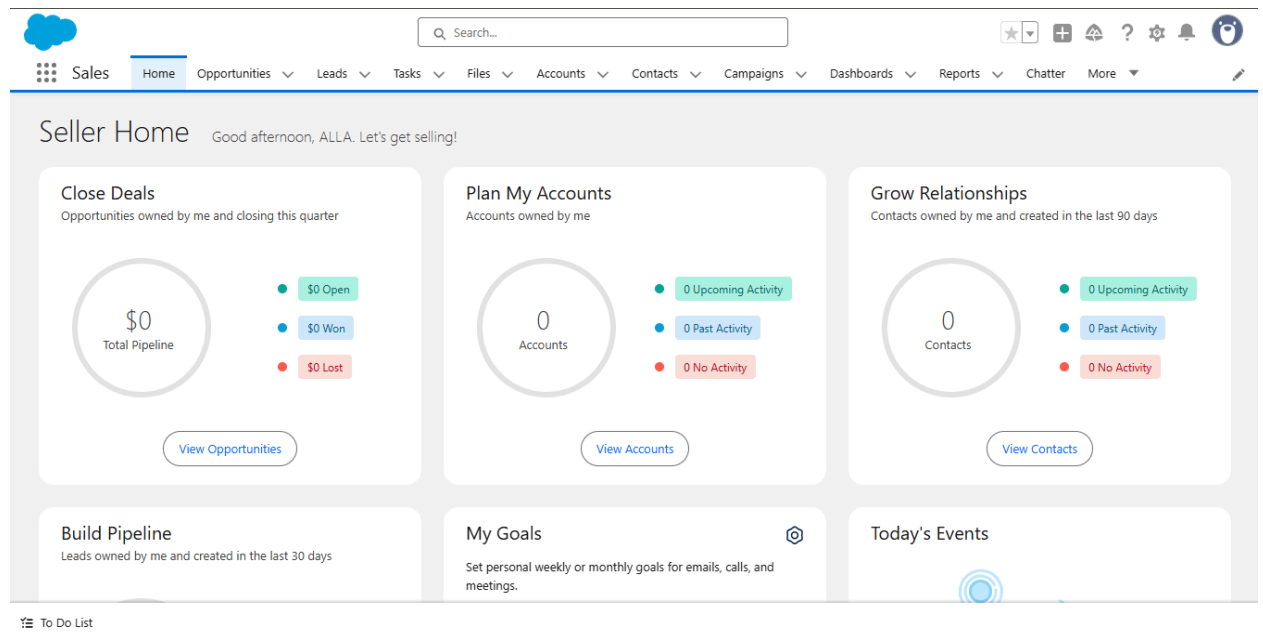


# Salesforce Setup Guide: Phase 2 - Org & User Configuration

This document outlines the foundational steps to configure your Salesforce org for the Residential Maintenance Request Portal.

