**Phase 2: Org Setup & Configuration**

**1. Salesforce Editions**

* **Available Editions**: Essentials, Professional, Enterprise, Unlimited, Developer.
* For this project:
  + **Developer Edition** (free) → Best for learning & prototyping.
  + **Enterprise/Unlimited** → Needed in real-world deployment (more automation, API, and customization options).

**2. Company Profile Setup**

* Define **Company Information**:
  + Company Name, Address, Primary Contact, Currency, Locale, Default Time Zone.
* This ensures correct **event date/time tracking** and **regional attendee details**.

**3. Business Hours & Holidays**

* Configure **Business Hours** (e.g., 9 AM – 6 PM, Monday–Friday).
* Define **Holidays** (e.g., Diwali, Christmas).
* Helps in **support processes** and for time-sensitive registrations (e.g., cut-off times for events).

**4. Fiscal Year Settings**

* Standard fiscal year: 12-month cycle (Jan–Dec or Apr–Mar).
* Needed for **event performance reporting** by quarter or year.
* Example: Number of events held per fiscal quarter.

**5. User Setup & Licenses**

* Add **users** for:
  + Organizer/Admin.
  + Support staff (handling registrations).
  + Attendees (if Experience Cloud is enabled).
* Assign **licenses**:
  + Salesforce Platform License → Organizers/Admins.
  + Community/Experience Cloud License → Attendees (if portal needed).

**6. Profiles**

* Control **object-level permissions**.
* Example profiles:
  + **System Administrator** → Full access.
  + **Event Manager** → Create/manage events & attendees.
  + **Read-Only Staff** → View dashboards/reports only.

**7. Roles**

* Define hierarchy for **data visibility**.
* Example Role Structure:
  + CEO → Event Director → Event Manager → Staff.
* Higher roles see data of subordinates.

**8. Permission Sets**

* Grant **additional access** without modifying profiles.
* Example:
  + *Event Reporting Permission Set* → Allows access to dashboards.
  + *Attendee Form Access Permission Set* → For users who manage registrations.

**9. OWD (Organization-Wide Defaults)**

* Define **baseline sharing model**:
  + Event: Public Read/Write (since organizers need full access).
  + Attendee: Private (only event managers see their event’s attendees).

**10. Sharing Rules**

* Provide extra access beyond OWD.
* Example:
  + Share all attendees of an event with staff assigned to that event.
  + Share event dashboards with executives.

**11. Login Access Policies**

* Configure **security settings**:
  + Trusted IP ranges (only allow login from company network).
  + Two-factor authentication for admins.
  + Login hours (restrict staff logins outside business hours).

**12. Dev Org Setup**

* Use **Salesforce Developer Org** (free).
* Install required **apps from AppExchange** (if benchmarking needed).
* Create **custom objects, fields, validation, flows** for the project.

**13. Sandbox Usage**

* Sandboxes = Testing environments.
* Types: Developer, Developer Pro, Partial Copy, Full Copy.
* Use Developer Sandbox → Build & test event registration logic.
* Use Full Sandbox → Test with production-like data.

**14. Deployment Basics**

* **Change Sets** → Deploy configurations from Sandbox → Production.
* **Ant Migration Tool / SFDX** → For code-based deployments (Apex triggers, classes).
* Deployment Checklist:
  + Code must have **75% test coverage**.
  + Validate deployment in sandbox first.
  + Deploy during **off-hours** to avoid disruption.