Phase 2: Org Setup & Configuration

1. Salesforce Editions

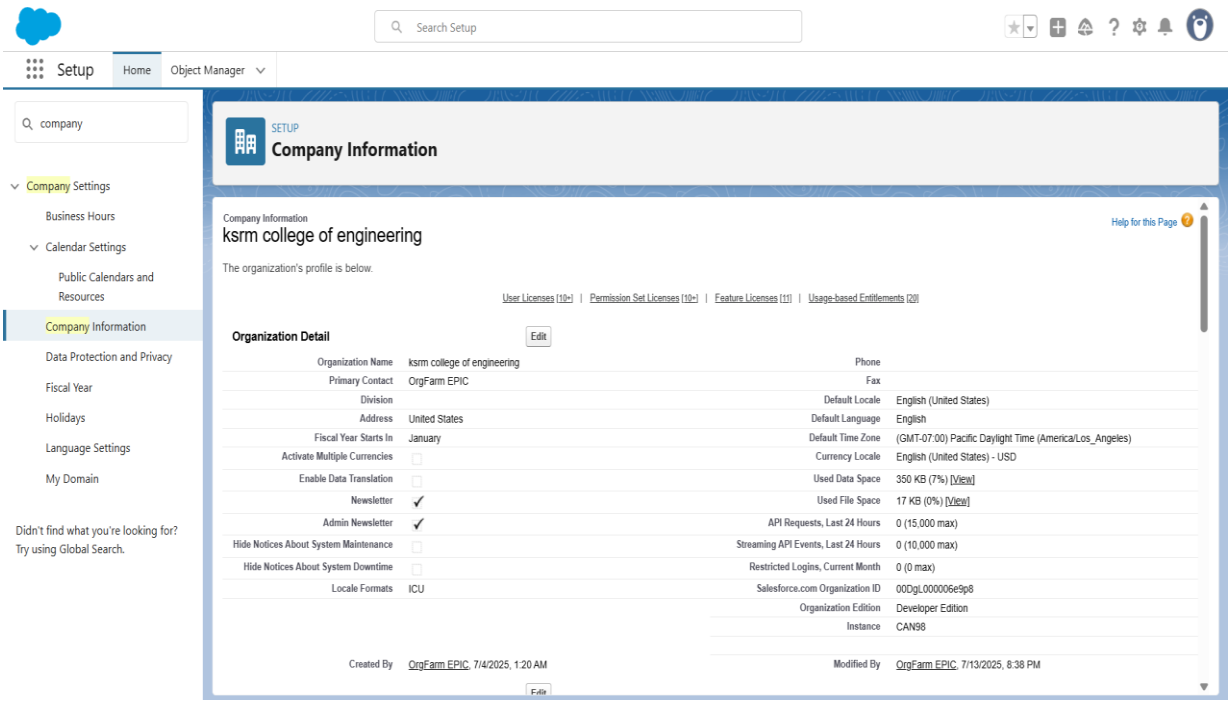
Choosing the right Salesforce Edition is a crucial step in configuring the SkyCast – Smart City Weather Information System. Each edition provides different levels of scalability, customization, and integration capabilities. After detailed evaluation, the Enterprise Edition was selected as the most suitable option.

- Evaluation of Editions: Professional, Enterprise, and Unlimited editions were compared for scalability, workflow automation, and API support.
- Selection Criteria: Considered factors like number of users, API limits, integration requirements, and cost feasibility.
- Final Choice: Enterprise Edition chosen for its balance of advanced automation and cost efficiency.
- Developer Org Usage: Developer Edition used for testing, training, and proof of concept activities.
- License Allocation: Licenses mapped for Admins, Standard Users, and API users.
- Justification: Enterprise Edition ensures scalability for future growth of the SkyCast system.

2. Company Profile Setup

The company profile setup establishes the foundational configuration for the Salesforce org. This ensures accurate localization, compliance, and brand identity within the system.

