

# Phase 2: Org Setup & Configuration – DineTrack (Restaurant CRM)

## Preliminaries

0. Sign up / log into **Salesforce Developer Edition** (<https://developer.salesforce.com>).

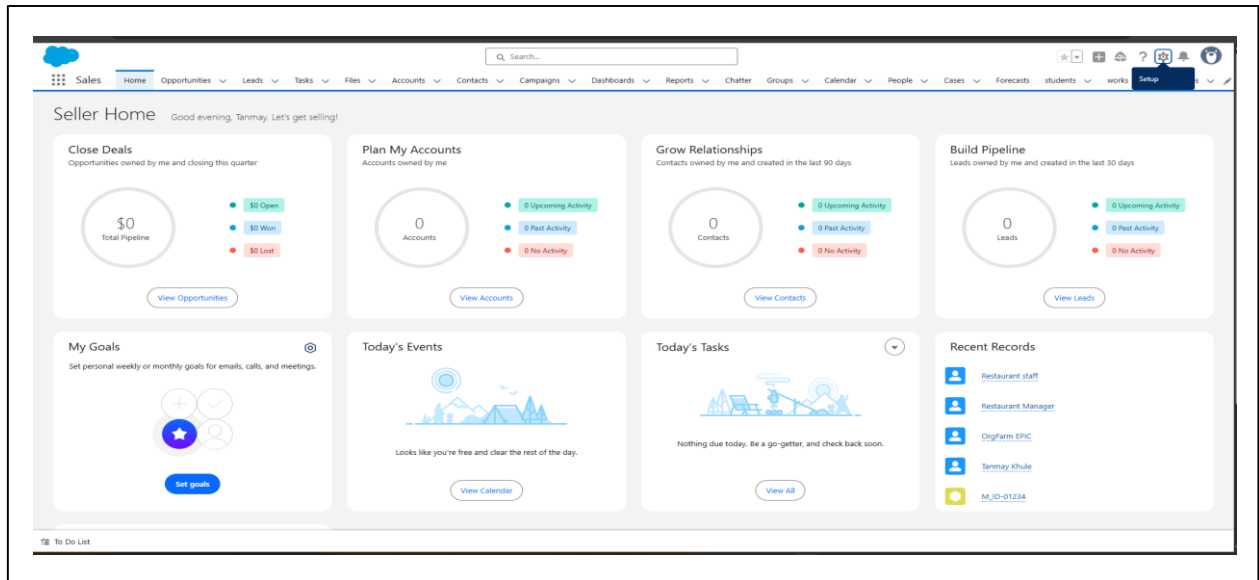


Figure 1 Developer Org home

## 1. Company Profile (Company Information)

1. Setup → Quick Find: Company Information → Open.
2. Edit → set Organization Name = **DineTrack Restaurant Portal**
  - Set Default Time Zone = Asia/Kolkata, Default Currency = INR. → Save.

SETUP

Company Information

Company Information

DineTrack Restaurant Portal

The organization's profile is below.

User Licenses (10x)

Permission Set Licenses (10x)

Feature Licenses (11)

Usage-based Entitlements (10x)

Organization Detail

Edit

Organization Name	DineTrack Restaurant Portal	Phone	08010869238
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (India)
Address	Mahendra Colony Amravati 444604 Maharashtra India	Default Language	English
Fiscal Year Starts In	January	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%) <a href="#">View</a>
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) <a href="#">View</a>
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	00DgK000007Zzey
		Organization Edition	Developer Edition
		Instance	CAN96

Created By

OrgFarm EPIC, 7/17/2025, 9:58 AM

Modified By

Tanmay Khule, 9/21/2025, 10:58 AM

Figure 2 Company info with org name, timezone, currency.

## 2. Business Hours & Holidays

1. Setup → Quick Find: **Business Hours** → New Business Hours.
  - Label: DineTrack Hours → Set Mon–Sun 12:00 AM–12:00 PM→ Save.

