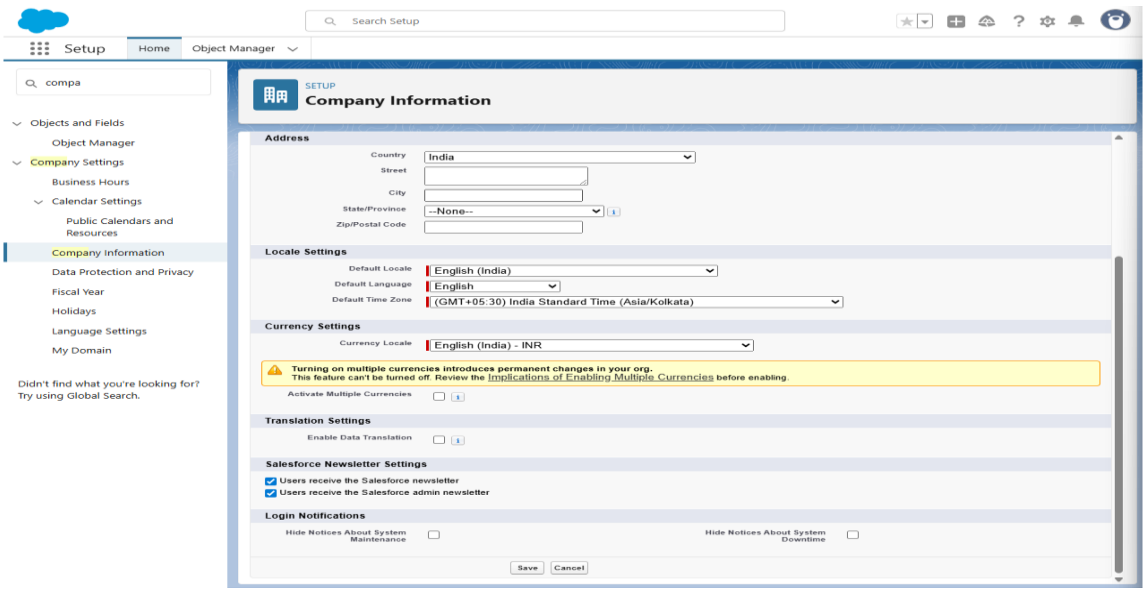
Phase 2 — Org setup & configuration

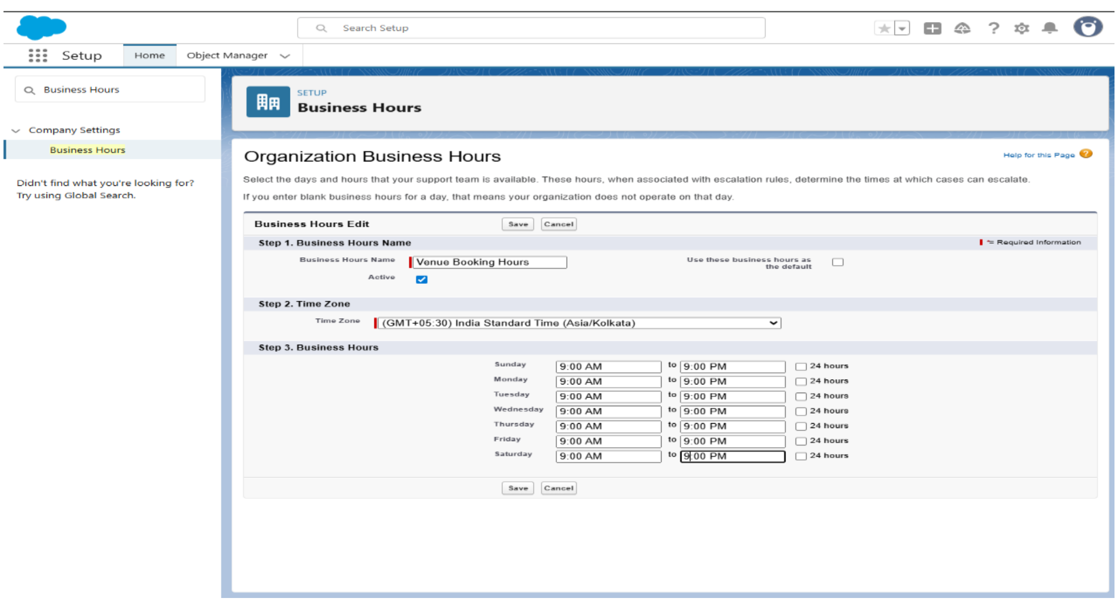
Project Title: Venue Connect CRM