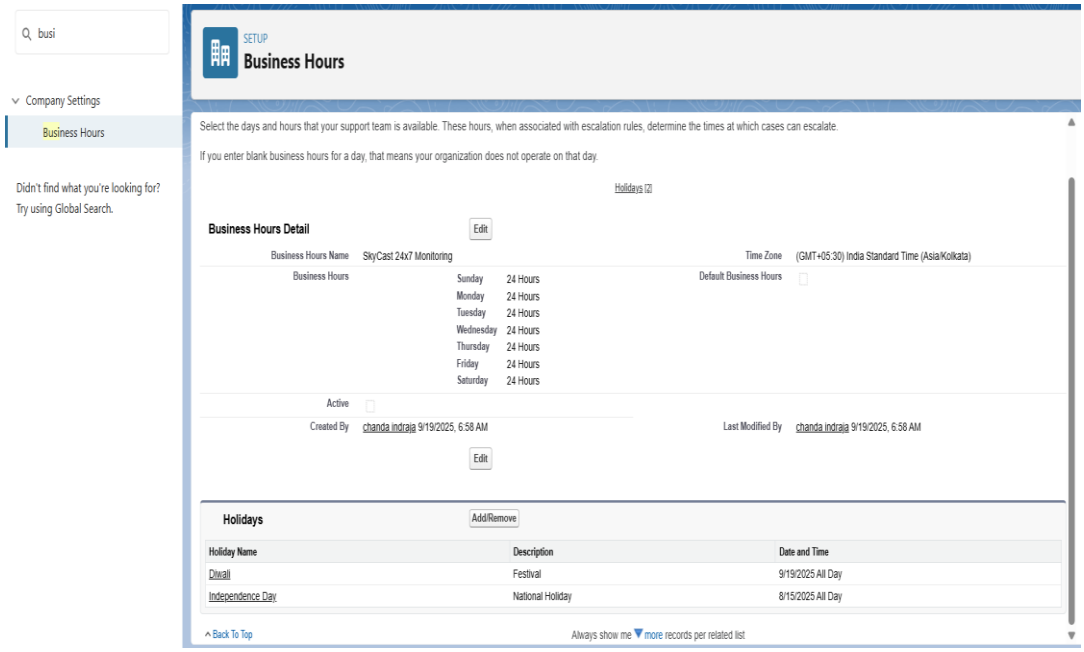
- Organization Details: Configured company name, address, and primary contact information.
- Locale & Time Zone: **Set to Indian Standard Time (IST) and English (India).**
- Default Currency: Enabled INR as the base currency and multi-currency support for USD/EUR.
- Branding: Uploaded company logo and configured email settings for notifications.
- Audit & Compliance: Verified organization information accuracy to prevent data/reporting issues.
- Governance: Ensured profile setup aligns with corporate policies.



3. Business Hours & Holidays

Business hours and holiday settings define availability for service-level agreements, escalation rules, and customer interactions. Proper configuration ensures accurate case handling and timely response to emergencies.

- **Standard Hours:** Defined 9 AM – 6 PM, Monday to Friday.
- **Holiday Calendar:** Configured key national holidays such as Republic Day, Independence Day, and Diwali.
- **Emergency Hours:** Created 24/7 service hours for City Administrators and Emergency Services.
- **Escalation Rules:** Linked escalation and case management with business hours and holidays.
- Testing: Verified that escalation pauses during defined holidays.
- **Regional Variations:** Added holidays for state-specific requirements.



4. Fiscal Year Settings

Feature	Configuration / Action	Impact / Notes
Standard Fiscal Year	April–March cycle (aligned with Indian financial year)	Ensures all reports and forecasts follow standard FY
Custom Fiscal Year	Evaluated but deferred	Maintains simplicity and avoids unnecessary complexity
Revenue & Forecast Alignment	Revenue, Opportunities, and ARR tracking aligned to fiscal year	Accurate revenue recognition and forecasting
Reporting & Analytics	Dashboards and reports configured with fiscal year filters	Consistent reporting and analytics across the org
Governance	Restricted changes to fiscal year	Prevents accidental changes; ensures long-term consistency