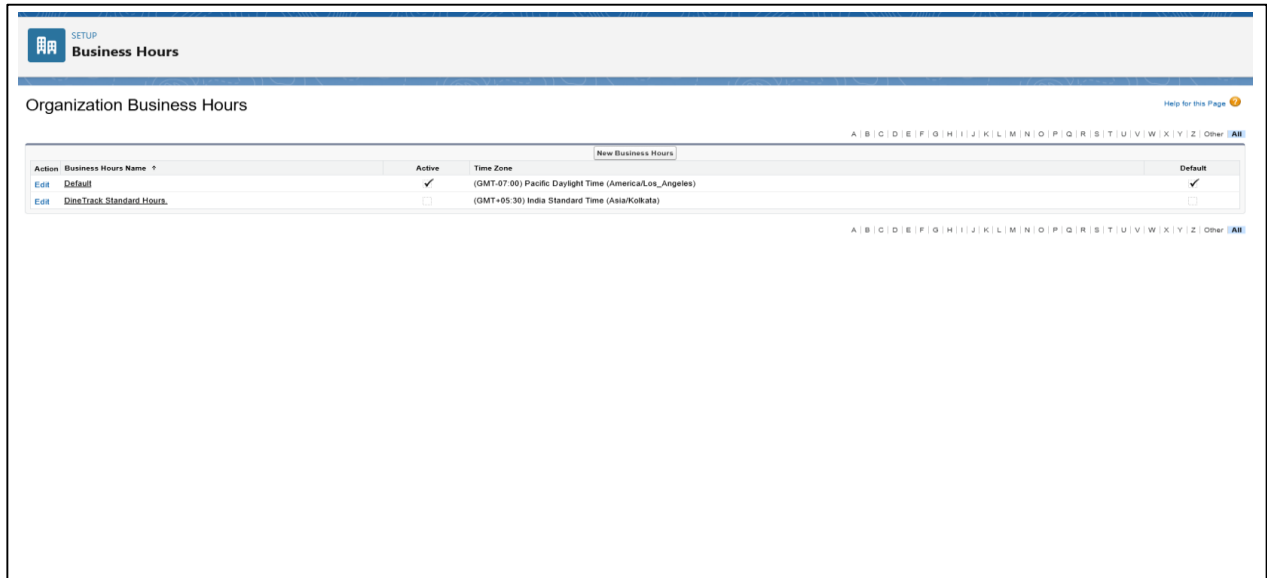


Figure 3 Business Hours

Setup → Quick Find: **Holidays** → New Holiday.

