

# Phase 2 – Org Setup & Configuration (Ashok Motors Capstone)

## Objective:

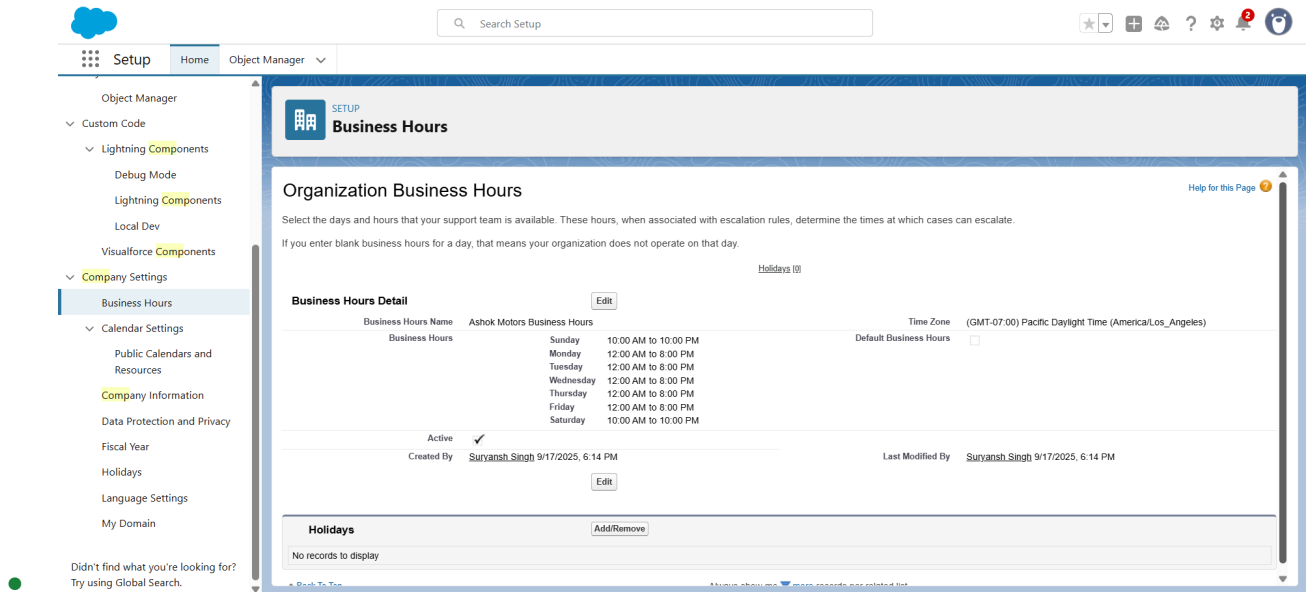
Prepare the Dev Org for the capstone project by configuring users, profiles, roles, and permissions to ensure smooth functioning of automation, Apex, UI, and reporting.

## 1. Company Settings

- **Company Info:** Company profile configured in Ashok Motors Dev Org.
- **Fiscal Year & Business Hours:** Set to ensure workflows and approval processes function correctly.
- **Screenshot:**
- 

The screenshot shows the Salesforce Setup interface for the 'Ashok Motors' organization. The left sidebar contains a navigation menu with options like 'Setup', 'Home', 'Object Manager', 'Custom Code', 'Lightning Components', 'Debug Mode', 'Visualforce Components', 'Company Settings', 'Business Hours', 'Calendar Settings', 'Public Calendars and Resources', 'Company Information', 'Data Protection and Privacy', 'Fiscal Year', 'Holidays', 'Language Settings', and 'My Domain'. The main content area is titled 'Company Information' and displays the organization's profile details. The profile information includes the organization name 'Ashok Motors', primary contact 'OrgFarm EPIC', division, address, fiscal year start, and various settings like newsletter, data translation, and API requests. The page also shows the creation and modification dates and times.

