

# Phase 2: Org Setup & Configuration

## 1. Salesforce Edition

- Selected **Developer Edition Org (free)** to build the Local Business Service CRM.
- Enabled **Sandbox usage** for testing and safe deployment of changes.
- Ensures development and testing can be done without affecting live data.

## 2. Company Profile Setup

- **Org Name** → Local Business Service CRM
- **Time Zone** → Asia/Kolkata (IST)
- **Locale** → English (India)
- **Currency** → INR

Q company

Company Settings

Business Hours

Calendar Settings

Public Calendars and Resources

Company Information

Data Protection and Privacy

Fiscal Year

Holidays

Language Settings

My Domain

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

SETUP

Company Information

Company Information

Local Service Hub

The organization's profile is below.

User Licenses [10x] | Permission Set Licenses [10x] | Feature Licenses [11] | Usage-based Entitlements [10x]

Organization Detail

Organization Name

Local Service Hub

Primary Contact

OrgFamr EPIC

Division

United States

Address

United States

Fiscal Year Starts In

April

Activate Multiple Currencies

Enable Data Translation

Newsletter

Admin Newsletter

Hide Notices About System Maintenance

Hide Notices About System Downtime

Locale Formats

ICU

Phone

Fax

Default Locale

Hindi (India)

Default Language

English

Default Time Zone

(GMT+05:30) India Standard Time (Asia/Kolkata)

Currency Locale

English (United States) - USD

Used Data Space

382 KB (7%) [View]

Used File Space

66 KB (0%) [View]

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

00DgL000007QGpx

Organization Edition

Developer Edition

Instance

CAN98

Created By

OrgFamr EPIC, 7/17/2025, 12:23 AM

Modified By

Urmil shrivastava, 9/14/2025, 10:15 PM

## 3. Business Hours & Holidays

- **Working Days** → Monday to Friday
- **Working Hours** → 9:00 AM – 6:00 PM
- Ensures support and service operations run within defined timings.



## 5. User Setup and Licences

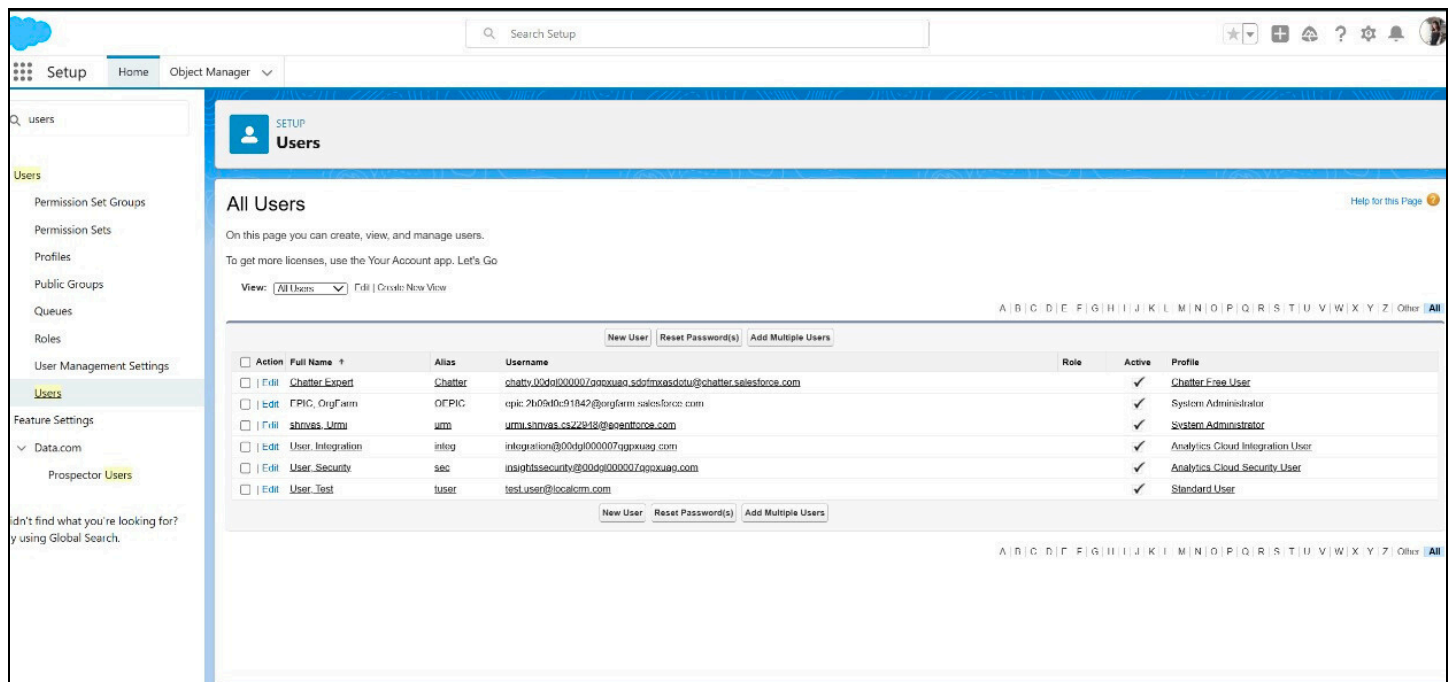
- **Created Users** → Admin, Customer, Service Provider
- **Assigned User Licences** based on roles and access requirements
- Ensures correct access rights and functionality for each user

