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.
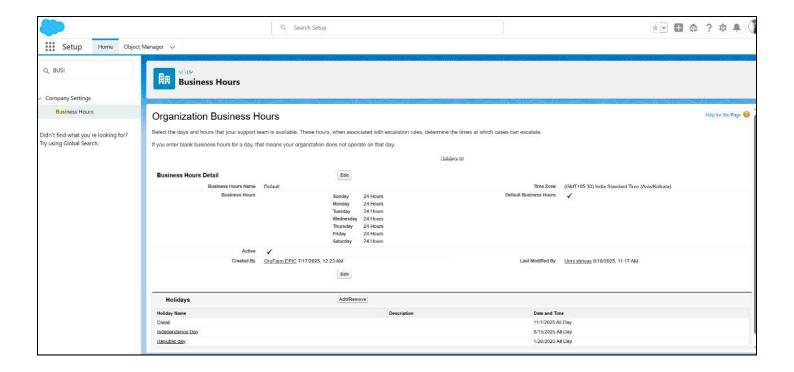- Ensures development and testing can be done without affecting live data.

2. Company Profile Setup

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

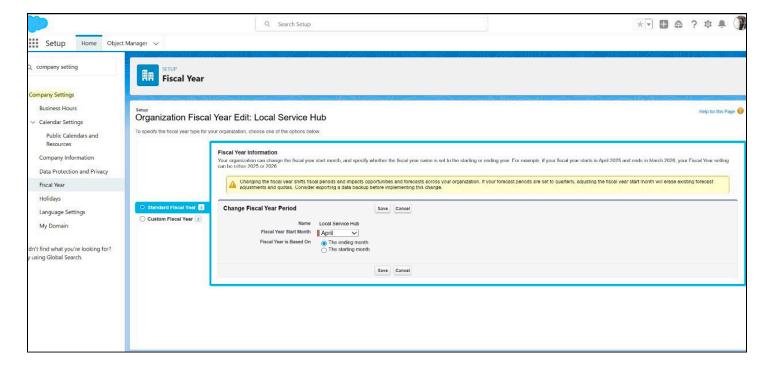

3· Business Hours & Holidays

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

4. Fiscar Year Setting

- **Fiscal Year** → Standard (April–March)
- Matches institutional accounting cycle for accurate reporting.
- Ensures financial and operational reports align with organizational timelines.

5.User Setup and Licences

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

6.Profiles

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

Setup   Home   Object Manager ∨

Q users

Users
- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users

Feature Settings
∨ Data.com
   Prospector Users

idn't find what you're looking for?
y using Global Search.

SETUP
Users

All Users

Help for this Page ❓

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
☐	Edit	Chatter Expert	Chatter	chatty.00dgl00007ggpxuag.sdofmxesdotu@chatter.salesforce.com		✔	Chatter Free User
☐	Edit	EPIC, OrgFarm	OEPIC	epic.2b09d0c91842@orgfarm.salesforce.com		✔	System Administrator
☐	Edit	shrives, Urmi	urm	urmi.shrives.cs22948@agentforce.com		✔	System Administrator
☐	Edit	User, Integration	integ	integration@00dgl000007ggpxuag.com		✔	Analytics Cloud Integration User
☐	Edit	User, Security	sec	insightssecurity@00dgl000007ggpxuag.com		✔	Analytics Cloud Security User
☐	Edit	User, Test	tuser	test.user@localcrm.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**