

Smart Lost & Found System — Phase 2: Org Setup & Configuration

1. Introduction

This phase focuses on setting up a Salesforce Developer Org for the Smart Lost & Found System. The aim is to configure the organizational structure, user roles, profiles, sharing settings, and security policies to support core functionality such as reporting lost items, logging found items, and managing claim requests securely.

2. Objectives

- Configure a clean Salesforce Developer Org named **Smart Lost & Found**.
- Set up company profile, business hours, and holidays for the university environment.
- Create sample users representing Students, Staff, Security, and Admin.
- Define profiles and roles with appropriate permissions.
- Establish Org-Wide Defaults (OWD) and Sharing Rules for data security.
- Enable Login Access Policies and set up a Lightning App.
- Test role-based access and sharing logic.

3. Configuration Steps

Step 0 - Company Info

- Signed up for Developer Edition and logged in.
- Setup → Company Information → updated:
 - **Organization Name:** Smart Lost & Found System
 - **Locale:** English (India)
 - **Timezone:** IST

Company Information

Smart Lost & Found System

The organization's profile is below.

User Licenses (102) | Permission Set Licenses (102) | Feature Licenses (11) | Usage-based Entitlements (132)

Organization Detail [Edit](#)

Organization Name	Smart Lost & Found System	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (India)
Address	India	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Colombo)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (United States) - USD
Enable Data Translation	<input type="checkbox"/>	Used Data Space	342 KB (7%) View
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) View
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	39 (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 (3 max)
Locale Formats	ICU	Salesforce.com Organization ID	00Dgt.00000BmCq
		Organization Edition	Developer Edition
		Instance	CAN58

Created By: [OrgFarm EPIC](#) 9/16/2025, 7:51 AM

Modified By: [CHAVAKULA LASTAVALLI](#) 9/19/2025, 8:06 AM

Fig.0 - Company Information Setup

Step 1 - Business Hours & Holidays

- Created **University Business Hours** (Mon–Sat, 9 AM–6 PM).
- Added key holidays (e.g., Independence Day, Diwali) and linked them to Business Hours.

Business Hours

Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate.

If you enter blank business hours for a day, that means your organization does not operate on that day.

Holidays (2)

Business Hours Detail [Edit](#)

Business Hours Name	University Business Hours	Time Zone	(GMT+05:30) India Standard Time (Asia/Colombo)
Business Hours		Default Business Hours	<input type="checkbox"/>
	Sunday	No Hours	
	Monday	9:00 AM to 6:00 PM	
	Tuesday	9:00 AM to 6:00 PM	
	Wednesday	9:00 AM to 6:00 PM	
	Thursday	9:00 AM to 6:00 PM	
	Friday	9:00 AM to 6:00 PM	
	Saturday	9:00 AM to 6:00 PM	

Active: ☐

Created By: [CHAVAKULA LASTAVALLI](#) 9/19/2025, 8:13 AM

Last Modified By: [CHAVAKULA LASTAVALLI](#) 9/19/2025, 8:17 AM

Holidays [Add/Remove](#)

Holiday Name	Description	Date and Time
Diwali		10/19/2025 All Day
Independence Day		8/15/2025 All Day

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Fig.1 - University Business Hours & Holidays

Step 2 - Users

Created sample users:

Display Name	Username (example)	Profile	Role
University Admin	admin@lostfound.com	System Administrator	Admin
Student Reporter	student1@lostfound.com	Student	Student
Staff Reporter	staff1@lostfound.com	Staff Reporter	Staff Reporter
Security Officer	security@lostfound.com	Security Staff	Security Officer

