

Phase-2: Org Setup & Configuration

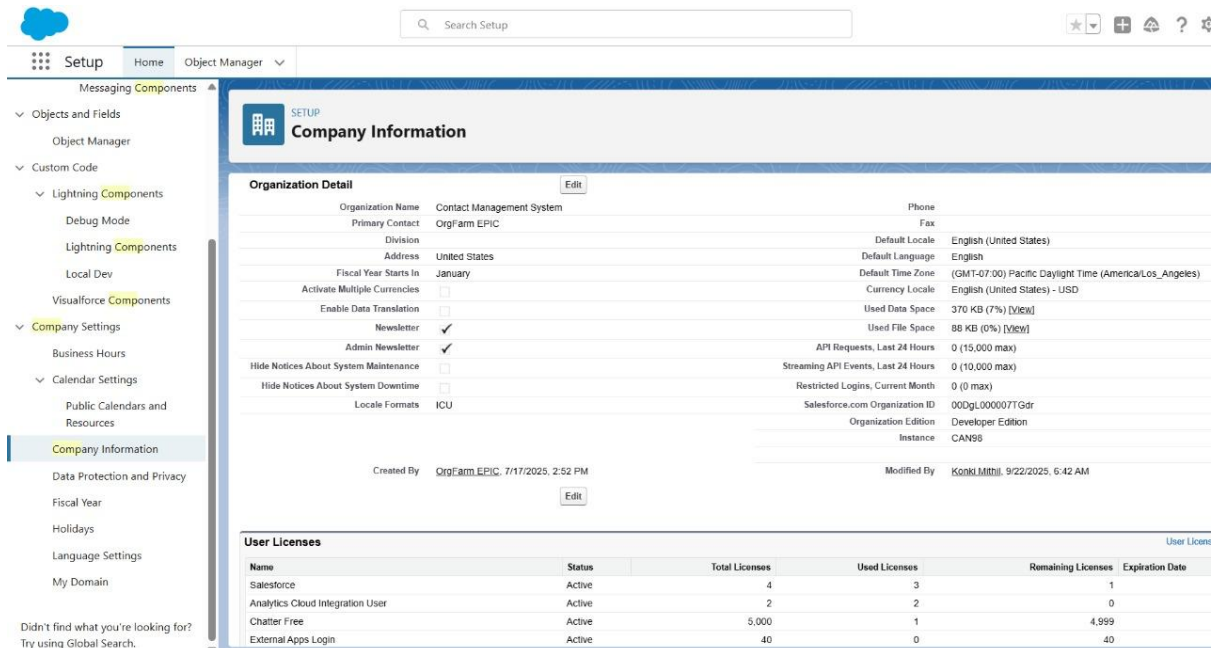
Salesforce Editions:

- Used Developer Edition Org (free).
- Includes custom objects, Flows, Apex, Approval Processes, and Lightning components.
- Sandbox not available in Developer Edition, so work is done directly in Dev O.

Company Profile Setup

Set up basic org details under **Setup** → **Company Information** → **Edit**:

- **Name:** Contact Management System – Dev
- **Time Zone:** GMT+05:30 Asia/Kolkata
- **Locale:** English (India)
- **Language:** English
- **Currency:** INR



