

LegalAid Connect– Phase 2: Org Setup & Configuration Report

Project Title: LegalAid Connect – Free & Affordable Legal Assistance CRM

Phase: 2 – Org Setup & Configuration

Date: 24 September 2025

Prepared By: SRIJITHA G

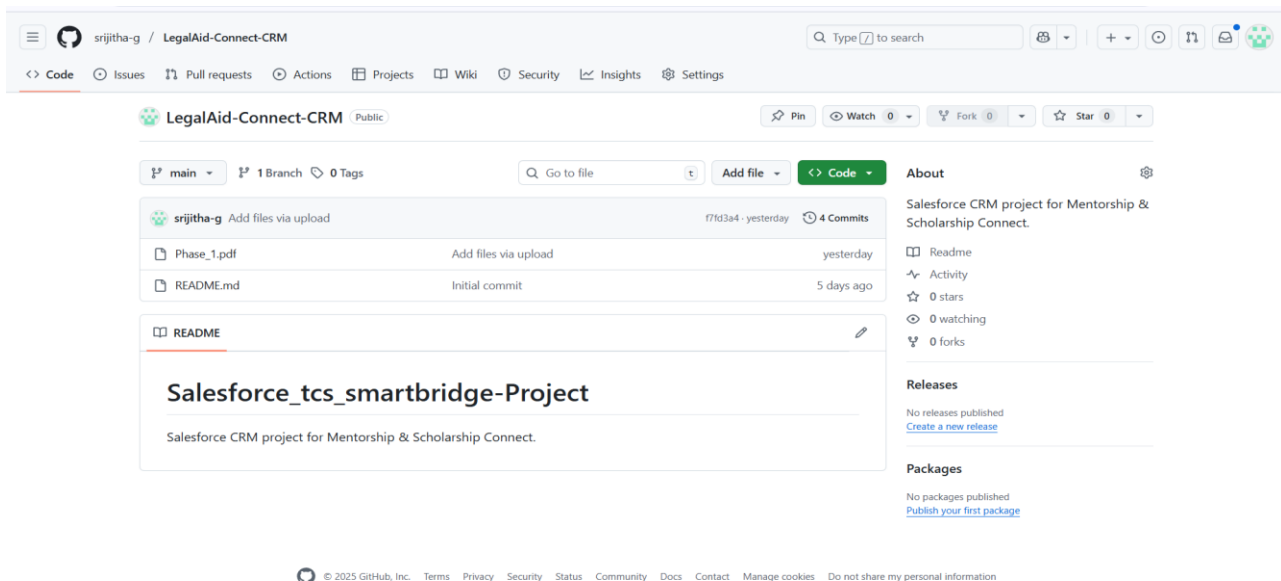
1. Introduction

Phase 2 of the LegalAid Connect project focuses on setting up the Salesforce Developer Org, configuring the company profile, defining business hours and holidays, fiscal year, users, roles, profiles, and implementing basic security and access controls.

The purpose of this phase is to establish the technical foundation for the system, ensuring that all stakeholders (clients, lawyers, NGO coordinators, and government officers) have the appropriate access, permissions, and configurations before moving into Phase 3: Data Modeling & Relationships.

2. Developer Org & DevOps Setup

- Salesforce **Developer Edition Org** created (free, Enterprise features enabled)
- Tools installed/configured:
 - VS code with SalesforceExtensions
-
- GitHub repository created and connected for version control
- Initial DevOps workflow established using SFDX commands and GitHub integration



3. Company Profile & Global Settings

- Company Name: LegalAid Connect CRM
- Primary Contact: SRIJITHA G-8074789691
- Locale: English (India)
- Time Zone: IST (GMT+05:30)
- Currency: INR

SETUP Company Information

Company Information
LegalAid Connect CRM

The organization's profile is below.

[User Licenses \(10\)](#) | [Permission Set Licenses \(10\)](#) | [Feature Licenses \(1\)](#) | [Usage-based Entitlements \(10\)](#)

Organization Detail [Edit](#)

Organization Name	LegalAid Connect CRM	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (United States)
Address	United States	Default Language	English
Fiscal Year Starts In	April	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	350 KB (7%) View
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 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	00cgl.000000C1taf
		Organization Edition	Developer Edition
		Instance	CAN98
Created By	OrgFarm EPIC 9/19/2025, 9:02 AM	Modified By	GOVIND SRIVATHA 9/24/2025, 3:10 PM

[Edit](#)

User Licenses [User Licenses Help](#)

Name	Status	Total Licenses	Used Licenses	Remaining Licenses	Expiration Date
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Business Hours & Holidays:

- Monday –Friday, 9:00 AM – 6:00 PM
- Holidays configured: Independence Day, Republic Day ,Dussehra

SETUP Business Hours

Organization Business Hours

Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate.

If you enter blank business hours for a day, that means your organization does not operate on that day.

