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

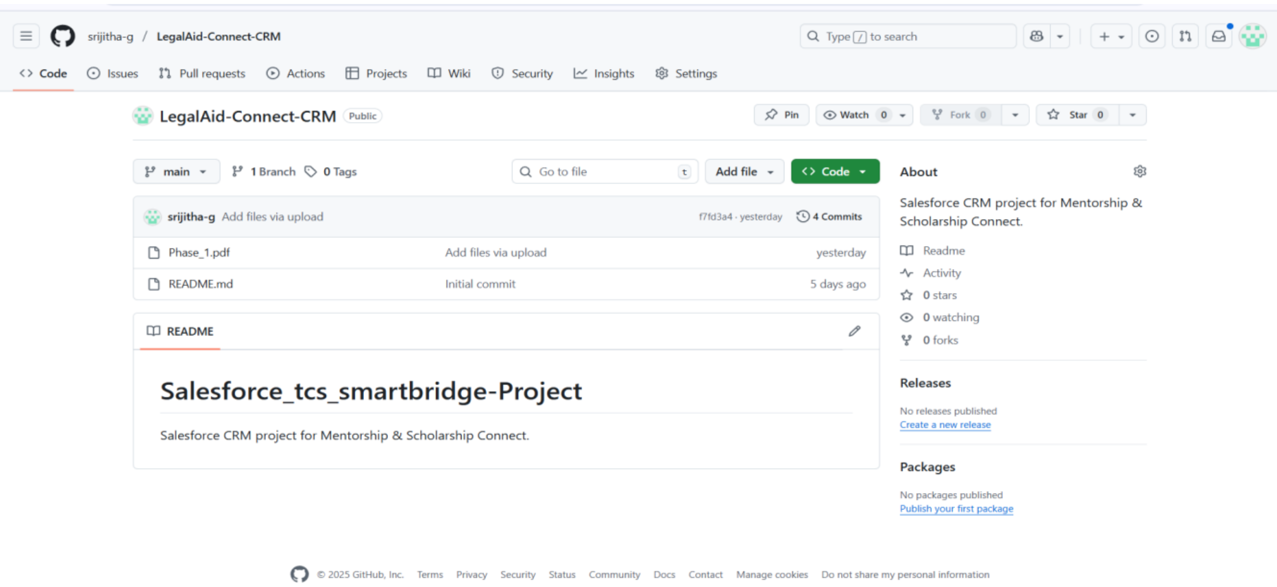
1. Introduction

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.

