

Phase 2: Org Setup & Configuration

1. Salesforce Editions

Salesforce offers different editions depending on the organization's size and requirements. For this project, a **Developer Edition** org is used, which provides:

- **Core CRM Objects:** Accounts, Contacts, Cases, Events, Tasks
- **Customization Options:** Custom fields, Profiles, Permission Sets, Roles
- **Sandbox Support:** Single developer sandbox for testing metadata changes
- **License Limitations:** 5 users, standard Salesforce licenses

Rationale: Developer Edition is ideal for testing and learning because it provides most features without requiring production licenses.

The screenshot displays the Salesforce Setup interface. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'Company Information' and contains two tables.

Company Information Table:

Name	Status	Total Licenses	Used Licenses	Remaining Licenses	Expiration Date
Salesforce	Active	4	4	0	
Analytics Cloud Integration User	Active	2	2	0	
Chatter Free	Active	5,000	1	4,999	
External Apps Login	Active	40	0	40	
Salesforce Integration	Active	1	0	1	
Salesforce Platform	Active	6	0	6	
Customer Community Login	Active	5	0	5	
Work.com Only	Active	3	0	3	
Customer Portal Manager Custom	Active	10	0	10	
Identity	Active	110	0	110	

[Show 10 more »](#) | [Go to list \(25\) »](#)

Permission Set Licenses Table:

Name	Status	Total Licenses	Used Licenses	Remaining Licenses	Expiration Date	Enabled for Integrations	Custom Permission Set License
Agent platform builder	Active	5	0	5		<input type="checkbox"/>	<input type="checkbox"/>
Apexforce (Default)	Active	5	1	4		<input type="checkbox"/>	<input type="checkbox"/>
Apexforce Service Agent Builder	Active	10,000	1	9,999		<input type="checkbox"/>	<input type="checkbox"/>
Apexforce Service Agent Libr	Active	200	0	200		<input type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Builder	Disabled	0	0	0		<input type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Explorer	Disabled	0	0	0		<input type="checkbox"/>	<input type="checkbox"/>
Analytics View Only Embedded App	Active	3	0	3		<input type="checkbox"/>	<input type="checkbox"/>
B2B Buyer Manager Permission Set One Seat	Active	40	0	40		<input type="checkbox"/>	<input type="checkbox"/>
B2B Buyer Permission Set One Seat	Active	40	0	40		<input type="checkbox"/>	<input type="checkbox"/>

2. Company Profile Setup

Configuration:

- Primary Contact: Name - Palak Lodhi , Email - palak.lodhi.aiml22@ggits.net
- Default Locale: English (India)
- Default Time Zone: GMT+5:30 Asia/Kolkata
- Default Currency: INR

Purpose:

Ensures accurate formatting for reports, dashboards, and date-time calculations across the org.

The screenshot shows the Salesforce Setup interface for 'Company Information'. The left sidebar contains a navigation menu with options like 'Setup', 'Home', 'Object Manager', 'Objects and Fields', 'Company Settings', 'Calendar Settings', 'Data Protection and Privacy', 'Fiscal Year', 'Holidays', 'Language Settings', and 'My Domain'. The main content area is titled 'Company Information' and displays the organization's profile for 'Gyan Ganga Institute of Technology and Sciences'. The profile 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, Locale Formats, 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, and Instance. The page also shows the creation and modification dates and times.

Organization Detail	
Organization Name	Gyan Ganga Institute of Technology and Sciences
Primary Contact	Org/arm EPIC
Division	
Address	United States
Fiscal Year Starts In	January
Activate Multiple Currencies	<input type="checkbox"/>
Enable Data Translation	<input type="checkbox"/>
Newsletter	<input checked="" type="checkbox"/>
Admin Newsletter	<input checked="" type="checkbox"/>
Hide Notices About System Maintenance	<input type="checkbox"/>
Hide Notices About System Downtime	<input type="checkbox"/>
Locale Formats	ICU
Phone	
Fax	
Default Locale	English (United States)
Default Language	English
Default Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Currency Locale	English (United States) - USD
Used Data Space	403 KB (8%) [View]
Used File Space	17 KB (5%) [View]
API Requests, Last 24 Hours	0 (15,000 max)
Streaming API Events, Last 24 Hours	0 (10,000 max)
Restricted Logins, Current Month	0 (0 max)
Salesforce.com Organization ID	00000000000000000000000000000000
Organization Edition	Developer Edition
Instance	CAN06

