Phase 2: Org Setup & Configuration

1. Salesforce Editions

- The project is implemented on the Salesforce Developer Edition org, which provides free access for customization and testing.
- For real-world deployment, **Enterprise Edition** would be preferred because it supports advanced features like profiles, roles, sharing rules, API integration, and sandbox creation.

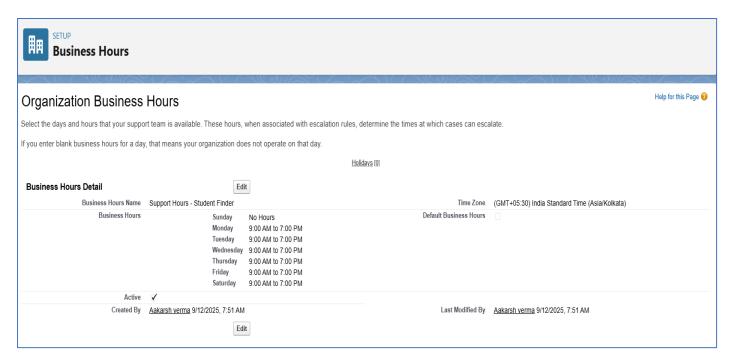
2. Company Profile Setup

- Company profile set as Student Accommodation Finder Pvt. Ltd.
- Details such as company name, address, primary contact, default currency (INR), and time zone configured.



3. Business Hours & Holidays

- Business hours: Monday-Saturday (9:00 AM 7:00 PM)
- Public holidays (e.g., Independence Day, Diwali, New Year) added

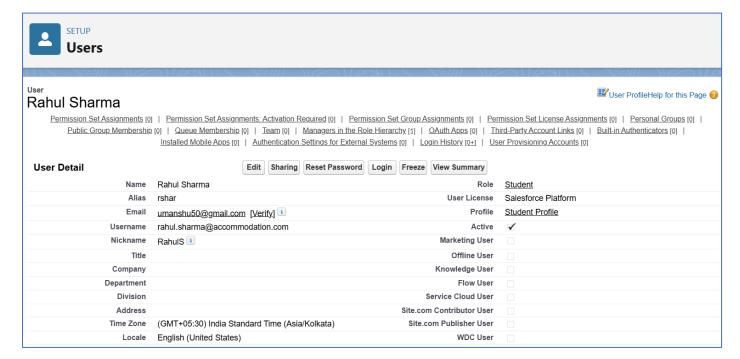


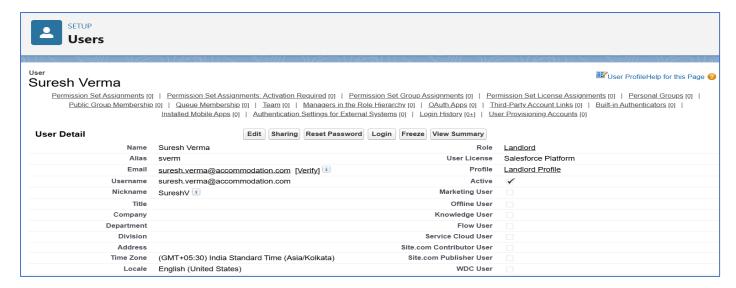
4. Fiscal Year Settings

• Standard fiscal year chosen (April-March)

5. User Setup & Licenses

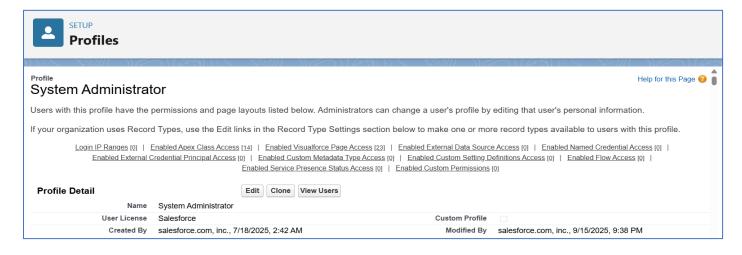
- Users created for roles: Students, Landlords, Admins
- Licenses assigned:
 - Platform License → Students and Landlords
 - Salesforce License → Admins and Managers