The screenshot shows the Salesforce Setup interface for managing users. The left sidebar contains navigation links: Setup, Home, Object Manager, Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users, Feature Settings, Data.com, and Prospectors. The main content area is titled 'All Users' and includes a search bar, a 'View: All Users' dropdown, and a 'Create New User' button. Below this is a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists five users: Chatter Expert, OrgPic, shivya, User Integration, and User Security. Each user has an 'Edit' link and a 'Reset Password(s)' button. The table also includes a 'New User' button and an 'Add Multiple Users' button. The bottom of the page shows a pagination bar with '1' of 5 items and a 'Show All' link.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>   <a href="#">Edit</a>	Chatter Expert	Chatter	chatter.00000000000000000000000000000000@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/>   <a href="#">Edit</a>	OrgPic, OrgPic	OrgPic	orgpic.00000000000000000000000000000000@orgpic.salesforce.com		✓	System Administrator
<input type="checkbox"/>   <a href="#">Edit</a>	shivya, shivya	shivya	shivya.00000000000000000000000000000000@shivya.salesforce.com		✓	System Administrator
<input type="checkbox"/>   <a href="#">Edit</a>	User Integration	integ	integration.00000000000000000000000000000000@integration.salesforce.com		✓	Analytics Cloud Integration User
<input type="checkbox"/>   <a href="#">Edit</a>	User Security	sec	security.00000000000000000000000000000000@security.salesforce.com		✓	Analytics Cloud Security User
<input type="checkbox"/>   <a href="#">Edit</a>	User Test	tester	test.user@localorm.com		✓	Standard User