5. User Setup & Licenses

a) User Types & Roles

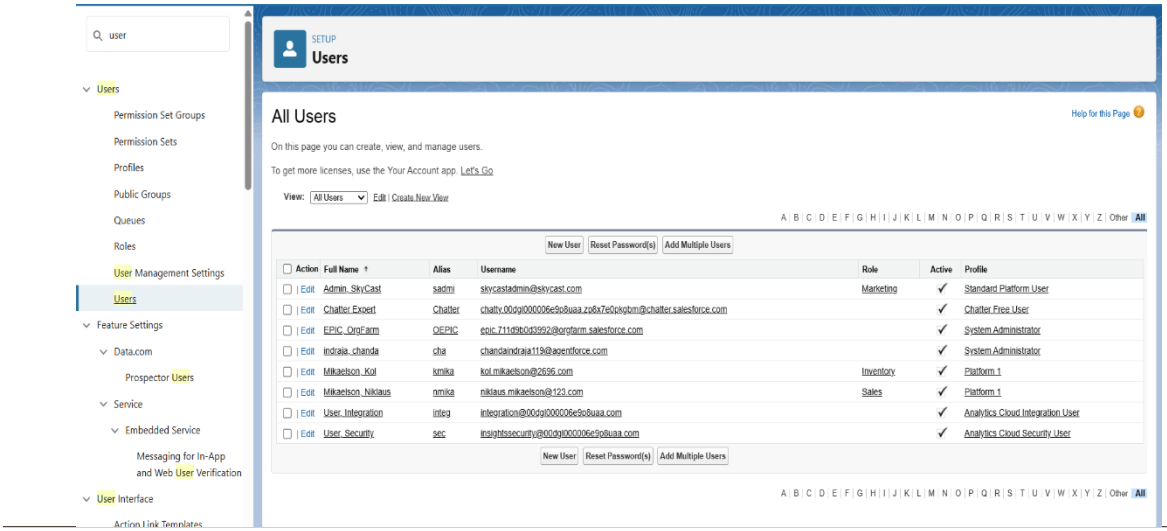
- **Admin Users:** Full system-level permissions for configuration and management.
- **Standard Users:** Role-based access tailored to responsibilities.
- **API Users:** Dedicated for IoT sensor and system integrations.