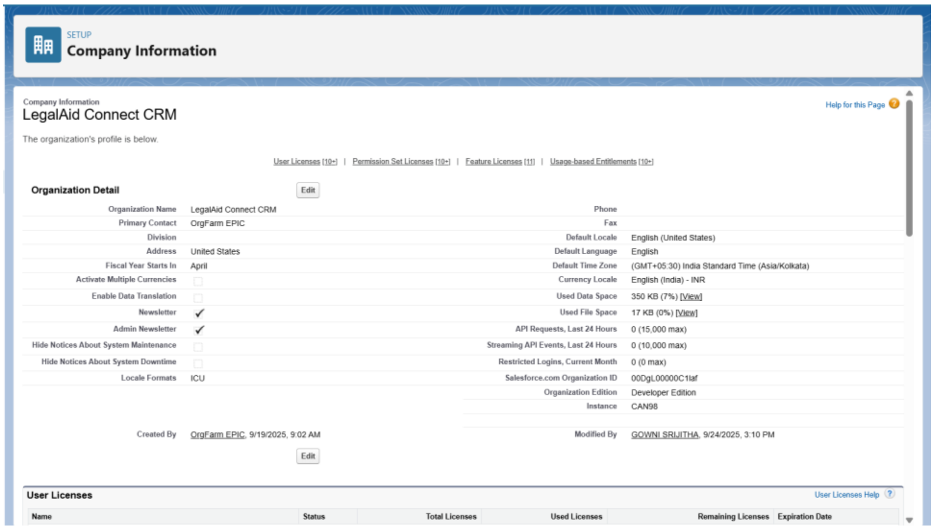
2. Developer Org & DevOps Setup

- 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



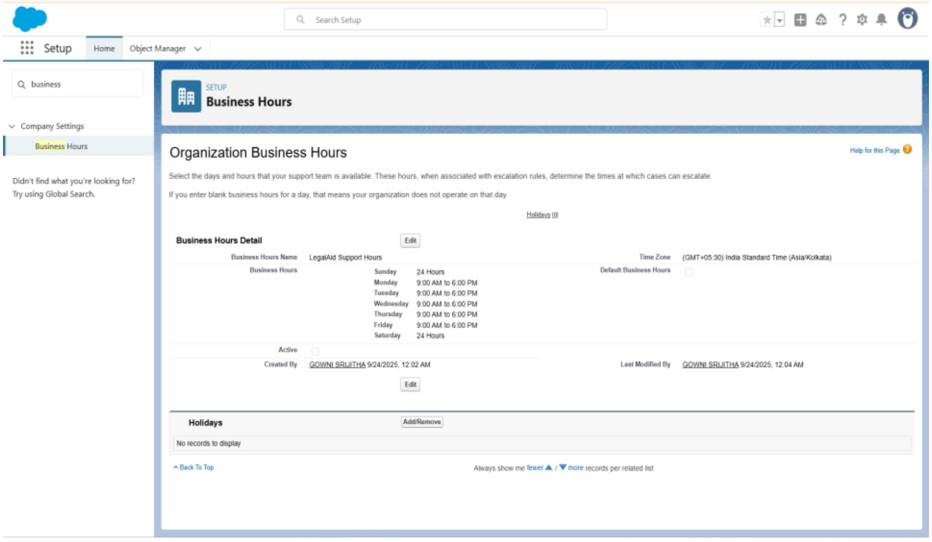
3. Company Profile & Global Settings

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



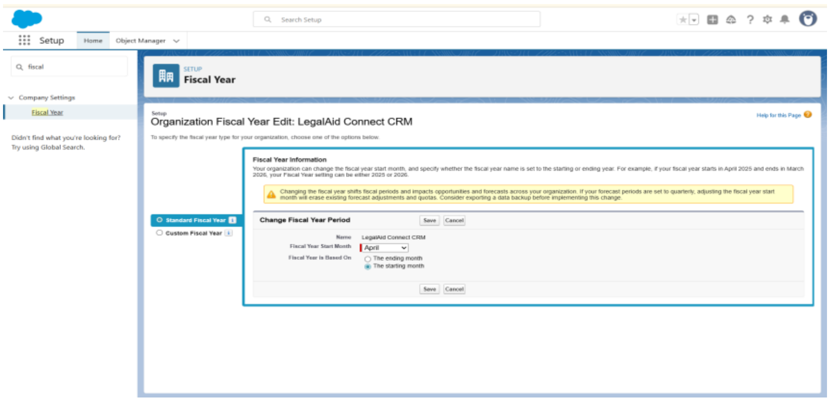
Business Hours & Holidays:

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



Fiscal Year:

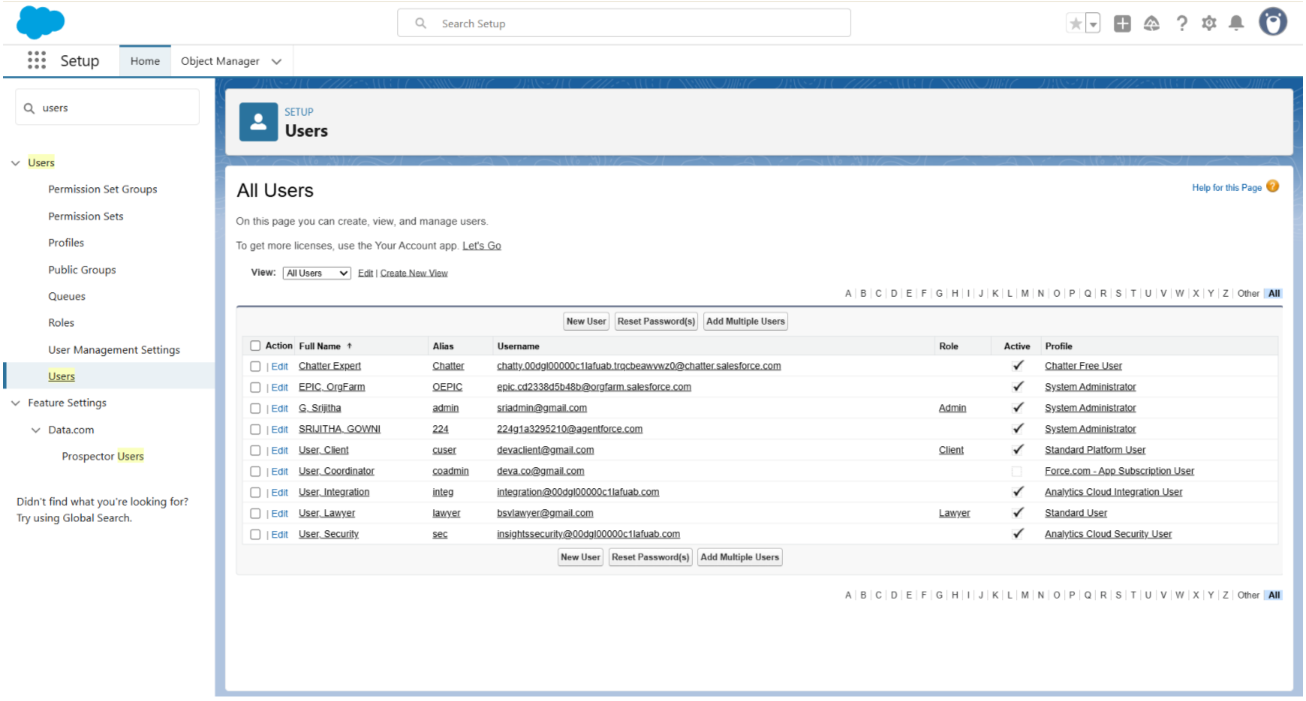
- Standard Fiscal Year, starting April



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

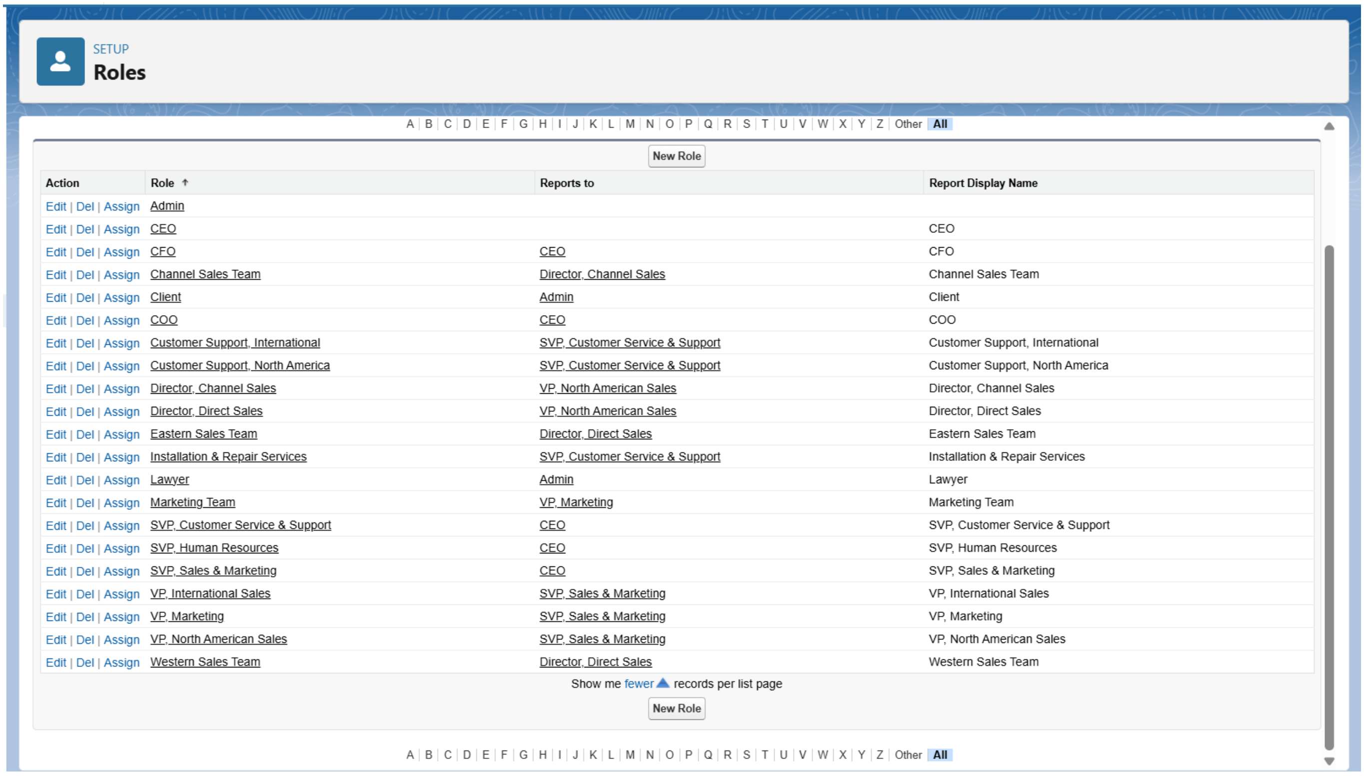


Action	Full Name ↑	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty.00dgl00000c1lafuab.trqcbeawvwz0@chatter.salesforce.com		✓	Chatter Free User
Edit	EPIC, OrgFarm	OEPIC	epic.cd2338d5b48b@orgfarm.salesforce.com		✓	System Administrator
Edit	G, Srijitha	admin	sriadmin@gmail.com	Admin	✓	System Administrator
Edit	SRIJITHA, GOWNI	224	224g1a3295210@agentforce.com		✓	System Administrator
Edit	User, Client	cuser	devaclient@gmail.com	Client	✓	Standard Platform User
Edit	User, Coordinator	coadmin	deva.co@gmail.com			Force.com - App Subscription User
Edit	User, Integration	integ	integration@00dgl00000c1lafuab.com		✓	Analytics Cloud Integration User
Edit	User, Lawyer	lawyer	bsvlawyer@gmail.com	Lawyer	✓	Standard User
Edit	User, Security	sec	insightssecurity@00dgl00000c1lafuab.com		✓	Analytics Cloud Security User

5. Roles, Profiles & Permission Sets

Roles Created:

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



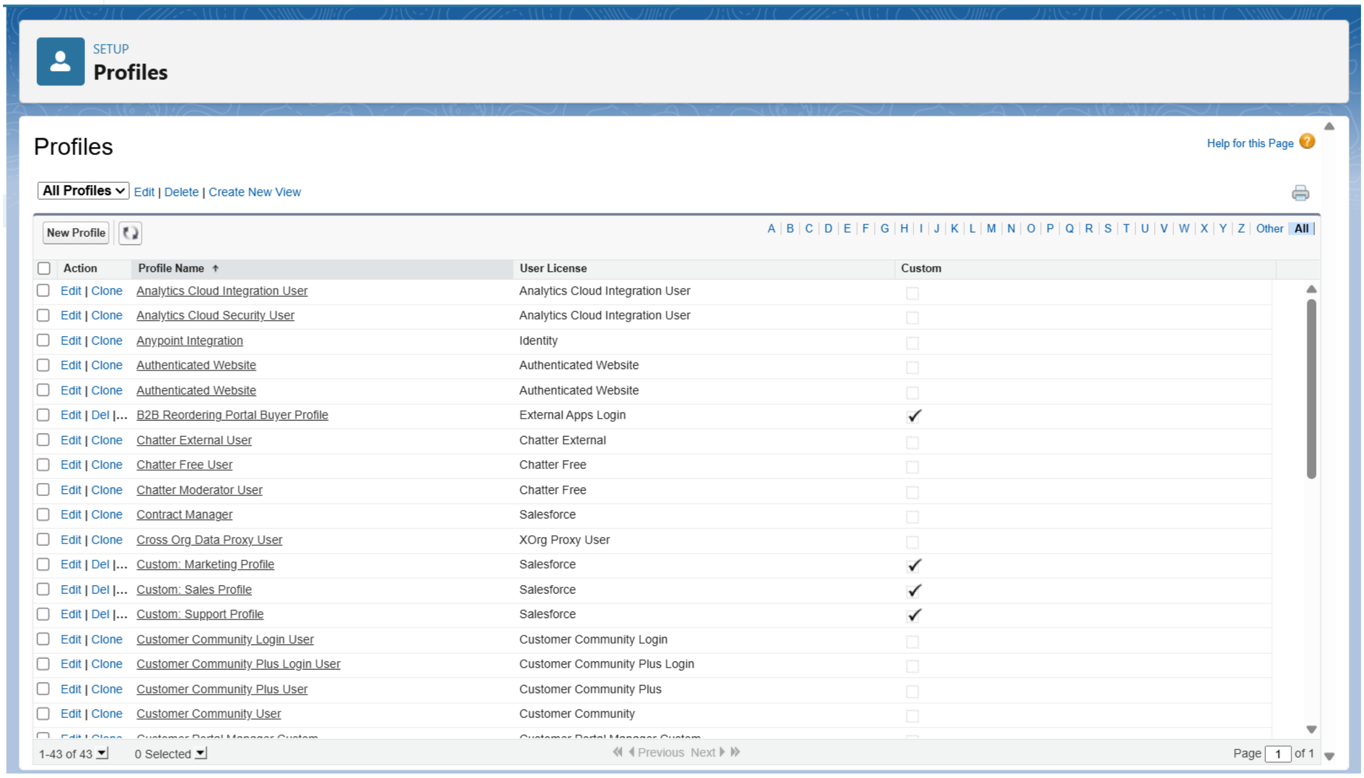
Action	Role ↑	Reports to	Report Display Name
Edit | Del | Assign	Admin		
Edit | Del | Assign	CEO		CEO
Edit | Del | Assign	CFO	CEO	CFO
Edit | Del | Assign	Channel Sales Team	Director, Channel Sales	Channel Sales Team
Edit | Del | Assign	Client	Admin	Client
Edit | Del | Assign	COO	CEO	COO
Edit | Del | 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