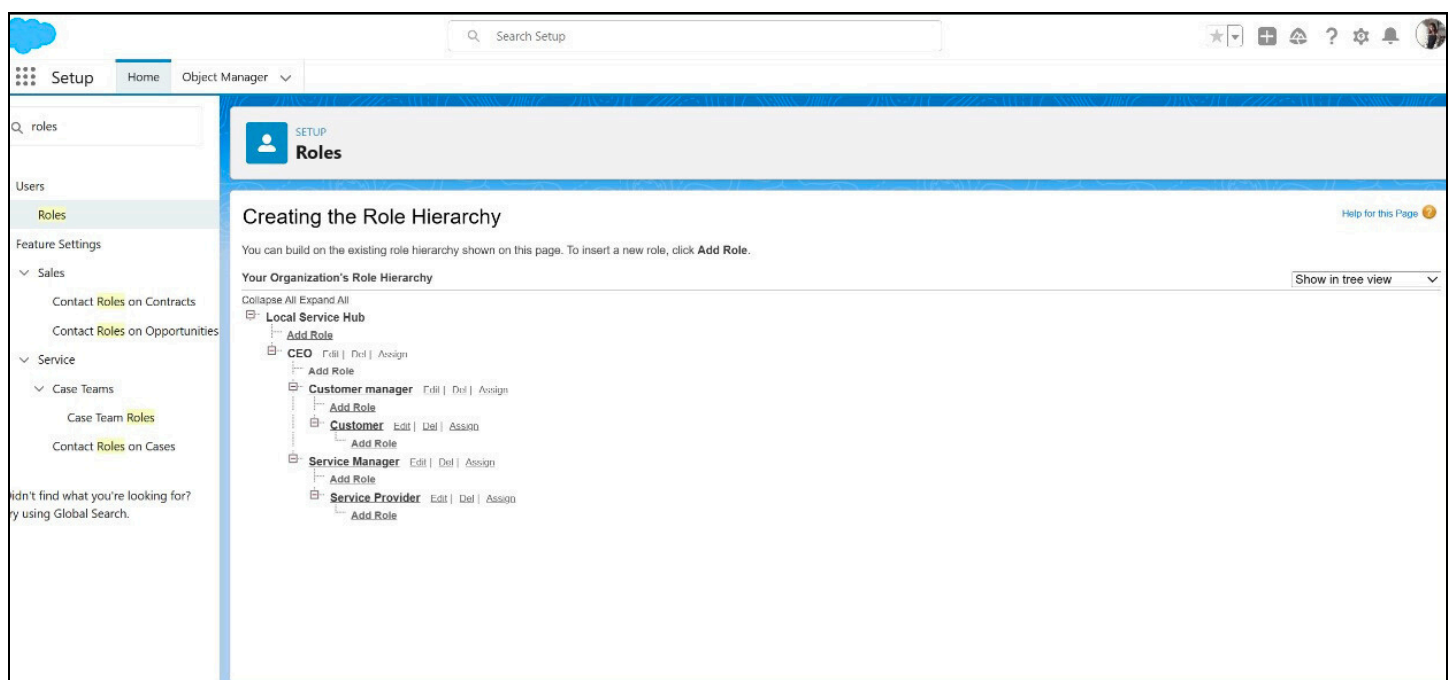
## 6. Profiles

- **System Administrator** → Full access to all settings & data.
- **Customer Manager** → Can manage all customer records & service requests.
- **Provider Manager** → Can manage all service providers & their assignments.
- **Customer Agent** → Can handle only assigned customer requests.
- **Service Provider** → Can update status of their assigned jobs only.