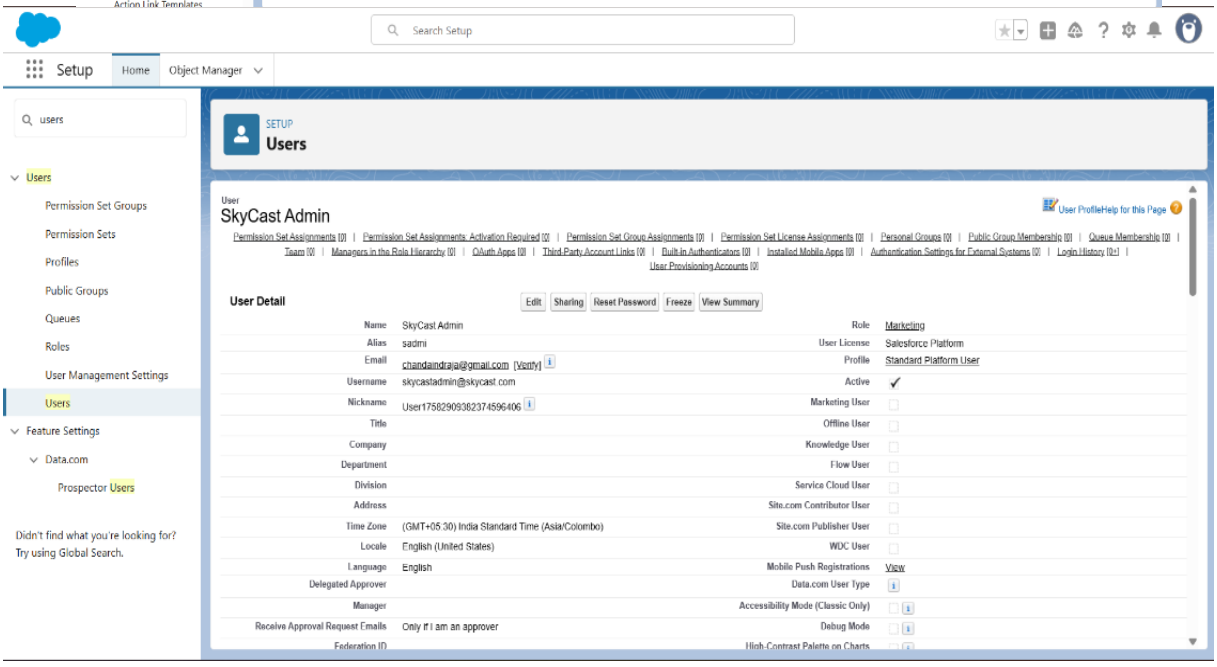
b) License Management

- Assigned based on job function to ensure compliance and cost-efficiency.
- Optimized allocation to prevent under- or over-licensing.

c) Security Measures

- **Multi-Factor Authentication (MFA):** Enforced for all privileged accounts.
- **Login IP Ranges:** Restricted to trusted locations to reduce security risks.





6. Profiles

- **Profile Details**

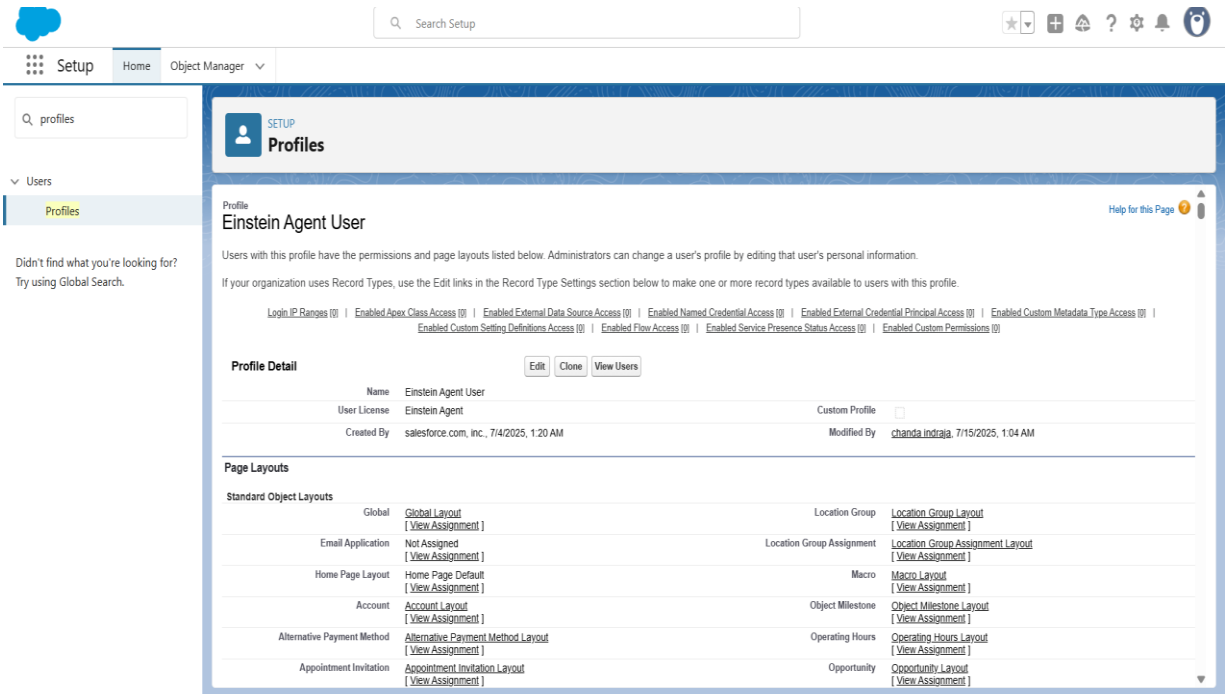
  - **Name:** Einstein Agent User
  - **User License:** Einstein Agent
  - Includes quick links to set **Login IP Ranges**, **Enabled Apex Class Access**, **External Data Source Access**, and other permissions.

