookings.
2. **warranty1** → Profile: Warranty_Manager_Profile → Role: Warranty Manager
- Example: Reviews and approves warranty requests.
3. **manager1** → Profile: Admin_Profile → Role: Service Manager
- Example: Oversees both teams, resolves escalations.

Service_Agent_Profile

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.

Profile Detail

Name	Service_Agent_Profile	Edit	Clone	Delete	View Users
User License	Salesforce	Custom Profile ✓			
Description					
Created By	Bhavitha Bolla, 9/17/2025, 2:21 AM	Modified By Bhavitha Bolla, 9/17/2025, 2:23 AM			

Warranty_Manager_Profile

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.

Profile Detail

Name	Warranty_Manager_Profile	Edit	Clone	Delete	View Users
User License	Salesforce Platform	Custom Profile ✓			
Description					
Created By	Bhavitha Bolla, 9/17/2025, 2:25 AM	Modified By Bhavitha Bolla, 9/17/2025, 2:25 AM			

Admin_Profile

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.

Profile Detail

Name	Admin_Profile	Edit	Clone	Delete	View Users
User License	Salesforce	Custom Profile ✓			
Description					
Created By	Bhavitha Bolla, 9/17/2025, 2:26 AM	Modified By Bhavitha Bolla, 9/17/2025, 2:26 AM			

Role Hierarchy Setup

- ② **CEO:** Full access to all modules.
- ② **Operations Manager:** Monitors service appointments and warranty processing.
- ② **Service Executive / Technician:** Works on service requests, updates status, logs issues.
- ② **Warranty Coordinator:** Reviews warranty claims, approves replacements, manages warranty data.
- ② **Sales Manager / Sales Rep:** Manages customer sales and links sales to service/warranty records.
- ② **Finance Manager / Executive:** Tracks payments, invoices, and warranty costs.

CEO



The screenshot shows a software interface titled "SETUP" with a sub-section titled "Roles". Below this, the heading "Creating the Role Hierarchy" is displayed. A sub-section titled "Your Organization's Role Hierarchy" follows, containing a tree view of roles under "Smart Service Appointment & Warranty Automation". The tree includes nodes for CEO, Finance Manager, VP. Marketing, VP. North American Sales, Operations Manager, and Sales Manager, each with edit, delete, and assign options.

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



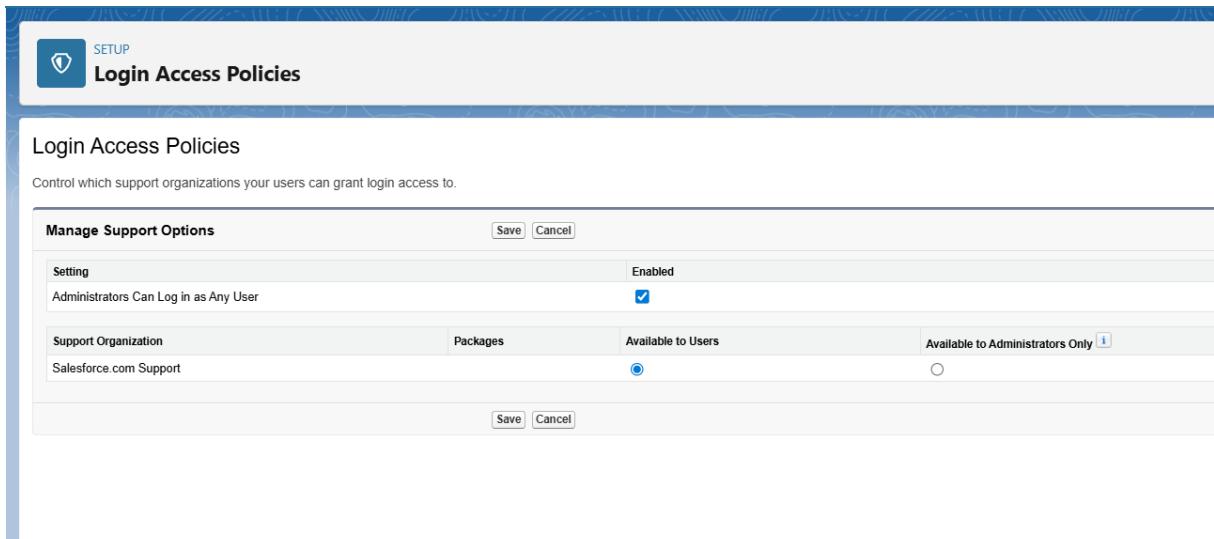
OWD (Org Wide Default)

This has to be done in the Phase 3, as the OWD setting are needed to be applied on an object which will be implemented in next phase of the project.

Sharing Rule

This has to be done in the Phase 3 as well considering it has to be implemented on an object.

Assign Permission Set(s)



The screenshot shows the Salesforce Setup interface with the following details:

- Header:** SETUP / Login Access Policies
- Section Title:** Login Access Policies
- Description:** Control which support organizations your users can grant login access to.
- Form Fields:**
 - Manage Support Options:** Buttons for Save and Cancel.
 - Setting:** Administrators Can Log in as Any User. The "Enabled" checkbox is checked.
 - Support Organization:** Salesforce.com Support. The "Available to Users" radio button is selected, while "Available to Administrators Only" is unselected.
- Buttons:** Save and Cancel at the bottom of the form.

Dev Org Setup



- To implement the following project a Salesforce Developer Edition org was setup.
 - Made a GitHub Repository for source control.
 - Setting up the VS Code and SFDX for the implementation of the LWC Component for development.
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