

# A CRM Application to Manage the Services offered by an Institution

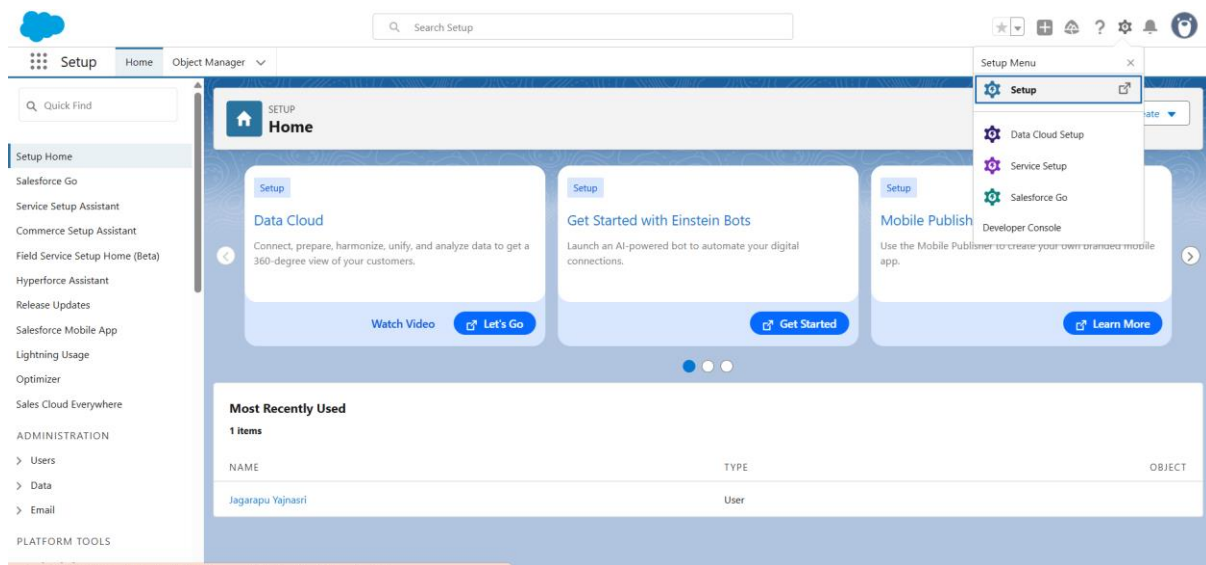
## Phase 2: Org Setup & Configuration

### Step 1: Goal of Phase 2

- Prepare Salesforce environment.
- Setup Users, Roles, Profiles, Permissions.
- Configure Company Info, Business Hours, Holidays, Fiscal Year.
- Expected Outcome (Phase 2 Goal): Org ready for Phase 3 (Data Modeling & Relationships).

### Step 2: Salesforce Editions

- Use Developer Edition Org (free).
- Already account exists → login.
- Dev Org = sandbox for build/test.



### Step 3: Company Profile Setup

- Setup → Company Settings → Company Information.
- Fill details: Name, Timezone, Currency.
- Save.

Setup

Home

Object Manager

Search Setup

Quick Find

Setup Home

Salesforce Go

Service Setup Assistant

Commerce Setup Assistant

Field Service Setup Home (Beta)

Hyperforce Assistant

Release Updates

Salesforce Mobile App

Lightning Usage

Optimizer

Sales Cloud Everywhere

ADMINISTRATION

> Users

> Data

> Email

PLATFORM TOOLS

SETUP

Company Information

Company Information

Institution CRM Project

The organization's profile is below.

User Licenses (19) | Permission Set Licenses (18) | Feature Licenses (11) | Usage-based Entitlements (10)

Organization Detail

Organization Name

Institution CRM Project

Phone

Primary Contact

OrgFarm EPIC

Fax

Division

Chowdavaram

Default Locale

English (India)

Address

Guntur 522019

Default Language

English

Andhra Pradesh

India

Fiscal Year Starts In

January

Default Time Zone

(GMT+05:30) India Standard Time (Asia/Kolkata)

Activate Multiple Currencies

☐

Currency Locale

English (India) - INR

Enable Data Translation

☐

Used Data Space

342 KB (7%) [View](#)

Newsletter

☒

Used File Space

17 KB (0%) [View](#)

Admin Newsletter

☒

API Requests, Last 24 Hours

0 (15,000 max)

