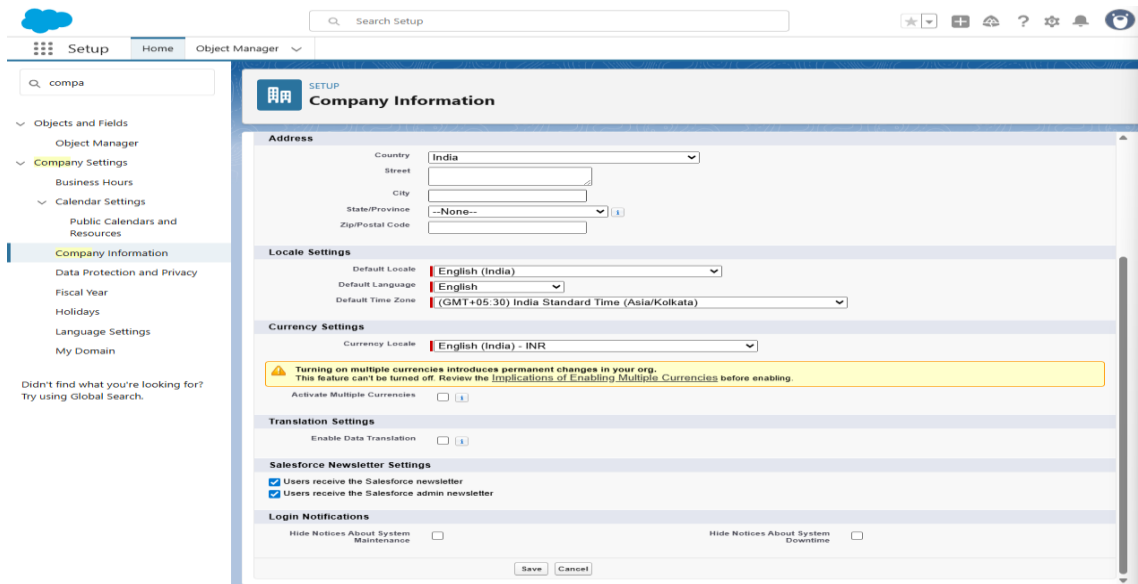


Phase 2 — Org setup & configuration

Project Title: Event Venue CRM

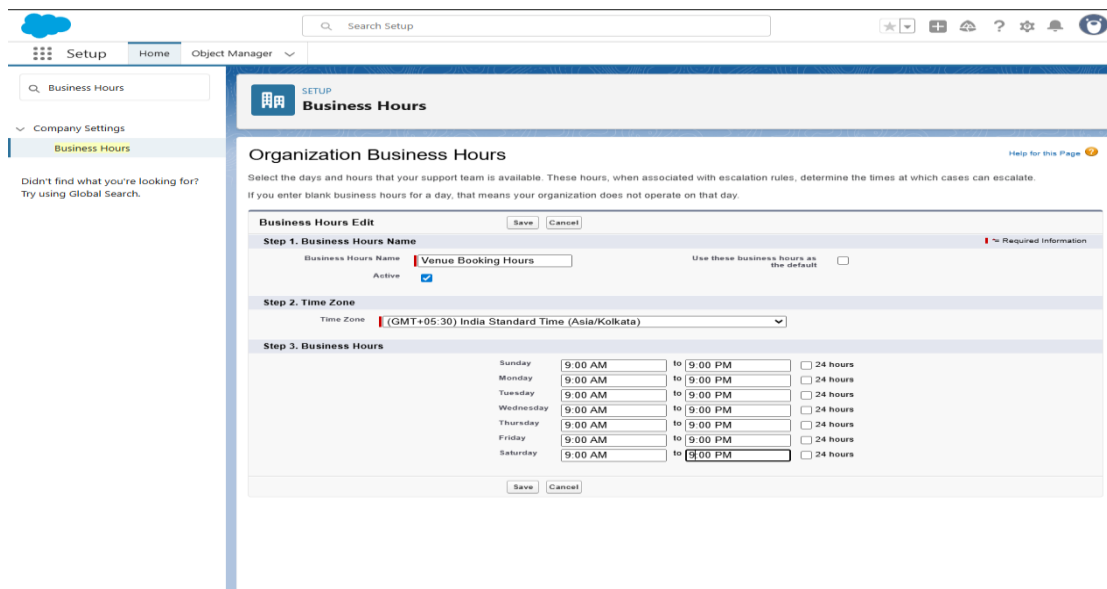
2.1 Basic org settings

1. Setup → *Company Settings* → Company Information → update Default Locale, Time Zone, Default Currency.



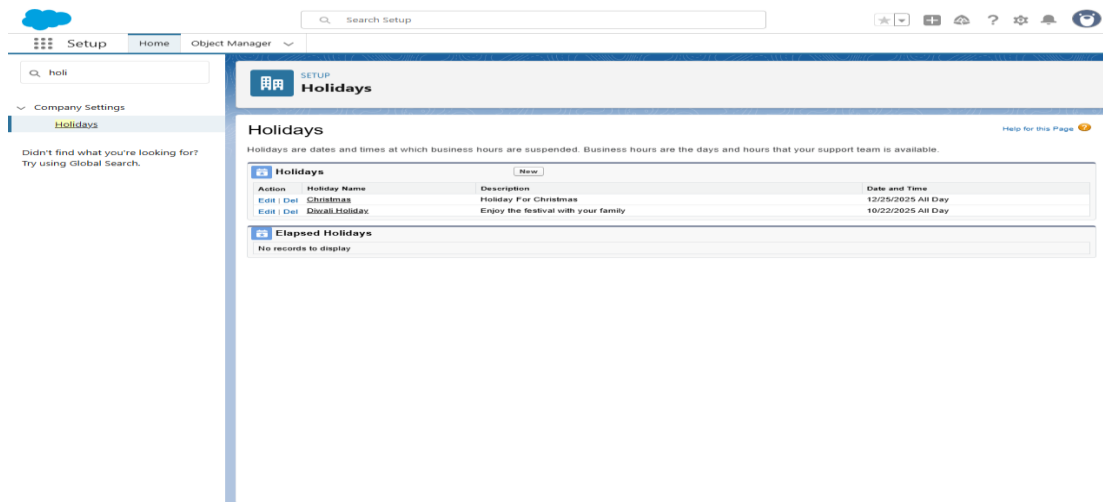
The screenshot shows the Salesforce Setup interface with the 'Company Information' page selected. The left sidebar contains a navigation menu with options like 'Setup', 'Home', 'Object Manager', and 'Company Settings'. The main content area is titled 'Company Information' and includes sections for Address, Locale Settings, Currency Settings, Translation Settings, Salesforce Newsletter Settings, and Login Notifications. The 'Address' section shows 'India' as the country. 'Locale Settings' shows 'English (India)' as the default locale and '(GMT+05:30) India Standard Time (Asia/Kolkata)' as the default time zone. 'Currency Settings' shows 'English (India) - INR' as the currency locale. A yellow warning banner states: 'Turning on multiple currencies introduces permanent changes in your org. This feature can't be turned off. Review the [Implications of Enabling Multiple Currencies](#) before enabling.' Below this, there are checkboxes for 'Activate Multiple Currencies', 'Enable Data Translation', and 'Users receive the Salesforce newsletter'.

2. Setup → *Business Hours* → New → create Venue Booking Hours.



The screenshot shows the Salesforce Setup interface with the 'Business Hours' page selected. The left sidebar contains a navigation menu with options like 'Setup', 'Home', 'Object Manager', and 'Company Settings'. The main content area is titled 'Business Hours' and includes sections for 'Organization Business Hours', 'Business Hours Edit', 'Step 1. Business Hours Name', 'Step 2. Time Zone', and 'Step 3. Business Hours'. The 'Business Hours Edit' section shows 'Venue Booking Hours' as the business hours name. The 'Step 2. Time Zone' section shows '(GMT+05:30) India Standard Time (Asia/Kolkata)' as the time zone. The 'Step 3. Business Hours' section shows a table with columns for Day, Start Time, End Time, and 24 hours. The table is populated with data for Sunday through Saturday, with start times at 9:00 AM and end times at 9:00 PM. The '24 hours' checkbox is checked for all days.