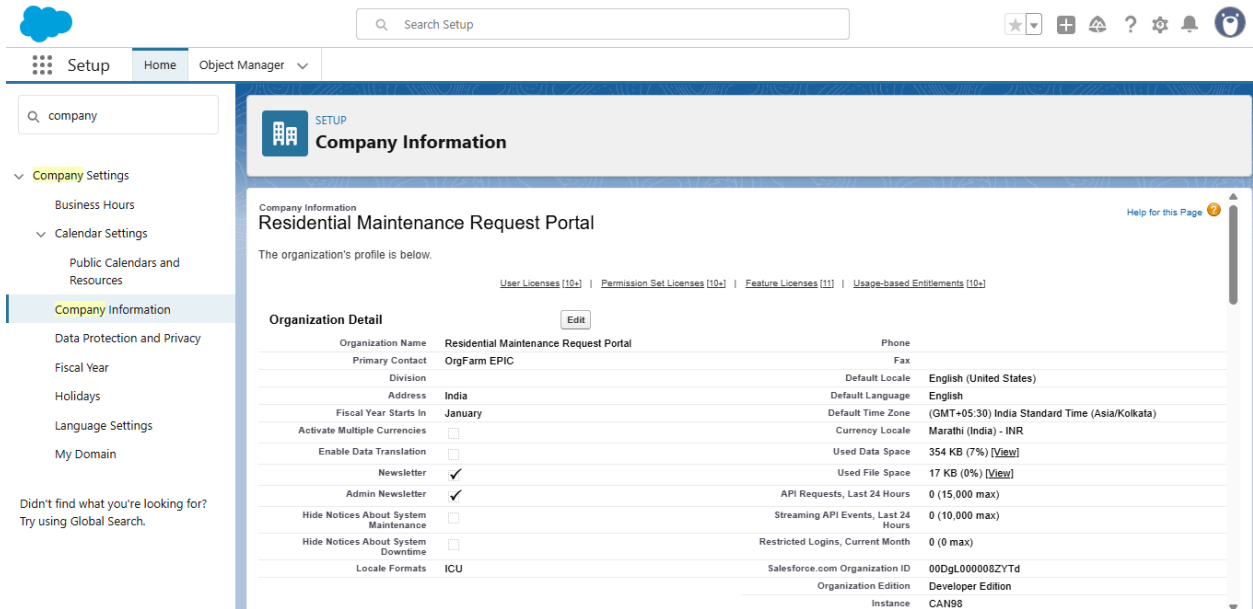
## Step 1: Set Up Your Developer Org

- **Purpose:** To get a free, safe environment for building and testing.
- **Action:**
  1. Go to [developer.salesforce.com/signup](https://developer.salesforce.com/signup).
  2. Fill out the form. Your **Username** must be unique and in an email format (e.g., `myproject@dev.com`). Your **Email** must be a real address for verification.
  3. Verify your account via the email link and log in.



## Step 2: Configure Company Information

- **Purpose:** To set the correct time zone and currency for your records.
- **Action:**
  1. Go to **Setup > Company Information**.
  2. Click **Edit**.
  3. Set your **Default Time Zone** and **Default Currency**.
  4. Click **Save**.

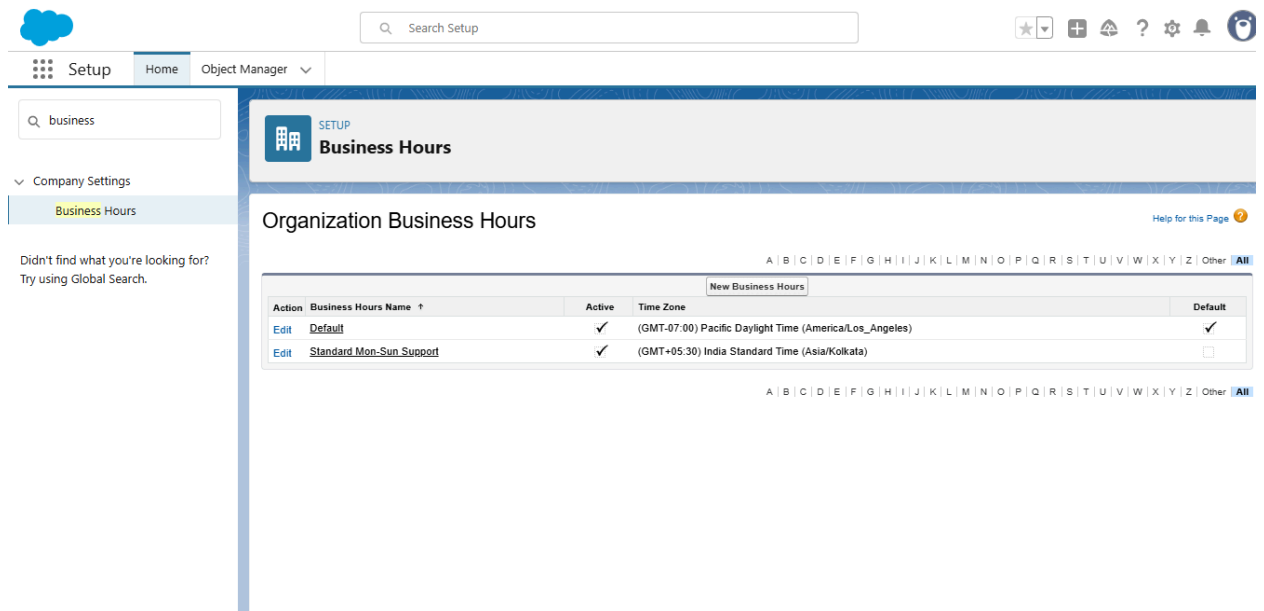


The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'company' and a list of settings: Company Settings, Business Hours, Calendar Settings, Public Calendars and Resources, Company Information (selected), Data Protection and Privacy, Fiscal Year, Holidays, Language Settings, and My Domain. The main content area is titled 'Company Information' and 'Residential Maintenance Request Portal'. It displays the organization's profile with a table of details.

