

# PROJECT MANAGEMENT APP

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## 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.

**Create Lookup Field (Object: Timesheet)**

Field Label: Consultant

Field Name: Consultant

Description:

Help Text:

Related To: User

Child Relationship Name: Timesheets

Related List Label: Timesheets

Save Cancel

Create Number Field (Object: Project)

Field Label

Total Hours

Field Name

Total\_Hours

Description

Help Text

Default Value

Length

16

Decimal Places

2

Required

☐

Unique

☐

External ID

☐

Number of digits to the left of the decimal point

Number of digits to the right of the decimal point

Always require a value in this field in order to save a record

Do not allow duplicate values

Set this field as the unique record identifier from an external system

Save

Cancel

Create Date Field (Object: Project)

Field Label

Start Date

Field Name

Start\_Date

Description

Help Text

Default Value

Required

☐

Always require a value in this field in order to save a record

Save

Cancel

Create Date Field (Object: Timesheet)

Field Label

Task Date

Field Name

Task\_Date

Description

Help Text

Default Value

Required

☐

Always require a value in this field in order to save a record

Save

Cancel