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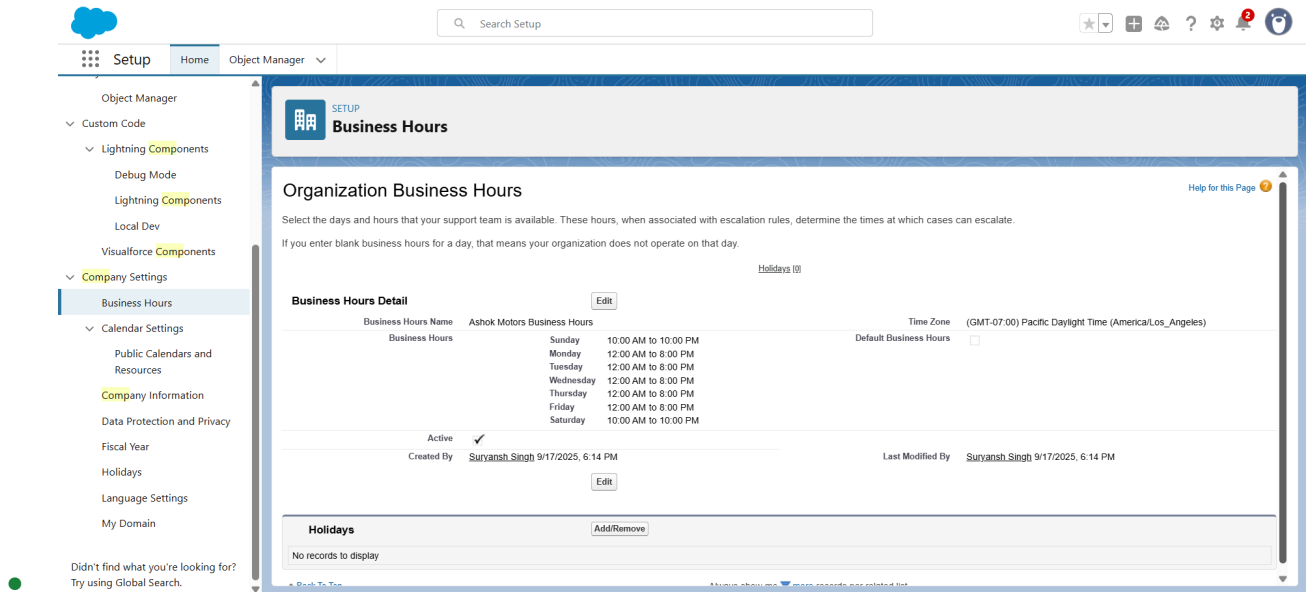
## Objective:

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.

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## 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:**
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# 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:**

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# 3. Profiles & Permission Sets

- **Profiles:**

  - `Sales_Rep_Profile` – cloned from Standard User with limited object permissions for testing non-admin access.

- **Permission Sets:**

  - `Capstone_Full_Access` – grants additional permissions for custom objects (Test Drive, Vehicle, Invoice) and automation testing.

- **Screenshot:**



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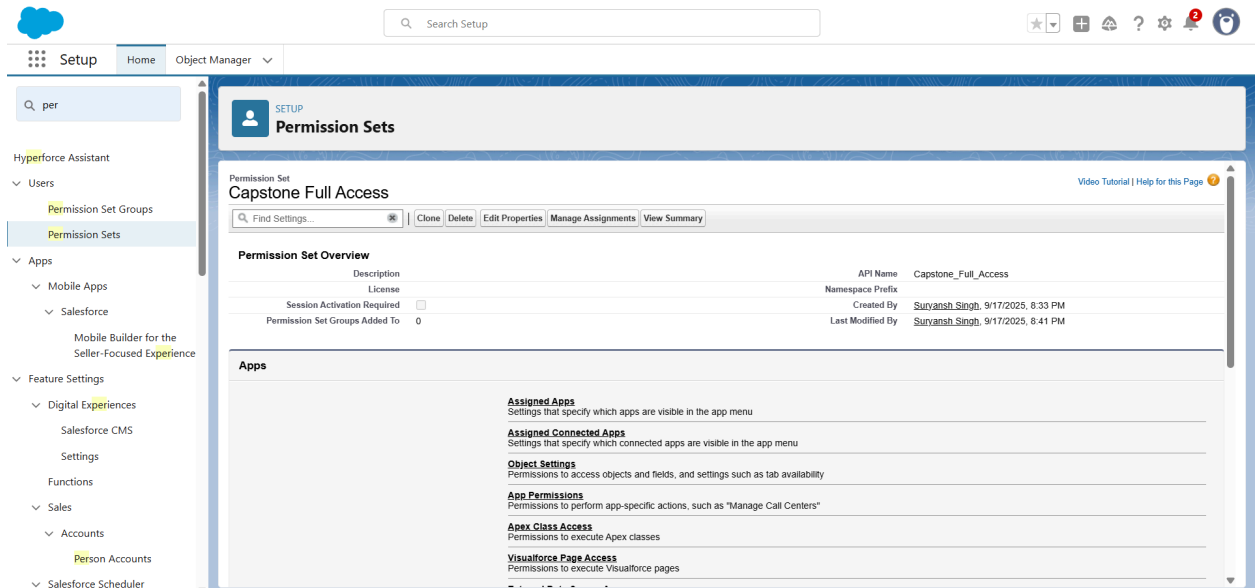
# 4. Roles & Role Hierarchy

