PROJECT MANAGEMENT APP

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Phase 2: Org Setup & Configuration

Goal: Prepare the Salesforce environment and configure essential settings.

- Sign up for Developer Org for development and testing.

- Configure company profile with time zone, fiscal year, currency settings.

- Define working hours and add official holidays.

- Create users like Project Manager, Team Member, and Client roles.

- Assign profiles to control data visibility and access levels.

- Use Org-Wide Defaults (OWD) for record-level security.

- Set up sharing rules to allow collaboration where needed.

- Create permission sets for additional access without changing profiles.

- Implement login access policies and restrictions for security.

Create Number Field (Object: Project) ✕

Field Label	Total Hours
Field Name	Total_Hours
Description	
Help Text	

This text displays on detail and edit pages when users hover over the info icon next to this field.

Default Value	
Length	16

Number of digits to the left of the decimal point

Decimal Places	2

Number of digits to the right of the decimal point

Required	☐ Always require a value in this field in order to save a record
Unique	☐ Do not allow duplicate values
External ID	☐ Set this field as the unique record identifier from an external system

[Save] [Cancel]

Create Date Field (Object: Project) ✕

Field Label	Start Date
Field Name	Start_Date
Description	
Help Text	

This text displays on detail and edit pages when users hover over the info icon next to this field.

Default Value	
Required	☐ Always require a value in this field in order to save a record

[Save] [Cancel]

Create Date Field (Object: Timesheet) ✕

Field Label	Task Date
Field Name	Task_Date
Description	
Help Text	

This text displays on detail and edit pages when users hover over the info icon next to this field.

Default Value	
Required	☐ Always require a value in this field in order to save a record

[Save] [Cancel]