

Smart Waste Management Tracker – Salesforce Project

Phase 2: Org Setup & Configuration

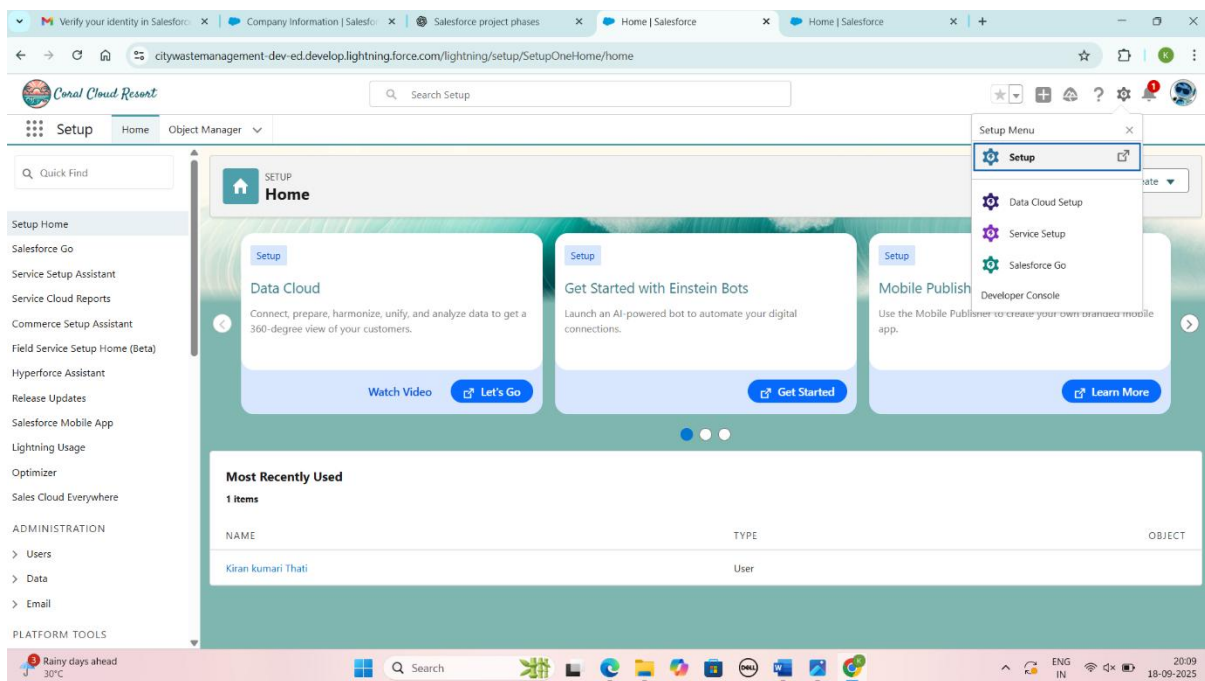
Step 1: Goal of Phase 2

- Prepare Salesforce environment.
- Setup Users, Roles, Profiles, Permissions.
- Configure Company Info, Business Hours, Holidays, Fiscal Year.

Expected Outcome (Phase 2 Goal): Org ready for Phase 3 (Data Modeling & Relationships).

Step 2: Salesforce Editions

- Use **Developer Edition Org** (free).
- Already account exists → login.
- Dev Org = sandbox for build/test.



Step 3: Company Profile Setup

- Setup → Company Settings → Company Information.
- Fill details: Name, Timezone, Currency.
- Save.

Verify your identity in Salesforce | Sale...

Company Information | Salefo...

Salesforce projects

Home | Salesforce

Company Information | Salefo...

+

citywastemanagement-dev-ed.develop.lightning.force.com/lightning/setup/CompanyProfileInfo/page?address=%2F00DNS00000b0wR%2Fe3FretURL%3D%252F00DNS00000b0wR%25...

Star

+


App

?

Settings

1

Profile

Coral Cloud Resort

Setup

Home

Object Manager

Company Information

Company Settings

Company Information

Didn't find what you're looking for?

Try using Global Search.

SETUP

Company Information

Edit Organization Profile

City Waste Management

Help for this Page

Use the form below to edit your organization profile.