2.1 Basic org settings

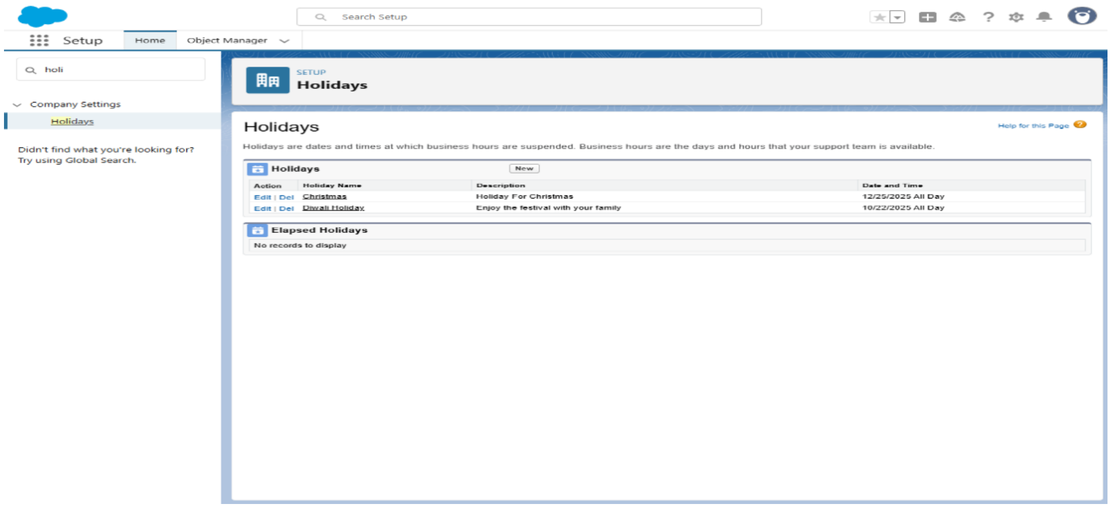
1. Setup → *Company Settings* → Company Information → update Default Locale, Time Zone, Default Currency.