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

Help for this Page

All Profiles | Edit | Delete | Create New View

New Profile

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Action	Profile Name ↑	User License	Custom
Edit | Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	
Edit | Clone	Analytics Cloud Security User	Analytics Cloud Integration User	
Edit | Clone	Anypoint Integration	Identity	
Edit | Clone	Authenticated Website	Authenticated Website	
Edit | Clone	Authenticated Website	Authenticated Website	
Edit | Del |...	B2B Reordering Portal Buyer Profile	External Apps Login	✓
Edit | Clone	Chatter External User	Chatter External	
Edit | Clone	Chatter Free User	Chatter Free	
Edit | Clone	Chatter Moderator User	Chatter Free	
Edit | Clone	Contract Manager	Salesforce	
Edit | Clone	Cross Org Data Proxy User	XOrg Proxy User	
Edit | Del |...	Custom: Marketing Profile	Salesforce	✓
Edit | Del |...	Custom: Sales Profile	Salesforce	✓
Edit | Del |...	Custom: Support Profile	Salesforce	✓
Edit | Clone	Customer Community Login User	Customer Community Login	
Edit | Clone	Customer Community Plus Login User	Customer Community Plus Login	
Edit | Clone	Customer Community Plus User	Customer Community Plus	
Edit | Clone	Customer Community User	Customer Community	

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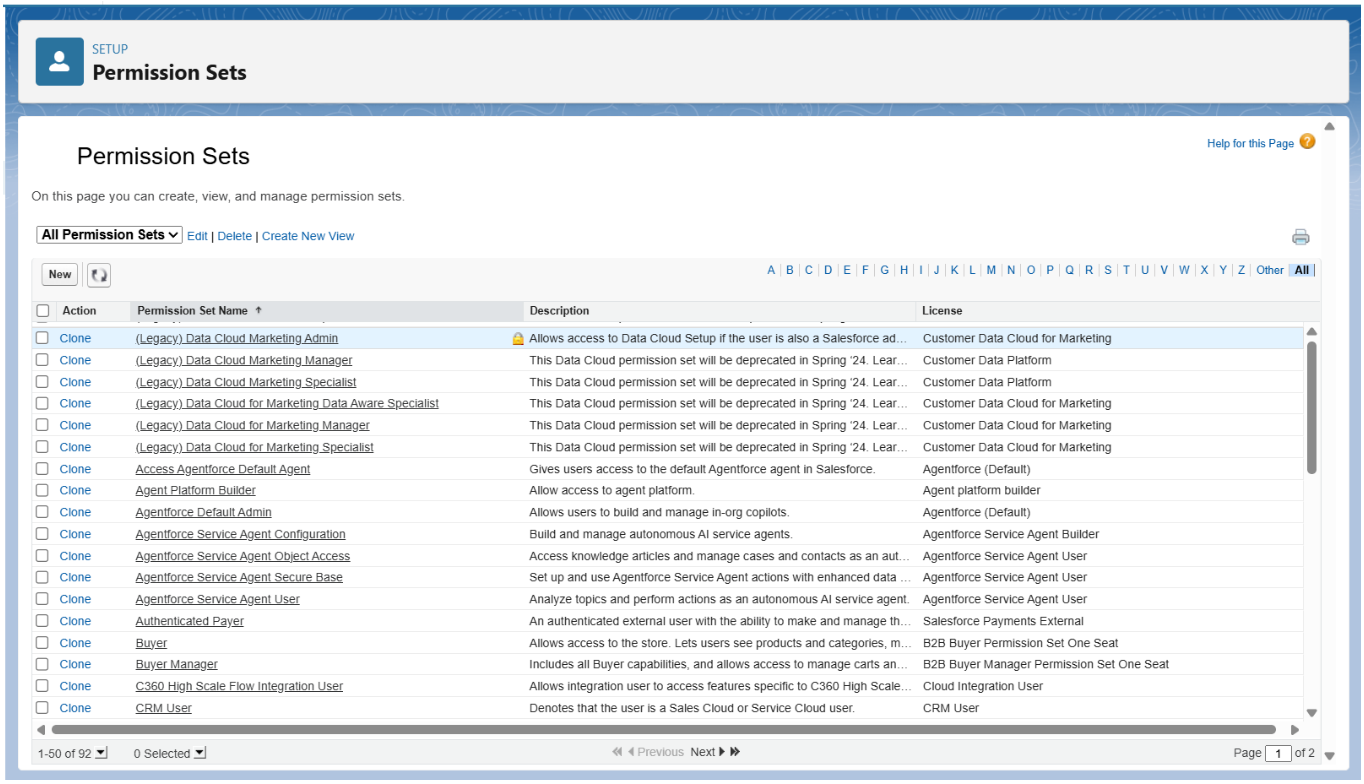
Permission Sets:

-Case Management Access

-Dashboard & Reporting Access



SETUP
Permission Sets

Permission Sets

Help for this Page

On this page you can create, view, and manage permission sets.

