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## 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<sup>1</sup>. The images provided detail the following configurations

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### 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

The screenshot shows the 'Company Information' page in the Salesforce Setup interface. The page title is 'Company Information' with a 'SETUP' icon. The organization name is 'Prof. Ram Megha Institute Of Technology & Research'. Below the name, it says '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 a table of configuration details. The table includes fields like Organization Name, Primary Contact, Division, Address, 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, Phone, Fax, Default Locale, Default Language, 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, Instance, and Modified By. The 'Created By' field shows 'OrgFarm EPIC' and the 'Modified By' field shows 'Harsh Kohale'.

Organization Detail	
Organization Name	Prof. Ram Megha Institute Of Technology & Research
Primary Contact	OrgFarm EPIC
Division	
Address	United States
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 (United States)
Default Language	English
Default Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Currency Locale	English (United States) - USD
Used Data Space	618 KB (12%) <a href="#">View</a>
Used File Space	17 KB (0%) <a href="#">View</a>
API Requests, Last 24 Hours	437 (15,000 max)
Streaming API Events, Last 24 Hours	0 (10,000 max)
Restricted Logins, Current Month	0 (0 max)
Salesforce.com Organization ID	00DgLO000007Sd0n
Organization Edition	Developer Edition
Instance	CAN98
Created By	OrgFarm EPIC, 7/17/2025, 10:52 AM
Modified By	Harsh Kohale, 9/19/2025, 7:16 AM

**Process Flow:** Setup → Company Information → Edit

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## Fiscal Year Settings

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

The screenshot shows a form titled "Change Fiscal Year Period" with "Save" and "Cancel" buttons at the top right. The form contains the following fields:

- Name:** Prof. Ram Megha Institute Of Technology & Research
- Fiscal Year Start Month:** A dropdown menu with "January" selected.
- Fiscal Year is Based On:** Two radio buttons. "The ending month" is selected, and "The starting month" is unselected.

At the bottom of the form, there are "Save" and "Cancel" buttons.

**Process Flow:** Setup → Fiscal Year → Define

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## Business Hours

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

The screenshot shows two steps of a configuration process:

**Step 2. Time Zone**

Time Zone: (GMT-07:00) Pacific Daylight Time (America/Los\_Angeles) [dropdown arrow]

**Step 3. Business Hours**

Day	Start Time	End Time	Duration
Sunday	12:00 AM	to 12:00 AM	<input checked="" type="checkbox"/> 24 hours
Monday	12:00 AM	to 12:00 AM	<input checked="" type="checkbox"/> 24 hours
Tuesday	12:00 AM	to 12:00 AM	<input checked="" type="checkbox"/> 24 hours
Wednesday	12:00 AM	to 12:00 AM	<input checked="" type="checkbox"/> 24 hours
Thursday	12:00 AM	to 12:00 AM	<input checked="" type="checkbox"/> 24 hours
Friday	12:00 AM	to 12:00 AM	<input checked="" type="checkbox"/> 24 hours
Saturday	12:00 AM	to 12:00 AM	<input checked="" type="checkbox"/> 24 hours

At the bottom of the form, there are "Save" and "Cancel" buttons.

**Process Flow:** Setup → Business Hours → New Business Hours

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## 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

**SETUP Profiles**

Profile Edit  
**Librarian Profile** [Help for this Page](#)

Set the permissions and page layouts for this profile.

**Profile Edit** Save Save & New Cancel

Name:

User License:

Description:

Custom Profile: ☒

**Custom App Settings** ⓘ Required Information

	Visible	Default		Visible	Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>	Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
Approvals (standard__Approvals)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales Cloud Mobile (standard__SalesCloudMobile)	<input checked="" type="checkbox"/>	<input type="radio"/>
Automation (standard__FlowsApp)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="radio"/>
Community (standard__Community)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Scheduler Setup	<input type="checkbox"/>	<input type="radio"/>

**SETUP Users**

User Edit  
**Librarian User** [Help for this Page](#)

**User Edit** Save Save & New Cancel

**General Information** ⓘ Required Information

First Name:

Last Name:

Alias:

Email:

Username:

Nickname:

Title:

Company:

Department:

Division:

Role:

User License:

Profile:

Active: ☒

Marketing User: ☐

Offline User: ☐

Knowledge User: ☐

Flow User: ☐

Service Cloud User: ☐

Site.com Contributor User: ☐

Site.com Publisher User: ☐

WDC User: ☐

Data.com User Type:

