

“Government Schemes Management System”

PHASE 2 – Org Setup & Configuration

Company Profile Setup

- **Path:** Setup → Company Information → Edit
- **Details Configured:**
 - **Name:** Government Schemes Management – Dev
 - **Time Zone:** GMT+05:30 (Asia/Kolkata)
 - **Locale:** English (India) – to control date/number formats
 - **Language:** English
 - **Currency:** INR (₹)

SETUP

Company Information

Company Information

: Government Schemes Management

The organization's profile is below.

User Licenses (10+)

 |

Permission Set Licenses (10+)

 |

Feature Licenses (11)

 |

Usage-based Entitlements (10+)

Organization Detail

Edit

Organization Name	: Government Schemes Management	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (India)
Address	Andhra Pradesh India	Default Language	English
Fiscal Year Starts In	April	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (United States) - USD
Enable Data Translation	<input type="checkbox"/>	Used Data Space	482 KB (0%) View
Newsletter	<input checked="" type="checkbox"/>	Used File Space	22 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	00DgLO0000758uT
		Organization Edition	Developer Edition
		Instance	CAN68

Created By

OrgFarm EPIC, 7/17/2025, 8:30 AM

Modified By


Anala Lasya, 9/27/2025, 9:51 AM

Business Hours Setup

Configure working hours for escalation rules and SLA tracking:

- **Path:** Setup → Business Hours → New.

- **Name:** Govt Dept Working Hours.
- **Time Zone:** (GMT+05:30) India Standard Time (Asia/Kolkata).
- **Working Hours:**
 - Monday to Friday → 10:00 AM to 5:00 PM
 - Saturday → 10:00 AM to 1:00 PM
 - Sunday → Closed
- **Save:** Applied as Default Business Hours.
- **Active:** Checked.



SETUP
Business Hours

Organization Business Hours Help for this Page

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](#) (0)

Business Hours Detail
Edit

Business Hours Name	Govt Dept Working Hours	Time Zone
Business Hours	<div> <div>Sunday</div> <div>No Hours</div> </div> <div> <div>Monday</div> <div>10:00 AM to 5:00 PM</div> </div> <div> <div>Tuesday</div> <div>10:00 AM to 5:00 PM</div> </div> <div> <div>Wednesday</div> <div>10:00 AM to 5:00 PM</div> </div> <div> <div>Thursday</div> <div>10:00 AM to 5:00 PM</div> </div> <div> <div>Friday</div> <div>10:00 AM to 5:00 PM</div> </div> <div> <div>Saturday</div> <div>10:00 AM to 1:00 PM</div> </div>	(GMT+05:30) India Standard Time (Asia/Kolkata) <div> Default Business Hours <input checked="" type="checkbox"/> </div>

Active ☒

Created By [Anila Leavy](#) 9/27/2025, 9:50 AM
 Edit

Last Modified By [Anila Leavy](#) 9/27/2025, 9:50 AM

Fiscal Year Setup

Defines reporting boundaries for forecasts and scheme analysis.

- **Path:** Setup → Fiscal Year
- **Type:** Standard Fiscal Year (April–March)
- **Configuration:** Select the starting month as April
- **Save:** Apply settings to define fiscal periods

SETUP

Fiscal Year

Setup

Organization Fiscal Year Edit : Government Schemes Management

[Help for this Page](#)

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

Standard Fiscal Year

Custom Fiscal Year

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

Save

Cancel

Name

: Government Schemes Management

Fiscal Year Start Month

April

Fiscal Year Is Based On

☐ The ending month

☒ The starting month

Save

Cancel

User Setup (Profiles, Roles, Permission Sets, Users)

- Profiles:** Cloned standard profiles to create custom ones for baseline access.
 - Auditor_Profile, Officer_Profile, Citizen_Profile (to be tuned later with object permissions).
- Roles:** Defined role hierarchy for access and reporting.
 - CEO, Scheme Manager, Scheme Officer, Auditor, Citizen.
- Permission Sets:** Created Auditor_Access_PS for auditing functions (object permissions to be added once objects exist).
- Users:** Added sample users with respective profiles and roles.
 - auditor1 → Auditor_Profile, Role: Auditor
 - officer1 → Officer_Profile, Role: Scheme Officer
 - citizen1 → Citizen_Profile, Role: Citizen

Profile

Auditor

Help for this Page

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](#) |
 [Enabled Apex Class Access](#) |
 [Enabled Visualforce Page Access](#) |
 [Enabled External Data Source Access](#) |
 [Enabled Named Credential Access](#) |
 [Enabled External Credential Principal Access](#) |
 [Enabled Custom Metadata Type Access](#) |
 [Enabled Custom Setting Definitions Access](#) |
 [Enabled Flow Access](#) |
 [Enabled Service Presence Status Access](#) |
 [Enabled Custom Permissions](#)

Profile Detail

EditCloneDeleteView Users

Name	Auditor	
User License	Salesforce	Custom Profile ✓
Description		
Created By	Anala Lasya, 9/28/2025, 10:04 AM	Modified By Anala Lasya, 9/28/2025, 10:04 AM

Profile

Officer

Help for this Page

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.