Business Hours Detail [Edit](#)

Business Hours Name	Business Hours	Time Zone
LegalAid Support Hours	Sunday 24 Hours Monday 9:00 AM to 6:00 PM Tuesday 9:00 AM to 6:00 PM Wednesday 9:00 AM to 6:00 PM Thursday 9:00 AM to 6:00 PM Friday 9:00 AM to 6:00 PM Saturday 24 Hours	(GMT+05:30) India Standard Time (Asia/Kolkata)

Active ☒

Created By GOVIND SRIVATHA 9/24/2025, 12:02 AM

Last Modified By GOVIND SRIVATHA 9/24/2025, 12:04 AM

Holidays [Add/Remove](#)

No records to display

[Back To Top](#) Always show me fewer [more](#) records per related list

Fiscal Year:

- Standard Fiscal Year, starting April

SETUP Fiscal Year

Organization Fiscal Year Edit: LegalAid Connect CRM

To specify the fiscal year type for your organization, choose one of the options below.

Fiscal Year Information

Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example, if your fiscal year starts in April 2025 and ends in March 2026, your Fiscal Year setting can be either 2025 or 2026.

Change Fiscal Year Period [Save](#) [Cancel](#)

Name	Fiscal Year Start Month	Fiscal Year is Based On
LegalAid Connect CRM	April	The ending month

[Save](#) [Cancel](#)

4. User Setup & Licenses

- Admin User: Full access (System Administrator)
- Lawyer/Volunteer User: Standard User (case updates, notifications)
- NGO Coordinator User: Standard User (monitor cases, assign lawyers)

- Client User: Customer Community User (view case status in portal)
- Government Officer / Donor User: Read-only dashboards

Users

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

Action	Full Name ↑	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty.009g00000c1tafuaab.trocbeawvz0@chatter.salesforce.com		✓	Chatter Free User
Edit	EPIC_OrgFarm	OEPIG	epic.cd2338d5b48b@orgfarm.salesforce.com		✓	System Administrator
Edit	G_Srijitha	admin	sriadmin@gmail.com	Admin	✓	System Administrator
Edit	SRUITHA_GOVINI	224	224g1a3295210@apentforce.com		✓	System Administrator
Edit	User_Client	cuser	devacient@gmail.com	Client	✓	Standard Platform User
Edit	User_Coordinator	coadmin	deva.co@gmail.com		✓	Force.com - App Subscription User
Edit	User_Integration	integ	integration@009g00000c1tafuaab.com		✓	Analytics Cloud Integration User
Edit	User_Lawyer	lawyer	bavlawyer@gmail.com	Lawyer	✓	Standard User
Edit	User_Security	sec	insightssecurity@009g00000c1tafuaab.com		✓	Analytics Cloud Security User

5. Roles, Profiles & Permission Sets

Roles Created:

- System Administrator
- Lawyer/Volunteer
- NGO Coordinator
- Client
- Government Officer

Roles

[New Role](#)

Action	Role ↑	Reports to	Report Display Name
Edit Del Assign	Admin		
Edit Del Assign	CEO		CEO
Edit Del Assign	CFO		CFO
Edit Del Assign	Channel Sales Team	Director Channel Sales	Channel Sales Team
Edit Del Assign	Client	Admin	Client
Edit Del Assign	COO	CEO	COO
Edit Del Assign	Customer Support International	SVP Customer Service & Support	Customer Support, International
Edit Del Assign	Customer Support North America	SVP Customer Service & Support	Customer Support, North America
Edit Del Assign	Director Channel Sales	VP North American Sales	Director, Channel Sales
Edit Del Assign	Director Direct Sales	VP North American Sales	Director, Direct Sales
Edit Del Assign	Eastern Sales Team	Director Direct Sales	Eastern Sales Team
Edit Del Assign	Installation & Repair Services	SVP Customer Service & Support	Installation & Repair Services
Edit Del Assign	Lawyer	Admin	Lawyer
Edit Del Assign	Marketing Team	VP Marketing	Marketing Team
Edit Del Assign	SVP Customer Service & Support	CEO	SVP, Customer Service & Support
Edit Del Assign	SVP Human Resources	CEO	SVP, Human Resources
Edit Del Assign	SVP Sales & Marketing	CEO	SVP, Sales & Marketing
Edit Del Assign	VP International Sales	SVP Sales & Marketing	VP, International Sales
Edit Del Assign	VP Marketing	SVP Sales & Marketing	VP, Marketing
Edit Del Assign	VP North American Sales	SVP Sales & Marketing	VP, North American Sales
Edit Del Assign	Western Sales Team	Director Direct Sales	Western Sales Team

Show me [fewer](#) ▲ records per list page

[New Role](#)

Profiles Defined:

- Admin Profile (Full Access)
- Lawyer Profile (Case management access)
- NGO Coordinator Profile (Case monitoring)

- Client Profile (Limited portal access)
- Government Officer Profile (Read-only dashboards)

SETUP

Profiles

Profiles

[All Profiles](#) | [Edit](#) | [Delete](#) | [Create New View](#)