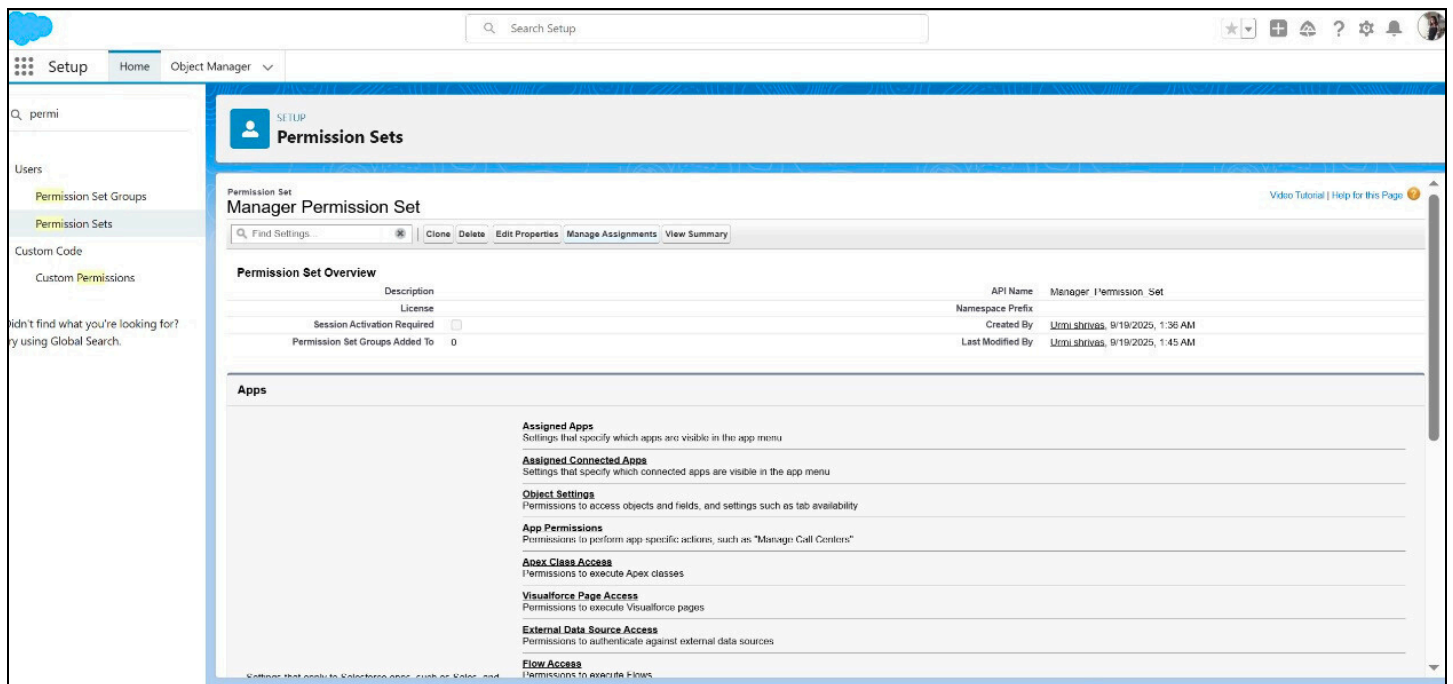
## 7.Roles Hierarchy

- Ensures proper data visibility and access control based on organizational hierarchy.
- Higher roles (e.g., CEO/Admin) can view and manage records of all subordinates.
- Lower roles (Agents/Service Providers) have access only to their relevant records.