Created By: Org/arm EPIC, 7/18/2025, 2:42 AM
Modified By: Palak Lodhi, 9/22/2025, 3:44 AM

3. Business Hours & Holidays

Configuration:

- Business Hours: 24*7
- Holidays: Organization-specific (optional)

Steps:

1. Setup → Business Hours → New
2. Enter Business Hours Name: Standard Business Hours
3. Select working days and times
4. Save

Purpose:

Defines operational hours for appointments, Events, and SLA calculations for Cases.

The screenshot shows the Salesforce Setup interface for configuring Business Hours. The left sidebar includes a search bar and a navigation menu with 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Business Hours' and contains the following sections:

- Organization Business Hours**: A section with instructions on selecting support team availability days and hours.
- Business Hours Detail**: A table showing the configuration for 'Default' business hours. The table has columns for 'Business Hours Name', 'Default', 'Time Zone', and 'Default Business Hours'. The rows show the days of the week (Sunday through Saturday) and their corresponding hours (24 Hours). The 'Time Zone' is set to '(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)'. The 'Default Business Hours' are marked with a checkmark.
- Holidays**: A section with an 'Add/Remove' button and a message 'No records to display'.

At the bottom of the page, there is a 'Back To Top' link and a note 'Always show me more records per related list'.

5. User Setup & Licenses

Purpose: Create test users to verify profile and permission configurations.

Test Users Created in the Org:

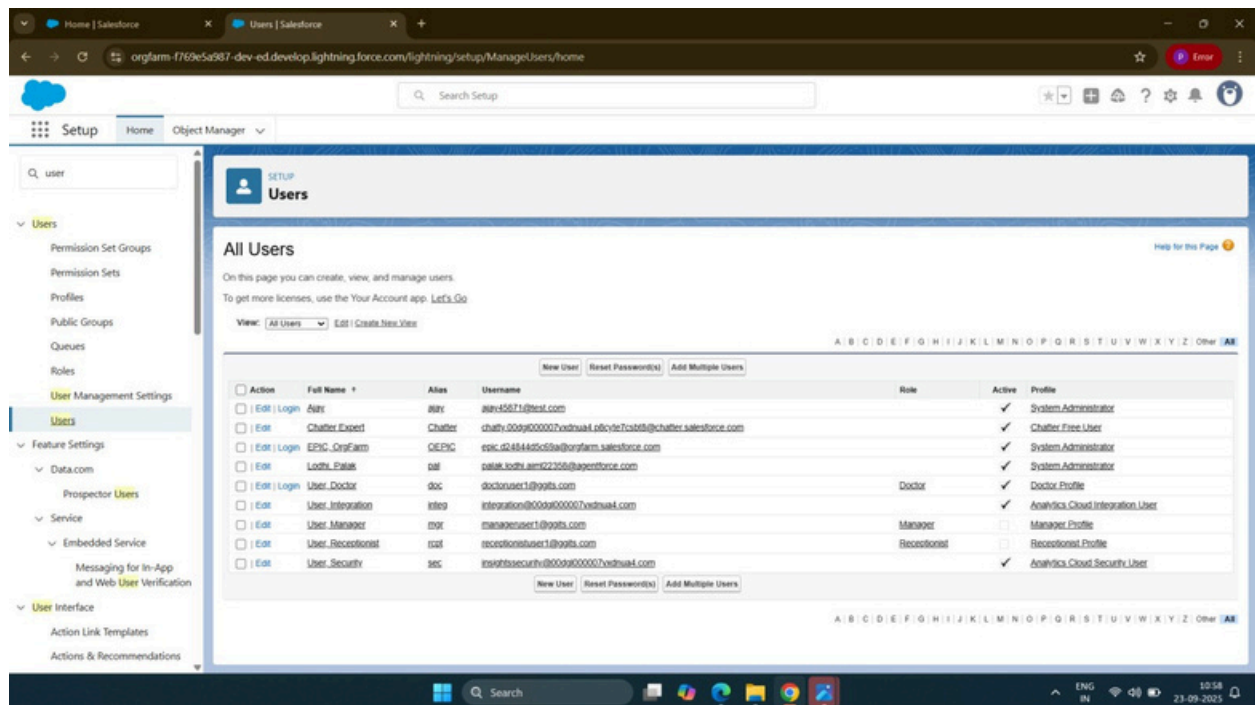
<i>User Type</i>	<i>Full Name</i>	<i>Alias</i>	<i>Username</i>	<i>Role</i>	<i>Profile</i>	<i>Active</i>
		<i>s</i>				<i>e</i>

