

❖ Phase 2: Org Setup & Configuration – Completed ✓

This document records all the setup and configuration steps performed in Salesforce for the **RenewSure – Smart Contract Expiry & Renewal Tracker** project.
Phase 2 focused on preparing the Salesforce org environment and ensuring proper security, access, and configuration settings.

❖ 1. Salesforce Edition & Org Setup

- Selected **Salesforce Developer Edition Org** for initial implementation.
- Connected Org with **VS Code (SFDX Project Setup)**.
- Verified basic org information:
 - Company Profile: RenewSure Demo Corp
 - Default Locale: **English (India)**
 - Default Currency: **INR (₹)**

The screenshot shows the 'Company Information' page under the 'SETUP' tab. The page title is 'Company Information'. It displays the organization's profile with fields for Organization Name (Smart Retail Pvt. Ltd.), Primary Contact (Retail Admin), Division, Address (Registered Retail Office, Amravati 444701, Maharashtra, IN), and various configuration settings such as Fiscal Year Starts In (January), Default Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata), and API Requests, Last 24 Hours (0 (15,000 max)). The page also shows system statistics like Streaming API Events, Last 24 Hours (0 (10,000 max)) and Restricted Logins, Current Month (0 (0 max)). At the bottom, it shows the last modified by Tanvi Markad on 20/09/2025 at 11:53 pm.

2. Company Profile Setup

- Updated **Company Information** (Company Name = *Smart Retail Pvdt.Ltd.*).
- Set **Fiscal Year = Standard (Jan-Dec)**.
- Configured **Business Hours**:
 - Default = **Mon-Fri, 09:00 AM -6:00 PM IST**



- Holidays = Added placeholder holiday list.

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

[Holidays \[3\]](#)

Business Hours Detail		Edit															
Business Hours Name	Smart Retail Standard Hours	Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)														
Business Hours	<table border="1"> <tr><td>Sunday</td><td>24 Hours</td></tr> <tr><td>Monday</td><td>9:00 am to 6:00 pm</td></tr> <tr><td>Tuesday</td><td>9:00 am to 6:00 pm</td></tr> <tr><td>Wednesday</td><td>9:00 am to 6:00 pm</td></tr> <tr><td>Thursday</td><td>9:00 am to 6:00 pm</td></tr> <tr><td>Friday</td><td>9:00 am to 6:00 pm</td></tr> <tr><td>Saturday</td><td>24 Hours</td></tr> </table>	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	Default Business Hours	<input checked="" type="checkbox"/>
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																
Active	<input checked="" type="checkbox"/>																
Created By	Tanyi Markad	Created On	20/09/2025, 2:52 pm														
Last Modified By	Tanyi Markad	Modified On	21/09/2025, 12:01 am														
Edit																	

Holidays		Add/Remove	
Holiday Name	Description	Date and Time	
Independence Day		15/08/2026 All Day	
Republic Day		26/01/2026 All Day	
Rest Day		09/09/2025 All Day	

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◊ 3. User Setup & Licenses

- Created initial project users with **Standard Salesforce Licenses**:
 - CEO (System Administrator)
 - Manager
 - Agent

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](#) [Edit](#) [Create New View](#)

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty_0odd000000czrhuaa.21tvcudpsr@chatter.salesforce.com	Agent	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	Kulkarni_Sneha	sneuk	sneha.kulkarni@smartretail.com.dev	Agent	<input checked="" type="checkbox"/>	Agent Profile
<input type="checkbox"/> Edit	Markad_Tanyi	TMark	markadtnyi@gmail.com	System Administrator	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Edit	Sharma_Rahul	ratar	rahul.sharma@smartretail.com.dev	Manager	<input checked="" type="checkbox"/>	Manager Profile
<input type="checkbox"/> Edit	User_Integration	integ	integration@0odd000000czrhuaa.com	Analytics Cloud Integration User	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@0odd000000czrhuaa.com	Analytics Cloud Security User	<input checked="" type="checkbox"/>	

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

4. Role Hierarchy

- Configured **Role Hierarchy** for visibility:

```
graph TD
A[Promotion Manager] --> B[Store Agent 1]
A[Promotion Manager] --> C[Store Agent 2]
CEO --> Full visibility
```

- **Promotion Manager** → Full visibility on all promotions and discounts.