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



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

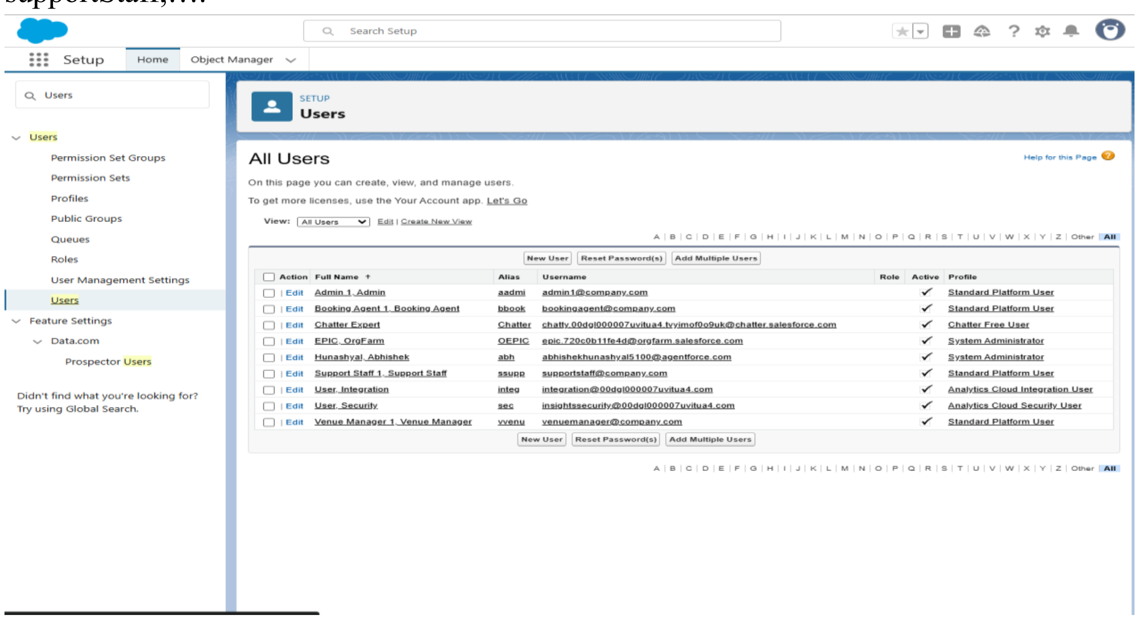


2.2 Enable features

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

2.3 Users, Profiles, Roles

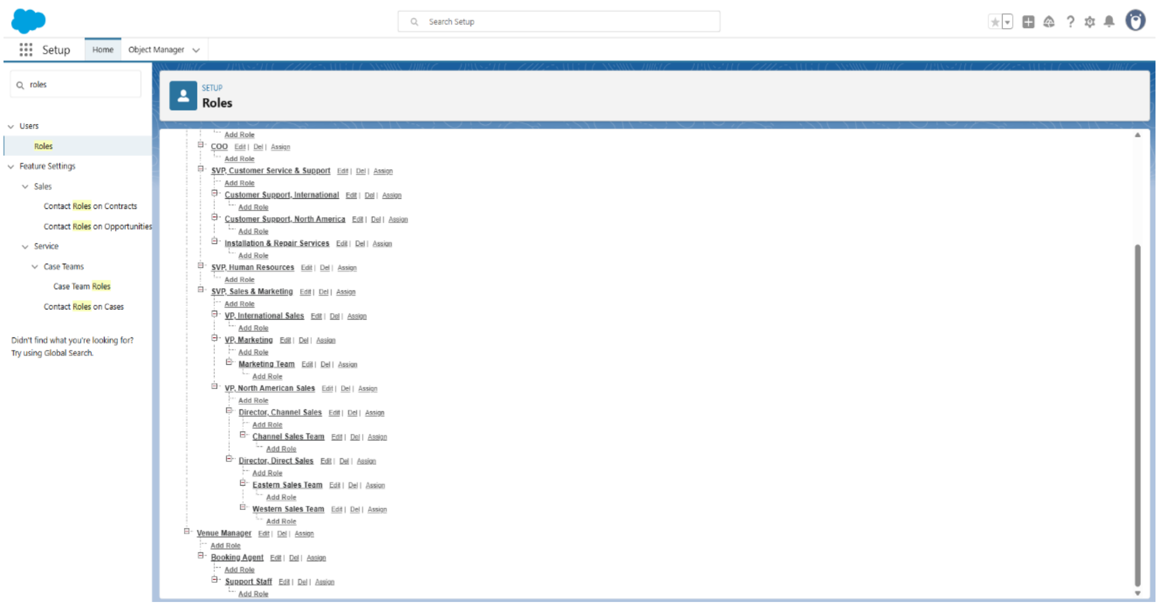
1. Setup → *Users* → New User → create sample accounts: VenueManager, supportStaff,….