Organization Detail	
Organization Name	Ashok Motors
Primary Contact	OrgFarm EPIC
Division	
Address	United States
Fiscal Year Starts In	January
Activate Multiple Currencies	<input type="checkbox"/>
Enable Data Translation	<input type="checkbox"/>
Newsletter	<input checked="" type="checkbox"/>
Admin Newsletter	<input checked="" type="checkbox"/>
Hide Notices About System Maintenance	<input type="checkbox"/>
Hide Notices About System Downtime	<input type="checkbox"/>
Locale Formats	ICU
Phone	
Fax	
Default Locale	English (United States)
Default Language	English
Default Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Currency Locale	English (United States) - USD
Used Data Space	342 KB (7%) <a href="#">View</a>
Used File Space	17 KB (0%) <a href="#">View</a>
API Requests, Last 24 Hours	0 (15,000 max)
Streaming API Events, Last 24 Hours	0 (10,000 max)
Restricted Logins, Current Month	0 (0 max)
Salesforce.com Organization ID	00DGL00000BMdfj
Organization Edition	Developer Edition
Instance	CAN98
Created By	OrgFarm EPIC, 9/10/2025, 10:19 PM
Modified By	Suryansh Singh, 9/17/2025, 6:15 PM



## 2. Users

- **Users Created:**

1. **Admin\_User** – primary admin for development.
2. **SalesRep\_** – non-admin user for testing flows, record access, and permissions.

- **Note:** Only 2 users are available in the Dev Org; additional roles and access are managed via **Permission Sets**.

- **Screenshot:**

Setup

Home

Object Manager

Search Setup

Setup

Users

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

SETUP

Users

All 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 | Create New User

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

New User

Reset Password(s)

Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>   Edit	Chatter Expert	Chatter	chatty00d900000bmdfjua02wvsnxds@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/>   Edit	EPIC_OrgFarm	OEPIK	epic.e2ee417cb77@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/>   Edit	Manager_Dealer	dmana	dealer_r@demogh.com	Dealer Manager	✓	Dealer Manager
<input type="checkbox"/>   Edit	Rep_Sales	strep	sales_rep_vourname@ashok.com	Sales Rep	✓	Sales Rep
<input type="checkbox"/>   Edit	Singh_Suryansh	sur	suryansh.singh.cs22908@agentforce.com		✓	System Administrator
<input type="checkbox"/>   Edit	User_Integration	integi	integration@00d900000bmdfjua0		✓	Analytics Cloud Integration User
<input type="checkbox"/>   Edit	User_Security	sec	insightssecurity@00d900000bmdfjua0		✓	Analytics Cloud Security User

New User

Reset Password(s)

Add Multiple Users

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

## 3. Profiles & Permission Sets

- Profiles:
  - Sales\_Rep\_Profile** – cloned from Standard User with limited object permissions for testing non-admin access.

Setup

Home

Object Manager

Search Setup

Setup

Profiles

pro

Hyperforce Assistant

Users

Profiles

Data

Mass Transfer Approval Requests

Feature Settings

Approval Settings

Data.com

Prospector Preferences

Prospector Users

Functions

Marketing

Lead Processes

Sales

Products

Asset Settings

Product Schedules

Profile

Sales\_Rep

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges | Enabled Apex Class Access | Enabled Visualforce Page Access | Enabled External Data Source Access | Enabled Named Credential Access | Enabled External Credential Principal Access | Enabled Custom Metadata Type Access | Enabled Custom Setting Definition Access | Enabled Flow Access | Enabled Service Presence Status Access | Enabled Custom Permissions

Profile Detail

Edit

Clone

Delete

View Users

Name	Sales_Rep
User License	Salesforce
Description	
Created By	Suryansh Singh, 9/17/2025, 6:36 PM
Modified By	Suryansh Singh, 9/17/2025, 6:36 PM