- **Page Layout Assignments**

  - **Global Layout** – Default global page layout
  - **Home Page Default** – Home page configuration
  - **Account Layout** – Page layout for Account object
  - Additional layouts for Alternative Payment Method, Appointment Invitation, Location Group, Macro, Object Milestone, Operating Hours, and Opportunity.

- **Customization Options**

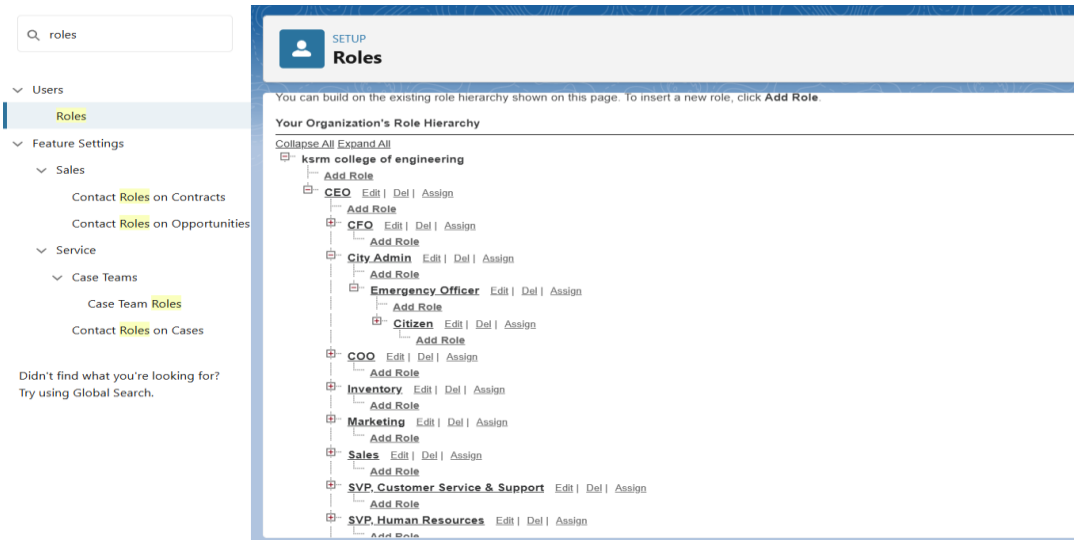
  - You can **Edit**, **Clone**, or **View Users** directly from the profile page.
  - Field-level security and tab visibility can be adjusted here to show only the relevant applications per profile.

- 

7. Roles

Roles control data visibility and hierarchical reporting structures in Salesforce. In SkyCast, they reflect the responsibilities of different smart city stakeholders.

- City Administrator: Top-level role with access to all records.
- Emergency Services: Role created with access to alerts and cases.
- Business Partners: Role with access to weather analytics and insights.
- Citizens: Limited access through community/portal roles.



8. Permission Sets

Objective

Provide selected users with **read-only access** to the custom object *Weather Data* without changing their base profile permissions.

Background

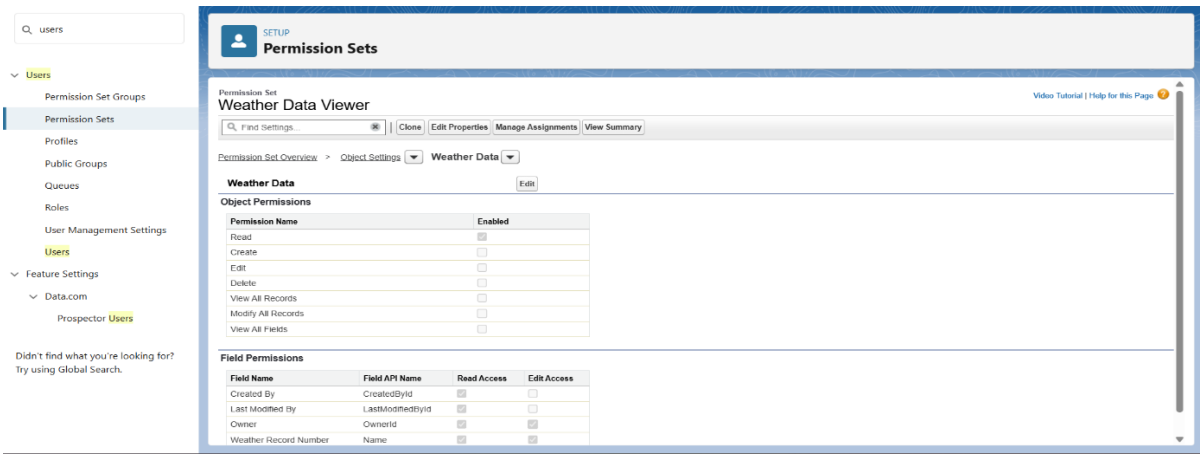
In Salesforce, **Permission Sets** extend a user's access beyond what their profile grants. **They are ideal when:**