Hide Notices About System Maintenance

☐

Streaming API Events, Last 24 Hours

0 (10,000 max)

Hide Notices About System Downtime

☐

Restricted Logins, Current Month

0 (0 max)

Locale Formats

ICU

Salesforce.com Organization ID

00DgL00000B5C1

Organization Edition

Developer Edition

Instance

CAN58

## Step 4: Business Hours & Holidays

- Setup → Business Hours → New → 9 AM – 6 PM.
- Holidays → Add public holidays.

SETUP

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.

Holidays (2)

Business Hours Detail

Business Hours Name

Institution CRM Working Hours

Time Zone

(GMT+05:30) India Standard Time (Asia/Kolkata)

Business Hours

Sunday

24 Hours

Monday

9:00 AM to 6:00 PM

Tuesday

9:00 AM to 6:00 PM

Wednesday

9:00 AM to 6:00 PM

Thursday

9:00 AM to 6:00 PM

Friday

9:00 AM to 6:00 PM

Saturday

24 Hours

Default Business Hours

☒

Active

☒

Created By

Jagarapu Yajnasri

9/20/2025, 11:31 PM

Last Modified By

Jagarapu Yajnasri

9/20/2025, 11:31 PM

Holidays

Holiday Name

Description

Date and Time

Independence Day

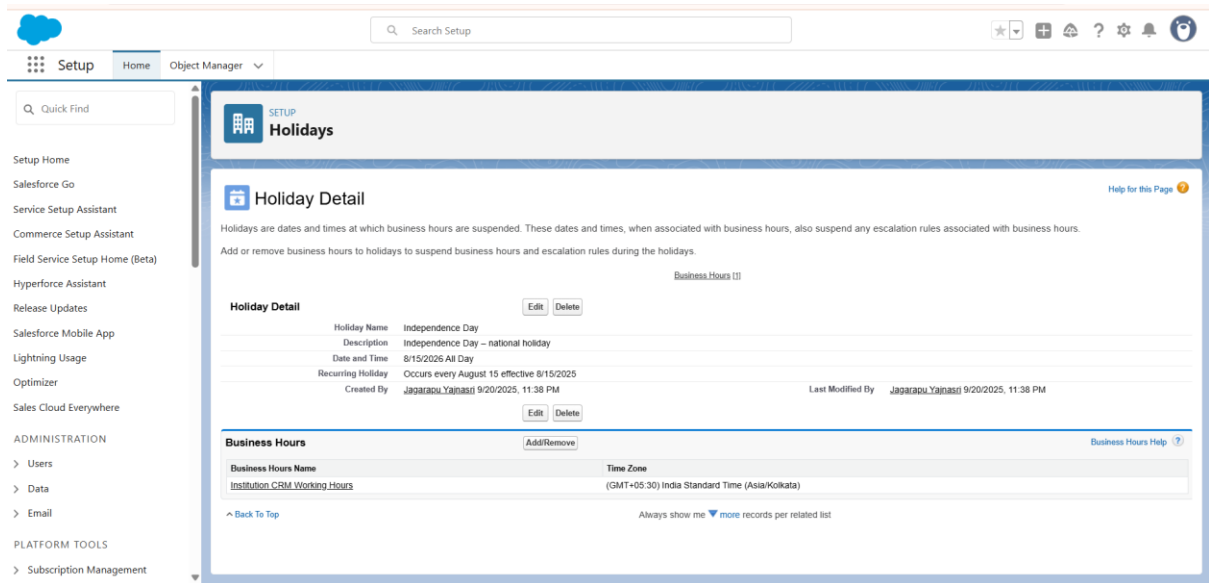
Independence Day – national holiday

8/15/2026 All Day

Republic Day

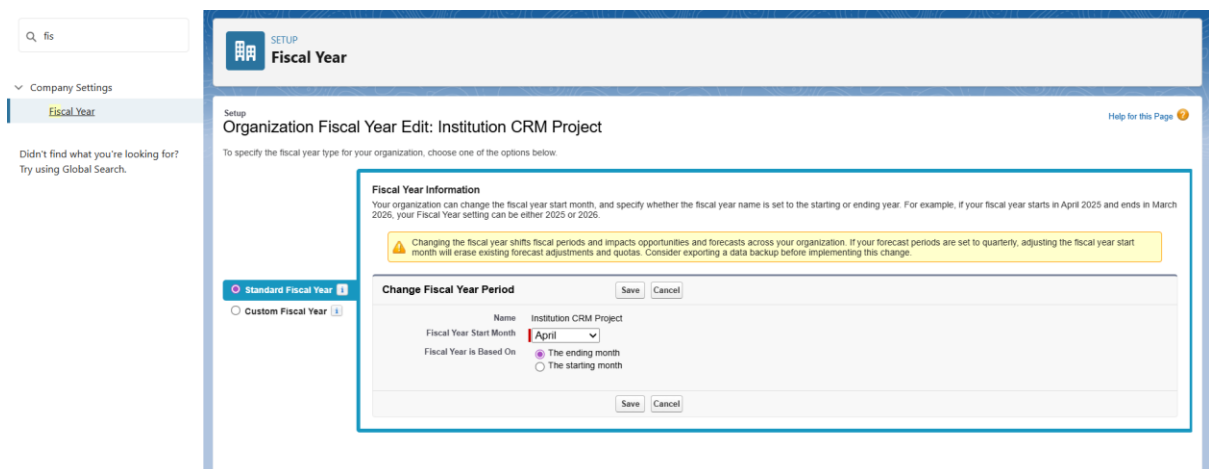
Republic Day-national holiday

1/26/2026 All Day



## Step 5: Fiscal Year settings

- Setup-> Fiscal Year -> standard (jan-Dec)
- Save



## Step 6: Users & Licenses

- Setup → Users → New User
- Create: Admin, Manager, Collection Staff
- Assign Salesforce license

orgfarm-771b88658-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home

Setup Home Object Manager

Search Setup

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

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	chatty.00d900000b5c1uaj.xux24ntr1e@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	EPIC_OrgFarm	OEPIG	epic.1a1772bd5869@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/> Edit	User Integration	integ	integration@00d900000b5c1uaj.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00d900000b5c1uaj.com		✓	Analytics Cloud Security User