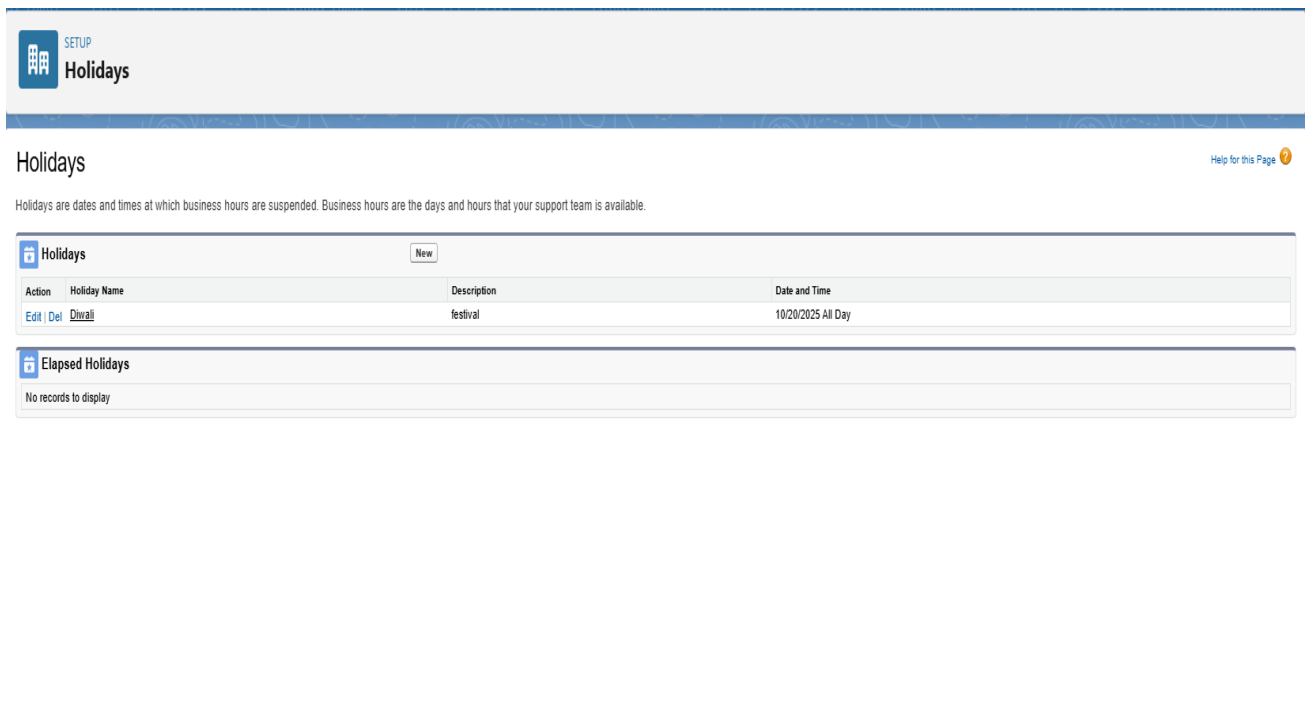


Figure 4 Holidays

### 3. Fiscal Year

1. Setup → Quick Find: **Fiscal Year** → Verified default fiscal year (Standard). set **April-March**.

The screenshot shows the 'Fiscal Year' setup page in Salesforce. The page title is 'Fiscal Year' under the 'SETUP' tab. Below the title, it says 'Organization Fiscal Year Edit: DineTrack Restaurant Portal'. A warning message states: 'Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing this change.' The 'Change Fiscal Year Period' section is highlighted with a blue border. It shows the 'Name' as 'DineTrack Restaurant Portal', the 'Fiscal Year Start Month' as 'April', and 'Fiscal Year is Based On' with 'The starting month' selected. There are 'Save' and 'Cancel' buttons at the bottom of the section.

Figure 5 Fiscal Year

### 4. Create Sample Users & Assign Licenses

1. Setup → Quick Find: **Users** → Users → New User. Create three users:
  - **Admin** — admin@dinetrack.com — Profile: System AdministratorRegional ☐
  - **Manager** — manager@dinetrack.com — Profile: Standard User
  - **Staff (Waiter)** — staff1@dinetrack.com — Profile: Standard User
2. Fill First/Last name, Username (unique), Email, License = Salesforce or Platform if available. Save

The screenshot shows the 'Users' management page in Salesforce. The page title is 'Users' under the 'SETUP' tab. It says 'All Users' and 'On this page you can create, view, and manage users.' Below this, there's a 'View: All Users' dropdown and a 'Create New User' button. A table lists the users with columns: Action, Full Name, Alias, Username, Role, Active, and Profile. The table contains 10 rows of users, including Chatter Expert, EPIC\_OrgFarm, Ingle, Akshay, Regional Coordinator, Relief Head, User Integration, User Security, and Volunteer.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter.00d000000bmbzquab.me@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	EPIC_OrgFarm	OEPIE	epic.87ba7374439a@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/> Edit	Ingle, Akshay	aks	akshayingle627670@agentforce.com		✓	System Administrator
<input type="checkbox"/> Edit	Regional Coordinator	regi	coordinator@demo.com		✓	Standard User
<input type="checkbox"/> Edit	Relief Head	reli	relief.head@demo.com		✓	System Administrator
<input type="checkbox"/> Edit	User Integration	integ	integration@80d900000bmbzquab.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00d000000bmbzquab.com		✓	Analytics Cloud Security User
<input type="checkbox"/> Edit	Volunteer	volu	volunteers@demo.com		✓	Standard Platform User

Figure 6 Sample Users

## 5. Role Hierarchy

1. Setup → Quick Find: **Roles** → Click **Set Up Roles** → Expand and **Add Role**:
2. **Admin (Top)**  
→ **Manager**  
→ **Staff**
3. Save.

