

# Phase 2: Org Setup & Configuration

## 1. Salesforce Edition

For this project, I used **Salesforce Developer Edition**, which provides all essential CRM features like custom objects, reports, dashboards, and automation.

It is suitable for building and testing applications such as the Corporate Training CRM without requiring a paid license.

## 2. Company Profile Setup

In the Corporate Training CRM, this setup represents the corporate training department of a company that manages employee upskilling programs.

- Updated Company Information with name: “Corporate Training CRM Pvt. Ltd.”
- Set default currency: INR (₹).
- Time Zone: (GMT+05:30) India Standard Time.
- Default Locale: English (India).

The screenshot displays the Salesforce Setup interface for a Developer Edition organization. The left sidebar contains navigation links for Setup Home, Salesforce Go, Service Setup Assistant, Commerce Setup Assistant, Hyperforce Assistant, Release Updates, Salesforce Mobile App, Lightning Usage, Optimizer, Sales Cloud Everywhere, ADMINISTRATION (Users, Data, Email), and PLATFORM TOOLS (Subscription Management, Apps). The main content area is titled 'Company Information' and shows the organization's profile for 'Corporate Training CRM Pvt. Ltd.'. The profile details include Organization Name, Primary Contact (OrgFam EPIC), Division, Address (India), Fiscal Year Starts In (January), Activate Multiple Currencies (unchecked), Enable Data Translation (unchecked), Newsletter (checked), Admin Newsletter (checked), Hide Notices About System Maintenance (unchecked), Hide Notices About System Downtime (unchecked), Locale Formats (ICU), Phone, Fax, Default Locale (English (India)), Default Language (English), Default Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata), Currency Locale (English (India) - INR), Used Data Space (394 KB (8%) [View]), Used File Space (17 KB (0%) [View]), API Requests, Last 24 Hours (0 (15,000 max)), Streaming API Events, Last 24 Hours (0 (10,000 max)), Restricted Logins, Current Month (0 (0 max)), Salesforce.com Organization ID (00DgK000000JxEb), Organization Edition (Developer Edition), and Instance (CAN96). The page also shows the creation and modification dates and times.

Organization Detail	
Organization Name	Corporate Training CRM Pvt. Ltd.
Primary Contact	OrgFam EPIC
Division	
Address	India
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
Phone	
Fax	
Default Locale	English (India)
Default Language	English
Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Currency Locale	English (India) - INR
Used Data Space	394 KB (8%) [View]
Used File Space	17 KB (0%) [View]
API Requests, Last 24 Hours	0 (15,000 max)
Streaming API Events, Last 24 Hours	0 (10,000 max)
Restricted Logins, Current Month	0 (0 max)
Salesforce.com Organization ID	00DgK000000JxEb
Organization Edition	Developer Edition
Instance	CAN96

Created By: OrgFam EPIC, 10/4/2025, 3:19 PM  
Modified By: Penmatsa Dhanvi Vidya Prabha, 10/12/2025, 3:47 AM

### 3. Business Hours & Holidays

#### Created new Business Hours:

- Name: Corporate Training Business Hours
- Hours: 9:00 AM – 6:00 PM, Monday to Friday

#### Added company holidays such as:

- Republic Day – Jan 26
- Independence Day – Aug 15
- Diwali – Nov (variable date)

The screenshot shows the Salesforce Setup interface for configuring Business Hours. The left sidebar contains navigation links for Setup Home, Salesforce Go, Service Setup Assistant, Commerce Setup Assistant, Hyperforce Assistant, Release Updates, Salesforce Mobile App, Lightning Usage, Optimizer, Sales Cloud Everywhere, ADMINISTRATION (Users, Data, Email), PLATFORM TOOLS (Subscription Management, Apps, Feature Settings), and a Quick Find search bar. The main content area is titled 'Organization Business Hours' and includes a 'New Business Hours' button. Below this is a table with columns for Action, Business Hours Name, Active, Time Zone, and Default. Two entries are listed: 'Corporate Training Business Hours' (Active, GMT+05:30 India Standard Time (Asia/Kolkata)) and 'Default' (Active, GMT-07:00 Pacific Daylight Time (America/Los\_Angeles)).