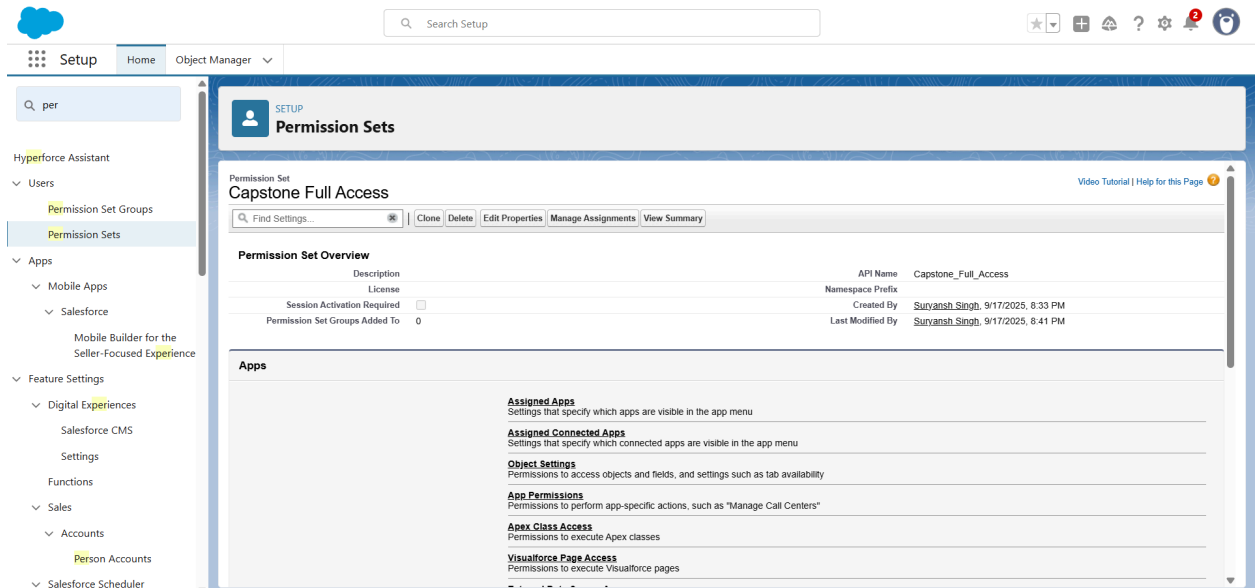
Page Layouts

Standard Object Layouts	Global	Global Layout ( View Assignment )	Location Group Assignment	Location Group Assignment Layout ( View Assignment )
Email Application	Not Assigned ( View Assignment )		Macro	Macro Layout ( View Assignment )
Home Page Layout	Home Page Default ( View Assignment )		Object Milestone	Object Milestone Layout ( View Assignment )
Account	Account Layout ( View Assignment )		Operating Hours	Operating Hours Layout ( View Assignment )
Alternative Payment Method	Alternative Payment Method Layout ( View Assignment )		Opportunity	Opportunity Layout ( View Assignment )
Appointment Institution	Appointment Institution Layout		Opportunity Product	Opportunity Product Layout

- **Permission Sets:**

- **Capstone\_Full\_Access** – grants additional permissions for custom objects (Test Drive, Vehicle, Invoice) and automation testing.

