Phase 2: Org Setup & Configuration

This phase focuses on configuring the Salesforce Org to support the Sports Equipment Rental

Management System. The goal is to set up the foundation of the environment, security model, user

access, and deployment strategy.

1. Salesforce Editions

● Developer Edition (Dev Org) – Free edition for development, configuration, and testing.

● Enterprise Edition (Target) – Chosen for scalability, role hierarchy, advanced sharing,

profiles, and reporting.

● Sandbox Types Used: Developer Sandbox, Partial Copy Sandbox, Full Sandbox

(Future).

2. Company Profile Setup

● Setup → Company Information.

● Organization Name: Sports Equipment Rental System.

● Default Time Zone: Asia/Kolkata, Locale: English (India), Currency: INR (■).

● Multi-Currency: Enabled (future scope).

3. Business Hours & Holidays

● Business Hours: Mon–Sat, 9:00 AM – 7:00 PM IST.

● Holidays: Republic Day, Independence Day, Diwali, Academy-specific events.

● Used in escalation rules and workflow triggers.

4. Fiscal Year Settings

● Standard Fiscal Year: April–March.

● Custom Fiscal Year: Optional, for tournament tracking.

5. User Setup & Licenses

● Setup → Users → New User.

● Licenses: Salesforce License (CRM Admin), Salesforce Platform (Sports Admins),

Customer Community (Customers).

● Feature Licenses: Marketing User, Knowledge User (future).

6. Profiles

● System Administrator – Full access.

● Sports Admin (Custom) – Equipment (CRED), Rental (CRED), Customer (Read/Edit),

Reports/Dashboards (Manage).

● Customer Profile – Equipment (Read), Rental (Create/Read own records), No reports.

7. Roles & Role Hierarchy

● Hierarchy: CRM Admin → Sports Admin → Customer.

● Ensures data visibility flows upwards.

8. Permission Sets

● Rental Management Access – CRUD on rentals.

● Reports & Dashboards Access – Dashboard creation.

● Notification Access – Send Emails/SMS.

● Data Export Access – Restricted.

9. Organization-Wide Defaults (OWD)

● Equipment: Public Read Only.

● Rentals: Private.

● Customers: Private.

10. Sharing Rules

● Rentals shared with Sports Admin role.

● Reports shared with Sports Management Committee (future).

● Criteria-based: High-value rentals shared with senior admins.

11. Login Access Policies

● Admins can log in as any user.

● MFA enforced for Admins/Sports Admins.

● IP Whitelisting for academy access.

● Login Hours restricted for Sports Admins.

12. Dev Org Setup

● Created custom app: Sports Rental Management (tabs: Equipment, Rentals,

Customers, Reports).

● Schema built via Object Manager.

13. Sandbox Usage

● Developer Sandbox – Unit testing.

● Partial Copy Sandbox – UAT with test data.

● Full Sandbox (future) – Training/performance testing.

14. Deployment Basics

● Change Sets used for deployment.

● Pipeline: Dev Org → Partial Copy → Production.

● Pre-deployment: Data backup, Freeze users.

● Post-deployment: Validate access, Regression test, Assign permission sets.