

Library Management:- Phase 2: Org Setup & Configuration

1. Introduction

This phase sets up a Salesforce Developer Org to model a small library for cataloguing, lending, and returns. It builds on Phase 1 by configuring book records, librarian/member roles, and security so the system reflects real library workflows for adding, editing, deleting, and viewing books.

2. Objective

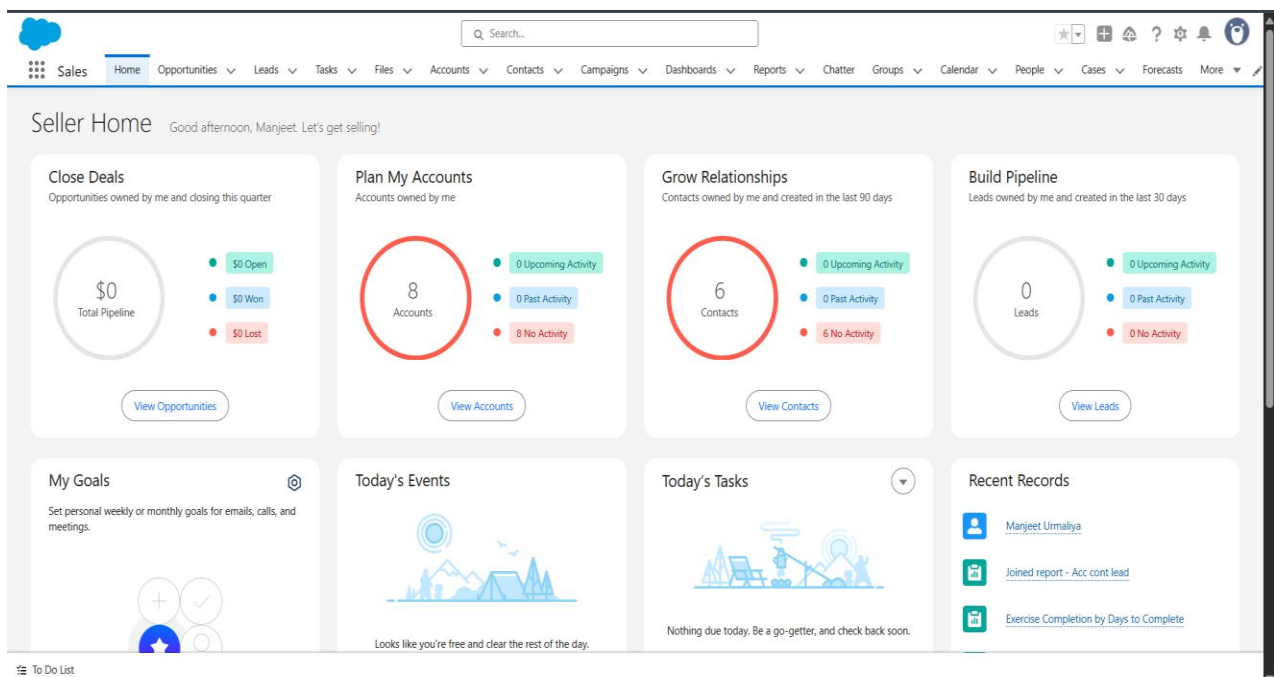
Create a clean Salesforce Developer Org named “Library Connect” with sample users (Head Librarian, Librarian, Member).

Use OWD and sharing rules to protect book data.

