

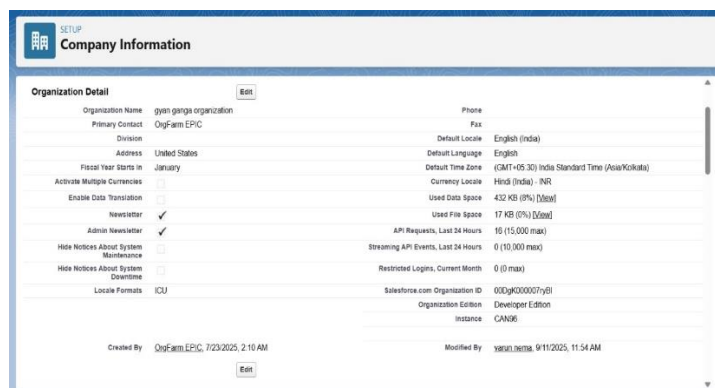
# Project Title – “Smart Subscription Tracker”

## PHASE 2 - Org Setup & Configuration

### Company Profile Setup

Set basic org details under *Setup* → *Company Information* → *Edit*:

- **Name:** Project/Org name (e.g., *Smart Subscription Tracker – Dev*).
- **Time Zone:** Default working timezone (e.g., *GMT+05:30 Kolkata*).
- **Locale:** Controls date/number formats (e.g., *English (India/US)*).
- **Language:** Default UI language for new users.
- **Currency:** Corporate currency (e.g., *INR, USD*).



The screenshot shows the 'Company Information' page in Salesforce Setup. The page is titled 'Company Information' with a 'Setup' icon and a 'Company Information' header. Below the header is the 'Organization Detail' section, which includes fields for Organization Name, Primary Contact, Division, Address, Phone, Fax, Default Locale, Default Language, Default Time Zone, Currency Locale, Used Data Space, Used File Space, API Requests, Streaming API Events, Restricted Logins, Salesforce Organization ID, Organization Edition, and Instance. The 'Organization Name' field is set to 'gymnastics organization'. The 'Primary Contact' field is set to 'OrgFarm EPIC'. The 'Division' field is set to 'United States'. The 'Address' field is set to 'January'. The 'Phone' field is set to 'English (India)'. The 'Fax' field is set to 'English (India)'. The 'Default Locale' field is set to 'English (India)'. The 'Default Language' field is set to 'English (India)'. The 'Default Time Zone' field is set to 'GMT+05:30 India Standard Time (Asia/Kolkata)'. The 'Currency Locale' field is set to 'INR'. The 'Used Data Space' field is set to '432 KB (8%) [Close]'. The 'Used File Space' field is set to '17 KB (0%) [Close]'. The 'API Requests, Last 24 Hours' field is set to '16 (15,000 max)'. The 'Streaming API Events, Last 24 Hours' field is set to '0 (10,000 max)'. The 'Restricted Logins, Current Month' field is set to '0 (0 max)'. The 'Salesforce Organization ID' field is set to '000gK000007y6i'. The 'Organization Edition' field is set to 'Developer Edition'. The 'Instance' field is set to 'CAN06'. The 'Created By' field is set to 'OrgFarm EPIC, 7/23/2025, 2:10 AM'. The 'Modified By' field is set to 'y88001.net08a, 9/11/2025, 11:54 AM'. There is an 'Edit' button at the bottom right of the page.

### Business Hours Setup

Configure working hours for escalation rules and SLA tracking:

- **Path:** *Setup* → *Business Hours* → *New*.
- **Name:** Define (e.g., *Standard Business Hours*).
- **Time Zone:** Select org or regional timezone (e.g., *GMT+05:30 Asia/Kolkata*).
- **Working Hours:** Set daily schedule (e.g., Mon–Sat 9:00 AM–6:00 PM; Sunday closed).
- **Save:** Apply as default if needed.

**Organization Business Hours**

Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate. If you enter blank business hours for a day, that means your organization does not operate on that day.

**Business Hours Edit**

Step 1: Business Hours Name  
Business Hours Name: **Standard Business Hours** ☐ Use these business hours as the default

Step 2: Time Zone  
Time Zone: **GMT+05:30 India Standard Time (Asia/Kolkata)**

Step 3: Business Hours

Day	Start Time	End Time	Hours
Sunday	9:00 AM	6:00 PM	24 hours
Monday	9:00 AM	6:00 PM	24 hours
Tuesday	9:00 AM	6:00 PM	24 hours
Wednesday	9:00 AM	6:00 PM	24 hours
Thursday	9:00 AM	6:00 PM	24 hours
Friday	9:00 AM	6:00 PM	24 hours
Saturday	9:00 AM	6:00 PM	24 hours

## **Fiscal Year Setup**

Defines reporting boundaries for forecasts and opportunities.

- **Path:** *Setup* → *Fiscal Year*.
- **Type:** Choose *Standard Fiscal Year* (Jan–Dec) or *Custom Fiscal Year* if months differ.
- **Configuration:** Select the starting month (e.g., *January*).
- **Save:** Apply settings to define fiscal periods.

**Setup**  
**Organization Fiscal Year Edit: gyan ganga organization**

To specify the fiscal year type for your organization, choose one of the options below.

**Fiscal Year Information**  
Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example, if your fiscal year starts in April 2025 and ends in March 2026, your Fiscal Year setting can be either 2025 or 2026.

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.

