**Phase 2: Org Setup & Configuration**

# 1. Overview

The purpose of this phase is to establish and configure the Salesforce organization (Org) to align with the company’s structure, governance standards, and operational requirements. This includes configuring organization settings, security models, environment setups, and deployment foundations.

Goal: To ensure the Salesforce environment is fully configured, secure, and ready for development, customization, and integration activities in subsequent phases.

# 2. Scope

This phase covers the following components

* Salesforce edition selection and organization setup
* User management, profiles, and roles
* Security model definition (OWD, sharing, permissions)
* Environment setup (Dev Org, Sandboxes)
* Deployment readiness and governance

**3. Configuration Components**

# Salesforce Editions

UserName - yash.patel.aiml22554@agentforce.com

# Company Profile Setup

Company Name – EventSync

Address – India

Language – English

**Business Hours & Holidays**

Holidays – National Holidays ,Festival Holidays and Sundays

**Fiscal Year Settings**

Fiscal year starts – January

**User Setup & Licenses**

Salesforce

System Administer

Standard User

**Profiles**

System Administrator Profile, Event Manager ,Event Coordinator ,Technical Team Profile

**Roles**

Event Manager -John Smith

Event Coordinator -Maria Singh

**Permission Sets**

Provide flexible, modular permissions beyond profiles.

**Organization-Wide Defaults (OWD)**

Define the baseline access level for all users in the system.

**Sharing Rules**

Allow exceptions to the OWD model to share records among users or teams.

**Login Access Policies**

Ensure secure and compliant access to the Salesforce environment.