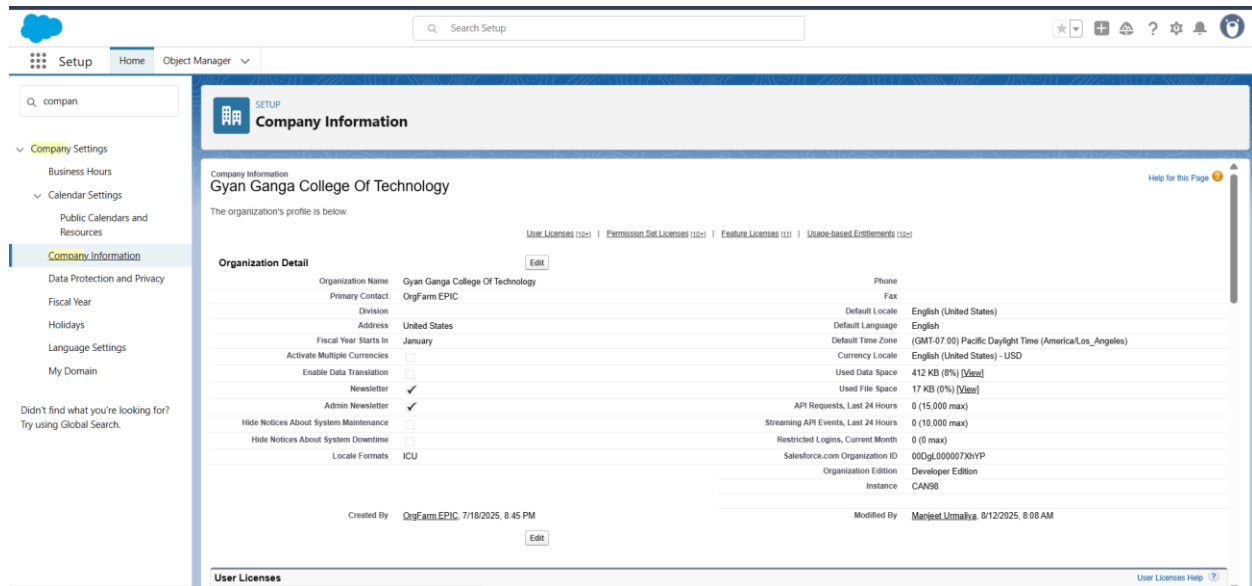
Showcase book entry, editing, and role-based visibility, and lay the groundwork for future fields and external integrations.

Step 1:- • Salesforce Editions Sign up & Login

Signed up for a Salesforce Developer Edition and logged into the Lightning Experience. Confirmed access to the Setup area using the gear icon.



Step 2:- •Company Profile Setup



The screenshot shows the 'Company Information' page in Salesforce Setup. The left sidebar contains navigation links: Setup, Home, Object Manager, and a search bar. The main content area is titled 'Company Information' and displays the organization's profile for 'Gyan Ganga College Of Technology'. The profile details include Organization Name, Primary Contact (OrgFarm EPIC), Division, Address, Fiscal Year (January), and various system settings like Default Locale, Language, Time Zone, Currency, and File Space. The 'Organization Detail' section is expanded, showing fields like Organization Name, Primary Contact, Division, Address, Fiscal Year, and various system settings. The 'User Licenses' section is visible at the bottom.

Company Information

The organization's profile is below:

User Licenses (120) | Permission Set Licenses (120) | Feature Licenses (1) | Usage-Based Entitlements (120)

Organization Detail [Edit](#)

