

Phase 2: Org Setup & Configuration

◆ 1. Salesforce Editions

- Salesforce Editions define features and limits.
- Common editions: Essentials, Professional, Enterprise, Unlimited.
- For project/demo → **Developer Edition** is used (free, full-featured for dev).

◆ 2. Company Profile Setup

- Add company details (name, address, primary contact, language, currency).
- Example: Company Name → **Deepfake Solutions**
- Configure Fiscal Year & Locale settings.

The screenshot shows the Salesforce Setup interface with the following details:

Company Information page for Deepfake Incident Management System.

Organization Detail section:

Organization Name	Deepfake Incident Management 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/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale English (India) - INR
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 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 00DGK00000BD01N
		Organization Edition Developer Edition
		Instance CAN96

◆ 3. Business Hours & Holidays

- Setup → Company Information → Business Hours.

- Define **Working Hours** (e.g., Mon–Fri, 9 AM–6 PM).
- Add **Holidays** (e.g., 26 Jan – Republic Day, 15 Aug – Independence Day).
- Used in **case escalation rules & support processes**.

Business Hours Detail

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

Active ✓
Created By shreyansh.dubey 9/12/2025, 9:04 PM Last Modified By shreyansh.dubey 9/22/2025, 10:06 AM

Holidays [0] [Edit](#)

Add/Remove

No records to display

◆ 4. Fiscal Year Settings

- Two types: **Standard Fiscal Year** (Jan–Dec or Apr–Mar) OR **Custom Fiscal Year**.
- Example: College/Company projects often use **Apr–Mar** cycle.

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.

Change Fiscal Year Period

Name: Deepfake Incident Management System
Fiscal Year Start Month: January
Fiscal Year is Based On: The ending month

◆ 5. User Setup & Licenses

Created 3 users with Salesforce licenses:

1. Shreyansh Dubey – Company Director

- Profile: System Administrator
- Role: Company Director

2. Yash Jain – Assistant Manager

- Profile: Standard User
- Role: Assistant Manager

3. Kajal – Manager

- Profile: Standard User
- Role: Manager

The screenshot shows the Salesforce 'Users' page under the 'SETUP' tab. The page title is 'Users'. At the top, there are links for 'New User', 'Reset Password(s)', and 'Add Multiple Users'. Below this is a table listing three users:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	EPIC_OrgFarm	OEPIG	epic_212015d27864@orgfarm.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	User_Integration	integ	integration@00dgk00000bdo1nuax.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	Chatter_Expert	Chatter	chatty.00dgk00000bdo1nuax.qi3hjc3rww@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	User_Security	sec	insightssecurity@00dgk00000bdo1nuax.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input checked="" type="checkbox"/>	jain_yash	yjain	yash778@gmail.com	Assistant Manager	<input checked="" type="checkbox"/>	Standard User
<input checked="" type="checkbox"/>	dubey_shreyansh	dub	dubeyshreyansh20640@agentforce.com	Company Director	<input checked="" type="checkbox"/>	System Administrator
<input checked="" type="checkbox"/>	thakur_kajal	kthak	kaja12398@gmail.com	Manager	<input checked="" type="checkbox"/>	Standard User

◆ 6. Profiles

- System Administrator Profile → Full access (used by Shreyansh Dubey).
- Standard User Profile → Limited object access (used by Yash Jain & Kajal).

◆ 7. Roles

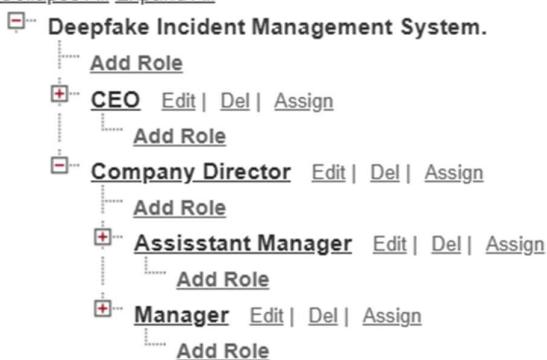
- Define hierarchy (data visibility).
- Higher roles automatically get access to lower role records.

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](#)



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◆ 8. Permission Sets

- Extra permissions without changing profile.
- Project Access Set → Allows CRUD on Projects (assigned to Yash Jain).
- Task Access Set → Allows CRUD on Tasks (assigned to Kajal).

◆ 9. Organization-Wide Defaults (OWD)

- Define **default record-level access**.
- Project Object: Private
- Task Object: Controlled by Parent
- Team Member Object: Public Read/Write

◆ 10. Sharing Rules

- Shared “Project” records of Assistant Manager with Manager role.
 - Ensures collaboration while maintaining security.
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◆ 11. Login Access Policies

- Allow users to grant Admin temporary access.
- Useful for troubleshooting & support.

SETUP

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"/>

◆ 12. Dev Org Setup

- Sign up for **Developer Org** (used for project build).
- Provides free licenses, API access, full configuration.

```
Successfully authorized dubeyshreyansh20640@agentforce.com with org ID 00DgK00000BD01NUAX
PS C:\Users\dubeyshreyansh.Dubey\Desktop\TCS_Lastmile\force-app\main\default\lwc\bikeCards>
```

◆ 13. Deployment Basics

- Deployment = moving setup from Sandbox → Production.
- Methods:
 - Change Sets (easy, UI-based)
 - Salesforce CLI / Metadata API (advanced)