Organization Edit

General Information

Required Information

Organization Name

City Waste Management

Phone

Primary Contact

Kiran kumari Thali

Fax

Division

Address

Street

Kuragalla

City

Mangalagiri

Zip/Postal Code

522503

State/Province

AP

Country

India

Locale Settings

Default Locale

English (India)

Default Language

English

Step 4: Business Hours & Holidays

- Setup → Business Hours → New → 9 AM – 6 PM.
- Holidays → Add public holidays.

Citywastemanagement-dev-ed.develop.lightning.force.com/lightning/setup/BusinessHours/page?address=%2F01m

Setup Home Object Manager

Company Settings

- Business Hours
- Calendar Settings
 - Public Calendars and Resources
- Company Information
- Data Protection and Privacy
- Fiscal Year
- Holidays
- Language Settings
- My Domain

Didn't find what you're looking for? Try using Global Search.

Organization Business Hours

Help for this Page

Table Headers: Action, Business Hours Name, Active, Time Zone, Default

Action	Business Hours Name	Active	Time Zone	Default
Edit	Collection Staff Hours	<input type="checkbox"/>	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	<input type="checkbox"/>
Edit	Default	<input checked="" type="checkbox"/>	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	<input checked="" type="checkbox"/>

Citywastemanagement-dev-ed.develop.lightning.force.com/lightning/setup/BusinessHours/page?address=%2F01m

Setup Home Object Manager

Company Settings

- Business Hours
- Calendar Settings
 - Public Calendars and Resources
- Company Information
- Data Protection and Privacy
- Fiscal Year
- Holidays
- Language Settings
- My Domain

Didn't find what you're looking for? Try using Global Search.

Organization Business Hours

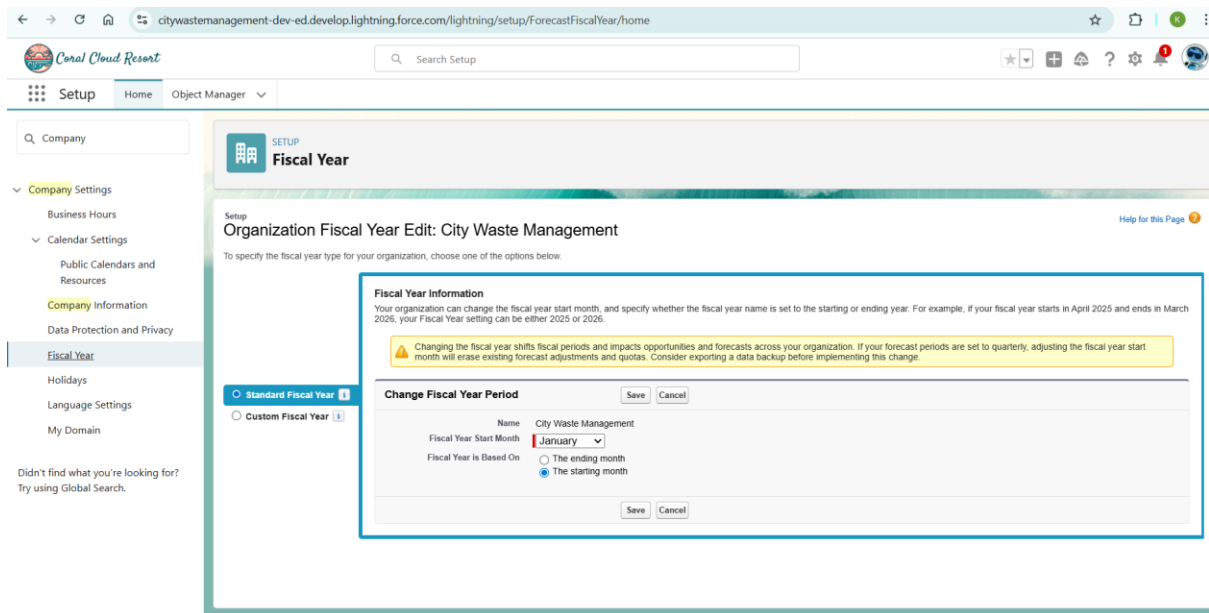
Help for this Page

Table Headers: Action, Business Hours Name, Active, Time Zone, Default

Action	Business Hours Name	Active	Time Zone	Default
Edit	Collection Staff Hours	<input type="checkbox"/>	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	<input type="checkbox"/>
Edit	Default	<input checked="" type="checkbox"/>	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	<input checked="" type="checkbox"/>