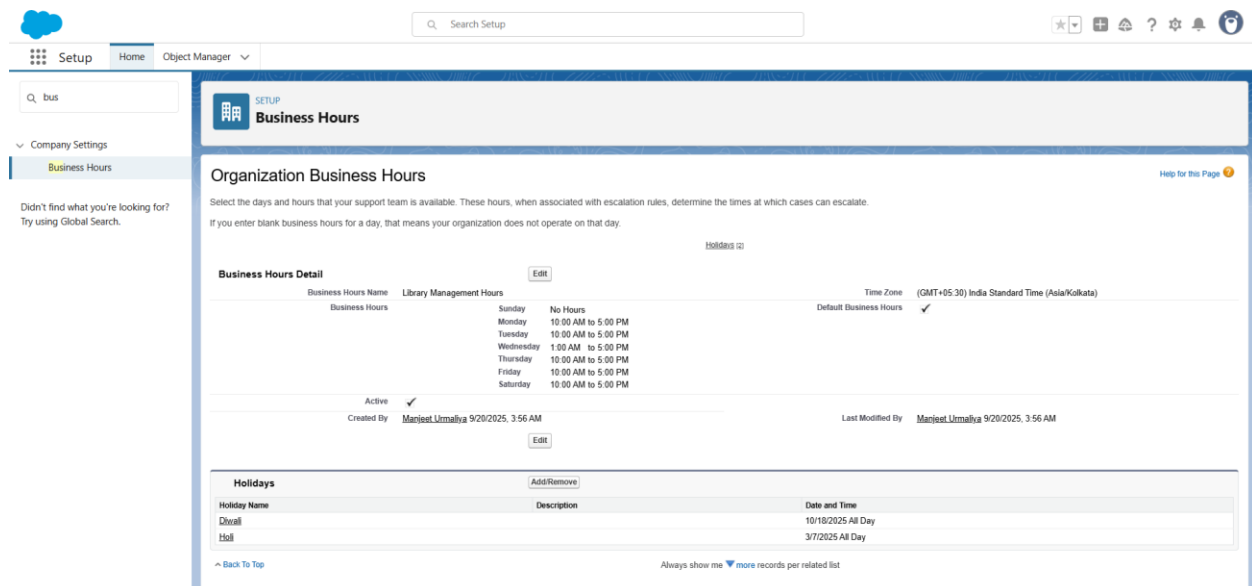
Field	Value
Organization Name	Gyan Ganga College Of Technology
Primary Contact	OrgFarm EPIC
Division	
Address	United States
Fiscal Year Starts In	January
Activate Multiple Currencies	<input type="checkbox"/>
Enable Data Translation	<input type="checkbox"/>
Newsletter	<input checked="" type="checkbox"/>
Admin Newsletter	<input checked="" type="checkbox"/>
Hide Notices About System Maintenance	<input type="checkbox"/>
Hide Notices About System Downtime	<input type="checkbox"/>
Locale Formats	ICU
Phone	
Fax	
Default Locale	English (United States)
Default Language	English
Default Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Currency Locale	English (United States) - USD
Used Data Space	412 KB (0%) View
Used File Space	17 KB (0%) View
API Requests, Last 24 Hours	0 (15,000 max)
Streaming API Events, Last 24 Hours	0 (10,000 max)
Restricted Logins, Current Month	0 (0 max)
Salesforce.com Organization ID	00DgI.000007X0iYP
Organization Edition	Developer Edition
Instance	CAN96
Created By	OrgFarm EPIC, 7/18/2025, 8:45 PM
Modified By	Manjeet Umalika, 8/12/2025, 8:08 AM

[User Licenses](#) [User Licenses Help](#)

Step 3:- • Business Hours & Holidays

Created " Library Management Hours" Mon-Sat 10 AM-5 PM.

Added relevant Holidays and linked them to Business Hours.



The screenshot shows the 'Business Hours' page in Salesforce Setup. The left sidebar contains navigation links: Setup, Home, Object Manager, and a search bar. The main content area is titled 'Business Hours' and displays the 'Organization Business Hours' section. The 'Business Hours Detail' section is expanded, showing fields like Business Hours Name, Library Management Hours, Time Zone, and Default Business Hours. The 'Holidays' section is visible at the bottom.

Business Hours

Organization 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](#)

Business Hours Detail [Edit](#)