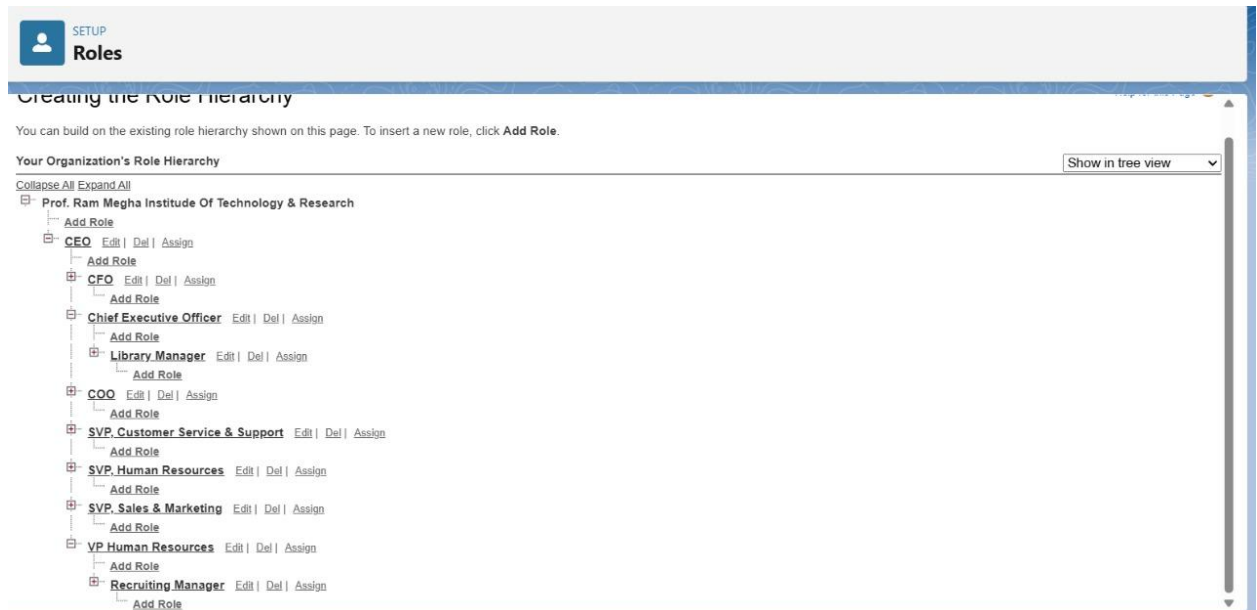
Data.com Monthly Addition Limit:

Accessibility Mode (Classic Only): ☐

**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:

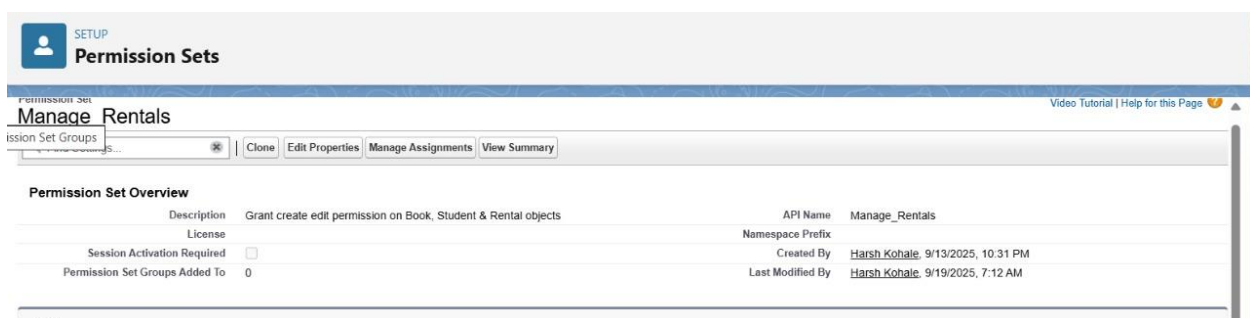


**Process Flow:** Setup → Roles → New Role → Define Hierarchy

## 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

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## Sharing Settings

A new rental sharing rule was implemented. The sharing rule is named '**LibraryManager\_Access**' and is shared with the '**Librarian**' role.

The screenshot shows the 'Setup Sharing Settings' page in Salesforce. The page title is 'Setup Rental Sharing Rule'. Below the title, there is a note: 'Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users. Note: "Roles and subordinates" includes all users in a role, and the roles below that role. You can use sharing rules only to grant wider access to data, not to restrict access.' The form contains the following fields: 'Label' with the value 'LibraryManager\_Access', 'Rule Name' with the value 'LibraryManager\_Access', and 'Description' which is empty. Below these fields, there is a section for 'Rental: owned by members of' with a dropdown menu showing 'Role: Librarian'. At the bottom of the form, there is a 'Created By' field with the value 'Harsh Kohale, 9/13/2025, 11:10 PM' and a 'Modified By' field with the value 'Harsh Kohale, 9/13/2025, 11:10 PM'. There are 'Save' and 'Cancel' buttons at the bottom right of the form.

**Process Flow:** Setup → Sharing Settings → New Sharing Rule

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## Profiles

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