Action	Business Hours Name	Active	Time Zone	Default
<a href="#">Edit</a>	Corporate Training Business Hours	✓	(GMT+05:30) India Standard Time (Asia/Kolkata)	<input type="checkbox"/>
<a href="#">Edit</a>	Default	✓	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	<input checked="" type="checkbox"/>

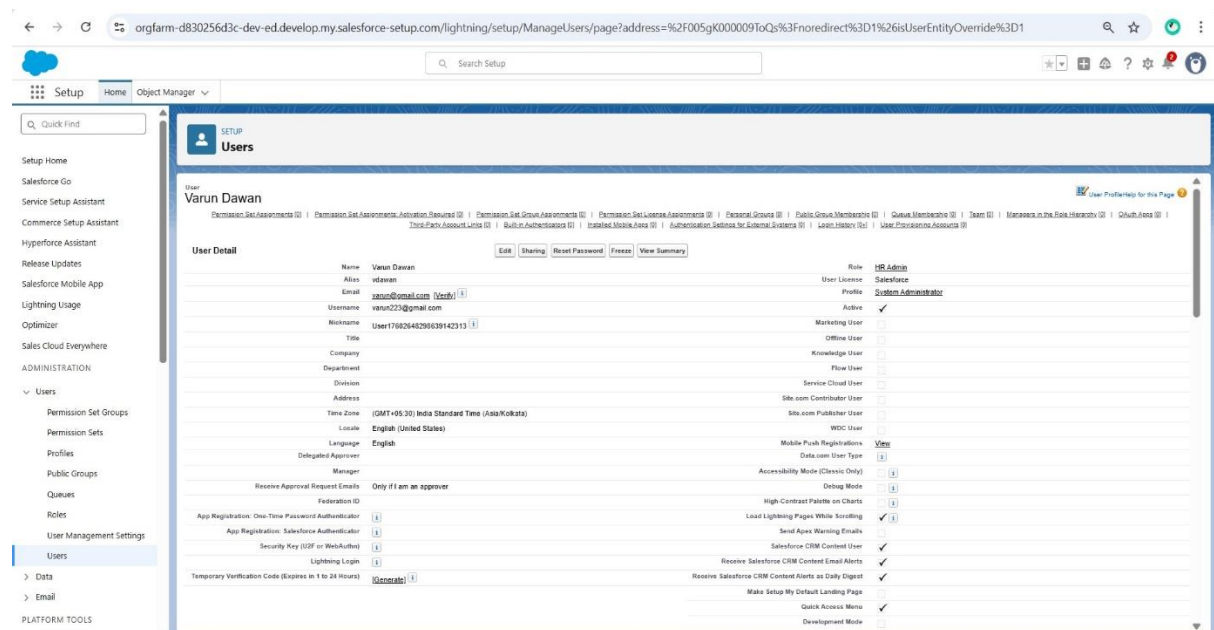
### 4. Fiscal Year Settings

- Used Standard Fiscal Year (April to March) suitable for Indian companies.
- Verified alignment with reporting dashboards.