3. Setup → *Holidays* → add semester breaks.

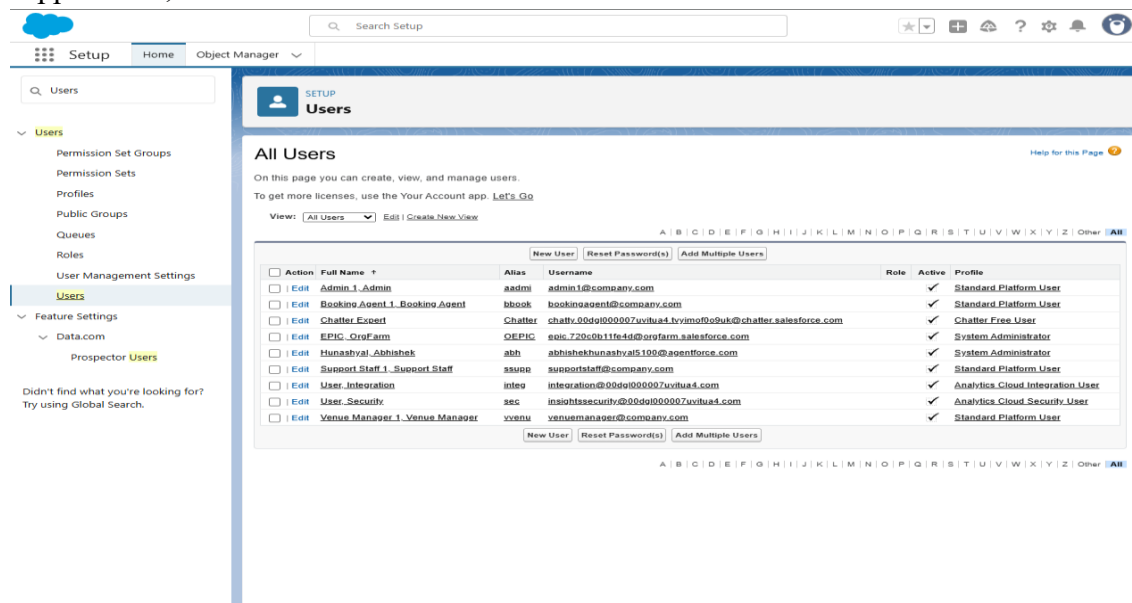


2.2 Enable features

1. Setup → *Quick Find* → Digital Experiences → enable if you want a customers to request bookings online.

2.3 Users, Profiles, Roles

1. Setup → *Users* → New User → create sample accounts: VenueManager, supportStaff,....

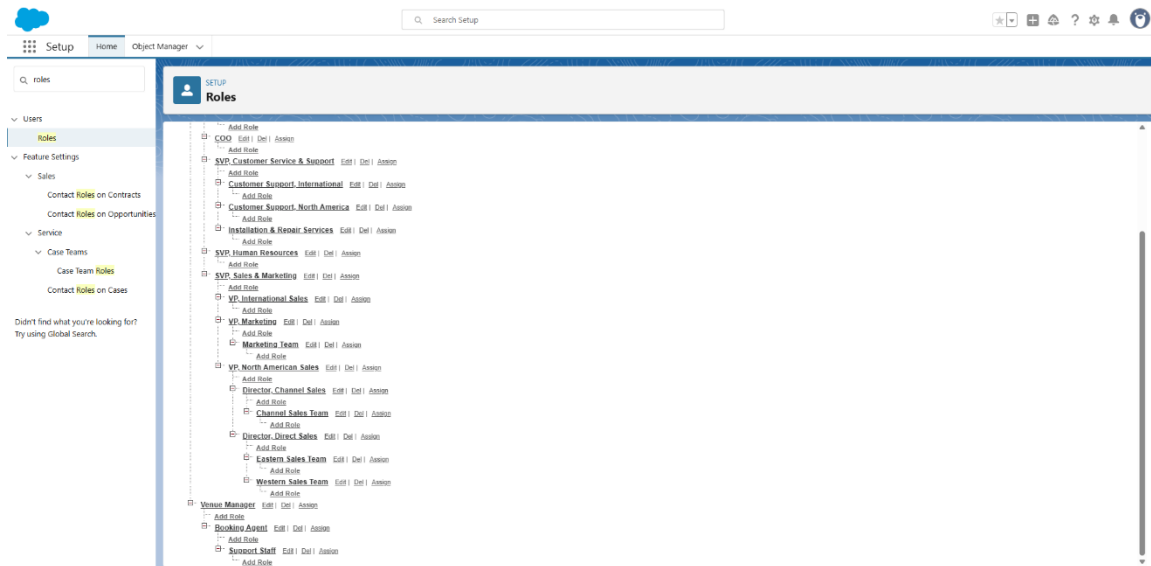


Setup → Profiles → Clone *Standard User*.

- Booking_Agent_Profile → Create/Edit Bookings only.
- Venue_Manager_Profile → Full access to Venues & Bookings.
- Support_Staff_Profile → Read-only access.

