

## Phase 2 – Org Setup & Configuration

This phase involved configuring the **Salesforce Developer Org** to build a secure, structured, and role-based environment for the **Insurance Claim and Policy Management System**.

The goal was to ensure proper **user access, data visibility, and control** before creating custom objects, relationships, and automation.

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### 1. Salesforce Developer Edition Setup

The project was developed entirely in **Salesforce Lightning Developer Edition**, which supports:

- Custom Object and Field creation
- Workflow and Validation Rules
- Profiles, Roles, Permission Sets
- Reports and Dashboards

A single Developer Org was used for end-to-end development and testing.

This environment provided full admin access to configure the data-model and security settings.

#### Procedure:

1. Logged into Salesforce Developer Org.
2. Enabled **Lightning Experience** via Setup → User Interface.
3. Verified access to Object Manager, Security, and Setup tools.
4. Created a dedicated App for **Insurance Policy Management**.

#### Brief Purpose:

To establish a fully functional development workspace with all customization features enabled.

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### 2. User Setup

Three users were created to simulate the working hierarchy:

- **Administrator** – complete access to configure and monitor all modules
- **Manager** – reviews and approves claims, monitors agent activities
- **Agent** – creates and manages customers, policies, and claim records

Each user account was assigned a role and profile to reflect real-world responsibilities.

Test logins were used to verify access privileges for each type of user.

#### Procedure:

1. Setup → Users → New User.
2. Created three users and assigned appropriate profiles and roles.
3. Logged in as each user to validate access and permissions.

SETUP

Users

All Users

Help for this Page

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.00dgl000007g2lvua0_geo6caltjpb8@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit Login	EPIC_OrgFarm	OEPIQ	epic.43d4750464b7@orgfarm.salesforce.com	Claims Agent	<input checked="" type="checkbox"/>	Agent Profile
<input type="checkbox"/> Edit Login	Mounika	mounika	mounika2502@gmail.com	Test Role	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Mounika_Konda	kon	kondamounika2502538@agentforce.com	Claims Manager	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User_Integration	integ	integration@00dgl000007g2lvua0.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00dgl000007g2lvua0.com		<input checked="" type="checkbox"/>	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

### 3. Profiles Configuration

Custom profiles were set up to define **object-level and field-level access**:

- System Administrator Profile:** Full CRUD access on all objects (Customers, Policies, Claims, Mentors)
- Manager Profile:** Read and Edit access on records created by their agents
- Agent Profile:** Create and View access only for their own records

Field-level security was applied to hide or make read-only sensitive data such as **Claim Amount** or **Policy Coverage** for lower roles.

#### Procedure:

- Setup → Profiles → Clone Standard User profile to create Agent profile.
- Modified Object Settings and Field-Level Security per role.
- Saved and tested profile functionality.

#### Brief Purpose:

Profiles control baseline permissions and ensure sensitive policy or claim data cannot be modified by unauthorized users.

SETUP

Profiles

Data Share Sagemaker Connections	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Work Plan Templates	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Data Share Snowflake Connections	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Work Step Templates	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Data Share Targets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Work Types	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Data Share Target Connection	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Work Type Groups	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Custom Object Permissions

	Basic Access				Data Administration				Basic Access				Data Administration		
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields		Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Claims	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Mentors	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Policies	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Students	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After2 hours of inactivitySession 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	45 minutes

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## 4. Role Hierarchy

A hierarchical structure was implemented as:

### Admin → Manager → Agent

- Agents can view and edit only their own records
- Managers can view and approve the records of their reporting agents
- Admin has full organization-wide visibility

### Procedure:

1. Setup → Roles → Set Up Roles → Add Role.
2. Created roles and assigned them to respective users.
3. Verified record visibility according to hierarchy.

### Brief Purpose:

Role hierarchy establishes the approval and reporting chain, enabling upward visibility for monitoring and validation.

SETUP Roles

### 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 Show in tree view

**Velagapudi Ramakrishna Siddhartha Engineering College**

- CEO** Edit | Del | Assign
  - Add Role**
- CFO** Edit | Del | Assign
  - Add Role**
- COO** Edit | Del | Assign
  - Add Role**
- Claims Manager** Edit | Del | Assign
  - Add Role**
- Claims Agent** Edit | Del | Assign
  - Add Role**
- Test Role** Edit | Del | Assign
  - Add Role**
- SVP Customer Service & Support** Edit | Del | Assign
  - Add Role**
- SVP Human Resources** Edit | Del | Assign
  - Add Role**
- SVP Sales & Marketing** Edit | Del | Assign
  - Add Role**

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## 5. Permission Sets

Created an additional **"Claims Extended Access"** permission set:

- Temporarily granted agents edit permission on claim status during workflow testing
- Allowed controlled flexibility without changing the base profile

### Procedure:

1. Setup → Permission Sets → New.
2. Enabled Edit permission on Claim records.
3. Assigned permission set to selected Agent users.

### Brief Purpose:

Permission sets were used to temporarily extend access without altering default profile permissions.

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## 6. Organization-Wide Defaults (OWD)

Configured base record-level security for all custom objects:

Object	Default Access	Description
Customers	Private	Only owner (agent) and their manager can view/edit
Policies	Controlled by Parent	Access inherited from related Customer
Claims	Private	Only record owner or approver can view/edit

### Procedure:

1. Setup → Sharing Settings → Organization-Wide Defaults.
2. Set access levels per object.
3. Saved changes.

### Brief Purpose:

OWD ensures data confidentiality and prevents unauthorized data visibility between different agents.

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## 7. Sharing Rules

Created a **Manager-Level Sharing Rule** to automatically share agent-owned records with their respective managers:

- Enabled Managers to review, verify, and approve claim or policy details created by agents

### Procedure:

1. Setup → Sharing Settings → Sharing Rules → New.
2. Set criteria: Owner Role = Agent → Share with Manager role.
3. Access Level: Read/Write.
4. Repeated for Claims and Policies.

### Brief Purpose:

Sharing rules extend record access upward in the hierarchy for supervision and claim verification.



Policy Sharing Rules		New	Recalculate	Policy Sharing Rules Help ?	
Action	Criteria	Shared With		Access Level	
<a href="#">Edit</a>   <a href="#">Del</a>	Owner in All Internal Users	<a href="#">Group: Recruiters</a>		Read Only	
<a href="#">Edit</a>   <a href="#">Del</a>	Owner in <a href="#">Group: Recruiters</a>	<a href="#">Group: Recruiters</a>		Read Only	

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## 8. Login Access & Testing

Enabled Admin login access for troubleshooting user-level issues.

Each configuration was tested by logging in as **Admin, Manager, and Agent** to confirm proper visibility and permission flow.

### Procedure:

1. Logged in as Agent — created sample Customer, Policy, and Claim.

2. Logged in as Manager — verified access to agent-created records.
3. Logged in as Admin — checked organization-wide visibility.
4. Confirmed restricted fields (Claim Amount, Policy Coverage) were hidden for Agents.

**Brief Purpose:**

Testing verified that security and record-sharing behaviors worked correctly before moving to customization and automation.

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## 9. Developer Org Verification

All configurations, metadata, and role-based rules were created and tested inside a single Salesforce Developer Org. Verified successful:

- Role-based access control
- Record visibility flow
- Field-level security restrictions
- Claim approval visibility from **Agent → Manager → Admin**

**Brief Purpose:**

Ensures the Salesforce org is stable, secure, and ready for next phases.

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The Salesforce Developer Org was fully configured with:

- Secured access
- Hierarchical data visibility
- Controlled sharing mechanisms