- **Screenshot:**



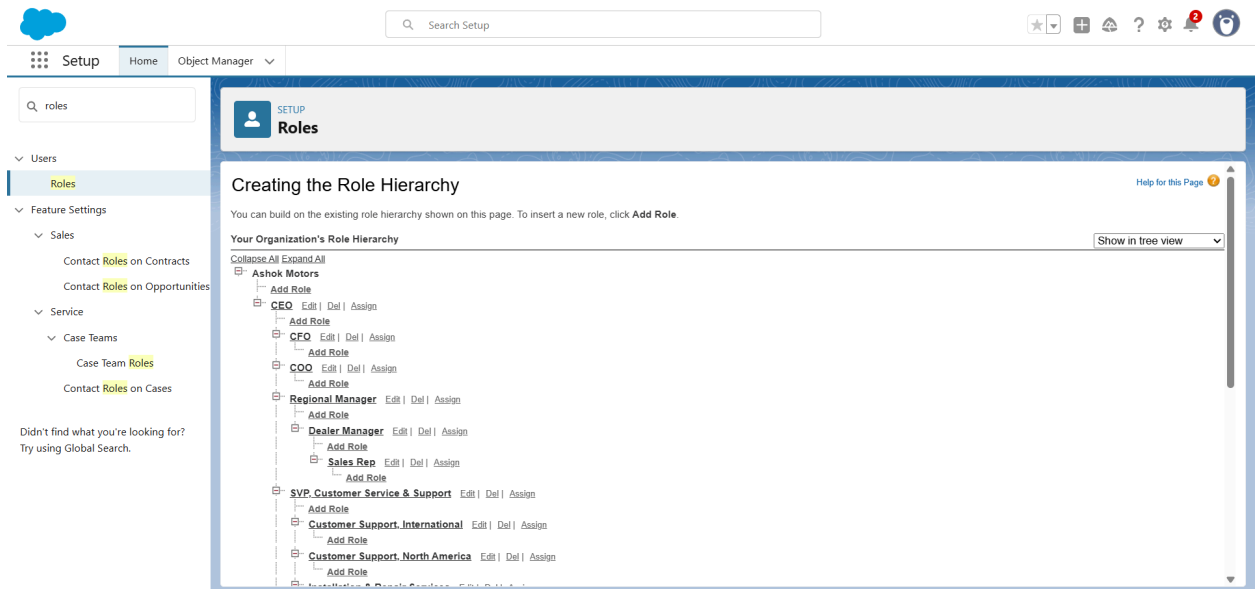
## 4. Roles & Role Hierarchy

- **Roles Defined:**

- **Ashok\_CEO > Regional\_Manager > Dealer\_Manager > Sales\_Rep**

- **Purpose:** Role hierarchy is used for sharing rules and approval processes.

- **Screenshot:**



## 5. Org-Wide Defaults & Sharing

- **OWD Settings:**
  - Accounts & Opportunities – Private
  - Leads – Public Read/Write (or Private based on business logic)
- **Purpose:** Controls record access and sharing, necessary for automation workflows.
- **Screenshot:**



Search Setup



Setup Home Object Manager

shar

Security

Guest User Sharing Rule Access Report

Sharing Settings

Didn't find what you're looking for?  
Try using Global Search.

## Sharing Settings

### Organization-Wide Sharing Defaults Edit

[Help for this Page](#)

Edit your organization-wide sharing defaults below. Changing these defaults will cause all sharing rules to be recalculated. This could require significant system resources and time depending on the amount of data in your organization. Setting an object to Private makes records visible to record owners and those above them in the role hierarchy, and access can be extended using sharing rules.

Save Cancel			
Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write	Private	<input checked="" type="checkbox"/>
Account and Contract	Private	Private	<input checked="" type="checkbox"/>
Order	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Contact	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Asset	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Opportunity	Private	Private	<input checked="" type="checkbox"/>
Case	Private	Private	<input checked="" type="checkbox"/>
Campaign	Public Full Access	Private	<input checked="" type="checkbox"/>
Campaign Member	Controlled by Campaign	Controlled by Campaign	<input checked="" type="checkbox"/>
User	Public Read Only	Private	<input checked="" type="checkbox"/>
Individual	Public Read/Write	Private	<input checked="" type="checkbox"/>
Voice Call	Private	Private	<input checked="" type="checkbox"/>
Activity	Private	Private	<input checked="" type="checkbox"/>
Calendar	Hide Details and Add Events	Hide Details and Add Events	<input checked="" type="checkbox"/>
Price Book	Use	Use	<input checked="" type="checkbox"/>