

Phase 2: Org Setup & Configuration

1. Salesforce Edition & Dev Org Setup

- 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
- Ensures correct regional settings for users and transactions.

The screenshot shows the Salesforce Setup interface for 'Company Information'. The left sidebar contains a search bar with 'company' and a list of settings categories: Company Settings, Calendar Settings, 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 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 Settings' 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 shows 'OrgFarm EPIC' and the 'Modified By' field shows 'Ujini shivoo'.

Organization Detail		System Settings	
Organization Name	Local Service Hub	Phone	
Primary Contact	OrgFarm 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	00DgLO00007Q0px
		Organization Edition	Developer Edition
		Instance	CAN96
Created By	OrgFarm EPIC, 7/17/2025, 12:23 AM	Modified By	Ujini shivoo, 9/14/2025, 10:15 PM

2. Bussiness hours and Holidays

- **Working Days** → Monday to Friday
- **Working Hours** → 9:00 AM – 6:00 PM
- **Added major holidays** → Independence Day, Diwali, New Year, etc.
- Ensures no service or booking activities are scheduled on holidays.