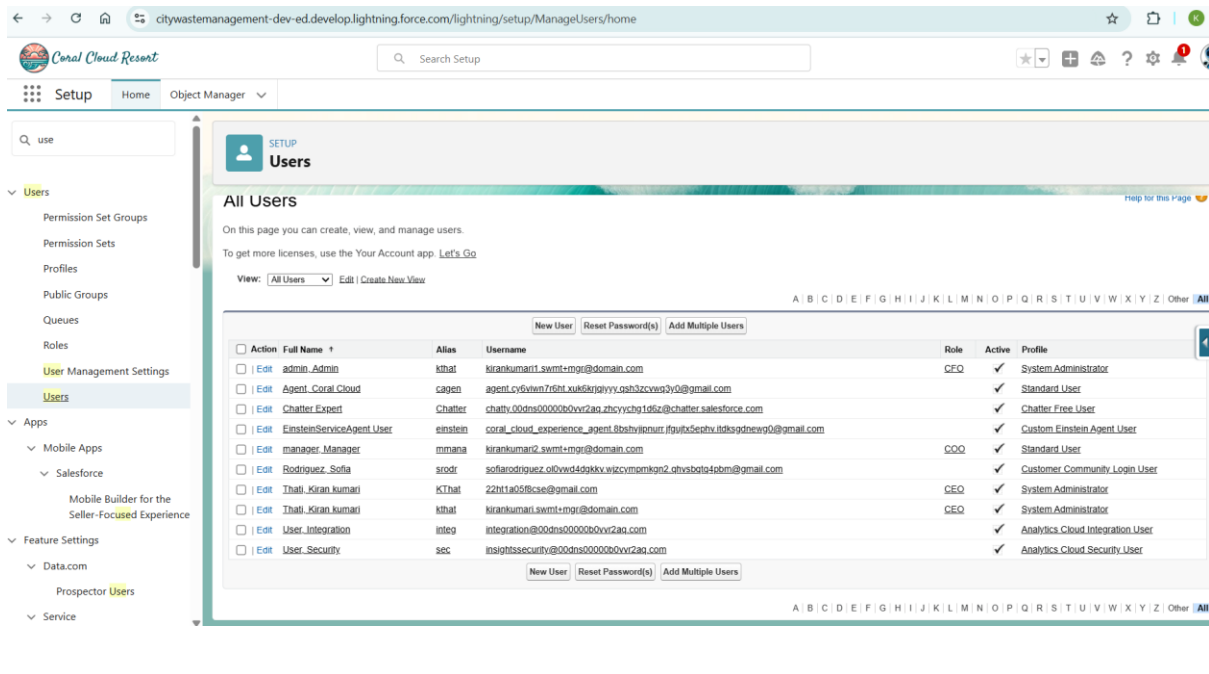
Step 5: Fiscal Year Settings

- Setup → Fiscal Year → Standard (Jan – Dec).
- Save.



Step 6: Users & Licenses

- Setup → Users → New User.
- Create: **Admin, Manager, Collection Staff.**
- Assign Salesforce license.



Step 7: Profiles

- Collection Staff → create/update tasks
- Manager → full access
- Admin → full + setup permissions

The screenshot shows the Salesforce Setup interface for the 'Collection Staff Profile'. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays the profile details and page layouts.

Profile: Collection Staff Profile

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.

Login IP Ranges (0) | Enabled Apex Class Access (0) | Enabled Visualforce Page Access (0) | Enabled External Data Source Access (0) | Enabled Named Credential Access (0) | Enabled External Credential Principal Access (0) | Enabled Custom Metadata Type Access (0) | Enabled Custom Setting Definitions Access (0) | Enabled Flow Access (0) | Enabled Service Presence Status Access (0) | Enabled Custom Permissions (0)

Profile Detail

Name	Collection Staff Profile
User License	Salesforce
Description	
Created By	Kiran kumar Thattai
Created On	18/09/2025, 9:14 pm
Modified By	Kiran kumar Thattai
Modified On	18/09/2025, 9:20 pm

Page Layouts

Standard Object Layouts	Global	Global Layout	Location Group Assignment	Location Group Assignment Layout
Email Application	Not Assigned	[View Assignment]	Macro	Macro Layout
Home Page Layout	Default	[View Assignment]	Managed Content	Managed Content Layout
Account		[View Assignment]	Managed Content Variant	Managed Content Variant Layout
Account Brand		[View Assignment]	Messaging Channel	Messaging Channel Layout

Step 8: Roles

- Manager → Top
- Collection Staff → Below Manager

The screenshot shows the Salesforce Setup interface for the 'Manager' role. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays the role details and the list of users assigned to the role.