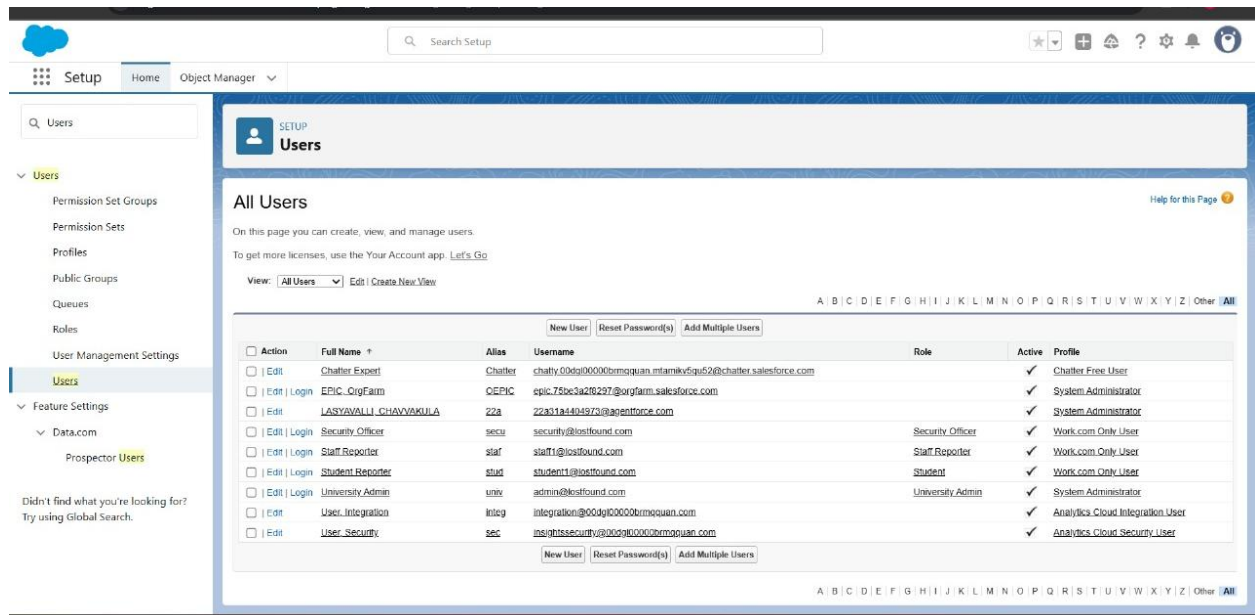


Fig.2 - Sample Users Creation

Step 3 - Profiles

- **Student Profile** (cloned from Standard User):
 - LostItem__c: Create/Read/Edit own records.
 - FoundItem__c: Read only.
 - ClaimRequest__c: Create/Read.

- **Staff Reporter Profile:**
 - LostItem__c: Read only.
 - FoundItem__c: Create/Read/Edit.
 - ClaimRequest__c: Read only.
- **Security Staff Profile:**
 - Full access to LostItem__c, FoundItem__c, ClaimRequest__c.