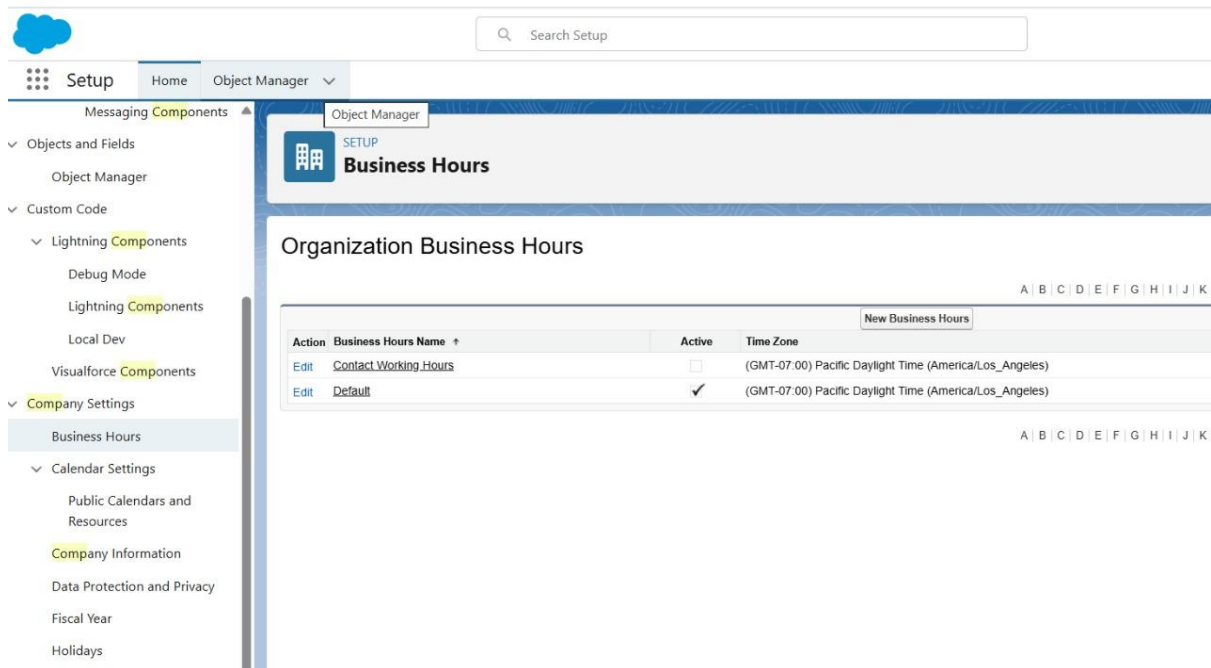
The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with categories like 'Objects and Fields', 'Custom Code', 'Lightning Components', 'Visualforce Components', 'Company Settings', 'Calendar Settings', and 'Company Information'. The 'Company Information' option is selected. The main content area is titled 'Company Information' and contains a form for 'Organization Detail'. The form includes fields for Organization Name, Primary Contact, Division, Address, Fiscal Year Starts In, Activate Multiple Currencies, Enable Data Translation, Newsletter, Admin Newsletter, Hide Notices About System Maintenance, Hide Notices About System Downtime, Locale Formats, Phone, Fax, Default Locale, Default Language, Default Time Zone, Currency Locale, Used Data Space, Used File Space, API Requests, Streaming API Events, Restricted Logins, Salesforce.com Organization ID, Organization Edition, and Instance. Below the form, there is a 'User Licenses' table.

Name	Status	Total Licenses	Used Licenses	Remaining Licenses	Expiration Date
Salesforce	Active	4	3	1	
Analytics Cloud Integration User	Active	2	2	0	
Chatter Free	Active	5,000	1	4,999	
External Apps Login	Active	40	0	40	

Business Hours Setup

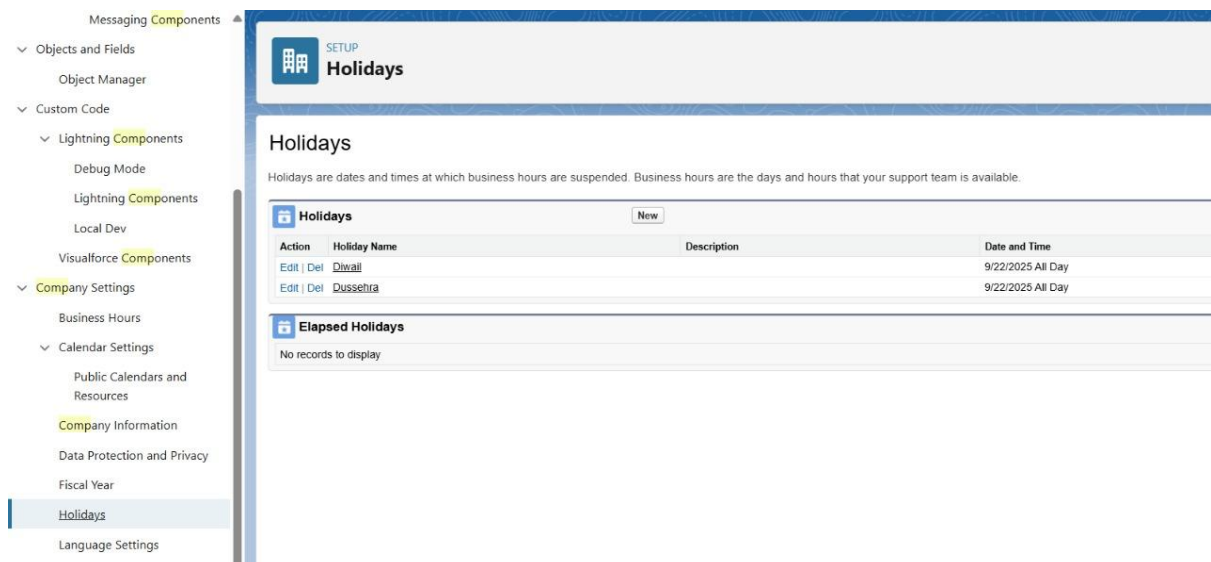
Configure working hours for customer interaction tracking and SLA monitoring:

- **Path:** Setup → Business Hours → New
- **Name:** Standard Business Hours
- **Time Zone:** GMT+05:30 Asia/Kolkata
- **Working Hours:** Mon–Fri 9:00 AM–6:00 PM, Sat–Sun Closed
- **Save:** Apply as default business hours



The screenshot shows the Salesforce Setup interface. The left sidebar contains the navigation menu with 'Setup' selected. The main content area is titled 'Business Hours' and displays 'Organization Business Hours'. A table lists the current business hours configuration.