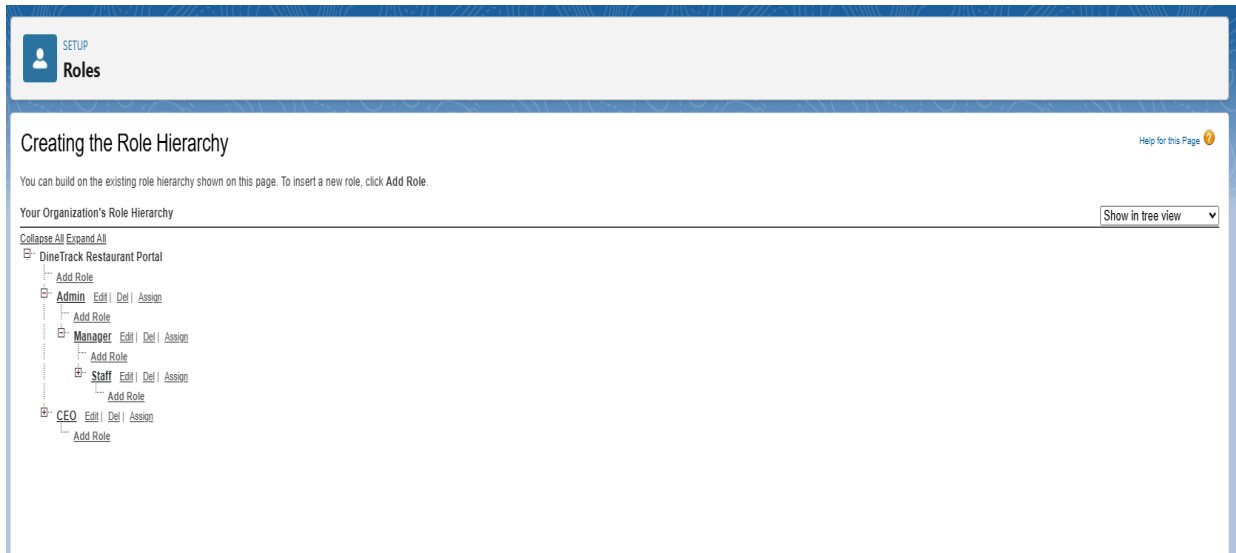


Figure 7 Role hierarchy tree.

## 6. Profiles (clone & edit)

Setup → Quick Find **Profiles** → Clone **Standard User** → Rename to **Manager Profile** → Clone again for **Staff Profile** → adjust object permissions later for **Reservation, Customer, Staff, Bill**.

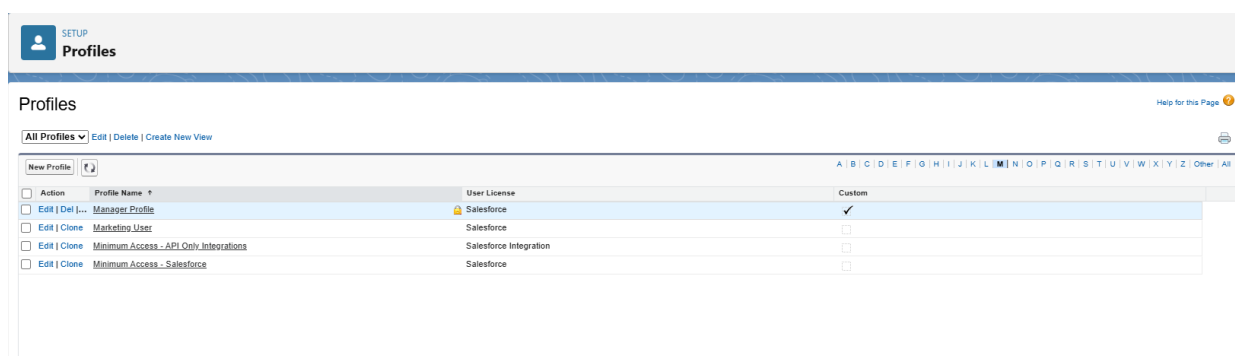


Figure 8 Coordinator Profile object permissions

## 7. Organization-Wide Defaults (OWD)

**Organization-Wide Defaults (OWD):** Setup → Quick Find **Sharing Settings** → Edit → set Reservation\_\_c = Private, Bill\_\_c = Private, Customer\_\_c = Controlled by Parent (Reservation), Staff\_\_c = Public Read Only → Save.