Manager	User, Manager	mgr	manageruser1@ggits.com	Manager	Manager Profile	No
Doctor	User, Doctor	doc	doctoruser1@ggits.com	Doctor	Doctor Profile	Yes
Receptionist	User, Receptionist	rcpt	receptionistuser1@ggits.com	Receptionist	Receptionist Profile	No

Manager: Responsible for supervising all hospital activities, can view and manage all patient records, appointments, and treatments.

Doctor: Can create and update patient records (Contacts), schedule and manage appointments (Events), and record treatments (Cases).

Receptionist: Can create patient records (Contacts) and schedule appointments (Events) but cannot create treatment records (Cases).



6. Profiles

Profiles Created:

- Manager Profile
- Doctor Profile
- Receptionist Profile

ObjectPermissions:

<i>Profile</i>	<i>Contacts</i>	<i>Events</i>	<i>Cases</i>
Manager	R/C/E/D	R/C/E/D	R/C/E/D
Doctor	R	R/C/E	R/C/E
Receptionist	R/C/E	R/C/E	R

Steps:

1. Setup→Profiles→CloneStandard User
2. Rename profile accordingly
3. EditObjectSettings→configure permissions per above

Purpose:

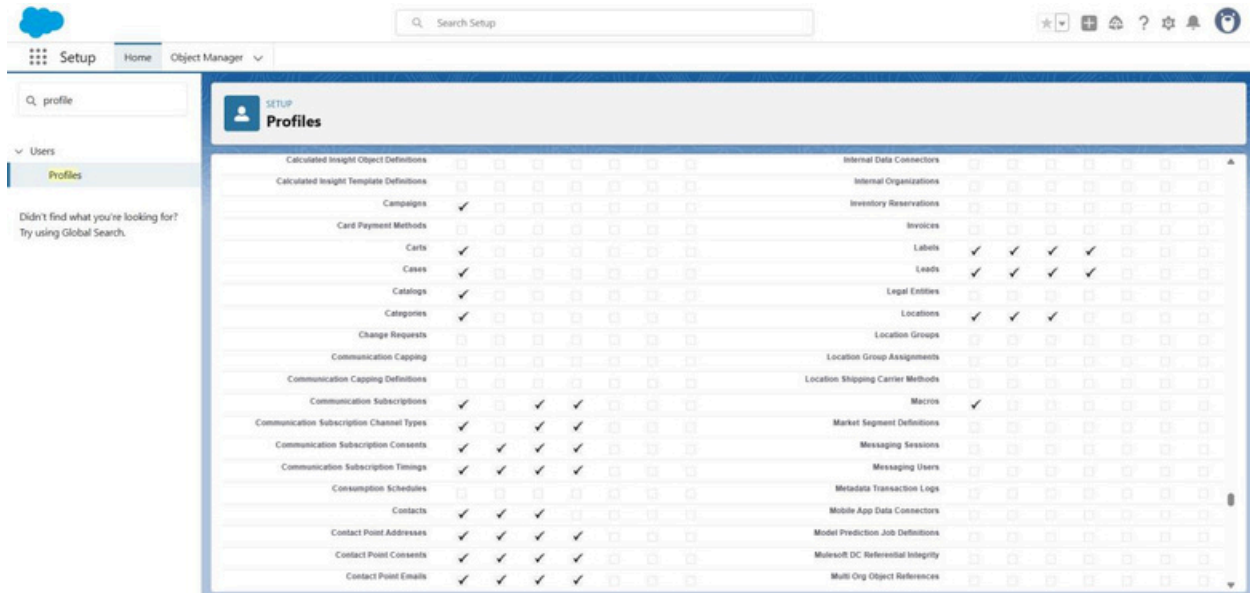
Profiles define baseline permissions for objects. Combined with roles and OWD, they control record-level access.