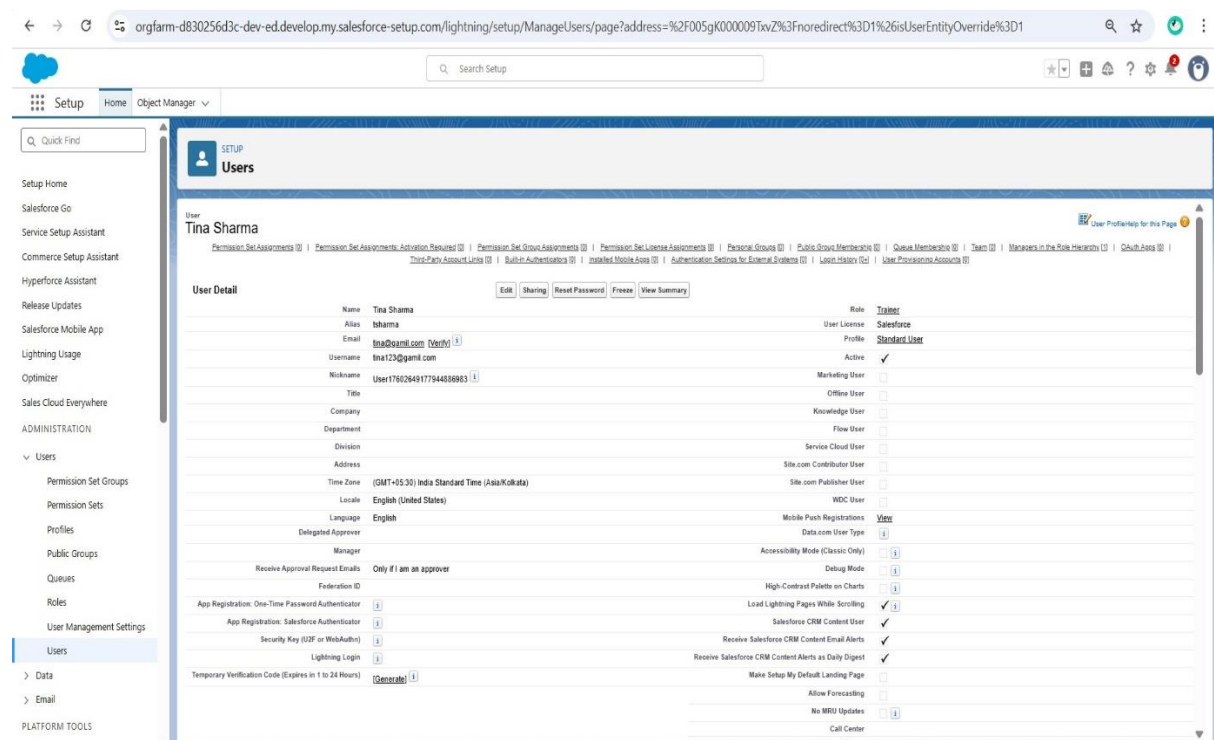
## 5. User Setup & Licenses

Created users:

- HR Admin (System Administrator) – Full access to all objects.
- Trainer User (Standard User) – Access to assigned courses and trainee progress.
- Employee User (Read Only) – View own registration and progress.
- Assigned Salesforce licenses to each.