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 [Enabled Apex Class Access](#) |
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 [Enabled External Credential Principal Access](#) |
 [Enabled Custom Metadata Type Access](#) |
 [Enabled Custom Setting Definitions Access](#) |
 [Enabled Flow Access](#) |
 [Enabled Service Presence Status Access](#) |
 [Enabled Custom Permissions](#)

Profile Detail

EditCloneDeleteView Users

Name	Officer	
User License	Salesforce	Custom Profile ✓
Description		
Created By	Anala Lasya, 9/28/2025, 10:07 AM	Modified By Anala Lasya, 9/28/2025, 10:07 AM

Profile

Citizen profile

Help for this Page

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.

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 [Enabled Apex Class Access](#) |
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 [Enabled External Credential Principal Access](#) |
 [Enabled Custom Metadata Type Access](#) |
 [Enabled Custom Setting Definitions Access](#) |
 [Enabled Flow Access](#) |
 [Enabled Service Presence Status Access](#) |
 [Enabled Custom Permissions](#)

Profile Detail

EditCloneDeleteView Users

Name	Citizen profile	
User License	Salesforce	Custom Profile ✓
Description		
Created By	Anala Lasya, 9/28/2025, 10:08 AM	Modified By Anala Lasya, 9/28/2025, 10:08 AM

Role Hierarchy Setup

Defines data visibility and reporting structure within the org.

- Path:** Setup → Roles → Set Up Roles
- Top-Level Role:** CEO (root of hierarchy)
- Scheme Manager Role:** Added as child of CEO

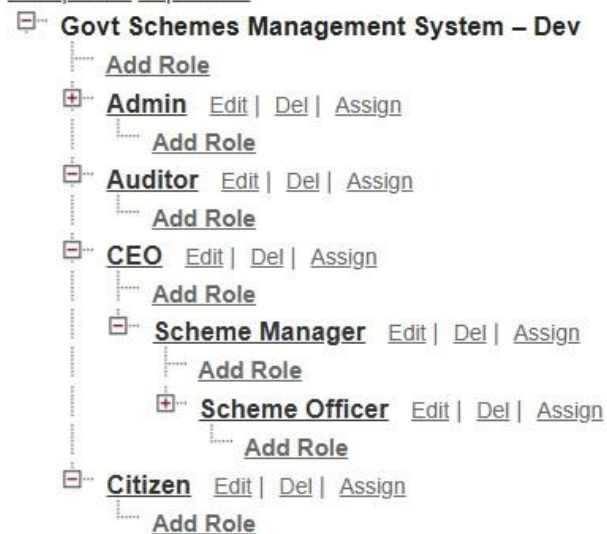
- **Scheme Officer Role:** Added as child under Scheme Manager
- **Auditor Role:** Added as separate top-level role for monitoring purposes
- **Citizen Role:** Added as separate top-level role for public access

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)



OWD (Org Wide Default)

- To be implemented in Phase 3, as OWD settings require objects that will be created later.

Sharing Rule

- To be implemented in Phase 3, since sharing rules depend on object-level access.

Assign Permission Set(s)


- After creating users, assign the permission set for auditing functions:

- **Setup → Quick Find → Users → Click the auditor user → Permission Set Assignments → Edit Assignments → Add Auditor_Reports_Access → Save**

Permission Set Assignments Edit Assignments			
Action	Permission Set Name	Date Assigned	Expires On
• Del	Auditor Reports Access	16/09/2025	

Login Access Policies

Control which support organizations your users can grant login access to.

 Changes Saved

Manage Support Options Save Cancel			
Setting		Enabled	
Administrators Can Log in as Any User		<input checked="" type="checkbox"/>	
Support Organization	Packages	Available to Users	Available to Administrators Only i
Salesforce.com Support		<input checked="" type="radio"/>	<input type="radio"/>
Save Cancel			

Dev Org Setup

- Salesforce Developer Edition org was set up for implementation.
- GitHub repository created for source control.
- VS Code and SFDX configured for LWC component development.