

# Phase 2 Documentation – Org Setup & Configuration

## 1. Salesforce Edition

- Selected **Salesforce Developer Edition** (free, for project/demo).
- Verified availability of required features (Users, Profiles, Permission Sets, Reports, etc.).

## 2. Company Profile Setup

- **Company Information:** Entered company name (e.g., *ABC retail Pvt Ltd*), default locale, language (English India – INR).
- **Currency:** Set to INR.
- **Time Zone:** Asia/Kolkata.
- **Fiscal Year:** Chosen **Standard Fiscal Year** (Jan–Dec).

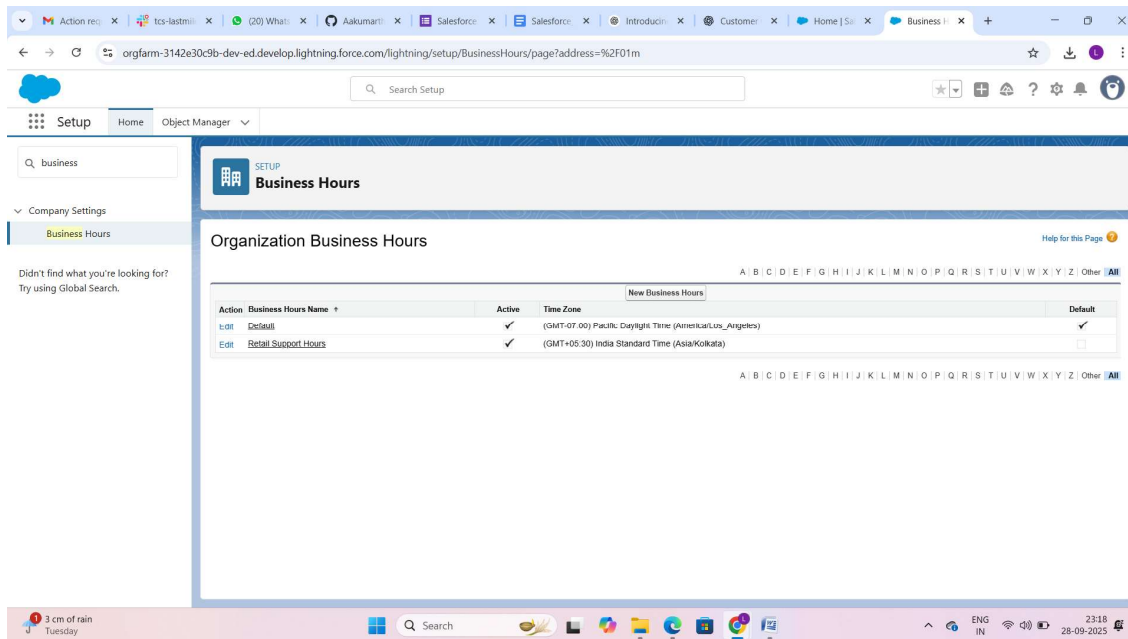
The screenshot shows the Salesforce Setup interface for a company profile. The left sidebar contains navigation links for Setup Home, Salesforce Go, Service Setup Assistant, Commerce Setup Assistant, Field Service Setup Home (Beta), Hyperforce Assistant, Release Updates, Salesforce Mobile App, Lightning Usage, Optimizer, Sales Cloud Everywhere, ADMINISTRATION (Users, Data, Email), and PLATFORM TOOLS (Subscription Management). The main content area is titled 'Company Information' and displays the organization's profile for 'ABC Retail Pvt Ltd'. The profile details include:

Organization Detail	
Organization Name	ABC Retail Pvt Ltd
Primary Contact	OrgFam EPIC
Division	India
Address	India
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 (India)
Default Language	English
Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Currency Locale	English (India) - INR
Used Data Space	342 KB (7%) <a href="#">View</a>
Used File Space	17 KB (0%) <a href="#">View</a>
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	00Dg1.000008Ksas
Organization Edition	Developer Edition
Instance	CAN98

Created By: OrgFam EPIC, 9/10/2025, 2:50 PM  
Modified By: Nuku Subrahmanya Venkata Lakshmi, 9/28/2025, 10:39 AM

### 3. Business Hours & Holidays

- Configured **Business Hours**: 9:00 AM – 5:30 PM IST (Mon–Fri).
- Added **Holidays** (optional): Republic Day, Diwali, etc.