2. Setup → *Roles* → Set Up Roles → create hierarchy:

- Admin
 - Venue Manager
 - Booking Agent
 - Support Staff



Setup → Permission Sets → New → *High_Value_Booking_PS*.

Grant special permissions (e.g., approve bookings > ₹1,00,000, export reports).

2.4 Security / OWD / Sharing

Setup → Sharing Settings → Edit

- Venues = Public Read Only
- Bookings = Private
- Customers = Private

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	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓
Product	Public Read/Write	Public Read/Write	✓
Individual	Public Read/Write	Private	✓
Voice Call	Private	Private	✓
Activation Target	Private	Private	✓

1. Create Sharing Rules: e.g., Share Bookings where *Booking: Number of guests greater than 200* → Role = Venue Manager (Read/Write).

Work Plan Template Sharing Rules [New](#) [Recalculate](#) [Work Plan Template Sharing Rules Help](#)

No sharing rules specified.

Work Step Template Sharing Rules [New](#) [Recalculate](#) [Work Step Template Sharing Rules Help](#)

No sharing rules specified.

Work Type Sharing Rules [New](#) [Recalculate](#) [Work Type Sharing Rules Help](#)

No sharing rules specified.

Work Type Group Sharing Rules [New](#) [Recalculate](#) [Work Type Group Sharing Rules Help](#)

No sharing rules specified.

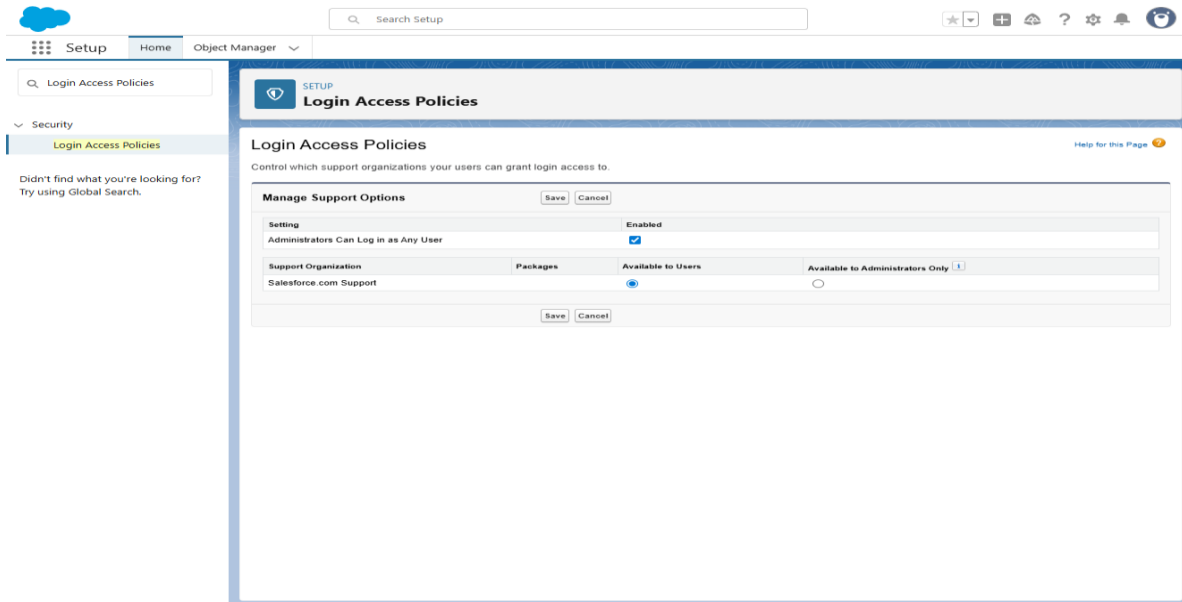
Booking Sharing Rules [New](#) [Recalculate](#) [Booking Sharing Rules Help](#)

Action	Criteria	Shared With	Access Level
Edit Del	Booking: Number of Guests GREATER THAN 200	Role: Venue Manager	Read/Write

Customer Sharing Rules [New](#) [Recalculate](#) [Customer Sharing Rules Help](#)

No sharing rules specified.

2. Setup → *Login Access Policies* → enable admin access if needed for troubleshooting.



2.4 Dev org & sandbox usage

- Use Developer org for building, Sandbox for UAT. Create a Partial Copy sandbox for more realistic data if available.
- Dev Org Setup
- To implement the following project a Salesforce Developer Edition org was setup.
- Made a GitHub Repository for source control.
- Setting up the VS Code and SFDX for the implementation of the LWC Component for development.