Field	Value																
Business Hours Name	Library Management Hours																
Business Hours	<table border="1"><thead><tr><th>Day</th><th>Hours</th></tr></thead><tbody><tr><td>Sunday</td><td>No Hours</td></tr><tr><td>Monday</td><td>10:00 AM to 5:00 PM</td></tr><tr><td>Tuesday</td><td>10:00 AM to 5:00 PM</td></tr><tr><td>Wednesday</td><td>10:00 AM to 5:00 PM</td></tr><tr><td>Thursday</td><td>10:00 AM to 5:00 PM</td></tr><tr><td>Friday</td><td>10:00 AM to 5:00 PM</td></tr><tr><td>Saturday</td><td>10:00 AM to 5:00 PM</td></tr></tbody></table>	Day	Hours	Sunday	No Hours	Monday	10:00 AM to 5:00 PM	Tuesday	10:00 AM to 5:00 PM	Wednesday	10:00 AM to 5:00 PM	Thursday	10:00 AM to 5:00 PM	Friday	10:00 AM to 5:00 PM	Saturday	10:00 AM to 5:00 PM
Day	Hours																
Sunday	No Hours																
Monday	10:00 AM to 5:00 PM																
Tuesday	10:00 AM to 5:00 PM																
Wednesday	10:00 AM to 5:00 PM																
Thursday	10:00 AM to 5:00 PM																
Friday	10:00 AM to 5:00 PM																
Saturday	10:00 AM to 5:00 PM																
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)																
Default Business Hours	<input checked="" type="checkbox"/>																
Active	<input checked="" type="checkbox"/>																
Created By	Manjeet Umalika 9/20/2025, 3:56 AM																
Last Modified By	Manjeet Umalika 9/20/2025, 3:56 AM																

[Holidays](#) [Add/Remove](#)

Holiday Name	Description	Date and Time
Chhail		10/18/2025 All Day
Holi		3/7/2025 All Day

[Back To Top](#) [Always show me more records per related list](#)

Step 4:- • User Setup & Licenses

- Created 2 sample users:

Display Name	Username (example)	Profile	Role
Librarian Admin	admin_librarian@library.com	Test Profile	Test Role
Teacher Librarian	teacher.librarian@library.com	Identity User	SVP, Human Resources

The screenshot shows the Salesforce Setup page for Users. The left sidebar contains the navigation menu with 'Users' selected. The main content area displays the 'All Users' list. The table below represents the data shown in the screenshot.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit Login	Alay	alay	alay1234@test.com	COO	✓	Test profile
<input type="checkbox"/> Edit Login	Chatter Expert	Chatter	chatter.00d9000007xhvuau0.Hzbb0en0ov0g@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit Login	EPIC_OrgFarm	OEPIC	epic.c7097299544@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/> Edit Login	Librarian Admin	admin	admin_librarian@library.com	Test Role	✓	Test profile
<input type="checkbox"/> Edit Login	Teacher Librarian	admin	teacher.librarian@library.com	SVP, Human Resources	✓	Identity User
<input type="checkbox"/> Edit	Urmaliya_Mandest	cae	cae22_mandestumaliya6044@agentforce.com		✓	System Administrator
<input type="checkbox"/> Edit	User_Integration	Integ	integration@00d9000007xhvuau0.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightsecurity@00d9000007xhvuau0.com		✓	Analytics Cloud Security User

Step 5:- Profiles

Cloned Standard User → created Librarian profile.

Cloned Standard User → created Teacher profile.

Adjusted Object Permissions:

Mentor_c: Doctor = Read/Create/Edit/Delete = Read/Create/Edit/Delete

student_c: Doctor = Read/Edit/Create/Delete = Read/Edit/Create

Setup

Home

Object Manager

Q profile

Users

Profiles

Didn't find what you're looking for?

Try using Global Search.

Profile Librarian

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 Settings Definitions Access

Enabled Flow Access

Enabled Service Presence Status Access

Enabled Custom Permissions

Profile Detail

EditCloneDeleteView Users

Name	Librarian	Custom Profile	✓
User License	Salesforce		
Description			
Created By	Manjeet Umalia, 9/20/2025, 5:08 AM	Modified By	Manjeet Umalia, 9/20/2025, 5:14 AM

Page Layouts

Standard Object Layouts

Global	Global Layout [View Assignment]	Location Group Assignment	Location Group Assignment Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Macro	Macro Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Account	Account Layout [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Opportunity	Opportunity Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Opportunity Product	Opportunity Product Layout [View Assignment]
Asset	Asset Layout [View Assignment]	Order	Order Layout [View Assignment]
Asset Action	Asset Action Layout [View Assignment]	Order Product	Order Product Layout [View Assignment]

Librarian profile

Setup

Home

Object Manager

Q profile

Users

Profiles

Didn't find what you're looking for?

