

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

The screenshot shows the Salesforce Setup interface for 'Company Information'. The left sidebar contains a search bar and a list of settings categories: Company Settings, Business Hours, Calendar Settings, Public Calendars and Resources, Company Information (selected), Data Protection and Privacy, Fiscal Year, Holidays, Language Settings, and My Domain. The main content area is titled 'Company Information' and 'Local Service Hub'. It displays the organization's profile with various fields and settings. The 'Organization Detail' section includes fields for Organization Name, Primary Contact, Division, Address, Fiscal Year Starts In, Activate Multiple Currencies, Enable Data Translation, Newsletter, Admin Newsletter, Hide Notices About System Maintenance, Hide Notices About System Downtime, and Locale Formats. The 'System Information' section includes fields for Phone, Fax, Default Locale, Default Language, Default Time Zone, Currency Locale, Used Data Space, Used File Space, API Requests, Last 24 Hours, Streaming API Events, Last 24 Hours, Restricted Logins, Current Month, Salesforce.com Organization ID, Organization Edition, Instance, and Modified By. The 'Created By' field is also visible at the bottom.

Organization Detail		System Information	
Organization Name	Local Service Hub	Phone	
Primary Contact	OrgFam EPIC	Fax	
Division		Default Locale	Hindi (India)
Address	United States	Default Language	English
Fiscal Year Starts In	April	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (United States) - USD
Enable Data Translation	<input type="checkbox"/>	Used Data Space	382 KB (7%) [View]
Newsletter	<input checked="" type="checkbox"/>	Used File Space	66 KB (0%) [View]
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	00DgL000007QGpx
		Organization Edition	Developer Edition
		Instance	CAN98
		Modified By	Urmil shrivastava, 9/14/2025, 10:15 PM
Created By	OrgFam EPIC, 7/17/2025, 12:23 AM		

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 for Setup, Home, Object Manager, and various user management options like Permission Set Groups, Profiles, and Roles. The main content area is titled 'All Users' and includes a search bar, a view selector (set to 'All Users'), and a table of users. The table has columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. Below the table are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter.00d00000000000000000000000000000@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	OPIC, OrgFarm	OPIC	opic.210510c91842@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/> Edit	shivas, Umi	umi	umi.shivas.c9272916@salesforce.com		✓	System Administrator
<input type="checkbox"/> Edit	User Integration	integ	integration@00d00000000000000000000000000000@salesforce.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightsecurity@00d00000000000000000000000000000@salesforce.com		✓	Analytics Cloud Security User
<input type="checkbox"/> Edit	User Test	tuser	test.user@localcm.com		✓	Standard User

6. Profiles

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

Setup

Home

Object Manager

Search Setup

Star

Share

Help

Settings

Notifications

Profile

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

SETUP

Users

Help for this Page

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

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	chatter.00000000000000000000000000000000@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	CPIC, OrgTeam	CPIC	cpic.210940c91842@orgteam.salesforce.com		✓	System Administrator
<input type="checkbox"/> Edit	shivas, Urm	urm	urm.shivas.cszzr18@salesforce.com		✓	System Administrator
<input type="checkbox"/> Edit	User Integration	integ	integration@00000000000000000000000000000000@gpxuag.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00000000000000000000000000000000@gpxuag.com		✓	Analytics Cloud Security User
<input type="checkbox"/> Edit	User Test	tuser	test.user@localcm.com		✓	Standard 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