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

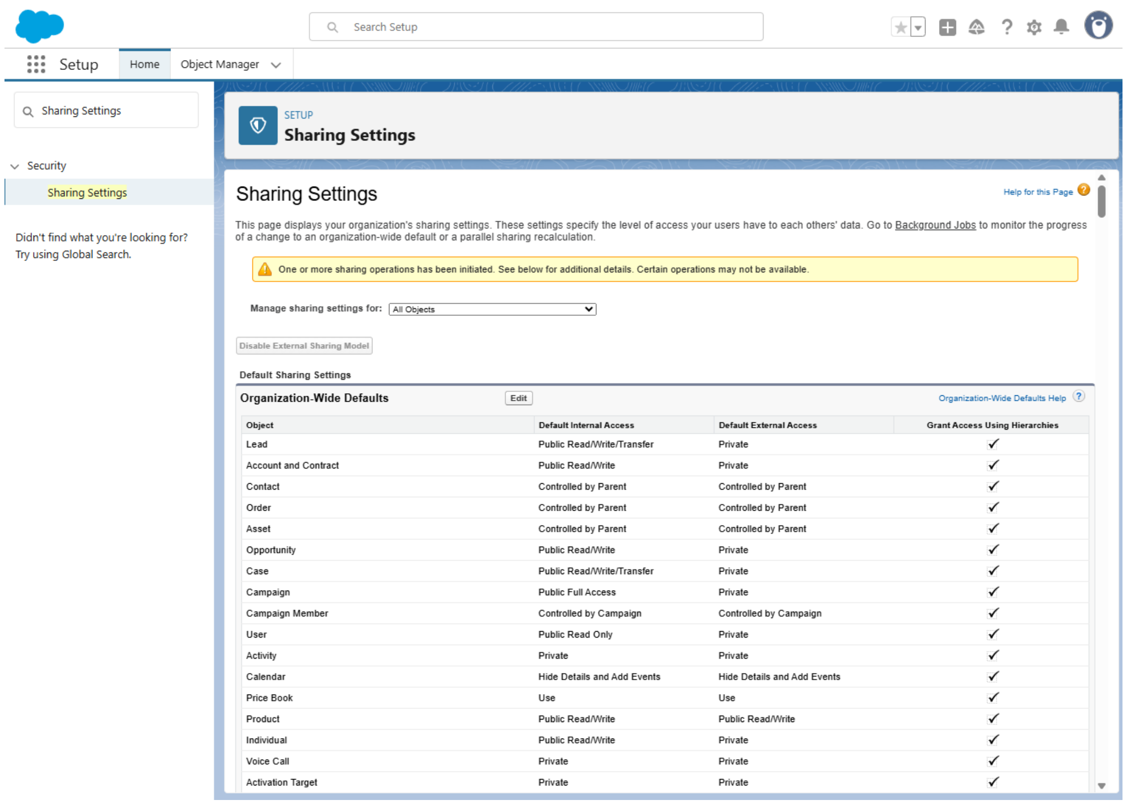


Setup → Permission Sets → New → *High_Value_Booking_PS*.
Grant special permissions (e.g., approve bookings > ₹1,00,000, export reports).