Try using Global Search.

Profiles

Data Share Snowflake Connections

Data Share Targets

Data Share Target Connection

Work Step Templates

Work Types

Work Type Groups

Custom Object Permissions

	Basic Access				Global Administration		
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Mentors	✓	✓	✓				
Students	✓		✓				

Session Settings

Session Times Out After 2 hours of inactivity

Session Security Level Required at Login

Password Policies

User passwords expire in	90 days
Enforce password history	3 passwords remembered
Minimum password length	8
Password complexity requirement	Must include alpha and numeric characters
Password question requirement	Cannot contain password
Maximum invalid login attempts	10
Lockout effective period	15 minutes
Obscure secret answer for password resets	
Require a minimum 1 day password lifetime	
Don't immediately expire links in forgot password emails	

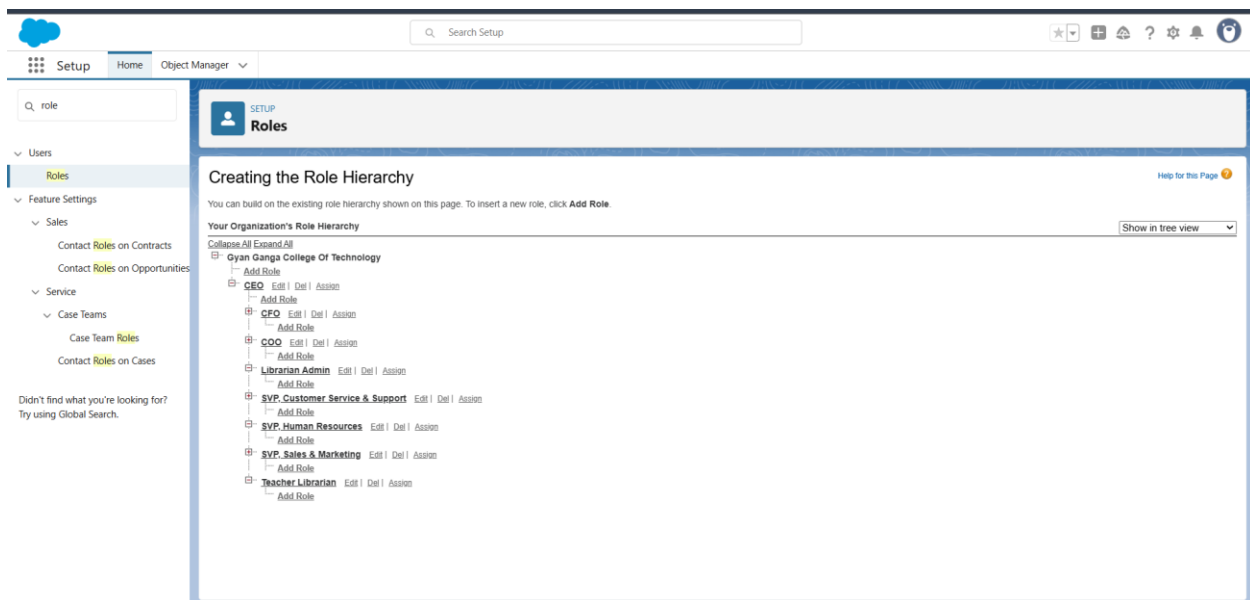
EditCloneDeleteView Users

Teacher profile

Step 6 — Role Hierarchy

Created simple hierarchy

- Librarian Admin
 - Librarian
 - Teacher

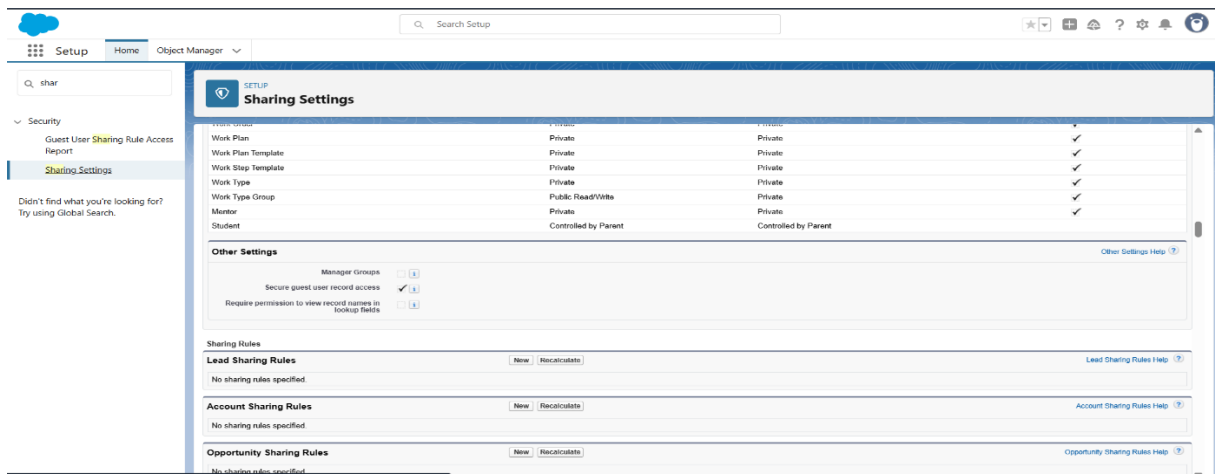


Step 7 Org:- Wide Defaults (OWD)

Setup → Sharing Settings

Mentor_c = Private.

Student_c = Controlled by Parent .



Step 8:- • Sharing Rules