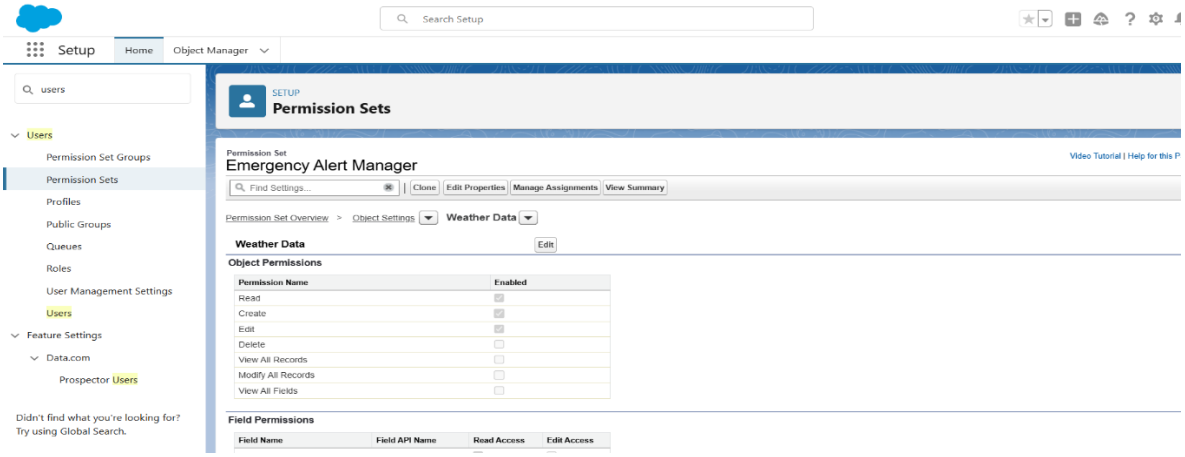
- Only certain users need extra permissions.
- You don't want to clone or modify profiles.

Configuration Details

Item	Description
Permission Set Name	Weather Data Viewer
Assigned Object	Weather Data (custom object)
Object Permissions	Read access only (Create, Edit, Delete disabled)
Field Permissions	Read access for all key fields: *Created By*, *LastModifiedBy*, *Owner*, *Weather Record Number*, *Name*
Assignments	Users who require visibility into weather records without edit rights

Implementation Steps



- 

9. Organization-Wide Defaults (OWD)

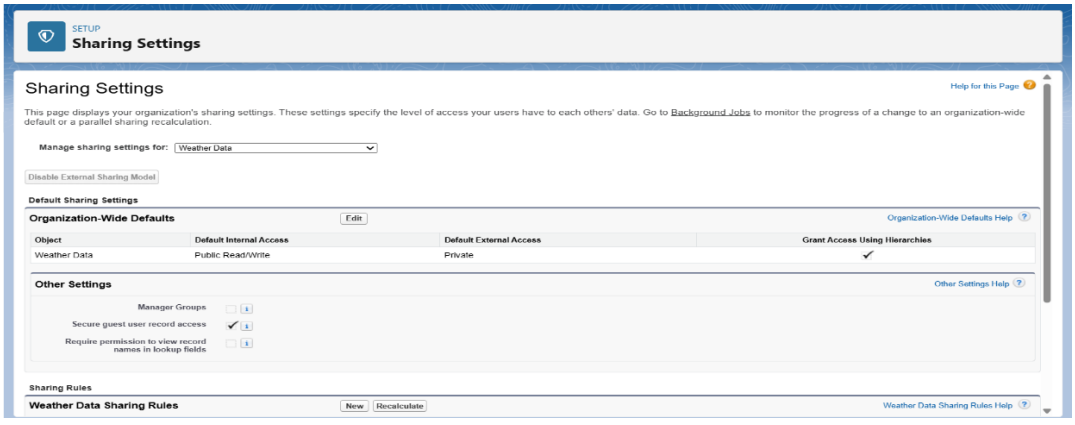
OWD settings define the baseline level of data access across the org. SkyCast required a balance between transparency of weather data and privacy for sensitive information.