SETUP Sharing Settings			
Shipping Carrier	Public Read Only	Private	✓
Shipping Carrier Method	Public Read Only	Private	✓
Shipping Configuration Set	Public Read Only	Private	✓
Streaming Channel	Public Read/Write	Private	✓
Tableau Host Mapping	Public Read Only	Private	✓
User Presence	Public Read Only	Private	✓
User Provisioning Request	Private	Private	✓
Waitlist	Private	Private	✓
Web Cart Document	Private	Private	✓
Work Order	Private	Private	✓
Work Plan	Private	Private	✓
Work Plan Template	Private	Private	✓
Work Step Template	Private	Private	✓
Work Type	Private	Private	✓
Work Type Group	Public Read/Write	Private	✓
Bill	Public Read/Write	Private	✓
Customer	Public Read/Write	Private	✓
employee	Public Read/Write	Private	✓
Mentor	Public Read/Write	Private	✓
Reservation	Public Read/Write	Private	✓
Staff	Public Read/Write	Private	✓
student	Public Read/Write	Private	✓
work	Public Read/Write	Private	✓

Figure 9 OWD table showing Requests private, Resources public read only

8. **Create Lightning App (DineTrack):** Setup → Quick Find App Manager → New Lightning App → Name: DineTrack Console → Add branding icon → Add Nav Items: Reservations, Customers, Staff, Bills, Reports, Dashboards → Save & Finish → From App Launcher, search DineTrack Console → open.

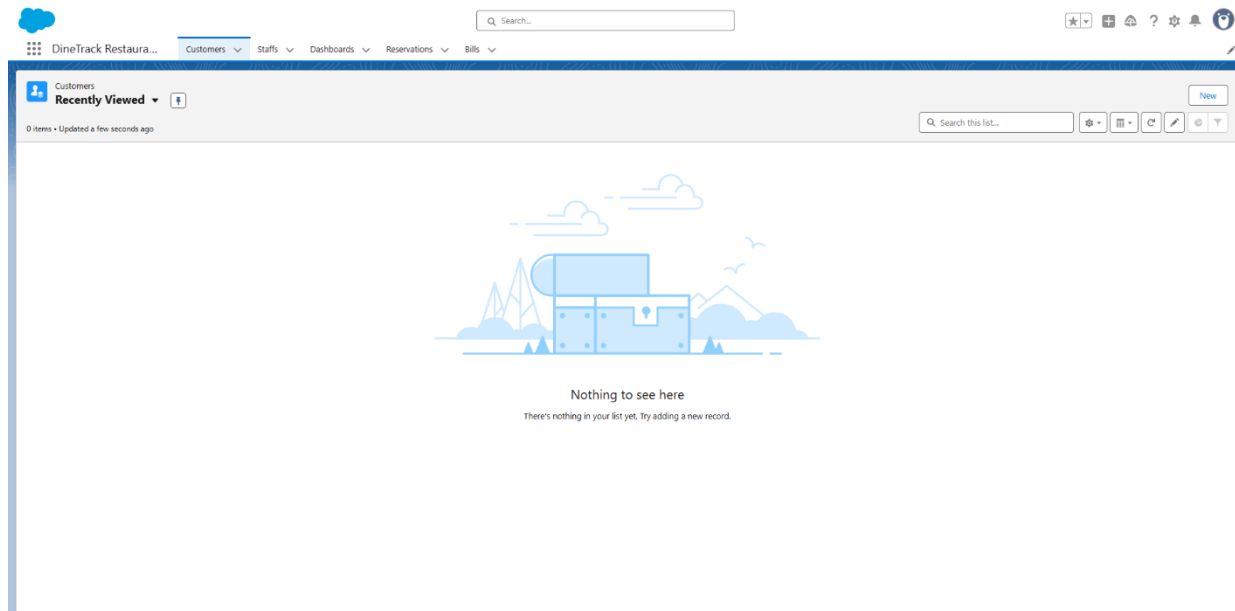


Figure 10 Dine Track Restaurant Portal App