The screenshot shows the Salesforce Setup page for Sharing Settings. The left sidebar contains a search bar with "sharing" and a list of navigation items: Security, Guest User, Sharing Rule Access Report, and Sharing Settings (highlighted). The main content area is titled "Sharing Settings" and contains several sections for defining sharing rules:

- Work Order Sharing Rules:** No sharing rules specified. Buttons: New, Recalculate. Help link: Work Order Sharing Rules Help.
- Work Plan Sharing Rules:** No sharing rules specified. Buttons: New, Recalculate. Help link: Work Plan Sharing Rules Help.
- Work Plan Template Sharing Rules:** No sharing rules specified. Buttons: New, Recalculate. Help link: Work Plan Template Sharing Rules Help.
- Work Step Template Sharing Rules:** No sharing rules specified. Buttons: New, Recalculate. Help link: Work Step Template Sharing Rules Help.
- Work Type Sharing Rules:** No sharing rules specified. Buttons: New, Recalculate. Help link: Work Type Sharing Rules Help.
- Work Type Group Sharing Rules:** No sharing rules specified. Buttons: New, Recalculate. Help link: Work Type Group Sharing Rules Help.
- Mentor Sharing Rules:** A table with columns: Action, Criteria, Shared With, and Access Level.

Action	Criteria	Shared With	Access Level
Edit Del	WHOSE1: M_Email NOT EQUAL TO	Role: Test Role	Read Only
Edit Del	Owner in Role: Librarian Admin	Role: Librarian Admin	Read/Write
Edit Del	Owner in Role: Teacher Librarian	Role: Teacher Librarian	Read/Write

Step 9:- Login Access Policy

- Enabled Administrators Can Log in as Any User.