Action	Business Hours Name	Active	Time Zone
Edit	Contact Working Hours	<input type="checkbox"/>	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Edit	Default	<input checked="" type="checkbox"/>	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)



The screenshot shows the Salesforce Setup interface. The left sidebar contains the navigation menu with 'Setup' selected. The main content area is titled 'Holidays' and displays a list of holidays. A table lists the current holidays configuration.

Action	Holiday Name	Description	Date and Time
Edit Del	Dussehra		9/22/2025 All Day
Edit Del	Dussehra		9/22/2025 All Day

Fiscal Year Setup

Defines reporting periods for contact engagement analysis:

- **Path:** Setup → Fiscal Year
- **Type:** Standard Fiscal Year (Jan–Dec)
- **Configuration:** Start Month = January
- **Save:** Apply settings

The screenshot shows the Salesforce Setup interface. On the left is a navigation menu with categories like 'Objects and Fields', 'Custom Code', 'Lightning Components', 'Visualforce Components', 'Company Settings', 'Calendar Settings', 'Company Information', 'Data Protection and Privacy', 'Fiscal Year', 'Holidays', 'Language Settings', and 'My Domain'. The 'Fiscal Year' option is selected. The main content area is titled 'Organization Fiscal Year Edit: Contact Management System'. It includes a warning message about changing the fiscal year and a 'Change Fiscal Year Period' section. In this section, 'Standard Fiscal Year' is selected, the 'Fiscal Year Start Month' is set to 'January', and 'The ending month' is selected for 'Fiscal Year is Based On'. There are 'Save' and 'Cancel' buttons at the bottom of the configuration section.

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

- **Profiles:** Clone standard profiles to create custom ones for baseline access.
 - **Sales_Rep_Profile** – For sales reps managing contacts and logging interactions
 - **Sales_Manager_Profile** – For managers reviewing team performance
 - **Executive_Profile** – For CEO/executive, full visibility
- **Roles:** Define role hierarchy for record visibility.
 - CEO → Sales Manager → Sales Rep
- **Permission Sets:** Create **Interaction_Access_PS** to grant extra access to Interaction History object.
- **Users:** Add sample users with respective profiles and roles:
 - sales1 → Sales_Rep_Profile, Role: Sales Rep
 - manager1 → Sales_Manager_Profile, Role: Sales Manager
 - ceo1 → Executive_Profile, Role: CEO

Q user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

Actions & Recommendations

SETUP Users

All Users

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. Let's Go

View: All Users Edit Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

New User Reset Password(s) Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.000g00007gduag.6xwvycxd13n@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit Login	EPIC_OrgFarm	CEPIC	epic.3b386tca207@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/> Edit Login	Mithil	mith	konkimthi2002@gmail.com	Test Role	✓	System Administrator
<input type="checkbox"/> Edit	Mithil_Konki	koi	konkimthi2002s42@agentforce.com		✓	System Administrator
<input type="checkbox"/> Edit Login	Project Admin	asadi	system22@ie.com		✓	Standard Platform User
<input type="checkbox"/> Edit	User_Integration	integ	integration@009g000007gduag.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@009g000007gduag.com		✓	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Setup Home Object Manager

Q profile

Users

Profiles

Didn't find what you're looking for? Try using Global Search.

SETUP Profiles

Profiles

All Profiles Edit Delete Create New View

New Profile

A B C D E F G H I J K L M N O P

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Delete Clone	Salesforce API Only System	Salesforce Integration	✓
<input type="checkbox"/> Edit Clone	Silver Partner User	Silver Partner	
<input type="checkbox"/> Edit Clone	Solution Manager	Salesforce	
<input type="checkbox"/> Edit Clone	Standard Platform User	Salesforce Platform	
<input type="checkbox"/> Edit Clone	Standard User	Salesforce	
<input type="checkbox"/> Edit Clone	System Administrator	Salesforce	

Role Hierarchy Setup

Defines data visibility within the org:

- **Path:** Setup → Roles → Set Up Roles
- **Top-Level Role:** CEO
- **Manager Role:** Child of CEO
- **Sales Rep Role:** Child of Manager

Resulting Hierarchy (example):

CEO → Sales Manager → Sales Rep

Roles	<div> <div>New Role</div> </div>		
Nature Settings			
Sales			
Contact Roles on Contracts			
Contact Roles on Opportunities			
Service			
Case Teams			