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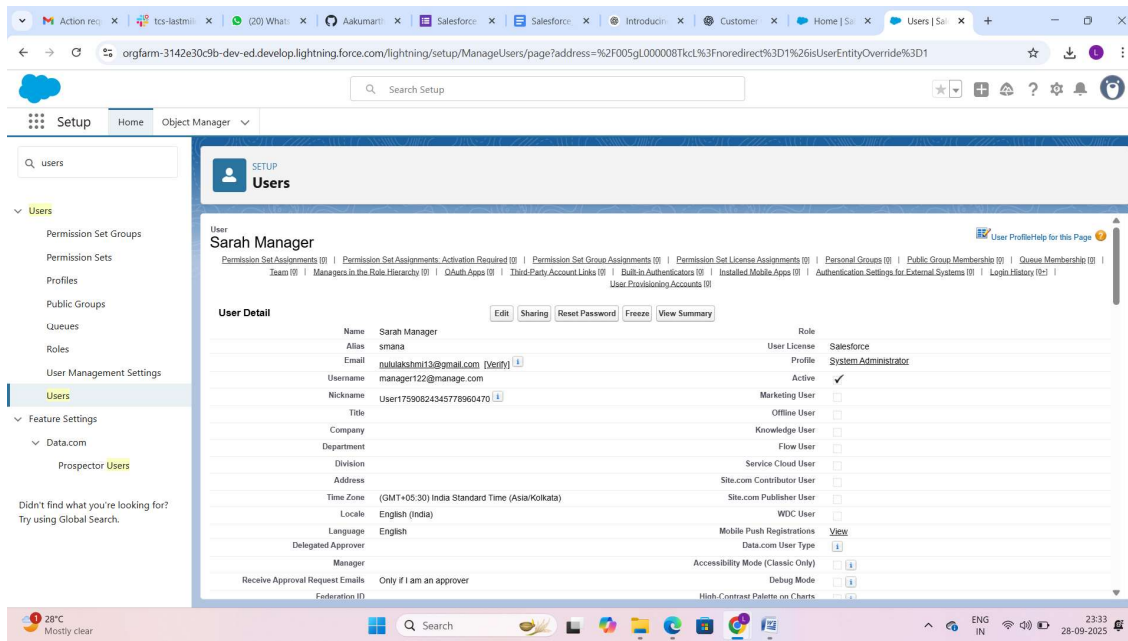
### 4. Fiscal Year Settings

- Confirmed **Standard Fiscal Year** is enabled.
- No customization required for this project.

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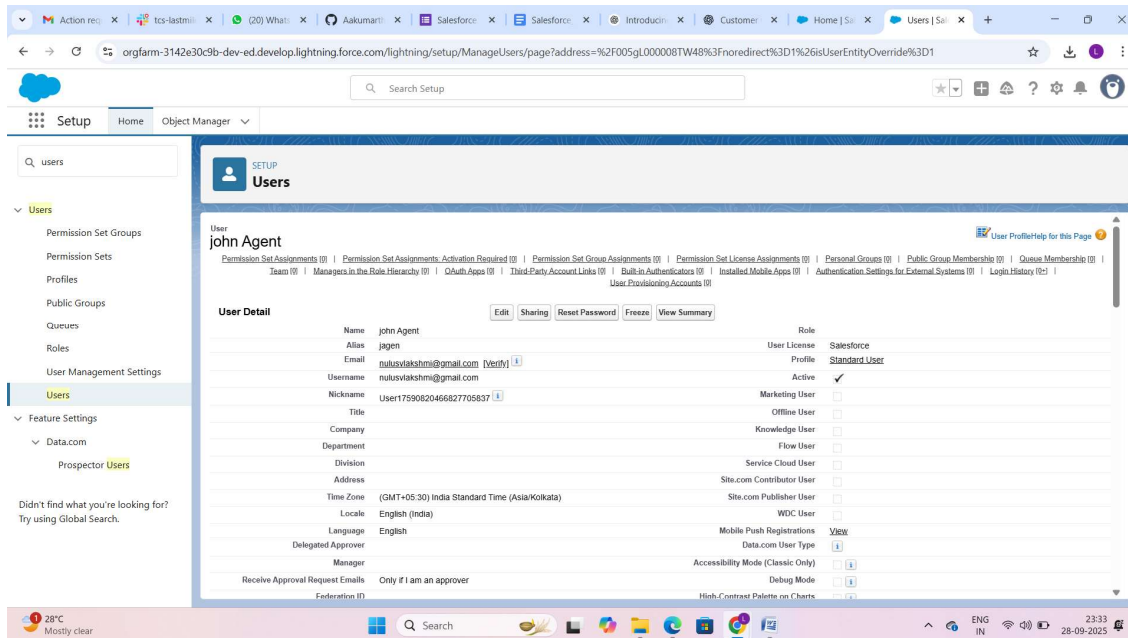
### 5. User Setup & Licenses