[illegible]

The screenshot shows the Microsoft Dynamics 365 Setup interface. The top navigation bar includes the Setup icon, Home, and Object Manager. A search bar at the top right contains the text "Search Setup". On the left sidebar, there are links for "profile" and "Users", with "Profiles" currently selected. The main area displays the "SETUP Profiles" page, which lists various system profiles in two columns. Each profile has a set of five toggle switches indicating its status.

Profile Name	Switch 1	Switch 2	Switch 3	Switch 4	Switch 5
Calculated Insight Object Definitions					
Calculated Insight Template Definitions					
Campaigns	✓				
Card Payment Methods					
Carts	✓				
Cases	✓	✓	✓	✓	
Catalogs	✓				
Categories	✓				
Change Requests					
Communication Capping					
Communication Capping Definitions					
Communication Subscriptions	✓		✓	✓	
Communication Subscription Channel Types	✓		✓	✓	
Communication Subscription Consents	✓	✓	✓	✓	
Communication Subscription Timings	✓	✓	✓	✓	
Consumption Schedules					
Contacts	✓	✓	✓	✓	
Contact Point Addresses	✓	✓	✓	✓	
Contact Point Consents	✓	✓	✓	✓	
Contact Point Emails	✓	✓	✓	✓	
Internal Data Connectors					
Internal Organizations					
Inventory Reservations					
Invoices					
Labels	✓	✓	✓	✓	
Leads	✓	✓	✓	✓	
Legal Entities					
Locations	✓	✓	✓		
Location Groups					
Location Group Assignments					
Location Shipping Carrier Methods					
Macros	✓				
Market Segment Definitions					
Messaging Sessions					
Messaging Users					
Metadata Transaction Logs					
Mobile App Data Connectors					
Model Prediction Job Definitions					
Mulesoft DC Referential Integrity					
Multi Org Object References					

Receptionist Profile :

