

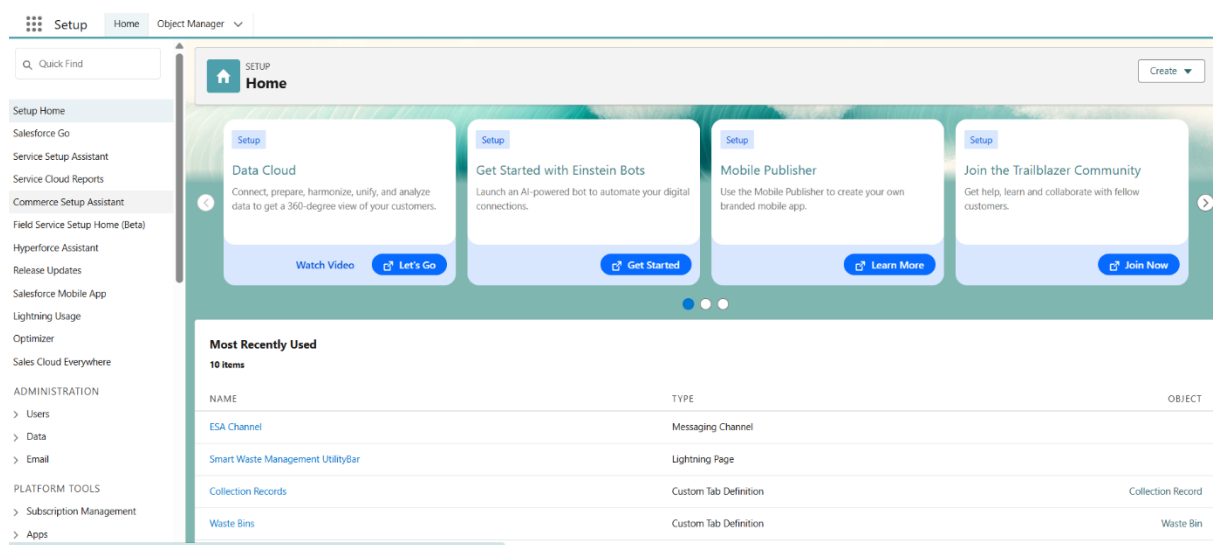
# Smart Waste Management Tracker – Salesforce Project

## Phase 2: Org Setup & Configuration

### Step 1: Goal of Phase 2

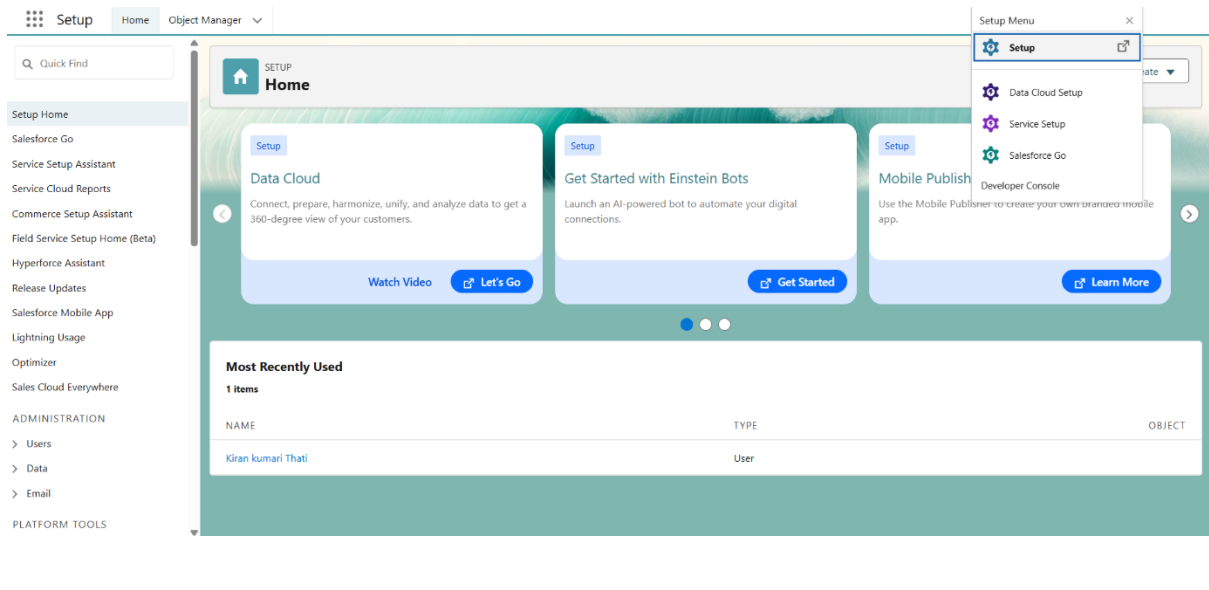
- Prepare Salesforce environment.
- Setup Users, Roles, Profiles, Permissions.
- Configure Company Info, Business Hours, Holidays, Fiscal Year.