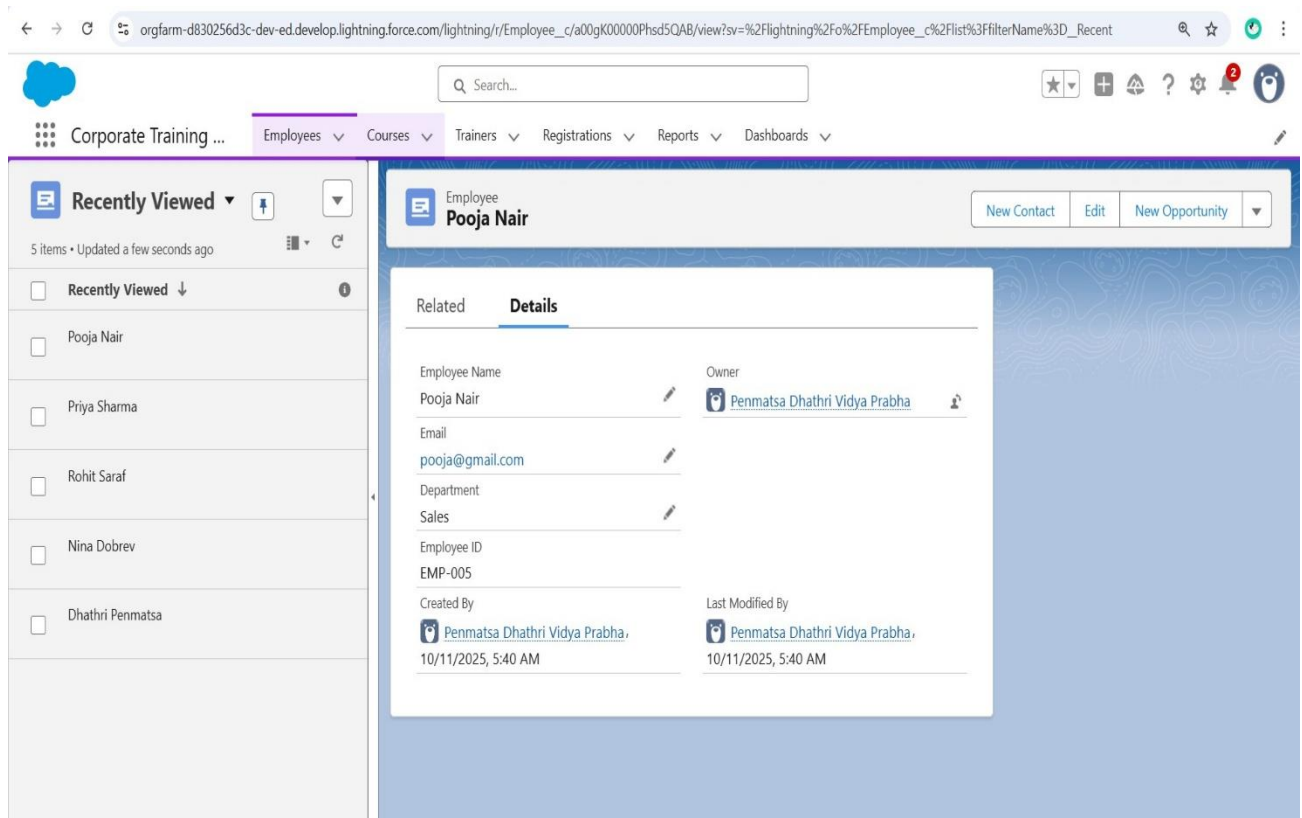
The screenshot shows the Salesforce Setup interface for the 'Users' section. The user 'Varun Dawan' is selected. The 'User Detail' section on the left lists various attributes: Name (Varun Dawan), Alias (vrdawan), Email (varun223@gmail.com), Username (varun223@gmail.com), Nickname (User17692648296389142313), Title, Company, Department, Division, Address, Time Zone (GMT+05:30 India Standard Time (Asia/Kolkata)), Locale (English (United States)), Language (English), Delegated Approver, Manager, Receive Approval Request Emails (Only if I am an approver), Federation ID, App Registration: One-Time Password Authenticator, App Registration: Salesforce Authenticator, Security Key (IDP or WebAuthn), Lightning Login, and Temporary Verification Code (Expires in 1 to 24 Hours). The 'Permissions' section on the right lists various roles and permissions, including 'HR Admin', 'Salesforce', 'System Administrator', 'Active', 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', 'WDC User', 'Mobile Push Registrations', 'Data.com User Type', 'Accessibility Mode (Classic Only)', 'Debug Mode', 'High-Contrast Palette on Charts', 'Load Lightning Pages While Scrolling', 'Send Apex Warning Emails', 'Salesforce CRM Content User', 'Receive Salesforce CRM Content Email Alerts', 'Receive Salesforce CRM Content Alerts as Daily Digest', 'Make Setup My Default Landing Page', 'Quick Access Menu', and 'Development Menu'.



The screenshot shows the Salesforce Setup interface for the 'Users' section. The user 'Tina Sharma' is selected. The 'User Detail' section on the left lists various attributes: Name (Tina Sharma), Alias (tsharma), Email (tina223@gmail.com), Username (tina223@gmail.com), Nickname (User1769264917794408893), Title, Company, Department, Division, Address, Time Zone (GMT+05:30 India Standard Time (Asia/Kolkata)), Locale (English (United States)), Language (English), Delegated Approver, Manager, Receive Approval Request Emails (Only if I am an approver), Federation ID, App Registration: One-Time Password Authenticator, App Registration: Salesforce Authenticator, Security Key (IDP or WebAuthn), Lightning Login, and Temporary Verification Code (Expires in 1 to 24 Hours). The 'Permissions' section on the right lists various roles and permissions, including 'Trainer', 'Salesforce', 'Standard User', 'Active', 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', 'WDC User', 'Mobile Push Registrations', 'Data.com User Type', 'Accessibility Mode (Classic Only)', 'Debug Mode', 'High-Contrast Palette on Charts', 'Load Lightning Pages While Scrolling', 'Send Apex Warning Emails', 'Salesforce CRM Content User', 'Receive Salesforce CRM Content Email Alerts', 'Receive Salesforce CRM Content Alerts as Daily Digest', 'Make Setup My Default Landing Page', 'Allow Forecasting', 'No MRU Updates', and 'Call Center'.

## 6. Developer Org Setup

- Created and configured Developer Org.
- Built custom objects, fields, relationships, and automation.
- Tested triggers, reports, and dashboards using sample data.



## 7. Summary

In this phase, we:

- Configured organization-wide settings
- Set up users and permissions
- Defined working hours and fiscal year
- Created developer environment and prepared for deployment