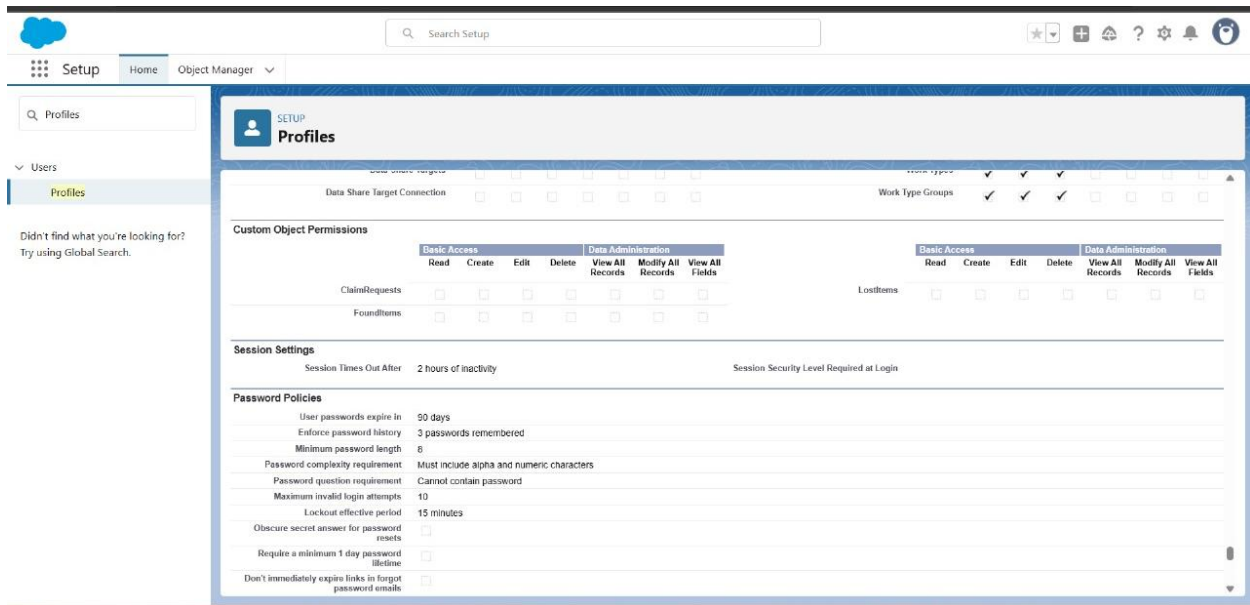


Fig.3 - Profiles Configuration

Step 4 - Role Hierarchy

- **University Admin (Top)**
 - **Security Officer**
 - **Staff Reporter**
 - **Students**

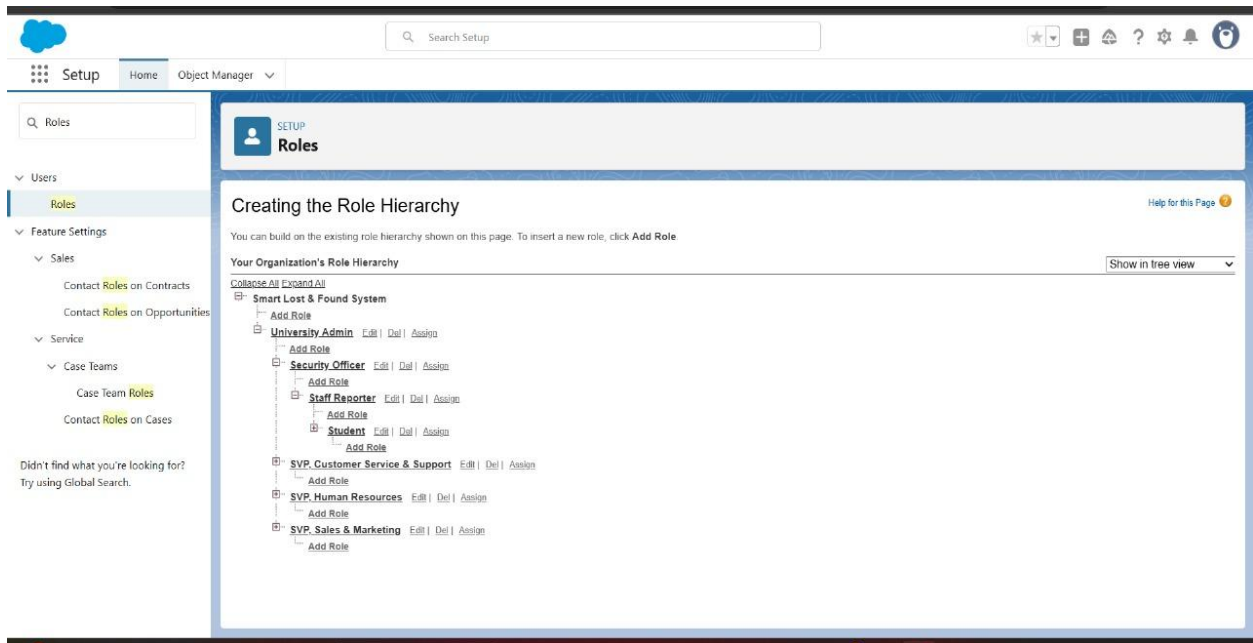


Fig.4 - Role Hierarchy Structure

Step 5 - Org-Wide Defaults (OWD)