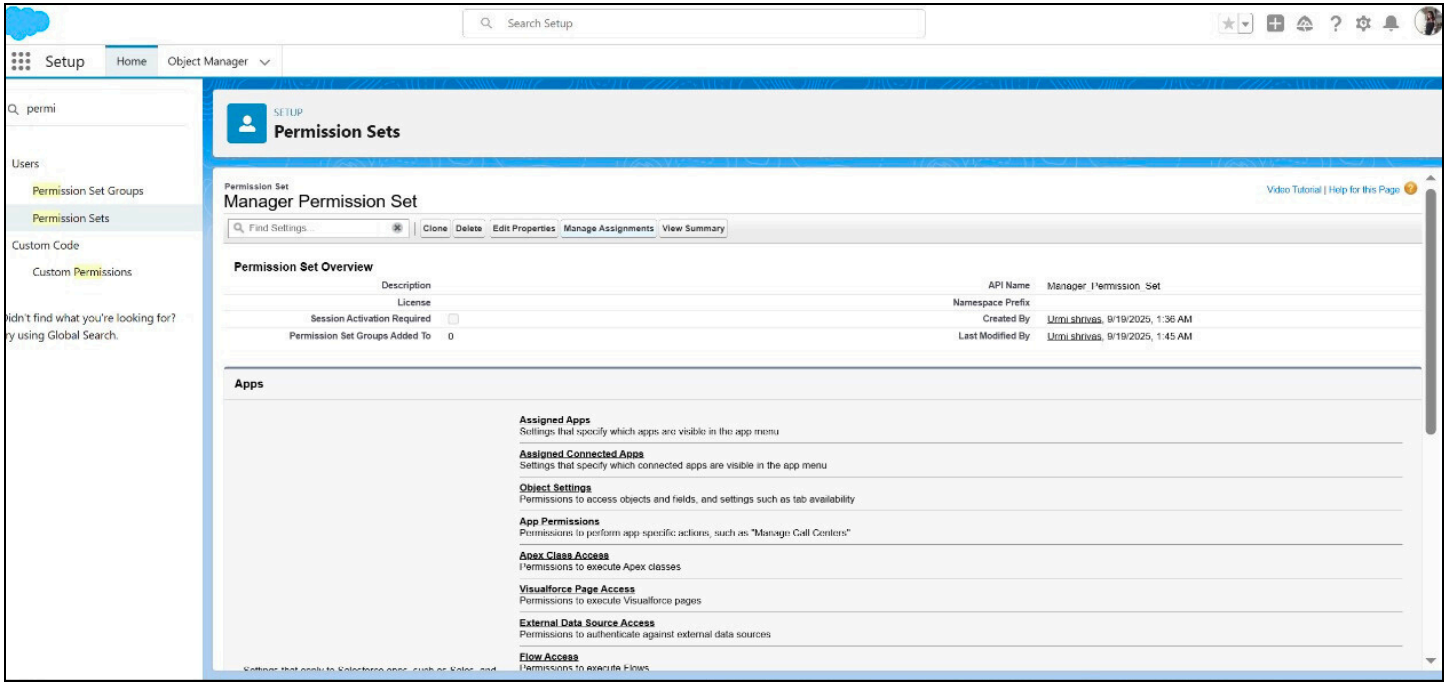
## 8. Permission Sets

- **Extra Access** → For additional object/field access
- **Report Access** → To create & view reports
- **Dashboard Access** → To view dashboards
- Assigned to users as per need, beyond their profiles



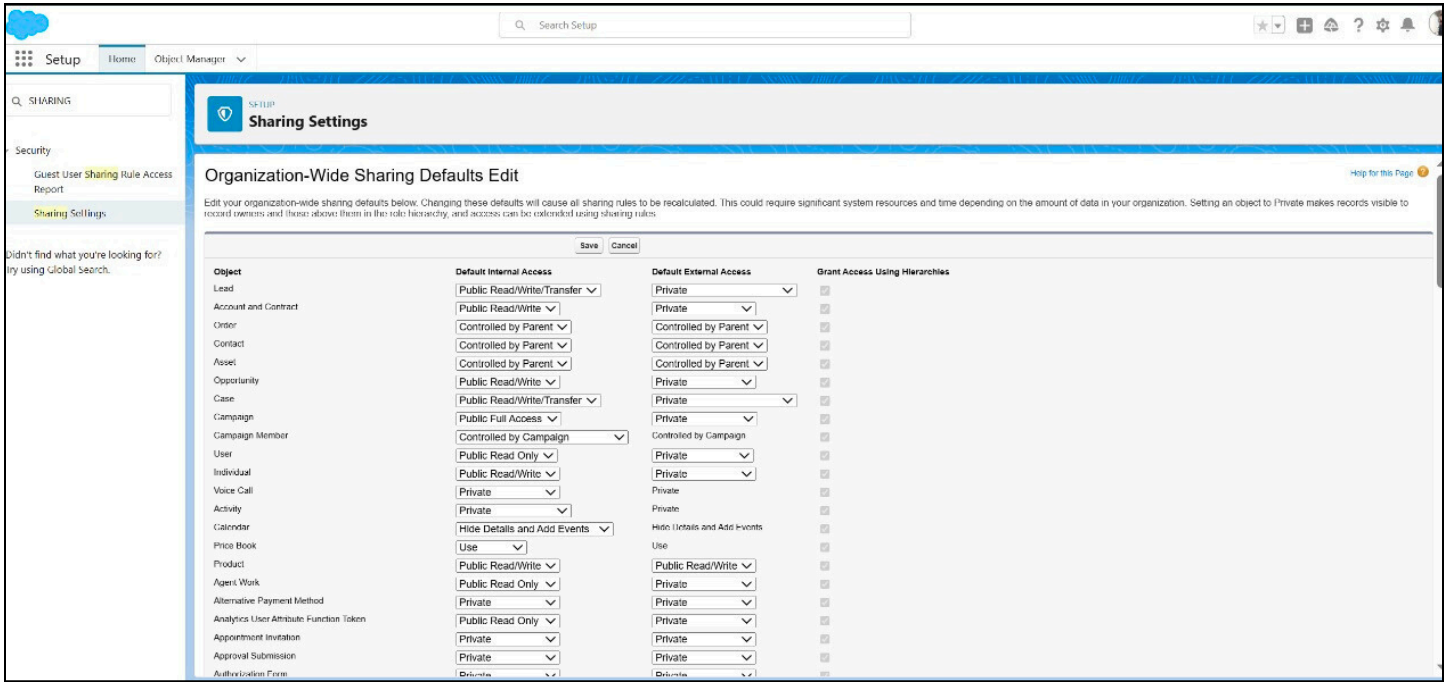
## 9. Organization-Wide Defaults (OWD)

- **Customer & Service Request Objects** → Private
- Ensures record-level security and controlled sharing.