The screenshot shows the Salesforce Setup page for Login Access Policies. The left sidebar contains a search bar with "Login Access Pol" and a list of navigation items: Security and Login Access Policies (highlighted). The main content area is titled "Login Access Policies" and contains a section for managing support options:

Manage Support Options (Buttons: Save, Cancel)

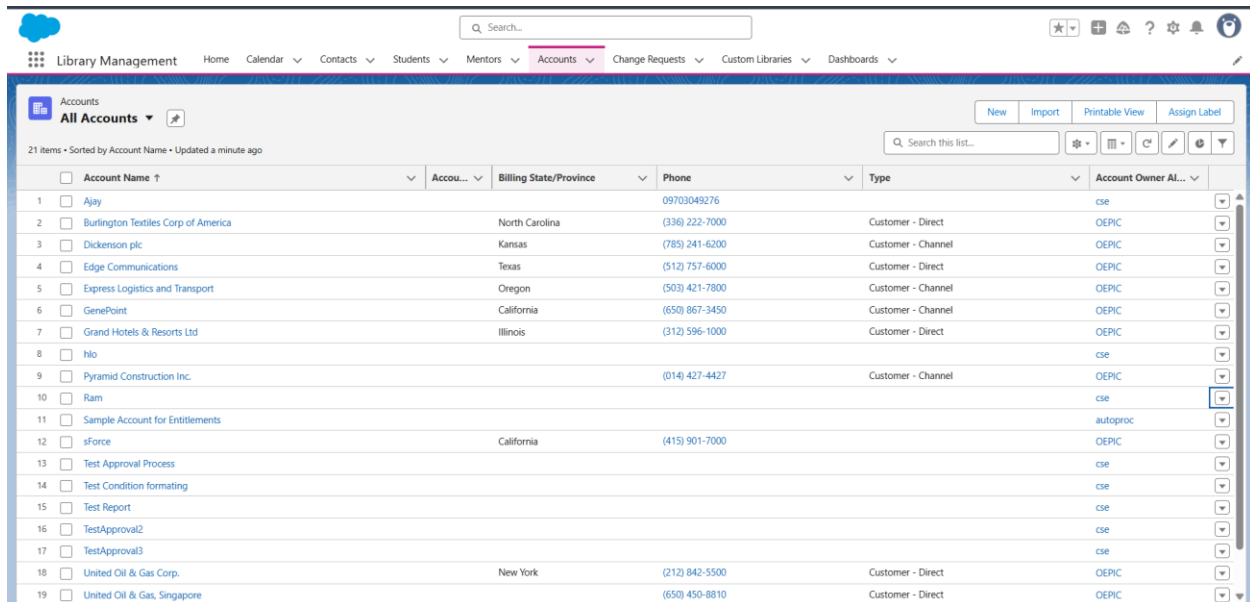
Setting	Value
Administrators Can Log in as Any User	Enabled <input checked="" type="checkbox"/>

Support Organization	Packages	Available to Users	Available to Administrators Only
Salesforce.com Support		<input checked="" type="radio"/>	<input type="radio"/>

(Buttons: Save, Cancel)