Role: Manager

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: City Waste Management » CEO » Manager
Siblings: SVP, Sales & Marketing, SVP, Customer Service & Support, CFO, SVP, Human Resources, COO

Users in Manager Role (0)

Role Detail

Label	Manager
This role reports to	CEO
Modified By	Kiran kumar Thattai
Modified On	18/09/2025, 9:26 pm
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases
Partner Role	<input type="checkbox"/>
Customer Role	<input type="checkbox"/>

Users in Manager Role

No records to display

Step 9: Permission Sets

- Extra access for specific users → create Permission Set

The screenshot shows the Salesforce Lightning Setup interface for the 'Reports_Access' permission set. The left sidebar contains navigation links for 'Setup', 'Home', and 'Object Manager'. The main content area displays the 'Permission Set Overview' for 'Reports_Access', including a table with columns for Description, License, Service User, API Name, Namespace Prefix, Created By, and Last Modified By. Below the overview, there is a section for 'Apps' with links to 'Object Settings', 'App Permissions', 'Flow Access', 'External Credential Principal Access', 'Custom Metadata Types', and 'Custom Setting Definitions'.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓

Step 10: Org-Wide Defaults (OWD)

- WasteBin__c → Public Read Only
- CollectionRecord__c → Private

The screenshot shows the Salesforce Lightning Setup interface for the 'Sharing Settings' page. The left sidebar contains navigation links for 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', 'Users', 'Feature Settings', 'Data.com', and 'Prospector Users'. The main content area displays the 'Sharing Settings' section, including a 'Manage sharing settings for' dropdown and a table for 'Organization-Wide Defaults'.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓

Step 11: Sharing Rules

- Create rule → Share CollectionRecord__c with Manager

The screenshot shows the Salesforce Setup page for 'Coral Cloud Resort'. The left sidebar contains navigation links: Setup, Home, Object Manager, Security, Guest User, Sharing Rule Access Report, and Sharing Settings. The main content area is titled 'Sharing Settings' and displays various sharing rule categories: Lead Sharing Rules, Account Sharing Rules, Opportunity Sharing Rules, Case Sharing Rules, and Campaign Sharing Rules. The 'Lead Sharing Rules' section is expanded, showing a table with columns: Action, Criteria, Shared With, and Lead. A single rule is listed with the criteria 'Owner in Role: Manager' and the lead 'Read Only'. A yellow banner at the top of the Lead Sharing Rules section states: 'A sharing rule operation is in progress. You can't create new owner-based sharing rules for Leads targeting the following groups. The initiating user will receive an email when each operation finishes.'

Step 12: Login Access Policies

- Restrict login hours → 9 AM – 6 PM for Collection Staff

The screenshot shows the Salesforce Setup page for 'Coral Cloud Resort'. The left sidebar contains navigation links: Setup, Home, Object Manager, Hyperforce Assistant, Users, Profiles, Data, Mass Transfer Approval Requests, Feature Settings, Approval Settings, Data.com, Prospector Preferences, Prospector Users, Functions, Marketing, Lead Processes, Sales, and Partner Relationship Management. The main content area is titled 'Profiles' and displays various profile settings: Login Hours, Login IP Ranges, Enabled Apex Class Access, and Enabled Visualforce Page Access. The 'Login Hours' section is expanded, showing a table with columns: Day, Start Time, and End Time. The table lists login hours for each day of the week, ranging from 9:00 am IST to 6:00 pm IST.

Step 13: Dev Org & Sandbox

- Build in Dev Org
- Sandbox → Production scenario

Step 14: Deployment Basics

- Change Sets / VS Code + SFDX → sandbox → production
-

Step 15: Expected Outcome (Phase 2 Completion)

- Salesforce org fully setup
- Users, Roles, Profiles, Permission Sets, OWD, Business Hours, Holidays configured
- Ready for Phase 3: Data Modeling & Relationships