- **Roles Defined:**

  - `Ashok_CEO > Regional_Manager > Dealer_Manager > Sales_Rep`

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

- **Screenshot:**

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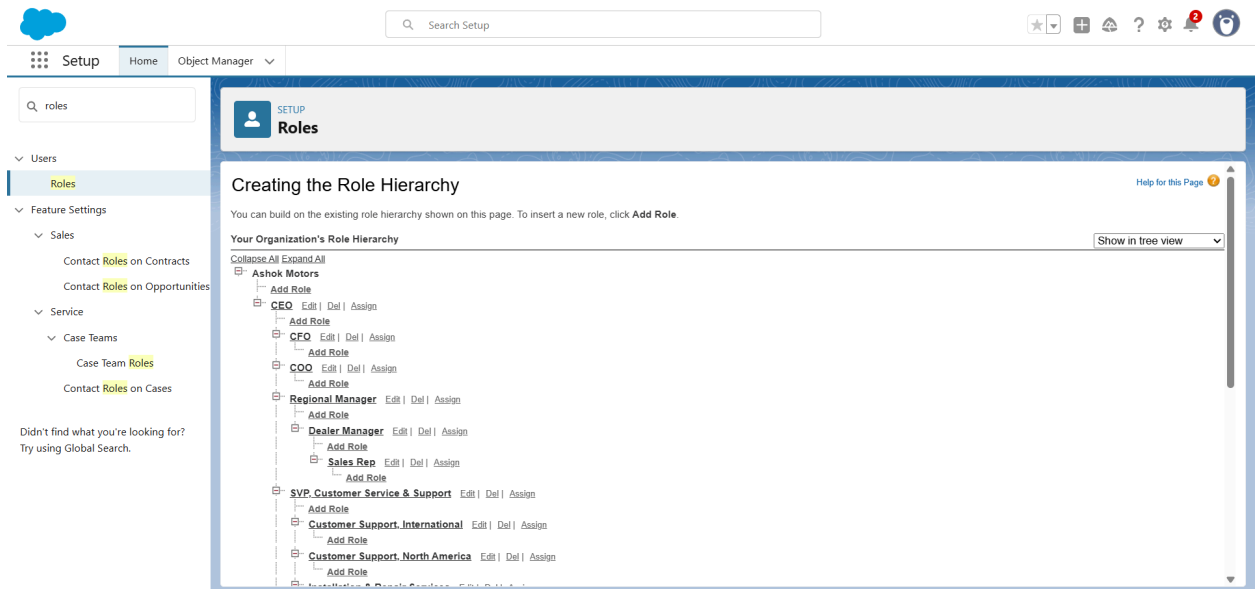
# 5. Org-Wide Defaults & Sharing

- **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

shar

Security
   Guest User Sharing Rule Access Report
   Sharing Settings

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SETUP
**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 | ☑ |
| Account and Contract | Private | Private | ☑ |
| Order | Controlled by Parent | Controlled by Parent | ☑ |
| Contact | Controlled by Parent | Controlled by Parent | ☑ |
| Asset | Controlled by Parent | Controlled by Parent | ☑ |
| Opportunity | Private | Private | ☑ |
| Case | Private | Private | ☑ |
| Campaign | Public Full Access | Private | ☑ |
| Campaign Member | Controlled by Campaign | Controlled by Campaign | ☑ |
| User | Public Read Only | Private | ☑ |
| Individual | Public Read/Write | Private | ☑ |
| Voice Call | Private | Private | ☑ |
| Activity | Private | Private | ☑ |
| Calendar | Hide Details and Add Events | Hide Details and Add Events | ☑ |
| Price Book | Use | Use | ☑ |