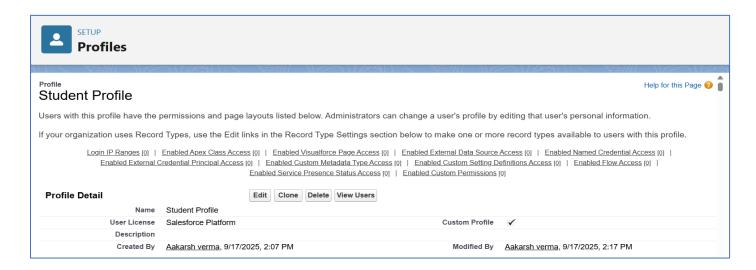


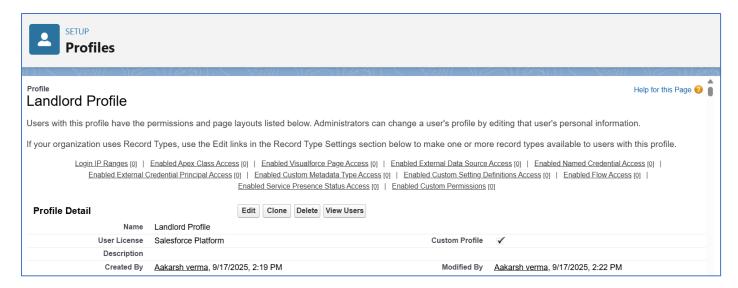


6. Profiles

- Profiles created to define baseline permissions:
 - Student Profile search, request, view accommodations
 - o Landlord Profile list accommodations, update availability, view bookings
 - o Admin Profile full access

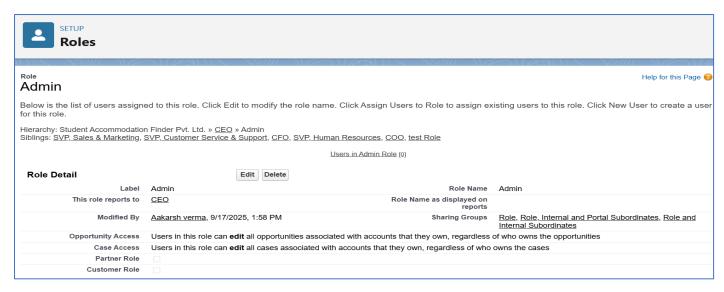


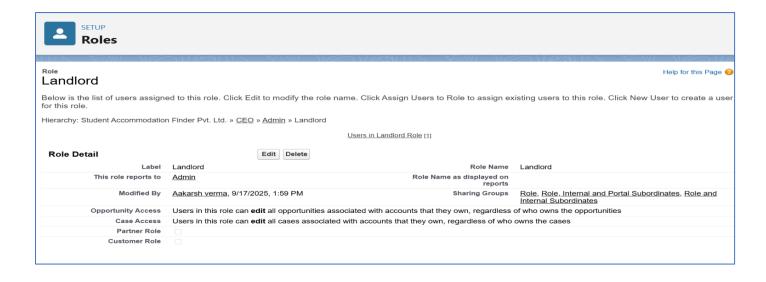


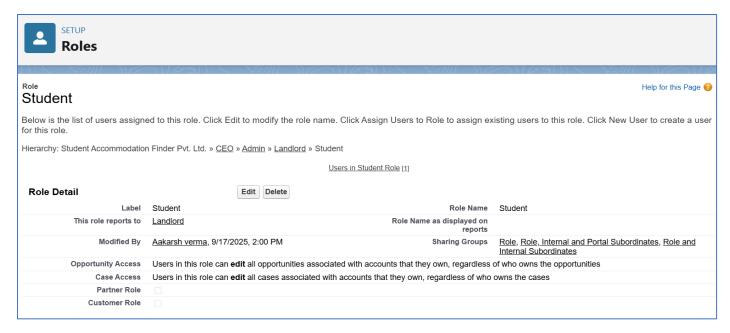


7. Roles

- Role hierarchy:
 - o Admin (top-level)
 - Landlord Manager
 - Student Support Executive