Organization Detail		
Organization Name	Residential Maintenance Request Portal	Phone
Primary Contact	OrgFarm EPIC	Fax
Division		Default Locale
Address	India	Default Language
Fiscal Year Starts In	January	Default Time Zone
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale
Enable Data Translation	<input type="checkbox"/>	Used Data Space
Newsletter	<input checked="" type="checkbox"/>	Used File Space
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month
Locale Formats	ICU	Salesforce.com Organization ID
		Organization Edition
		Instance

### Step 3: Define Business Hours & Holidays 🕒

- **Purpose:** To ensure time-based rules (like response times) are calculated accurately.
- **Action:**
  1. Go to **Setup > Business Hours > New Business Hours**.
  2. Name it "Standard Mon-Fri Support", set the hours (e.g., 9 AM to 6 PM, Monday-Friday), and **Save**.
  3. Go to **Setup > Holidays > New**.
  4. Add a few holidays (e.g., "Independence Day").
  5. Return to your **Business Hours** record, **Edit** it, and add the holidays you created.



The screenshot shows the Salesforce Setup interface for Business Hours. The left sidebar contains a search bar with 'business' and a list of settings: Company Settings, Business Hours (selected), and Public Calendars and Resources. The main content area is titled 'Business Hours' and 'Organization Business Hours'. It displays a table of business hours records.

Action	Business Hours Name	Active	Time Zone	Default
<a href="#">Edit</a>	Default	<input checked="" type="checkbox"/>	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	Standard Mon-Sun Support	<input checked="" type="checkbox"/>	(GMT+05:30) India Standard Time (Asia/Kolkata)	<input type="checkbox"/>

## Step 4: Create Users 👤

- **Purpose:** To create accounts for the people who will use the system.
- **Action:**
  1. Go to **Setup > Users > New User**.
  2. Create **Priya Manager**: Use the **System Administrator** Profile.
  3. Create **Ravi Tech**: Use the **Standard User** Profile.
  - *Ensure each user has a unique username and a real email for setup.*

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'users' and a list of navigation items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings. The 'Users' item is selected. The main content area is titled 'SETUP Users' and shows the 'User Detail' for 'Krishna Manager'. The user's email is 'krishna@test.com', username is 'krishna@test.com', and nickname is 'User17582819707507784179'. The user is assigned the 'Marketing Team' role and the 'System Administrator' profile. The 'Active' checkbox is checked. The 'Delegated Approver' field is empty.

User Detail	
Name	Krishna Manager
Alias	kmama
Email	krishna@test.com (Verify)
Username	krishna@test.com
Nickname	User17582819707507784179
Title	
Company	
Department	
Division	
Address	
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (United States)
Language	English
Delegated Approver	
Role	Marketing Team
User License	Salesforce
Profile	System Administrator
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Mobile Push Registrations	<a href="#">View</a>
Data.com User Type	<a href="#">i</a>

## Step 5: Configure Custom Profiles 🛠️

- **Purpose:** To create specific permission sets for each job role.
- **Action:**
  1. Go to **Setup > Profiles**.
  2. **Clone** the "System Administrator" profile and name the new one Property Manager.
  3. **Clone** the "Standard User" profile and name the new one Maintenance Technician.
  4. Go back to **Setup > Users**.
  5. Edit Priya Manager and assign her the **Property Manager** profile.
  6. Edit Ravi Tech and assign him the **Maintenance Technician** profile.

## Step 6: Establish the Role Hierarchy 🏢

- **Purpose:** To allow managers to see the records of their direct reports.
- **Action:**
  1. Go to **Setup > Roles > Set Up Roles**.
  2. Under the company name, **Add Role** and name it Property Manager.
  3. Under the new "Property Manager" role, **Add Role** and name it MaintenanceTechnician.
  4. From the role tree, click **Assign** next to each role to assign Priya Manager and Ravi