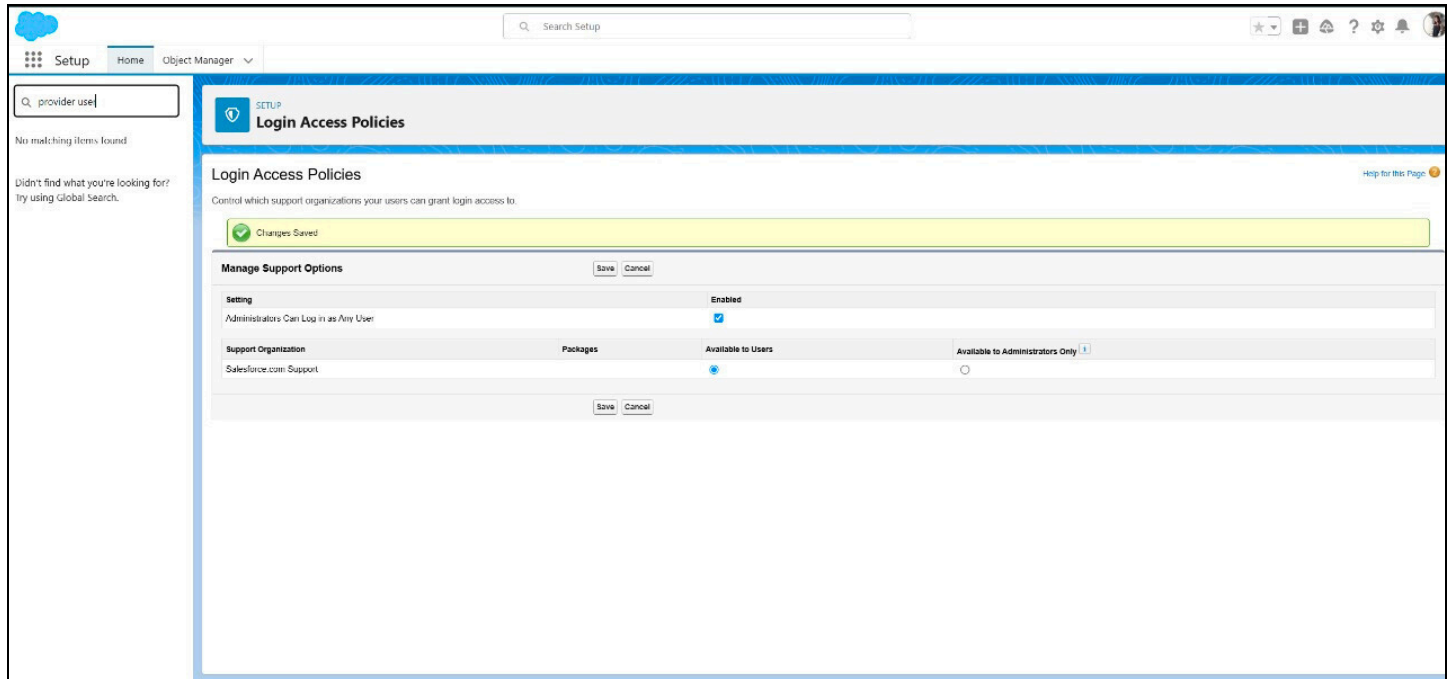
# Sharing rules

- **Customer Records** → Shared with Customer Manager (read/write)
- **Service Requests** → Shared with Provider Manager (read/write)
- **Reports** → Shared with Admin team (read-only)



# Login Access Policies

- **IP Restrictions** → Trusted IP ranges only
- **Login Hours** → Mon–Fri, 9 AM – 6 PM
- **Admin Access** → Enabled “Grant Login Access to Admin”



## Dev Org Setup

- **Created Salesforce Developer Org** (free edition).
- **Configured Basics** → Company profile, fiscal year, business hours, holidays.
- **Defined Users, Roles, Profiles** as per project needs.
- **Applied Security Settings** → OWD, Sharing Rules, Permission Sets.
- **Integrated with VS Code** using Salesforce CLI for development and deployments.

## Sandbox Usage

- Created Sandbox for safe testing of customizations.
- Used to validate changes before deploying to production.

# Deployment Basics

- **Change Sets** → For metadata migration.
- **VS Code + Salesforce CLI** → For advanced deployments.
- Ensures smooth and secure movement of changes Sandbox → Production.