

Phase 2: Org Setup & Configuration - Step-by-Step Guide for Salesforce Org

This document provides a detailed overview of the completed administrative and foundational configurations for Phase 2: Org Setup & Configuration for the "AutoService Manager" capstone project.

1. Salesforce Edition Selection

The Enterprise Edition of Salesforce has been selected for this project. This choice is critical as it provides access to the advanced features of

Field Service, which are essential for managing mobile technicians and work orders, addressing a key problem identified in Phase 1.

2. Company Profile & Business Information

The basic company information and business hours for "AutoFix Garage" have been configured to ensure the system reflects the real-world operations of the business.

Company Profile Setup

The following information has been configured in the Salesforce organization to set the company's identity and defaults:

- **Company Information:** The company name has been set to "AutoFix Garage".
- **Address and Contact:** The physical address, phone number, and website of the garage have been entered.
- **Default Settings:** The default language, locale, and currency for the organization have been defined.

Business Hours & Holidays

To address the problem of "double-booked appointments and scheduling conflicts", the standard working hours and holidays have been configured.


- **Business Hours:** The standard work week for the garage has been defined, for example, Monday to Friday from 9:00 AM to 6:00 PM. This will prevent appointments from being scheduled when the garage is closed.
- **Holidays:** All official holidays have been set up to ensure that appointments are not scheduled on those days.

Fiscal Year Settings

This is a critical step to support the financial reporting mentioned in your plan.

- **Standard Fiscal Year:** The fiscal year has been configured to follow the standard Gregorian calendar, running from January 1st to December 31st. This will align with the

MonthlyServiceReportBatch and "Monthly revenue by service type" reports.


Company Information

Company Information
AutoFix Garage

[User Licenses \(10+\)](#) | [Permission Set Licenses \(10+\)](#) | [Feature Licenses \(11\)](#) | [Usage-based Entitlements \(10+\)](#)

The organization's profile is below.

Organization Detail
[Edit](#)

Organization Name	AutoFix Garage	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (United Kingdom)
Address	India	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	Hindi (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	406 KB (8%) View
Newsletter	<input checked="" type="checkbox"/>	Used File Space	50 KB (0%) View
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00DgK000007ecnJ
		Organization Edition	Developer Edition
		Instance	CAN96

Created By [OrgFarm EPIC](#), 7/18/2025, 9:55 AM

Modified By [Shivansh Namdeo](#), 9/15/2025, 10:24 PM

[Edit](#)

3. User Setup

A well-defined user setup is a cornerstone of the "AutoService Manager" solution. This structure ensures that each user has the correct level of access and visibility based on their role and responsibilities.

Profiles

Four main profiles have been configured to manage user permissions:

- **Service Advisor Profile:** For front-desk staff who interact with customers, schedule appointments, and create work orders.
- **Technician Profile:** For the hands-on personnel who perform vehicle repairs. This profile is a Field Service user type.
- **Manager Profile:** For the Shop Manager who oversees operations, tracks performance, and manages inventory.
- **Customer Community Profile:** For external customers to view their service history and receive updates.

<input type="checkbox"/> Edit Del ... Manager Profile	Salesforce	✓
<input type="checkbox"/> Edit Del ... Service Advisor Profile	Salesforce	✓
<input type="checkbox"/> Edit Del ... Technician Profile	Salesforce	✓
<input type="checkbox"/> Edit Del ... Customer Community Profile	Customer Community	✓

Roles

A role hierarchy has been established to control data visibility and reporting, particularly for the Technician and Service Advisor roles.

- **Shop Manager**
- **Service Advisor**
- **Senior Technician**
- **Junior Technician**

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

[Collapse All](#) [Expand All](#)



4. Login Access Policies & Deployment

These foundational steps for security and deployment have been completed. They are independent of the data model and can be set up early in the project.

Login Access Policies

To enforce the security measure of "IP Restrictions: Shop location access only," the

Login IP Ranges feature has been configured for each user profile. This policy restricts all users from logging in to Salesforce from any IP address outside of the defined range, enforcing the security requirement.

Deployment Basics

Given the lack of a sandbox environment, development and deployment will be managed directly within the single development organization.

- **Change Sets:** The primary method for moving customizations between environments. This will be used to deploy new custom objects, fields, and automation rules.

- **VS Code & SFDX:** The Salesforce CLI (SFDX) and Visual Studio Code will be used to manage the project's source code and metadata. This approach serves as a "source-of-truth" and allows for version control of project assets even without a dedicated sandbox.
-

Phase 2: Pending Steps

The remaining steps of Phase 2 are dependent on the creation of custom objects, which will be completed in

Phase 3: Data Modelling & Relationships. Once the custom objects are in place, we will return to Phase 2 to complete the following:

1. Permission Sets

You have already defined the permission sets required for the project. These will be created in the organization after the custom objects are available.

- **Parts_Inventory_Access:** To grant access to the Parts_Inventory__c and Parts_Used__c custom objects.
- **Customer_Data_Access:** To provide access to the Vehicle__c custom object.
- **Financial_Reports_Access:** To give restricted access to financial data.

2. OWD & Sharing Rules

The Organization-Wide Defaults and sharing rules have been planned, but their implementation requires the custom objects to be created first.

- **Organization-Wide Defaults (OWD):** You will set the OWD for the custom Vehicle__c object to Controlled by Parent.

Sharing Rules: You will create sharing rules on the Work Order and Case objects to manage data visibility, which will depend on the custom Assigned_Technician__c field.