Phase 2: Org Setup & Configuration

This phase established the Salesforce environment with proper configurations for users, roles, profiles, permissions, and data-sharing policies to ensure secure, role-based access for academic workflows[1]. The images provided detail the following configurations

Company Profile Setup

Configured the company profile with the following details:

• **Organization Name:** Prof. Ram Meghe Institute of Technology & Research
• **Default Locale:** English (India)
• **Default Currency:** INR
• **Default Time Zone:** (GMT+05:30) India Standard Time

Process Flow: Setup → Company Information → Edit

Fiscal Year Settings

Defined the fiscal year from April 1, 2025, to March 31, 2026, aligning financial tracking and reporting to academic schedules.

Process Flow: Setup → Fiscal Year → Define

Business Hours

The business hours were set for 24 hours every day, from Sunday to Saturday.

Process Flow: Setup → Business Hours → New Business Hours

User Setup & Licenses

A new user was created with the following details:

- **First Name:** Librarian
- **Last Name:** User
- **Email:** temp123@gmail.com
- **User License:** Salesforce

- **Profile:** System Administrator
- **Role:** Librarian

Process Flow: Setup → Users → New User → Assign Role/Profile

Roles & Hierarchy

A role hierarchy was defined to manage visibility and reporting structures. The roles include:
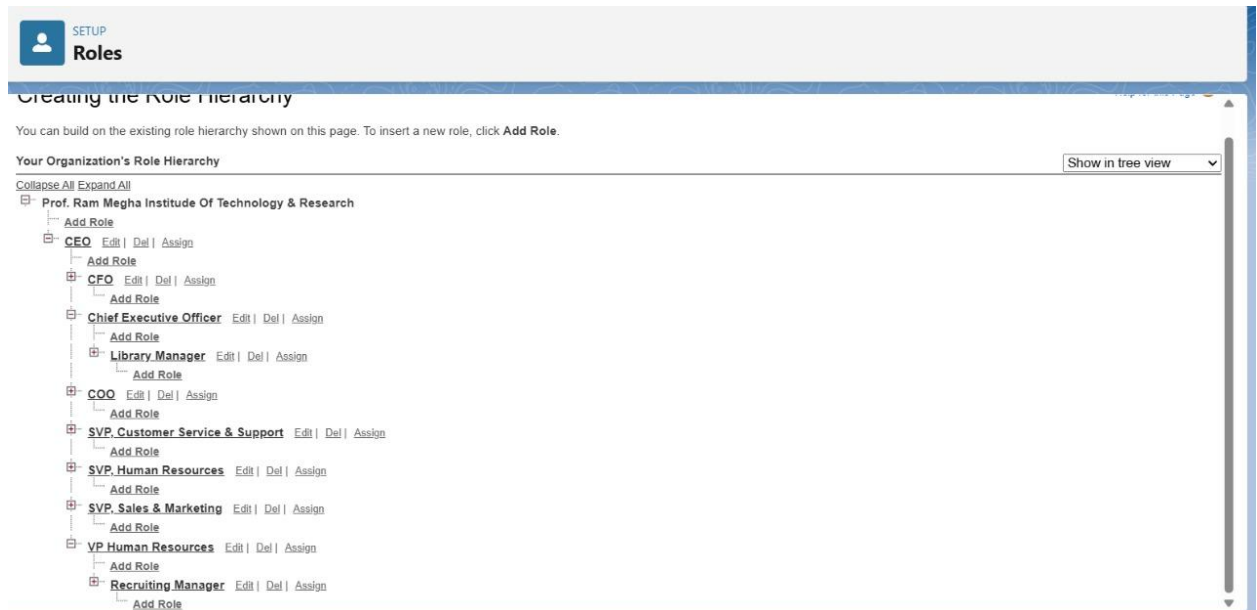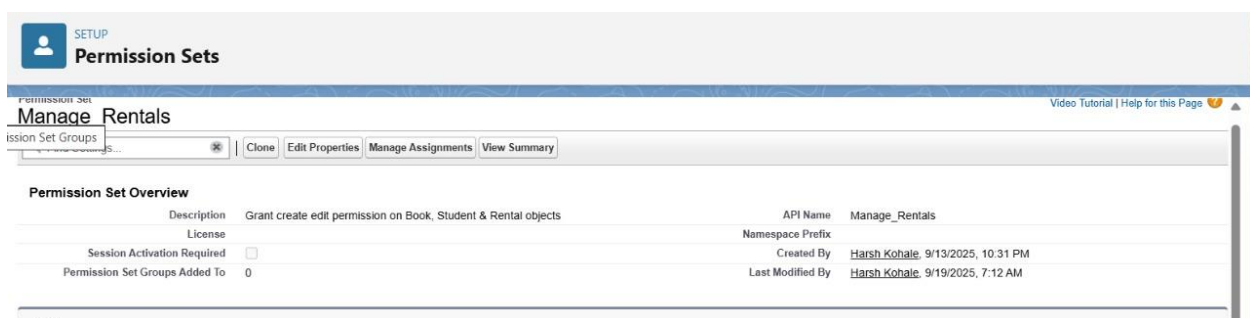

Process Flow: Setup → Roles → New Role → Define Hierarchy

Permission Sets

A permission set named

'Manage Rentals' was created with the description to "Grant create edit permission on Book, Student & Rental objects.

Process Flow: Setup → Permission Sets → New → Assign

Sharing Settings

A new rental sharing rule was implemented. The sharing rule is named

'LibraryManager_Access' and is shared with the **'Librarian'** role.

Process Flow: Setup → Sharing Settings → New Sharing Rule

Profiles

A new profile named **Librarian Profile** was created. This profile is a custom profile with a **Salesforce** user license.