- Created sample **Users**:
  - **Admin User** – Full Access.
  - **Manager User** – Supervises complaints.
  - **Support Agent User** – Handles complaints.



The screenshot shows the Salesforce Setup interface for the 'Users' section. The user 'Sarah Manager' is selected. The left sidebar shows the navigation menu with 'Users' highlighted. The main content area displays the user details for Sarah Manager, including Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, Receive Approval Request Emails, and Federation ID. The right sidebar shows the user's Role, User License, Profile, and various permissions.

Field	Value	Field	Value
Name	Sarah Manager	Role	Salesforce
Alias	smana	User License	System Administrator
Email	nulakshmi13@gmail.com	Profile	System Administrator
Username	manager122@manager.com	Active	<input checked="" type="checkbox"/>
Nickname	User17590824345778960470	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<input type="checkbox"/>
Delegated Approver		Data.com User Type	<input type="checkbox"/>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation ID		High Contrast Palette on Charts	<input type="checkbox"/>



The screenshot shows the Salesforce Setup interface for the 'Users' section. The user 'John Agent' is selected. The left sidebar shows the navigation menu with 'Users' highlighted. The main content area displays the user details for John Agent, including Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, Receive Approval Request Emails, and Federation ID. The right sidebar shows the user's Role, User License, Profile, and various permissions.

Field	Value	Field	Value
Name	John Agent	Role	Salesforce
Alias	jagen	User License	Standard User
Email	nulakshmi13@gmail.com	Profile	Standard User
Username	nulakshmi13@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User17590820466827705837	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<input type="checkbox"/>
Delegated Approver		Data.com User Type	<input type="checkbox"/>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation ID		High Contrast Palette on Charts	<input type="checkbox"/>

## 6. Profiles

- Configured **Profiles** for baseline access:
  - System Administrator** (default, full rights).
  - Complaint Manager Profile** (Read/Write on Complaint & Customer objects).
  - Complaint Agent Profile** (Read/Write complaints assigned to them).

The screenshot shows the Salesforce Setup interface for the 'Complaint Manager Profile'. The left sidebar includes a search bar with 'profile' and a navigation menu with 'Users' and 'Profiles' (selected). The main content area displays the profile details for 'Complaint Manager Profile'.

**Profile Detail**

Name	Complaint Manager Profile		
User License	Salesforce	Custom Profile	✓
Description			
Created By	Nulu Subrahmanya Venkata Lakshmi	9/29/2025, 9:22 AM	Modified By Nulu Subrahmanya Ve

**Page Layouts**

Standard Object Layouts		Location Group Assignment	Location Group Assign
Global	Global Layout [ View Assignment ]		Location Group Assign [ View Assignment ]
Email Application	Not Assigned [ View Assignment ]	Macro	Macro Layout [ View Assignment ]

The screenshot shows the Salesforce Setup interface for the 'Complaint Agent Profile'. The left sidebar includes a search bar with 'profile' and a navigation menu with 'Users' and 'Profiles' (selected). The main content area displays the profile details for 'Complaint Agent Profile'.

**Profile Detail**

Name	Complaint Agent Profile		
User License	Salesforce	Custom Profile	✓
Description			
Created By	Nulu Subrahmanya Venkata Lakshmi	9/29/2025, 3:54 AM	Modified By Nulu Subrahmanya Ve

**Page Layouts**

Standard Object Layouts		Location Group Assignment	Location Group Assign
Global	Global Layout [ View Assignment ]		Location Group Assign [ View Assignment ]
Email Application	Not Assigned [ View Assignment ]	Macro	Macro Layout [ View Assignment ]

## 7. Permission Sets

- Created **extra access layers**:
  - Complaint Manager Access** → Manage all complaints/customers + reports.
  - Complaint Viewer Access** → Read-only on complaints/customers.
  - Reports Access** → Run & export reports.
- Assigned to users based on roles.