**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.

The screenshot displays the 'Company Information' setup page in Salesforce. It includes sections for 'General Information', 'Address', and 'Locale Settings'. The 'General Information' section contains fields for Organization Name, Primary Contact, Division, Phone, and Fax. The 'Address' section includes fields for Street, City, Zip/Postal Code, State/Province, and Country. The 'Locale Settings' section has dropdowns for Default Locale and Default Language.

Setup

Home

Object Manager

Q Company Information

Company Settings

Company Information

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

SETUP

Company Information

Company Information

City Waste Management

The organization's profile is below.

User Licenses (10-)

Permission Set Licenses (10-)

Feature Licenses (11)

Usage-based Entitlements (1)

Organization Detail

Edit

Deactivate Org

Organization Name	City Waste Management	Phone	
Primary Contact	Kiran kumari Thati	Fax	
Division		Default Locale	Er
Address	Kuragallu Mangalagiri 522503 AP India	Default Language	Er
Fiscal Year Starts In	January	Default Time Zone	(G
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	Er
Enable Data Translation	<input type="checkbox"/>	Used Data Space	31
Newsletter	<input checked="" type="checkbox"/>	Used File Space	2.:
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	0 (
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (
Locale Formats	ICU	Salesforce.com Organization ID	00
		Organization Edition	De
		Instance	IN

## Step 4: Business Hours & Holidays

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

Setup

Home

Object Manager

Q Company

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.

SETUP

Business Hours

Organization Business Hours

Help for this Page

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

New Business Hours

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

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

**Setup** Home Object Manager

Company

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.

**SETUP Holidays**

**Holiday Detail**

Holidays are dates and times at which business hours are suspended. These dates and times, when associated with business hours, also suspend any escalation rules associated with business hours. Add or remove business hours to holidays to suspend business hours and escalation rules during the holidays.

Business Hours (1)

**Holiday Detail**

Holiday Name: Independence Day  
 Description: due to the freedom  
 Date and Time: 15/07/2025 All Day  
 Created By: Kiran kumar Thattai 18/09/2025, 8:26 pm  
 Last Modified By: Kiran kumar Thattai 18/09/2025, 8:30 pm

**Business Hours**

Business Hours Name: Default Time Zone: (GMT-07:00) Pacific Daylight Time (America/Los\_Angeles)

Back To Top Always show me more records per related list

## Step 5: Fiscal Year Settings

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

**Setup** Home Object Manager

Company

Company Settings

Business Hours

Calendar Settings

Public Calendars and Resources

Company Information

Data Protection and Privacy

**Fiscal Year**

Language Settings

My Domain

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

**SETUP Fiscal Year**

**Organization Fiscal Year Edit: City Waste Management**

To specify the fiscal year type for your organization, choose one of the options below:

**Fiscal Year Information**

Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example, if your fiscal year starts in April 2025 and ends in March 2026, your Fiscal Year setting can be either 2025 or 2026.

Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing this change.

**Change Fiscal Year Period**

Name: City Waste Management  
 Fiscal Year Start Month: January  
 Fiscal Year is Based On: ☐ The ending month ☒ The starting month

## Step 6: Users & Licenses

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

Setup Home Object Manager

Q use

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Apps

Mobile Apps

Salesforce

Mobile Builder for the Seller-Focused Experience

Feature Settings

Data.com

Prospector Users

Service

SETUP Users

All Users

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users Edit Create New View

New User Reset Password(s) Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	admin Admin	kthat	kirankumari1.swmt+mpr@domain.com	CEO	✓	System Administrator
<input type="checkbox"/> Edit	Agent Coral Cloud	cagen	agent.cv5vwn7r6ht.xuk6xjyvy.osh3zcwv3y0@gmail.com		✓	Standard User
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00dms0000b0vvr2aq.zhsycty1d6z@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	EinsteinServiceAgent User	einstein	coral_cloud_experience_agent.8bathyjpour.fpuite5eethv.00sgdnewg0@gmail.com		✓	Custom Einstein Agent User
<input type="checkbox"/> Edit	manager Manager	mmana	kirankumari2.swmt+mpr@domain.com	COO	✓	Standard User
<input type="checkbox"/> Edit	Rodriguez Sofia	srodrr	sofiarodriguez.ol0vwd4dgkky.wjzcvmmkgn2.qhvsbtp04ebm@gmail.com		✓	Customer Community Login User
<input type="checkbox"/> Edit	Thati Kiran kumari	KThat	22ht1a05fscse@gmail.com	CEO	✓	System Administrator
<input type="checkbox"/> Edit	Thati Kiran kumari	kthat	kirankumari.swmt+mpr@domain.com	CEO	✓	System Administrator
<input type="checkbox"/> Edit	User Integration	integ	integration@00dms0000b0vvr2aq.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00dms0000b0vvr2aq.com		✓	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