- LostItem__c → Private
- FoundItem__c → Private
- ClaimRequest__c → Private

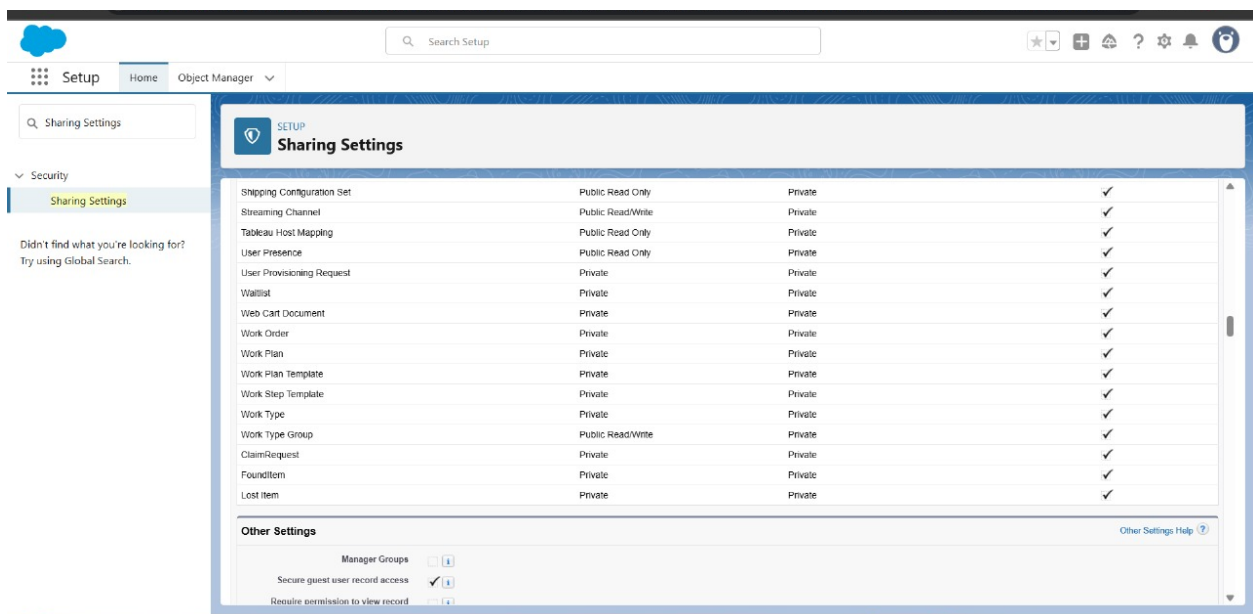


Fig.5 - Org-Wide Defaults (OWD) Settings

Step 6 - Sharing Rules

- Created Public Groups: **Students, Staff, Security**.
- Example Rules:
 - Share FoundItem__c created by Staff with **Security Staff** group → Read/Write.
 - Share ClaimRequest__c with **University Admin** group.

Public Groups

A public group is a set of users. It can contain individual users, other groups, the users in a particular role or territory, or the users in a role or territory plus all of the users below that role or territory in the hierarchy.

View: [All] [Edit] [Create New View]

Action	Label ↑	Group Name	Created By	Created Date
[Edit] [Del]	Security	Security	LASYAVALLI, CHANDRAKULA	9/19/2025, 9:30 AM
[Edit] [Del]	Staff	Staff	LASYAVALLI, CHANDRAKULA	9/19/2025, 9:29 AM
[Edit] [Del]	Students	Students	LASYAVALLI, CHANDRAKULA	9/19/2025, 9:29 AM
[Edit] [Del]	University_Admin	University_Admin	LASYAVALLI, CHANDRAKULA	9/19/2025, 9:30 AM

Fig.6 - Sharing Rules & Public Groups

Step 7 - Login Access Policies

- Enabled “Administrators Can Log in as Any User.”