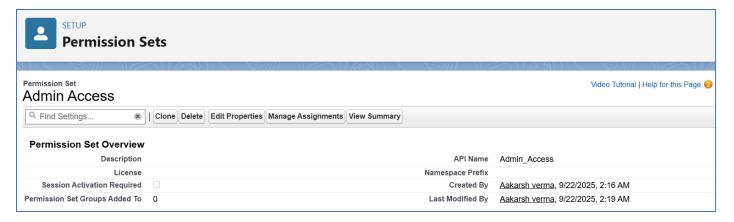


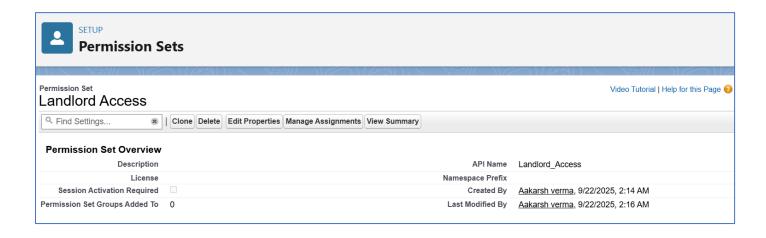


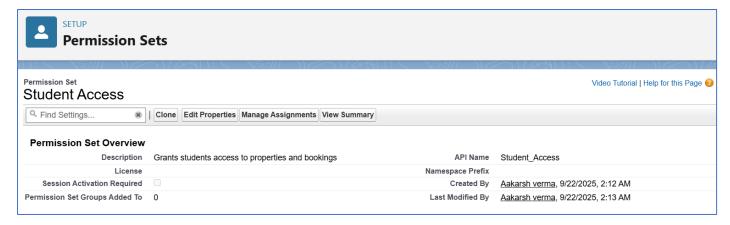


8. Permission Sets

- · Grant additional permissions without modifying profiles
- Examples:
 - Students → Read Accommodation, Create Booking
 - Landlords → Manage Accommodation, Approve Bookings
 - Admins → Full access







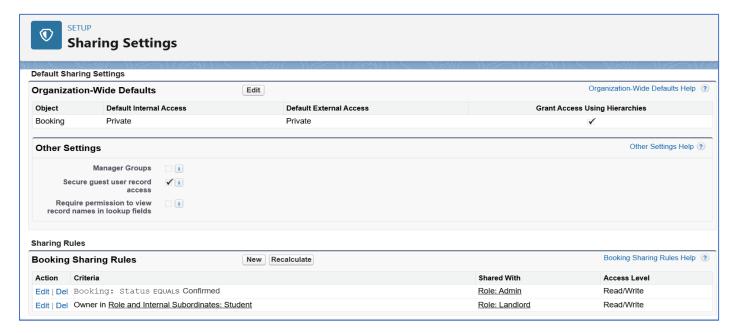
9. Organization-Wide Defaults (OWD)

- Booking → Private
- Accommodation → Public Read/Write
- Student → Private
- Landlord → Private



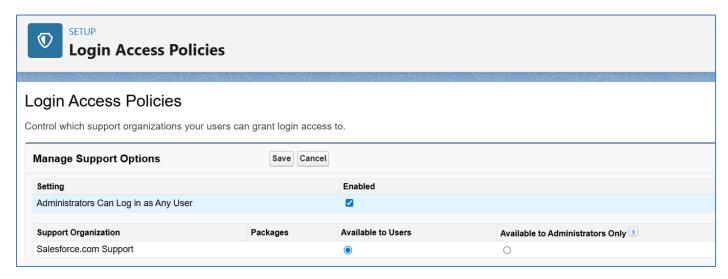
10. Sharing Rules

- Owner-Based: Bookings owned by Students → shared with Landlord → Read/Write
- **Criteria-Based**: Bookings with Status = Confirmed → shared with Admin → Read/Write



11. Login Access Policies

Enable admins temporary access for support



12. Developer Org Setup

- Sign up/Login at developer.salesforce.com
- Create users: Students, Landlords, Admins
- Create custom objects: Student, Landlord, Accommodation, Booking, Payment
- App & Tab Setup: Booking, Accommodation, Student, Landlord, Payment

13. Sandbox Usage

Developer Edition does not include Sandbox; skipped

14. Deployment Basics

Salesforce CLI

sfdx force:auth:web:login -a DevOrg

sfdx force:source:pull

sfdx force:auth:web:login -a TargetOrg

sfdx force:source:push -u TargetOrg