- **Store Agent** → Access only to their own campaigns/bookings.

The screenshot shows the 'Roles' page in Salesforce setup. At the top, there's a 'SETUP' icon and a 'Roles' tab. Below the header, it says 'Creating the Role Hierarchy'. A message indicates you can build on the existing role hierarchy or add a new role. The main area displays 'Your Organization's Role Hierarchy' for 'Smart Retail Pvt. Ltd.' with three levels of roles:

- Smart Retail Pvt. Ltd.** (parent)
 - Agent** (child)
 - Agent** (leaf node)
 - CEO** (child)
 - CEO** (leaf node)
 - Manager** (child)
 - Manager** (leaf node)

Buttons for 'Add Role' are available at each level. A 'Help for this Page' link is in the top right, and a 'Show in tree view' dropdown is at the bottom right.

5. Organization-Wide Defaults (OWD)

- Promotions Object → *Public Read Only* (all users can see active promotions)
- Discount Booking Object → *Private* (only owner/manager can view).
- Grant Access Using Hierarchies → Enabled.

The screenshot shows the 'Sharing Settings' page in Salesforce setup. At the top, there's a 'SETUP' icon and a 'Sharing Settings' tab. Below the header, it says 'Organization-Wide Sharing Defaults Edit'. A note explains that changing these defaults will affect all sharing rules and may require significant system resources. The main area is a table where you can set sharing defaults for different objects:

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

Buttons for 'Save' and 'Cancel' are at the top left. A 'Help for this Page' link is in the top right.



◊ 6. Login & Security Policies

6.1 Trusted IP Ranges (Network Access)

Name	Start IP	End IP	Description
Office HQ – India	47.11.15.0	47.11.15.255	Primary Office IP Range
Admin Home	47.11.15.0	47.11.15.255	Temporary Admin IP (example)

The screenshot shows the Network Access setup interface. At the top, there's a header with a shield icon and the word "SETUP". Below it, a sub-header says "Network Access". The main section is titled "Trusted IP Range Edit". A note below the title says: "Enter the range of valid IP addresses from which user logins are trusted. Users logging in from trusted IP addresses are not asked to activate their computers and may use their user password instead of a security token to log in to the API or a desktop client such as Connect for Outlook, Connect Offline, Connect for Office, Connect for Lotus Notes, or the Data Loader." There are two entries in the list:

- Office HQ – India**: Start IP 47.11.15.0, End IP 47.11.15.255. Description: Primary Office IP Range.
- Admin Home**: Start IP 47.11.15.0, End IP 47.11.15.255. Description: Temporary Admin IP (example).

The interface includes a "Help for this Page" link at the top right and a "Required Information" indicator (a red exclamation mark) next to the "Start IP Address" field.

6.2 Session Settings

- **Session Timeout:** 30 minutes
- **Lock sessions to originating IP:** Disabled (kept flexible)

The screenshot shows the Session Settings page. At the top, there's a header with a shield icon and the word "SETUP". Below it, a sub-header says "Session Settings". A note below the header says: "Set the session security and session expiration timeout for your organization." The page has several sections:

- Session Timeout**: Shows a dropdown menu set to "30 minutes". Below it are two checkboxes: "Disable session timeout warning popup" (unchecked) and "Force logout on session timeout" (checked).
- Session Settings**: Contains a list of checkboxes:
 - Lock sessions to the IP address from which they originated
 - Lock sessions to the domain in which they were first used
 - Terminate all of a user's sessions when an admin resets that user's password [i]
 - Force refresh after Login-As-User
 - Require HttpOnly attribute
 - Use POST requests for cross-domain sessions
 - Enforce login IP ranges on every request [i]
 - When embedding a Lightning application in a third-party site, use a session token instead of a session cookie
- Extended use of IE11 with Lightning Experience**: A note stating: "EXTENDED USE OF IE11 WITH LIGHTNING EXPERIENCE HAS NOW ENDED". Below it, a note: "AS OF DECEMBER 31, THE EXTENDED PERIOD HAS ENDED, AND USE OF INTERNET EXPLORER 11 (IE 11) WITH LIGHTNING EXPERIENCE IS NO LONGER SUPPORTED. ISSUES WITH PERFORMANCE OR FUNCTIONALITY THAT AFFECT ONLY IE 11 WILL NOT BE FIXED. PLEASE SWITCH TO A SUPPORTED BROWSER."