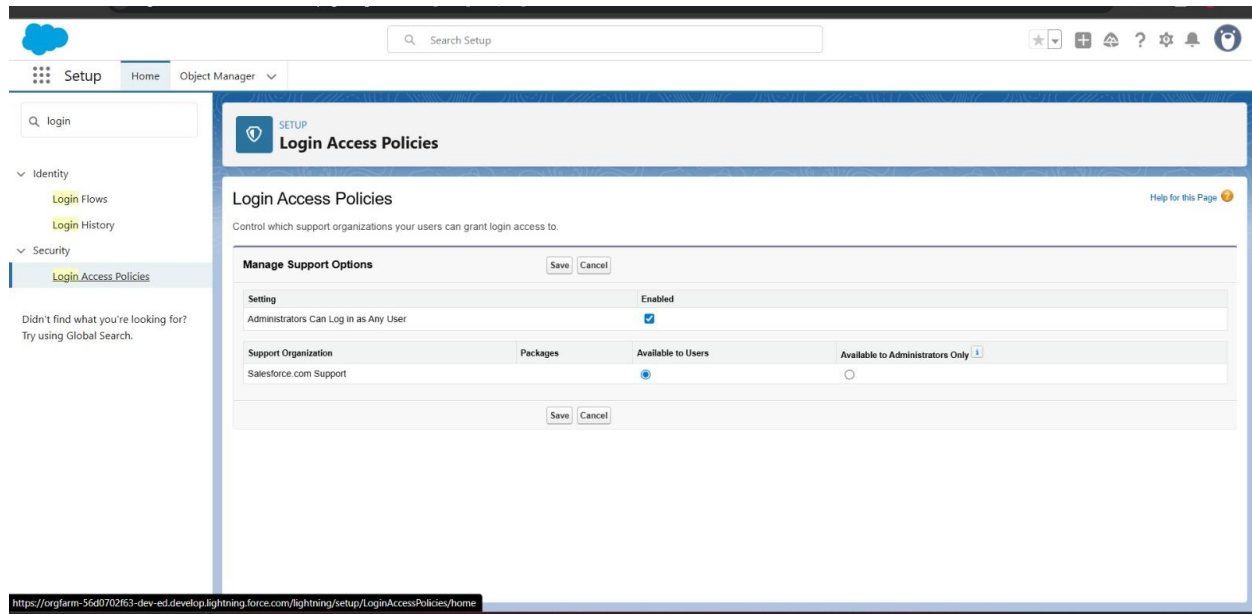


Fig.7 - Login Access Policies Setup

Step 8 - Lightning App Setup

- Created Lightning App: **Smart Lost & Found**
- Tabs added: Lost Items, Found Items, Claim Requests, Reports, Dashboards.