<input type="checkbox"/> Edit	Yajnasri Jagarapu	jag	jagarapuyajnasri740@agentforce.com		✓	System Administrator

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

Setup Home Object Manager

Lightning Usage

Optimizer

Sales Cloud Everywhere

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Data

Email

PLATFORM TOOL

Subscription Ma...

Business Ho...

SETUP Users

New User Reset Password(s) Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Prof
<input type="checkbox"/> Edit	Admin Institution	Admin	institution.admin@test.com		✓	Forc App Sub Use
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d900000b5c1uaj.xux24ntr1e@chatter.salesforce.com		✓	Cha Use
<input type="checkbox"/> Edit	EPIC_OrgFarm	OEPIG	epic.1a1772bd5869@orgfarm.salesforce.com		✓	Syst Adm
<input type="checkbox"/> Edit	Manager Service	Mngr	service.manager@test.com		✓	Forc App Sub Use
<input type="checkbox"/> Edit	User Integration	integ	integration@00d900000b5c1uaj.com		✓	Ana Clou Inter Use
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00d900000b5c1uaj.com		✓	Ana Clou Seci Use
<input type="checkbox"/> Edit	Yajnasri Jagarapu	jag	jagarapuyajnasri740@agentforce.com		✓	Syst Adm

New User Reset Password(s) Add Multiple Users

## Step 7: Profiles

- **Collection Staff** → create/update tasks
- **Manager** → full access
- **Admin** → full + setup permissions

- Setup
Home
Object Manager ▾

Lightning Usage

Optimizer

Sales Cloud Everywhere

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ADMINISTRATION

  - ▾ Users
    - Permission Set Groups
    - Permission Sets
    - Profiles
    - Public Groups
    - Queues
    - Roles
    - User Management Settings
    - Users
  - > Data
  - > Email

## SETUP Profiles

Profile

### Collection Staff

[Help for this Page](#)