- Accounts: Set to Private for confidentiality.
- Weather Data: Configured as Public Read-Only to allow transparency.
- Emergency Alerts: Access controlled via parent relationships.
- Cases: Configured with private visibility to protect sensitive reports.
- Grant Access Using Hierarchies: Enabled only where needed.
- Verification: Tested access using various user roles and profiles.

10. Sharing Rules

Sharing rules extend data access beyond OWD, ensuring that stakeholders receive the right insights without compromising security.

- Criteria-Based Sharing: Emergency alerts shared with Emergency Services.
- Owner-Based Sharing: Records shared upward through the role hierarchy.
- Public Groups: Configured for logistics, retail, and agriculture partners.
- Rule Testing: Conducted with multiple test records for accuracy.
- Audit Tracking: Documented all sharing rules for compliance.
- Quarterly Review: Established review cycle to keep rules updated.

- 

11. Login Access Policies

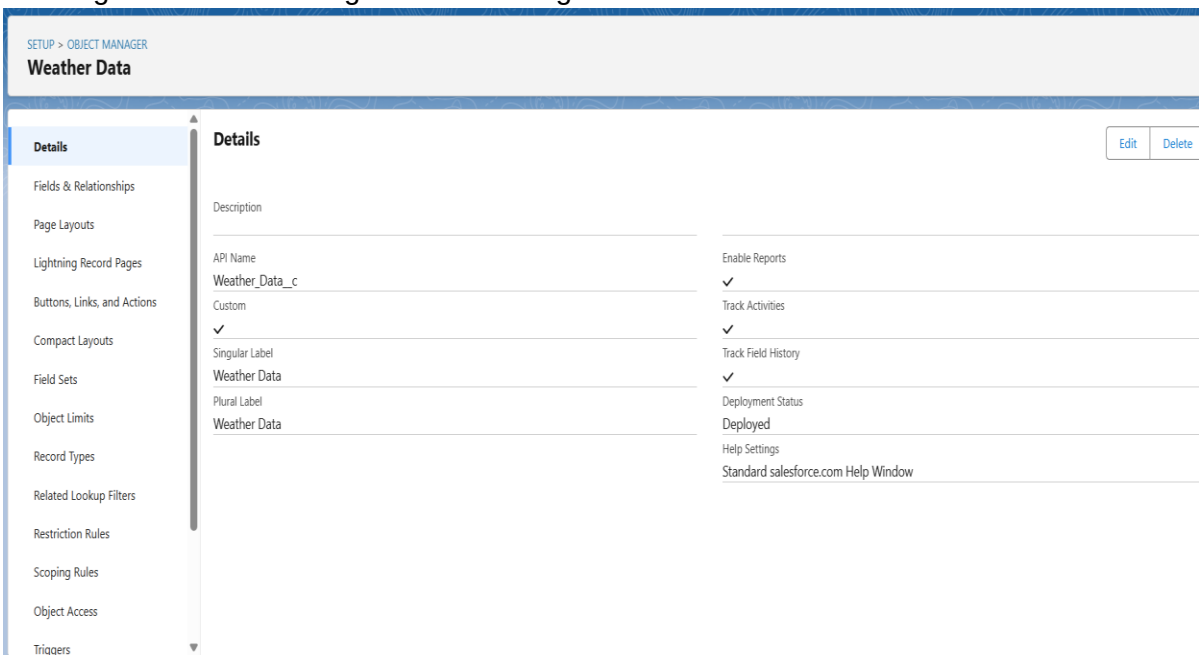
Login access policies provide additional security by defining conditions under which users can log in. This ensures strong security posture for SkyCast.