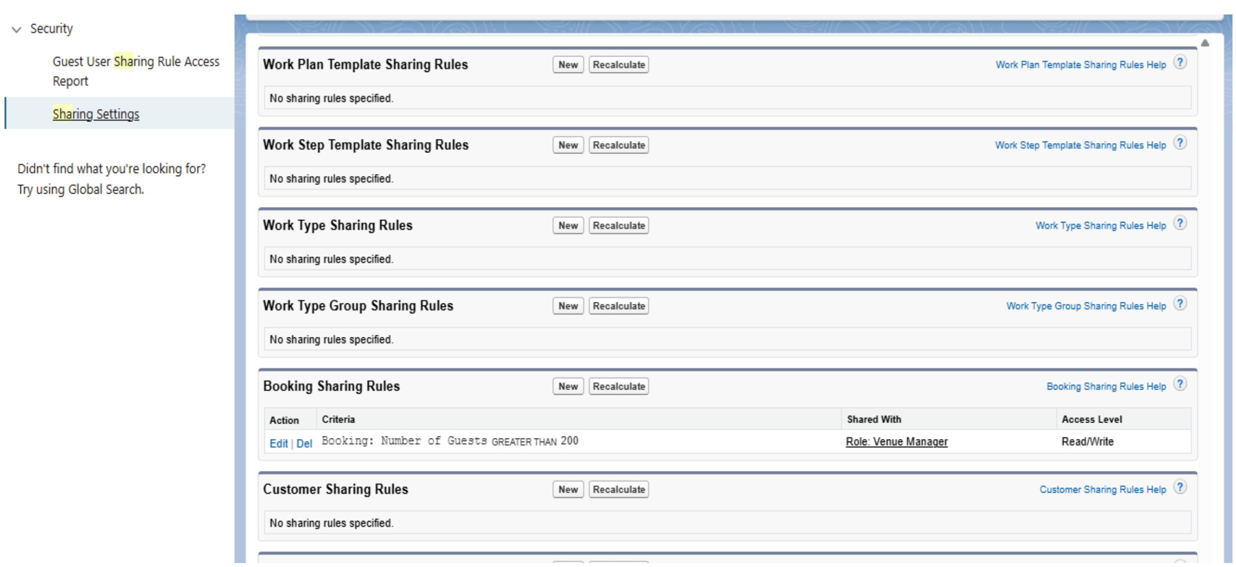
2.4 Security / OWD / Sharing

Setup → Sharing Settings → Edit

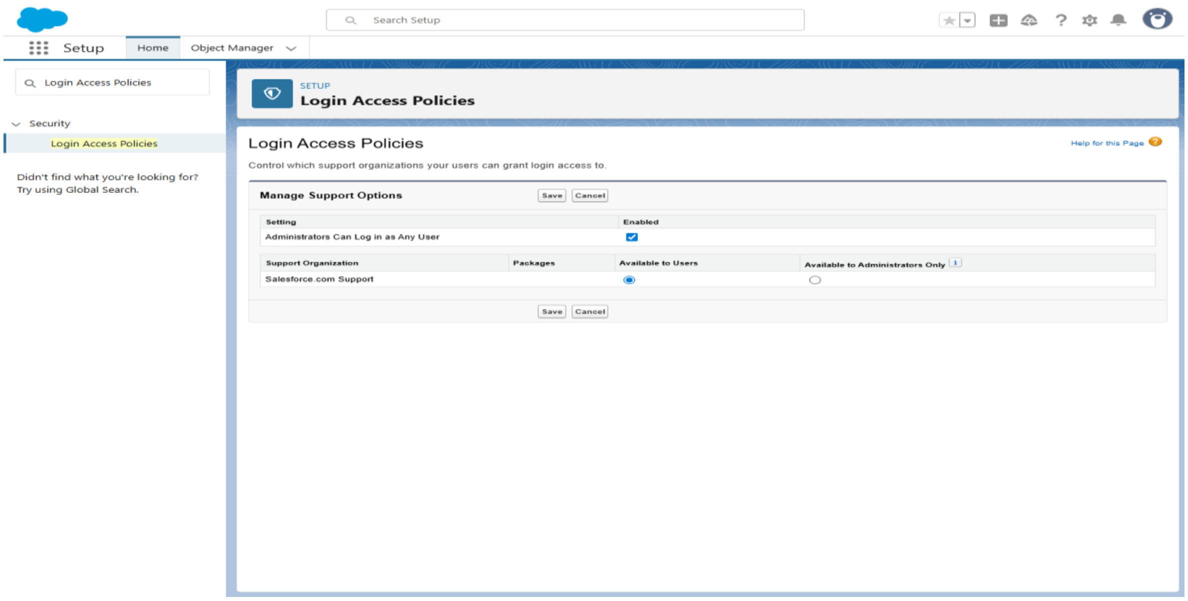
- Venues = Public Read Only
- Bookings = Private
- Customers = Private



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



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



2.5 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.