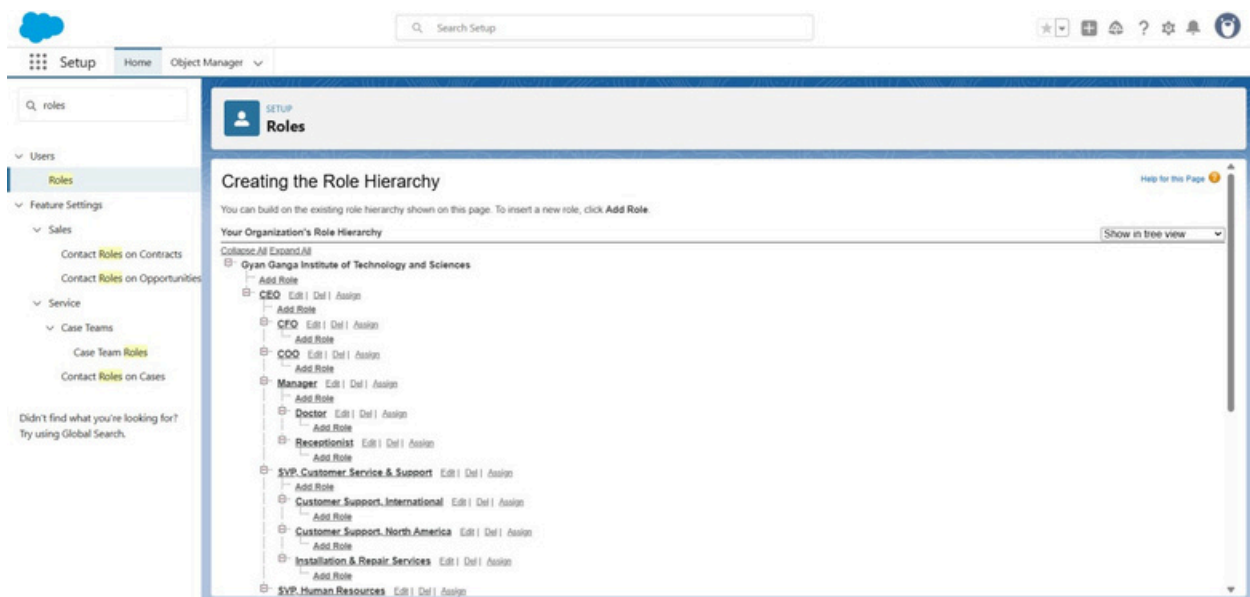


The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The left sidebar contains a search bar with 'profile' and a list of users, with 'Profiles' highlighted. The main content area displays a table of system objects and their permissions for the selected profile. The table is organized into two columns of objects, each with a grid of checkboxes for various permissions.

Object	View	Edit	Share	Transfer	Access	Other
Calculated Insight Object Definitions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Calculated Insight Template Definitions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Campaigns	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Card Payment Methods	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Carts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cases	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Catalogs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Categories	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Change Requests	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Capping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Capping Definitions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscriptions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Channel Types	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Timings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consumption Schedules	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Addresses	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Internal Data Connectors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Internal Organizations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inventory Reservations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Invoices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Labels	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Leads	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Legal Entities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Locations	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Location Groups	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Location Group Assignments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Location Shipping Carrier Methods	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Macros	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Market Segment Definitions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Messaging Sessions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Messaging Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Metadata Transaction Logs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mobile App Data Connectors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Model Prediction Job Definitions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MuleSoft DC Referential Integrity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Multi Org Object References	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7. Roles

Role Hierarchy:



The screenshot shows the Salesforce Setup interface with the 'Roles' tab selected. The left sidebar contains a search bar with 'roles' and a list of users, with 'Roles' highlighted. The main content area displays the 'Creating the Role Hierarchy' page. It includes a section titled 'Your Organization's Role Hierarchy' with a tree view showing the hierarchy of roles. The hierarchy starts with 'Gyan Ganga Institute of Technology and Sciences' and branches into various roles like CEO, CFO, COO, Manager, Doctor, Receptionist, SVP Customer Service & Support, Customer Support International, Customer Support North America, Installation & Repair Services, and SVP Human Resources. Each role has an 'Add Role' button and a 'Show in tree view' button.

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

Gyan Ganga Institute of Technology and Sciences

- CEO** (Add Role | Edit | Del | Assign)
- CFO** (Add Role | Edit | Del | Assign)
- COO** (Add Role | Edit | Del | Assign)
- Manager** (Add Role | Edit | Del | Assign)
- Doctor** (Add Role | Edit | Del | Assign)
- Receptionist** (Add Role | Edit | Del | Assign)
- SVP Customer Service & Support** (Add Role | Edit | Del | Assign)
- Customer Support International** (Add Role | Edit | Del | Assign)
- Customer Support North America** (Add Role | Edit | Del | Assign)
- Installation & Repair Services** (Add Role | Edit | Del | Assign)
- SVP Human Resources** (Add Role | Edit | Del | Assign)

Steps:

1. **Setup→Roles→ Enable Roles (if not already enabled)**
2. **AddRoleunder parent role (CEO → Manager → Doctor/Receptionist)**
3. *Save each role*

Purpose:

Roles manage record-level visibility:

- *Managers see all subordinate records*
- *Doctors see only their patient records*
- *Receptionists have limited access*

8. Permission Sets

Configuration:

- *Name: Treatment Access*
- *License: None*
- *Assigned to: Doctor User*

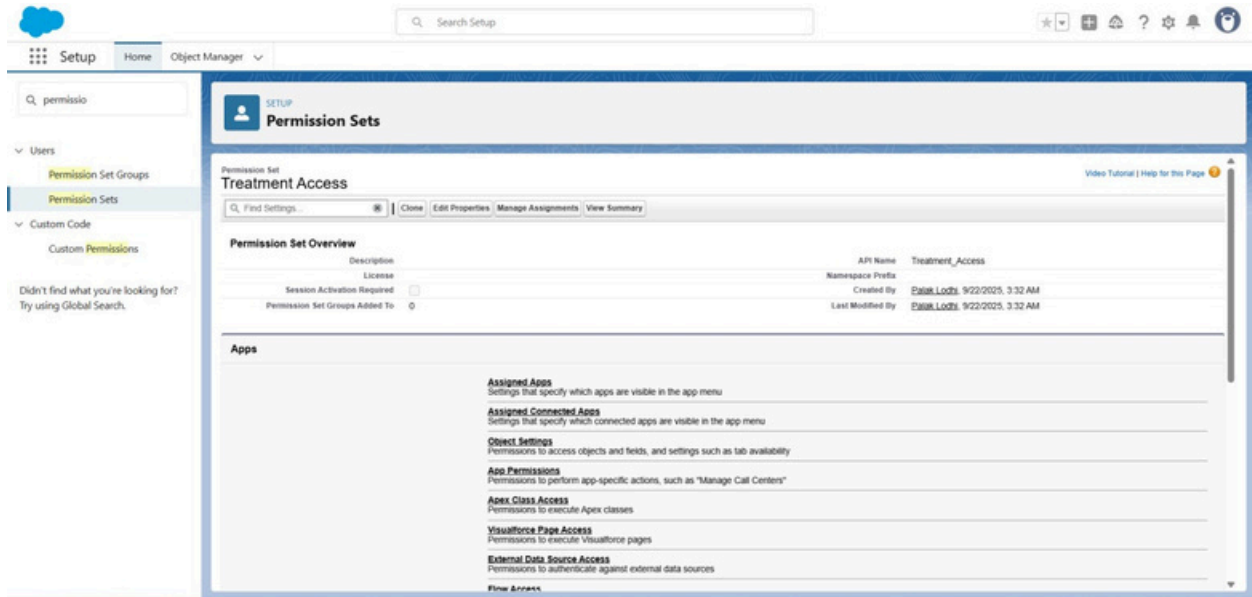
Steps:

1. **Setup → Permission Sets → New**
2. *Configure Case object permissions (Read/Create/Edit)*

3. Assign to Doctor user

Purpose:

Permission sets provide additional access without altering the user's profile, improving flexibility.



9. Org-Wide Defaults (OWD)

Configuration:

- Contacts → Private
- Cases → Private
- Events → Controlled by related Contact

Steps:

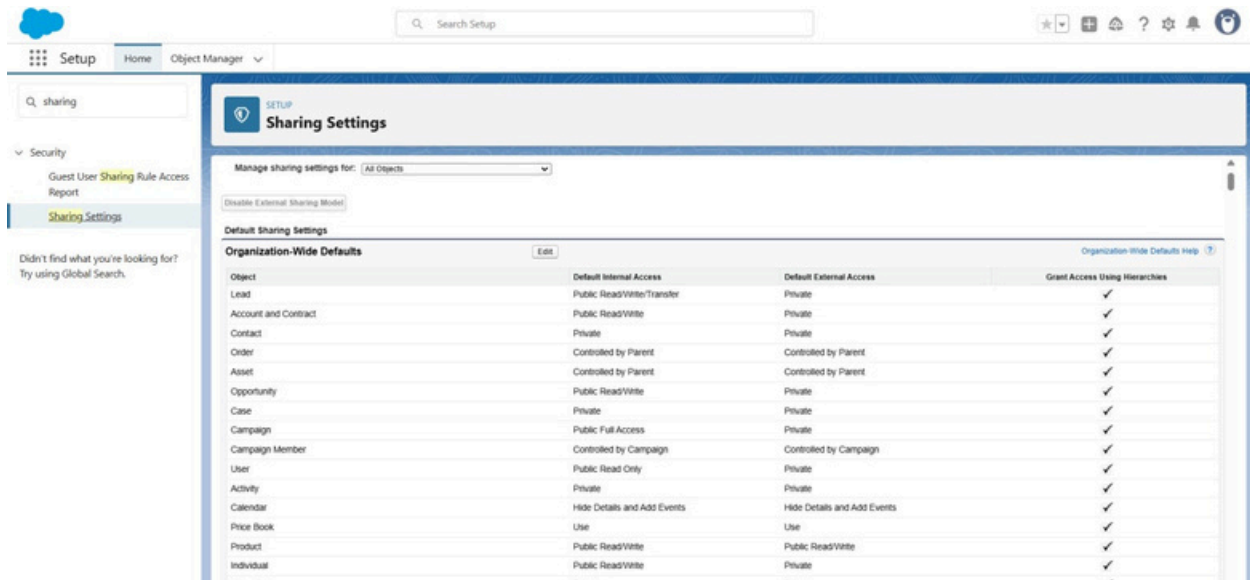
1. Setup → Sharing Settings → Edit

2. Set default internal access for Contacts and Cases to Private

3. Save

Purpose:

Ensures patient information privacy. Access is then controlled via role hierarchy or permission sets.



10. Sharing Rules

- No custom sharing rules created in Phase 2
- Default access controlled via Role Hierarchy

Purpose:

Allows for role-based sharing of records without additional rules.

11. Login Access Policies

Configuration:

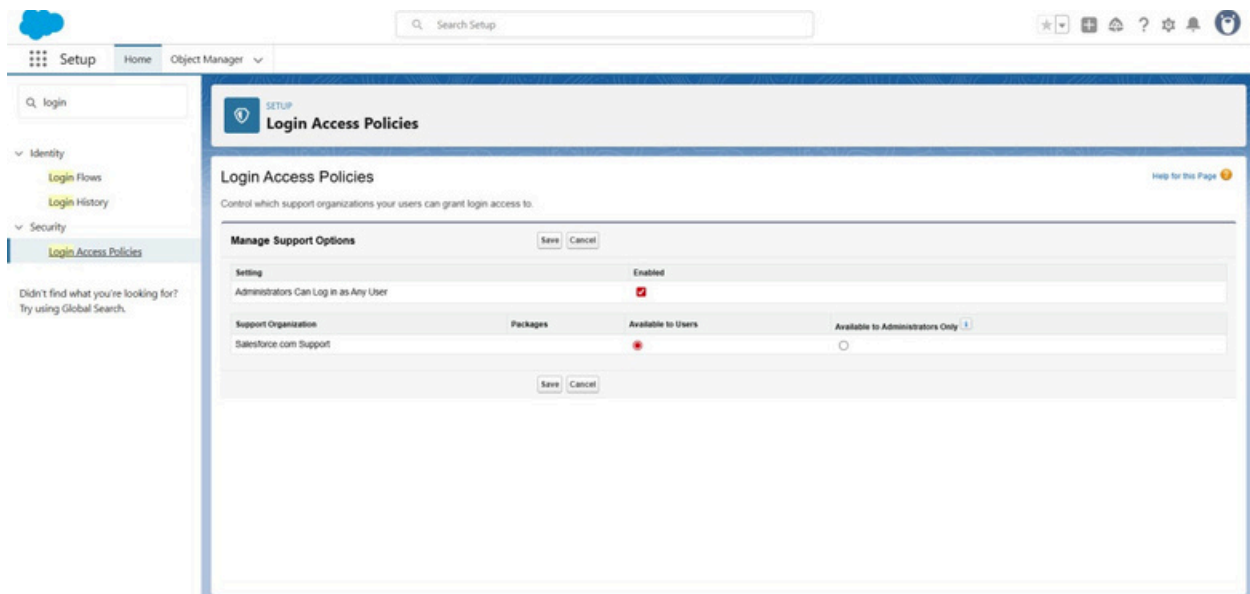
- Administrators Can Log in as Any User → Enabled

Steps:

1. Setup → Login Access Policies → Enable checkbox
2. Save

Purpose:

Allows admin to test visibility and permissions for different users without logging out and logging in manually.



13. Sandbox Usage

- Not used for Phase 2
- Developer Org sufficient for testing configurations

14. Deployment Basics

- Phase 2 focuses on *preparation of org structure*
- No deployments done yet
- Phase 3 will involve workflows, automation, and metadata deployment