

Phase 2

Org Setup & Configuration for Home-Maintenance-Repair-Management-System

Objective :

Configure a Salesforce Developer Edition org specifically for the Home Maintenance Repair Management system with company details, user roles, profiles, security, and sharing rules to ensure proper data visibility and access control for various stakeholders.

Dev Org Setup :

- Provision a Salesforce Developer Edition org for development and testing.
- This org supports custom objects, flows, Apex, dashboards, and app integrations for the project.

Company Profile Setup :

- Company Name: Home Maintenance Repair Management
- Default Time Zone: Asia/Kolkata (GMT +05:30)
- Default Locale: English (India)
- Default Currency: INR

Q compa

Objects and Fields

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

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SETUP

Company Information

Company Information

Home Maintenance Repair Management

The organization's profile is below.

User Licenses (10+)

Permission Set Licenses (10+)

Feature Licenses (13)

Usage-based Entitlements (10+)

Organization Detail

Edit

Deactivate Org

Organization Name	Home Maintenance Repair Management	Phone	
Primary Contact	Kusuma Kumar	Fax	
Division		Default Locale	English (India)
Address	IN	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/I
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	390 KB (8%) View
Newsletter	<input checked="" type="checkbox"/>	Used File Space	21 KB (0%) View
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00Dd200000Pbavl
		Organization Edition	Developer Edition
		Instance	SWE126

Created By

Kusuma Kumar, 27/09/2025, 1:10 pm

Modified By

Kusuma Kumar, 28/09/2025, 3:07 pm

User Setup, Roles & Profiles :

Roles

Create the following role hierarchy suitable for system users:

- Admin (root)
 - Homeowner
 - Maintenance Team
 - Vendor
 - Manager (for overseeing operations)

Users

- Create test users for each role to test data visibility and permissions:
 - One user each for Admin, Homeowner, Maintenance Team, Vendor, and Manager.

Profiles

- For simplicity, assign the Standard User profile to all roles initially.
- Customize profiles later for specific permissions as needed.

The screenshot displays a web interface titled "Creating the Role Hierarchy". At the top right, there is a "Help for this Page" link with a question mark icon. Below the title, a message states: "You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**." The main section is titled "Your Organization's Role Hierarchy" and includes a "Show in tree view" dropdown menu. Below this, there are links for "Collapse All" and "Expand All". The role hierarchy is shown as a tree structure:

- Home Maintenance Repair Management
 - Add Role
 - CEO Edit | Del | Assign
 - Add Role
 - Admin Edit | Del | Assign
 - Add Role
 - Homeowner Edit | Del | Assign
 - Add Role
 - Maintenance Team Edit | Del | Assign
 - Add Role
 - Vendor Edit | Del | Assign
 - Add Role
 - Manager Edit | Del | Assign
 - Add Role
 - CFO Edit | Del | Assign

OWD (Organization-Wide Defaults) & Sharing Rules :

Organization-Wide Defaults

Set data visibility defaults aligned to project requirements:

- Maintenance Request (or Work Order) → Private (only owner & shared users access)
- Asset (property items) → Public Read Only (viewable by all users)
- Vendor → Public Read Only (for transparency)
- User → Private (restrict user data)

Sharing Rules

Create sharing rules so that Managers and relevant users have access to maintenance requests and assets owned by their teams:

- Share Maintenance Requests owned by Maintenance Team users to their Manager role.
- Share Assets owned by Home owner role as needed.

Login Access Policies

- Enable “Administrators Can Log in as Any User” for testing role-based record access and permissions.

Testing and Validation

Administrators verify the setup by using the “Login As” feature to impersonate users in different roles. Sample records in custom objects are created under various users to test and confirm that access levels, sharing rules, and OWD settings work according to the design.

Deployment and Backup

Configurations including custom objects, roles, sharing rules, and profiles can be packaged into an unmanaged package. This package serves for backup purposes or future deployment into other Salesforce environments, ensuring consistent configurations.