**Change Fiscal Year Period**

Name: gyan ganga organization

Fiscal Year Start Month: **January**

Fiscal Year is Based On: ☐ The ending month ☒ The starting month

## **User Setup (Profiles, Roles, Permission Sets, Users)**

- **Profiles:** Cloned standard profiles to create custom ones for baseline access.
  - *Sales\_Profile, Finance\_Profile, Manager\_Profile* (to be tuned later with object permissions).
- **Roles:** Defined role hierarchy for access and reporting.
  - *Manager, Sales Rep, Finance*.
- **Permission Sets:** Created *Payment\_Access\_PS* for Finance (object permissions to be added once Payment object exists).
- **Users:** Added sample users with respective profiles and roles.

- *sales1* → Sales\_Profile, Role: Sales Rep
- *finance1* → Finance\_Profile, Role: Finance
- *manager1* → Manager\_Profile, Role: Manager

Profile  
**Sales\_Profile**

With this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges](#) | [Enabled Apex Class Access](#) | [Enabled Visualforce Page Access](#) | [Enabled External Data Source Access](#) | [Enabled Named Credential Access](#) | [Enabled External Credential Principal Access](#) | [Enabled Custom Metadata Type Access](#) | [Enabled Custom Setting Definitions Access](#) | [Enabled Flow Access](#) | [Enabled Service Presence Status Access](#) | [Enabled Custom Permissions](#)

**Profile Detail** [Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name	Sales_Profile	Custom Profile	✓
User License	Salesforce		
Description			
Created By	YASUN NEMO	9/11/2025, 12:21 PM	Modified By YASUN NEMO 9/11/2025, 12:21 PM

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Profile  
**Finance\_Profile**

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges](#) | [Enabled Apex Class Access](#) | [Enabled Visualforce Page Access](#) | [Enabled External Data Source Access](#) | [Enabled Named Credential Access](#) | [Enabled External Credential Principal Access](#) | [Enabled Custom Metadata Type Access](#) | [Enabled Custom Setting Definitions Access](#) | [Enabled Flow Access](#) | [Enabled Service Presence Status Access](#) | [Enabled Custom Permissions](#)

**Profile Detail** [Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name	Finance_Profile	Custom Profile	✓
User License	Salesforce		
Description			
Created By	YASUN NEMO	9/11/2025, 12:24 PM	Modified By YASUN NEMO 9/11/2025, 12:24 PM

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Profile  
**Manager\_profile1**

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges](#) | [Enabled Apex Class Access](#) | [Enabled Visualforce Page Access](#) | [Enabled External Data Source Access](#) | [Enabled Named Credential Access](#) | [Enabled External Credential Principal Access](#) | [Enabled Custom Metadata Type Access](#) | [Enabled Custom Setting Definitions Access](#) | [Enabled Flow Access](#) | [Enabled Service Presence Status Access](#) | [Enabled Custom Permissions](#)

**Profile Detail** [Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name	Manager_profile1	Custom Profile	✓
User License	Salesforce		
Description			
Created By	YASUN NEMO	9/11/2025, 12:24 PM	Modified By YASUN NEMO 9/11/2025, 12:24 PM



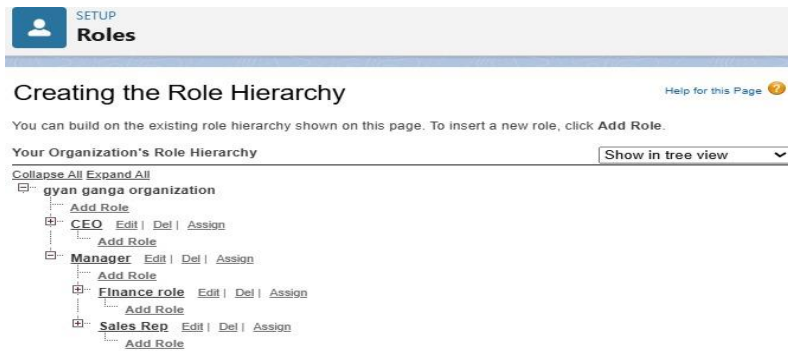
## Role Hierarchy Setup

Defines data visibility and reporting structure within the org.

- **Path:** *Setup* → *Roles* → *Set Up Roles*.
- **Top-Level Role:** *CEO* (root of hierarchy).
- **Manager Role:** Added as child of CEO.
- **Sales Rep Role:** Added as child under Manager.
- **Finance Role:** Added as sibling under Manager (or directly under top-level as needed).

### **Resulting Hierarchy (example):**

CEO → Manager → Sales Rep



### OWD (Org Wide Default)

This has to be done in the Phase 3, as the OWD setting are needed to be applied on an object which will be implemented in next phase of the project.

### Sharing Rule

This has to be done in the Phase 3 as well considering it has to be implemented on an object.

### Assign Permission Set(s)

After creating users, assign the permission set for finance (when Payment object exists):

Setup → Quick Find → Users → click the finance user → Permission Set Assignments → Edit Assignments → add Payment\_Access\_PS → Save.

SETUP

Login Access Policies

Login Access Policies

Help for this Page

Control which support organizations your users can grant login access to.

Manage Support Options

Save Cancel

Setting	Enabled
Administrators Can Log in as Any User	<input checked="" type="checkbox"/>

Support Organization	Packages	Available to Users	Available to Administrators
Salesforce.com Support		<input checked="" type="radio"/>	<input type="radio"/>

Save Cancel

## Dev Org Setup

- To implement the following project a Salesforce Developer Edition org was setup.
  - Made a GitHub Repository for source control.
  - Setting up the VS Code and SFDX for the implementation of the LWC Component for development.
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