## Step 7: Profiles

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

Setup Home Object Manager

Q Quick Find

Setup Home

Salesforce Go

Service Setup Assistant

Service Cloud Reports

Commerce Setup Assistant

Field Service Setup Home (Beta)

Hyperforce Assistant

Release Updates

Salesforce Mobile App

Lightning Usage

Optimizer

Sales Cloud Everywhere

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

SETUP Profiles

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

Edit Clone Delete View Users

Name	Description	Created By	Modified By
Collection Staff Profile	Salesforce	Kiran kumari Thati 18/09/2025, 9:14 pm	Kiran kumari Thati 18/09/2025, 9:20 pm

Page Layouts

Standard Object Layouts

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

## Step 8: Roles

- Manager → Top

- Collection Staff → Below Manager

The screenshot shows the Salesforce Setup interface with the 'Roles' page selected. The left sidebar contains a navigation menu with 'Users' and 'Roles' highlighted. The main content area displays the 'Manager' role details. Below the role name, there is a list of users assigned to this role, which is currently empty. The 'Role Detail' section includes fields for Label, Role Name, Role Name as displayed on reports, Sharing Groups, Opportunity Access, Case Access, Partner Role, and Customer Role. The 'Users in Manager Role' section at the bottom shows 'No records to display'.

## Step 9: Permission Sets

- Extra access for specific users → create Permission Set

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page selected. The left sidebar contains a navigation menu with 'Users' and 'Permission Sets' highlighted. The main content area displays the 'Reports\_Access' permission set details. The 'Permission Set Overview' section includes fields for Description, License, Service User, API Name, Namespace Prefix, Created By, and Last Modified By. The 'Apps' section lists various settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform. The 'Learn More' link is provided for additional information.

## Step 10: Org-Wide Defaults (OWD)

- WasteBin\_\_c → Public Read Only
- CollectionRecord\_\_c → Private

Setup Home Object Manager

SETUP > OBJECT MANAGER

## Waste Bin

**Details**

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers

**Details**

Edit Delete

Description

API Name  
Waste\_Bin\_\_c

Custom  
✓

Singular Label  
Waste Bin

Plural Label  
Waste Bins

Enable Reports  
✓

Track Activities  
✓

Track Field History  
✓

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

Coral Cloud Resort

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

## Collection Record

**Details**

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers

**Details**

Edit Delete

Description

API Name  
Collection\_Record\_\_c

Custom  
✓

Singular Label  
Collection Record

Plural Label  
Collection Records

Enable Reports  
✓

Track Activities  
✓

Track Field History

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

## Step 11: Sharing Rules

- Create rule → Share CollectionRecord\_\_c with Manager

Setup Home Object Manager

Q sha

Security

Guest User Sharing Rule Access Report

Sharing Settings

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

## Sharing Settings

**Sharing Rules**

**Lead Sharing Rules** [New](#) [Recalculate](#) [Lead Sharing Rules Help](#)

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.

Initiated By	Shared With	Initiated On
Kiran kumar Thali	Role: Manager	19/09/2025, 7:15 pm

Action	Criteria	Shared With	Lead
<a href="#">Edit</a>   <a href="#">Del</a>	Owner in Role: Manager	Role: Manager	Read Only

**Account Sharing Rules** [New](#) [Recalculate](#) [Account Sharing Rules Help](#)

No sharing rules specified.

**Opportunity Sharing Rules** [New](#) [Recalculate](#) [Opportunity Sharing Rules Help](#)

No sharing rules specified.

**Case Sharing Rules** [New](#) [Recalculate](#) [Case Sharing Rules Help](#)

No sharing rules specified.

**Campaign Sharing Rules** [New](#) [Recalculate](#) [Campaign Sharing Rules Help](#)

No sharing rules specified.

## Step 12: Login Access Policies

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

Setup Home Object Manager

Q pro

Hyperforce Assistant

Users

Profiles

Data

Mass Transfer Approval Requests

Feature Settings

Approval Settings

Data.com

Prospector Preferences

Prospector Users

Functions

Marketing

Lead Processes

Sales

Partner Relationship Management

## Profiles

**Login Hours** [Edit](#) [Delete](#) [Login Hours Help](#)

Day	Start Time	End Time
Sunday	All Day	All Day
Monday	9:00 am IST	6:00 pm IST
Tuesday	9:00 am IST	6:00 pm IST
Wednesday	9:00 am IST	6:00 pm IST
Thursday	9:00 am IST	6:00 pm IST
Friday	9:00 am IST	6:00 pm IST
Saturday	All Day	All Day

**Login IP Ranges** [New](#) [Login IP Ranges Help](#)

Action	IP Start Address	IP End Address	Description
<a href="#">Edit</a>   <a href="#">Del</a>	223.228.96.1	223.228.96.174	

**Enabled Apex Class Access** [Edit](#) [Enabled Apex Class Access Help](#)

No Apex Classes enabled

**Enabled Visualforce Page Access** [Edit](#) [Enabled Visualforce Page Access Help](#)

No Visualforce Pages enabled

## 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