All Permission Sets | Edit | Delete | Create New View

New

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

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

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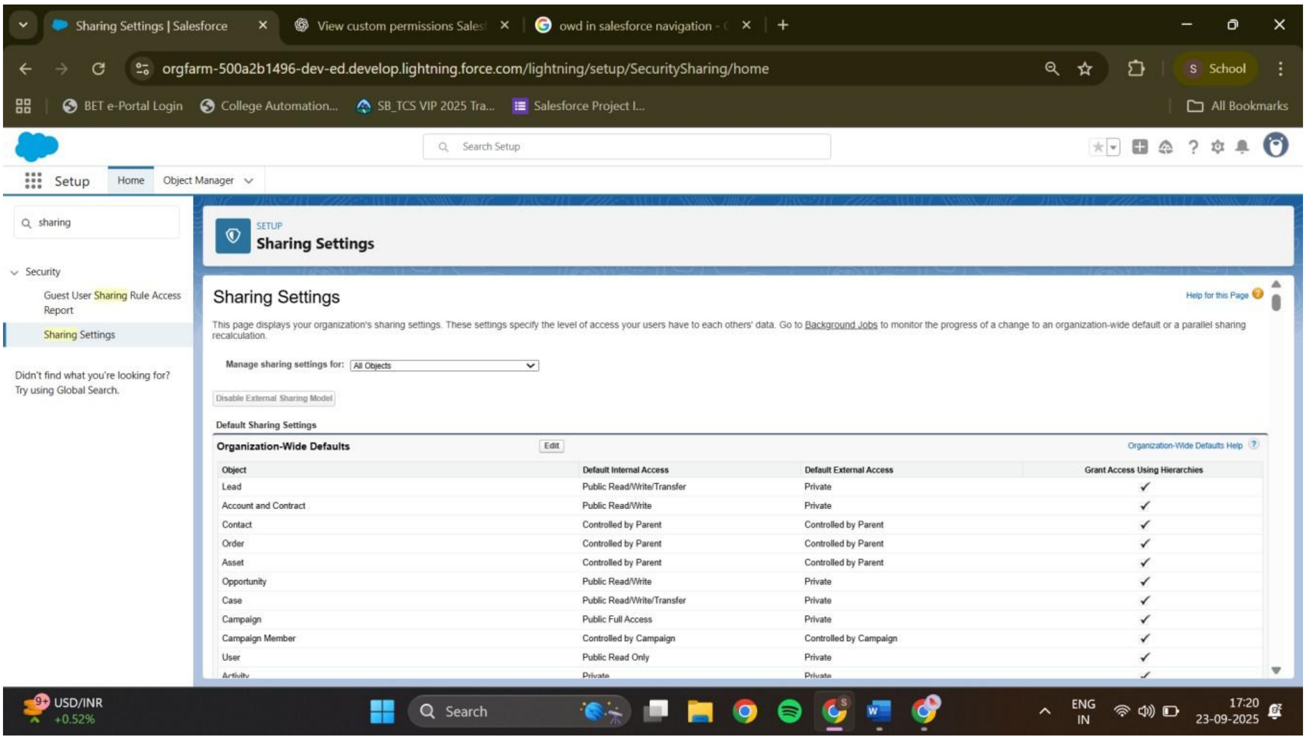
6. Org-Wide Defaults (OWD) & Sharing Rules

OWD Settings:

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



Sharing 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