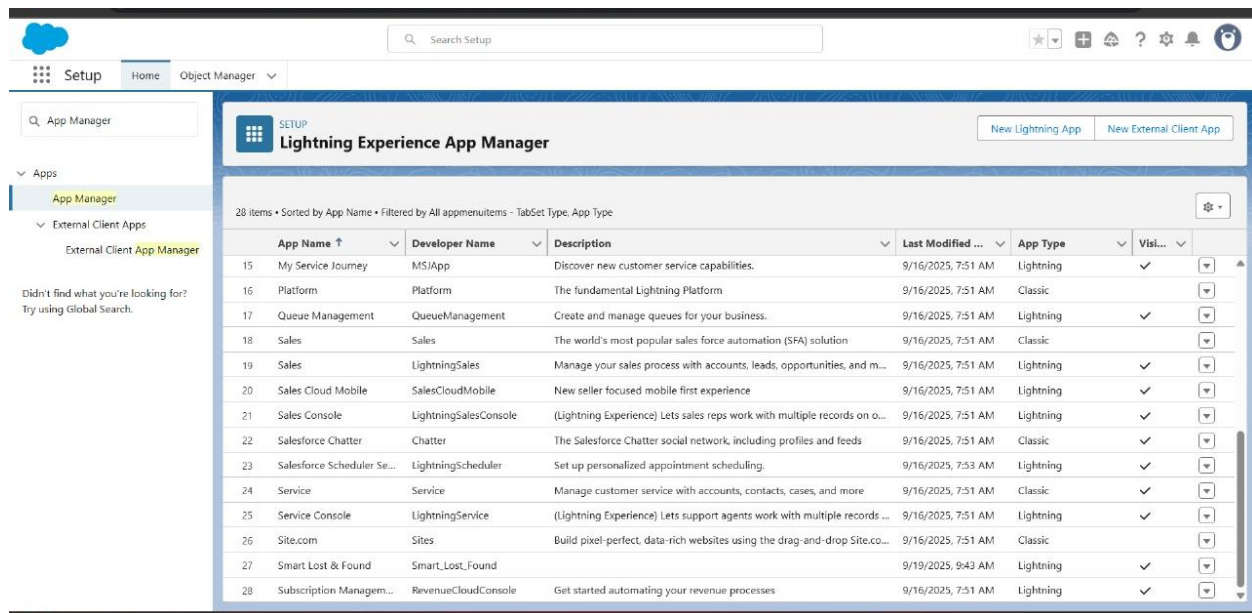


Fig.8 - Lightning App Setup (Smart Lost & Found App)

Step 9 -Testing

- Logged in as Student → created a Lost Item record.
- Logged in as Staff → created a Found Item record.
- Logged in as Security → viewed both Lost and Found items, approved ClaimRequest.
- Verified that Admin sees everything and OWD restrictions work correctly.

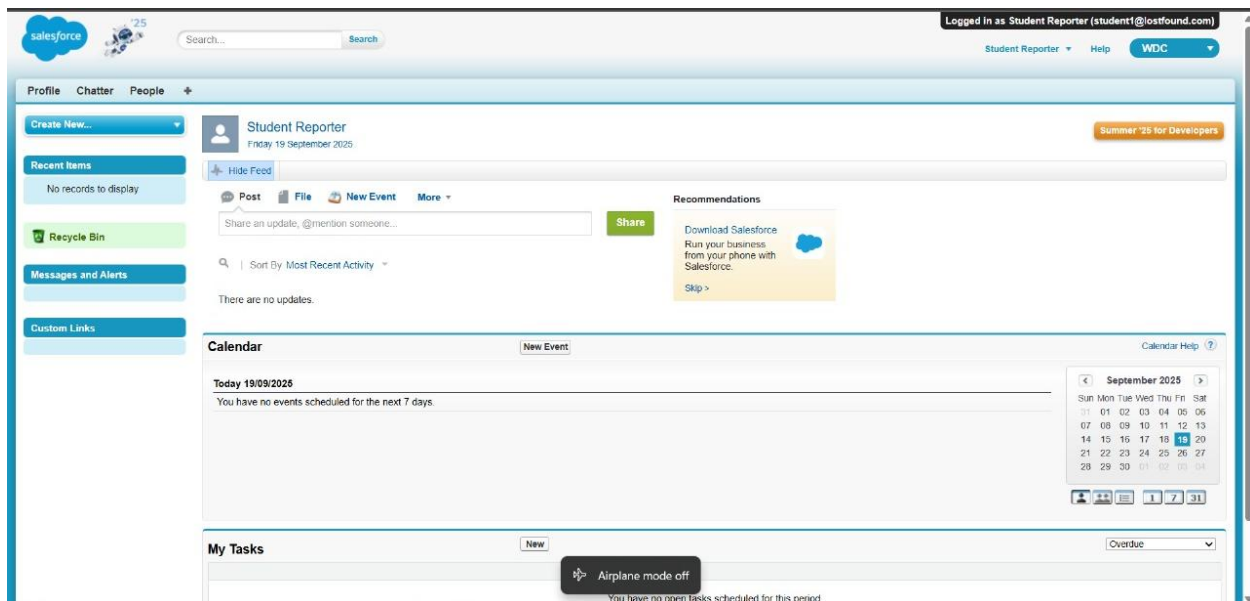


Fig.9 - Role-Based Access Testing Results

4. Results / Observations

- Role hierarchy ensures proper data visibility.
- OWD set to **Private** secures all objects.
- Sharing Rules allow controlled collaboration between Students, Staff, and Security.
- Login Access policies simplify testing.
- Lightning App provides a user-friendly navigation for core objects.

5. Next Steps

- Introduce data modeling with custom objects (LostItem__c, FoundItem__c, ClaimRequest__c).
- Define relationships between objects (Student → LostItem, Staff → FoundItem, Security → ClaimRequest).
- Add automation flows for claim approvals and notification triggers.
- Build dashboards for recovery rates, lost item categories, and claim statistics.