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 \[0\]](#) | 
 [Enabled Apex Class Access \[2\]](#) | 
 [Enabled External Data Source Access \[0\]](#) | 
 [Enabled Named Credential Access \[0\]](#) | 
 [Enabled External Credential Principal Access \[0\]](#) | 
 [Enabled Custom Metadata Type Access \[0\]](#) | 
 [Enabled Custom Setting Definitions Access \[0\]](#) | 
 [Enabled Flow Access \[0\]](#) | 
 [Enabled Service Presence Status Access \[0\]](#) | 
 [Enabled Custom Permissions \[0\]](#)

**Profile Detail**

Name	Collection Staff	
User License	Analytics Cloud Integration User	Custom Profile ✓
Description		
Created By	Jagarapu Jaynasri AM 9/21/2025, 5:23	Modified By Jagarapu Jaynasri AM 9/21/2025, 5:23

Setup Home Object Manager

Release Updates  
Salesforce Mobile App  
Lightning Usage  
Optimizer  
Sales Cloud Everywhere

ADMINISTRATION

Users

Permission Set Groups

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Queues

Roles

User Management Settings

Users

Data

Email

Permission Sets

Reports Access

Find Settings... Clone Edit Properties Manage Assignments View Summary

Permission Set Overview

Description	API Name	Reports_Access
License	Namespace Prefix	
Session Activation Required	Created By	Jagarapu Yajnasri 9/21/2025, 7:15 AM
Permission Set Groups Added To	Last Modified By	Jagarapu Yajnasri 9/21/2025, 7:16 AM

Apps

Assigned Apps  
Settings that specify which apps are visible in the app menu

Assigned Connected Apps  
Settings that specify which connected apps are visible in the app menu

Object Settings  
Permissions to access objects and fields, and settings such as tab availability

App Permissions  
Permissions to perform app-specific actions, such as "Manage Call Centers"

## Step 10: Org-Wide Defaults (OWD)

- Sensitive/Personal Data → Private
- Reference Data (like courses, programs) → Public Read Only
- Collaboration Data (like service requests) → Public Read/Write

Setup Home Object Manager

sharing

Security

Guest User Sharing Rule Access Report

Sharing Settings

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

Sharing Settings

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

One or more sharing operations has been initiated. See below for additional details. Certain operations may not be available.

Manage sharing settings for: All Objects

Disable External Sharing Model

Default Sharing Settings

Organization-Wide Defaults Edit Organization-Wide Defaults Help

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓

## Step 11: Sharing Rules

- Create a rule to share **CollectionRecord\_\_c** with **Manager**.

## Step 12: Login Access Policies

- Restrict login hours for **Collection Staff** → 9 AM – 6 PM.

The screenshot shows the Salesforce Setup interface. On the left, the navigation menu includes Setup, Home, and Object Manager. The main content area is titled 'Profiles' and shows the 'Login Hours' configuration for a specific profile. The page includes a search bar with 'pro' entered, a sidebar with 'Hyperforce Assistant' and various setup categories like Users, Profiles, Data, Feature Settings, etc. The 'Login Hours' section has a note: 'Select the days and hours that users with this profile are allowed to log in. Note that all times to a time zone. Login hours will be applied at those exact times even for users in different time zones.' Below this is a table for configuring login hours.

Day	Start Time	End Time	Action
Sunday	--None--	--None--	Clear times
Monday	9:00 AM	6:00 PM	Clear times
Tuesday	9:00 AM	6:00 PM	Clear times
Wednesday	9:00 AM	6:00 PM	Clear times
Thursday	9:00 AM	6:00 PM	Clear times
Friday	9:00 AM	6:00 PM	Clear times
Saturday	--None--	--None--	Clear times

Buttons for 'Save' and 'Cancel' are present at the top and bottom of the configuration area.

## Step 13: Dev Org & Sandbox

- Build configurations in **Developer Org**.
- **Sandbox** → mirrors production for testing & practice.

## Step 14: Deployment Basics

- Move changes **sandbox** → **production** using:
  - **Change Sets**
  - **VS Code + SFDX**

## Step 15: Expected Outcome (Phase 2 Completion)

- Salesforce org fully setup.
- Users, Roles, Profiles, Permission Sets, OWD, Business Hours, Holidays configured.