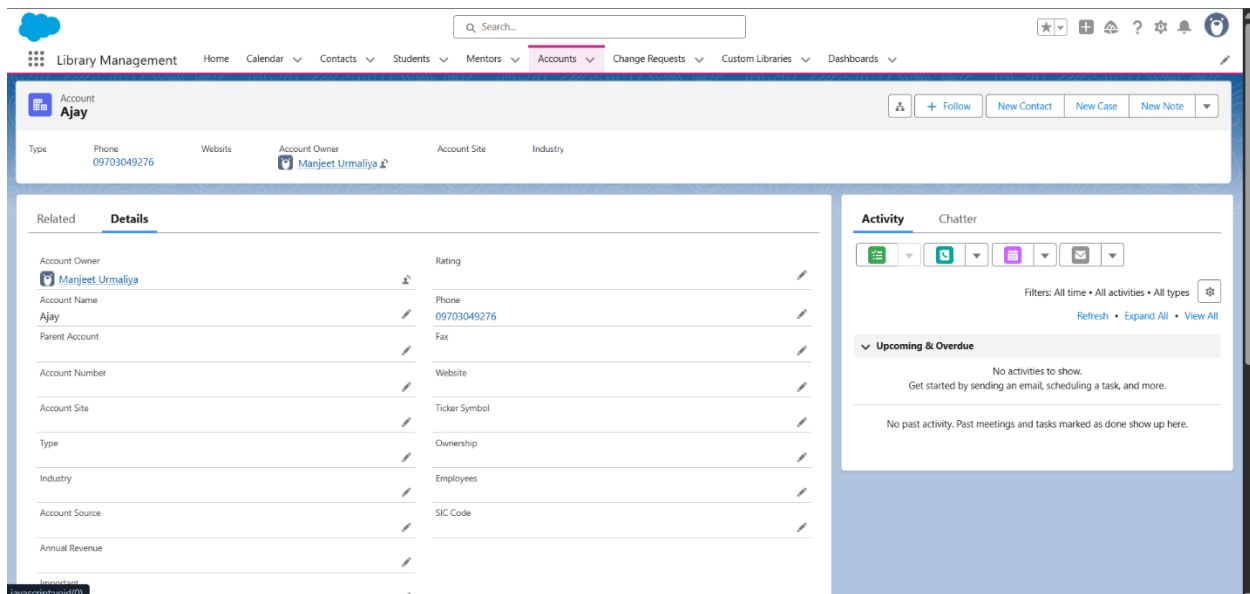
Step 10:- Library Management Lightning App.

- Setup → App Manager → New Lightning App “Library Management”



	Account Name ↑	Account Number	Billing State/Province	Phone	Type	Account Owner
1	<input type="checkbox"/> Ajay			09703049276		cse
2	<input type="checkbox"/> Burlington Textiles Corp of America		North Carolina	(336) 222-7000	Customer - Direct	OEPIC
3	<input type="checkbox"/> Dickenson plc		Kansas	(785) 241-6200	Customer - Channel	OEPIC
4	<input type="checkbox"/> Edge Communications		Texas	(512) 757-6000	Customer - Direct	OEPIC
5	<input type="checkbox"/> Express Logistics and Transport		Oregon	(503) 421-7800	Customer - Channel	OEPIC
6	<input type="checkbox"/> GenePoint		California	(650) 867-3450	Customer - Channel	OEPIC
7	<input type="checkbox"/> Grand Hotels & Resorts Ltd		Illinois	(312) 596-1000	Customer - Direct	OEPIC
8	<input type="checkbox"/> hlo					cse
9	<input type="checkbox"/> Pyramid Construction Inc.			(014) 427-4427	Customer - Channel	OEPIC
10	<input type="checkbox"/> Ram					cse
11	<input type="checkbox"/> Sample Account for Entitlements					autoproc
12	<input type="checkbox"/> sforce		California	(415) 901-7000		OEPIC
13	<input type="checkbox"/> Test Approval Process					cse
14	<input type="checkbox"/> Test Condition formatting					cse
15	<input type="checkbox"/> Test Report					cse
16	<input type="checkbox"/> TestApproval2					cse
17	<input type="checkbox"/> TestApproval3					cse
18	<input type="checkbox"/> United Oil & Gas Corp.		New York	(212) 842-5500	Customer - Direct	OEPIC
19	<input type="checkbox"/> United Oil & Gas, Singapore			(650) 450-8810	Customer - Direct	OEPIC

Step 11:- Testing



Type	Phone	Website	Account Owner	Account Site	Industry
	09703049276		Manjeet Urmaliya		

Related		Details	
Account Owner	Manjeet Urmaliya	Rating	
Account Name	Ajay	Phone	09703049276
Parent Account		Fax	
Account Number		Website	
Account Site		Ticker Symbol	
Type		Ownership	
Industry		Employees	
Account Source		SIC Code	
Annual Revenue			

Activity Chatter
Filters: All time • All activities • All types
Refresh • Expand All • View All
Upcoming & Overdue
No activities to show.
Get started by sending an email, scheduling a task, and more.
No past activity. Past meetings and tasks marked as done show up here.