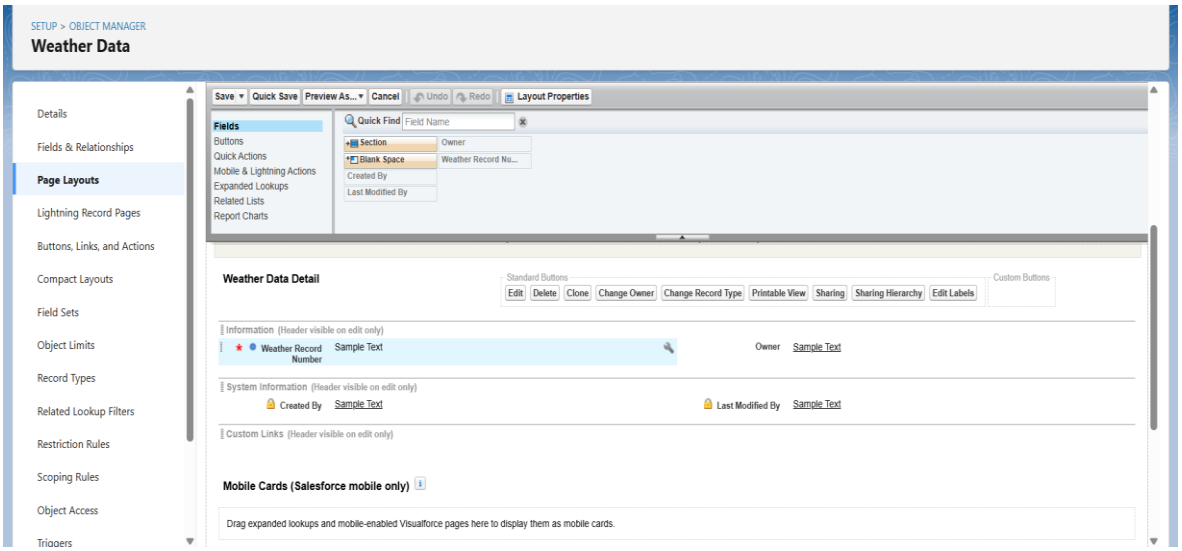
- IP Restrictions: Enforced trusted ranges for admins and API users.
- Login Hours: Limited non-admin users to business hours.
- MFA: Mandatory for all admins and privileged accounts.
- SSO Integration: Configured for corporate authentication.
- Login-As Policy: Enabled for admin troubleshooting with auditing.
- Monitoring: All login attempts logged and reviewed regularly.

12. Dev Org Setup

A developer org was established to test and validate configurations before moving to higher environments. This sandboxed approach ensures quality and reduces risks.

- Custom Objects: Created for Weather Data, Alerts, and IoT Readings.
- Page Layouts: Designed separately for different user groups.
- Validation Rules: Implemented to ensure data quality.
- Dashboards: Built sample weather monitoring dashboards.
- Debug Logs: Enabled to monitor integration behavior.
- Training: Used the Dev Org for user training and demonstrations.



- 

13. Sandbox Usage

Sandboxes were configured to ensure that development, testing, and deployment activities are isolated and safe. This protects the production environment.

- Developer Sandbox: Used for individual unit testing.
- Partial Sandbox: Contained sample data for integration testing.
- Full Sandbox: Created for UAT and performance testing.
- Refresh Strategy: Defined as monthly or after each release cycle.
- Data Masking: Applied to sensitive customer information.
- Deployment Testing: Verified deployment steps in sandbox before production.

14. Deployment Basics

Deployment planning was conducted to standardize movement of configurations across environments. This ensured smooth and error-free releases.

- Release Management: Defined process for Dev → UAT → Prod migration.
- Change Sets: Used for controlled metadata deployment.
- Version Control: GitHub maintained as the repository for metadata.
- Rollback Plans: Prepared for all major deployments.
- Naming Conventions: Implemented to standardize components.
- Documentation: Maintained logs for every deployment cycle.