New Profile

A

B

C

D

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F

G

H

I

J

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V

W

X

Y

Z

Other

All

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Anypoint Integration	Identity	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit Del ...	B2B Reordering Portal Buyer Profile	External Apps Login	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter External User	Chatter External	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Contract Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom: Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom: Sales Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom: Support Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Community Login User	Customer Community Login	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Community Plus Login User	Customer Community Plus Login	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Community Plus User	Customer Community Plus	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Community User	Customer Community	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Data Manager Custom	Customer Data Manager Custom	<input type="checkbox"/>

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Permission Sets:

- Case Management Access
- Dashboard & Reporting Access

SETUP

Permission Sets

Permission Sets

[All Permission Sets](#) | [Edit](#) | [Delete](#) | [Create New View](#)

New

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Other

All

Action	Permission Set Name	Description	License
<input type="checkbox"/> Clone	(Legacy) Data Cloud Marketing Admin	Allows access to Data Cloud Setup if the user is also a Salesforce ad...	Customer Data Cloud for Marketing
<input type="checkbox"/> Clone	(Legacy) Data Cloud Marketing Manager	This Data Cloud permission set will be deprecated in Spring '24. Lear...	Customer Data Platform
<input type="checkbox"/> Clone	(Legacy) Data Cloud Marketing Specialist	This Data Cloud permission set will be deprecated in Spring '24. Lear...	Customer Data Platform
<input type="checkbox"/> Clone	(Legacy) Data Cloud for Marketing Data Aware Specialist	This Data Cloud permission set will be deprecated in Spring '24. Lear...	Customer Data Cloud for Marketing
<input type="checkbox"/> Clone	(Legacy) Data Cloud for Marketing Manager	This Data Cloud permission set will be deprecated in Spring '24. Lear...	Customer Data Cloud for Marketing
<input type="checkbox"/> Clone	(Legacy) Data Cloud for Marketing Specialist	This Data Cloud permission set will be deprecated in Spring '24. Lear...	Customer Data Cloud for Marketing
<input type="checkbox"/> Clone	Access Agentforce Default Agent	Gives users access to the default Agentforce agent in Salesforce.	Agentforce (Default)
<input type="checkbox"/> Clone	Agent Platform Builder	Allow access to agent platform.	Agent platform builder
<input type="checkbox"/> Clone	Agentforce Default Admin	Allows users to build and manage in-org copilots.	Agentforce (Default)
<input type="checkbox"/> Clone	Agentforce Service Agent Configuration	Build and manage autonomous AI service agents.	Agentforce Service Agent Builder
<input type="checkbox"/> Clone	Agentforce Service Agent Object Access	Access knowledge articles and manage cases and contacts as an aut...	Agentforce Service Agent User
<input type="checkbox"/> Clone	Agentforce Service Agent Secure Base	Set up and use Agentforce Service Agent actions with enhanced data ...	Agentforce Service Agent User
<input type="checkbox"/> Clone	Agentforce Service Agent User	Analyze topics and perform actions as an autonomous AI service agent.	Agentforce Service Agent User
<input type="checkbox"/> Clone	Authenticated Payer	An authenticated external user with the ability to make and manage th...	Salesforce Payments External
<input type="checkbox"/> Clone	Buyer	Allows access to the store. Lets users see products and categories, m...	B2B Buyer Permission Set One Seat
<input type="checkbox"/> Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to manage carts an...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/> Clone	C360 High Scale Flow Integration User	Allows integration user to access features specific to C360 High Scale...	Cloud Integration User
<input type="checkbox"/> Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User

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0 Selected

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6. Org-Wide Defaults (OWD) & Sharing Rules

OWD Settings:

- Client records: Private
- Case records: Controlled by Parent (NGO/Coordinator)
- Lawyer records: Read Only

Sharing Settings

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: **All Objects**

[Disable External Sharing Model](#)

Default Sharing Settings

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public ReadWrite/Transfer	Private	✓
Account and Contract	Public ReadWrite	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public ReadWrite	Private	✓
Case	Public ReadWrite/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Artistic	Private	Private	✓

Sharing Rules:

- NGO Coordinators can view assigned client cases
- Lawyers can access cases assigned to them
- Government Officers can view aggregated reports

7. Security & Login Policies

- Password Policies configured according to standard security
- Login Access: No IP restrictions for development phase
- Field-Level Security: Sensitive fields (e.g., case details, personal info) restricted
- Audit Trail enabled

8. Deployment Workflow

- Development occurs in Salesforce Developer Org
- Version control with GitHub
- Metadata and configurations deployed manually (no Sandbox available)
- Future plan for real org: Use Change Sets or Packages for Sandbox → Production deployment

9. Challenges & Learnings

- Clarified the difference between Profiles vs Permission Sets
- Understood the importance of OWD & Sharing Rules as the foundation of security
- Learned how Company Profile settings impact workflows and reports

10. Next Steps

With Phase 2 completed, the project is now ready for Phase 3: Data Modeling & Relationships.

Next activities:

- Create custom objects Client, LegalAid_Case__c, Lawyer, NGO, Donor
- Define relationships between objects (lookup, master-detail)
- Setup Record Types, Page Layouts, and Schema Builder visualization.
- Configure automation: case assignment, notifications, SLA tracking

Phase 2 Completion Status: DONE

Prepared for Phase 3 Development