6.3 Login Hours (Profiles)s

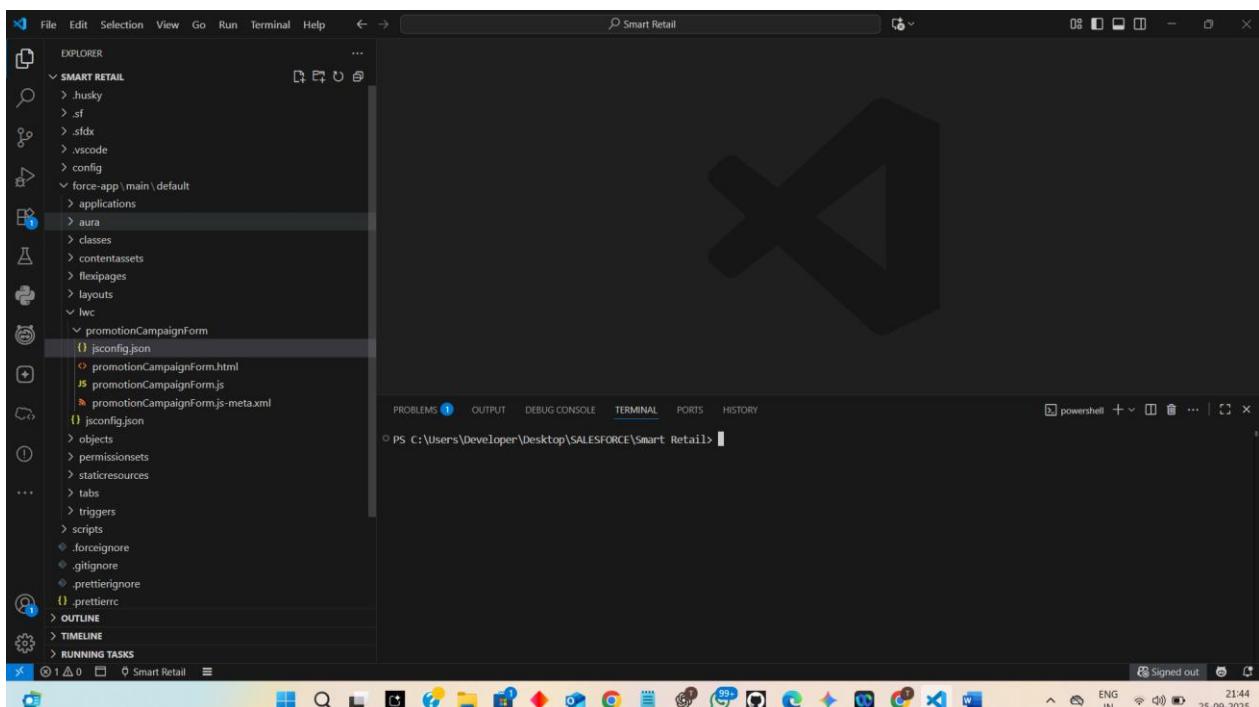
Profile	Mon-Fri	Sat	Sun
Promotion Manager	24/7 Access	24/7 Access	24/7 Access
Store Agents	09:00–18:00	09:00–18:00	No access

The screenshot shows a software interface for managing user profiles and login hours. In the top left, there's a blue icon with a person silhouette and the word "SETUP". Next to it is a blue button labeled "Profiles". Below this, the main area has a title "Login Hours" and two small buttons: "Edit" and "Delete". To the right is a "Login Hours Help" link with a question mark icon. The main content is a table with columns for "Day", "Start Time", and "End Time". The data rows are:

Day	Start Time	End Time
Sunday	All Day	All Day
Monday	8:00 am IST	6:00 pm IST
Tuesday	8:00 am IST	6:00 pm IST
Wednesday	8:00 am IST	6:00 pm IST
Thursday	8:00 am IST	6:00 pm IST
Friday	8:00 am IST	6:00 pm IST
Saturday	All Day	All Day

◇ 7. Deliverables Produced

- Role Hierarchy Diagram
- Access Rules Documentation
- Login & Security Policy Document
- Org Setup Verification



🔗 Phase 2 Status: Completed Successfully ✅

Next Step → **Phase 3: Data Modeling & Object Configuration** (Custom Objects, Fields, Relationships).