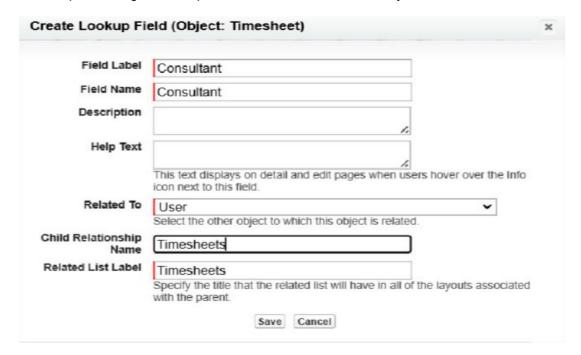
PROJECT MANAGEMENT APP

YELURI SAHITHI NAVYA

Phase 2: Org Setup & Configuration

Goal: Prepare the Salesforce environment and configure essential settings.

- Sign up for Developer Org for development and testing.
- Configure company profile with time zone, fiscal year, currency settings.
- Define working hours and add official holidays.
- Create users like Project Manager, Team Member, and Client roles.
- Assign profiles to control data visibility and access levels.
- Use Org-Wide Defaults (OWD) for record-level security.
- Set up sharing rules to allow collaboration where needed.
- Create permission sets for additional access without changing profiles.
- Implement login access policies and restrictions for security.



eate Number Fi	eld (Object: Project)
Field Label	Total Hours
Field Name	Total Hours
Description	
Help Text	
	This text displays on detail and edit pages when users hover over the info- icon next to this field.
Default Value	
Length	Number of digits to the left of the decimal point
Decimal Places	2
Required	Number of digits to the right of the decimal point Always require a value in this field in order to save a record
Unique	☐ Do not allow duplicate values
External ID	\square Set this field as the unique record identifier from an external system
	Save Cancel



Create Date Field	(Object: Timesheet)	×
Field Label	Task Date	
Field Name	Task_Date	
Description		
Help Text	4	
	This text displays on detail and edit pages when users hover over the Info icon next to this field.	
Default Value		
Required	Always require a value in this field in order to save a record Save Cancel	