

◆ Phase 2: Org Setup & Configuration

1. Salesforce Editions

- **Step:** Sign up for a **free Salesforce Developer Edition** → developer.salesforce.com/signup.
 - **Why:** It gives you Enterprise-level features (Profiles, Roles, Permission Sets, OWD, Sharing, API access) — everything you need.
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2. Company Profile Setup

- Go to **Setup** → **Company Settings** → **Company Information**.
 - **Update details:** Company Name → *IP Management Solutions*, Address, Currency (INR/USD), Default Locale (English - India).
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3. Business Hours & Holidays

- **Setup** → **Company Settings** → **Business Hours**.
 - Define: *Mon–Fri, 9 AM–6 PM*.
 - Add a holiday: e.g., *Republic Day (26 Jan)* or *Christmas (25 Dec)*.
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4. Fiscal Year Settings

- **Setup** → **Company Settings** → **Fiscal Year**.
 - Use **Standard Fiscal Year** → starting *April*.
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5. User Setup & Licenses

- You'll only have **1 user (yourself)** in Dev Org.
 - But for demo:
 - Create dummy users: *IP Admin, Inventor, Legal Officer*.
 - Assign them standard Salesforce licenses.
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6. Profiles

- Use **Standard Profiles** (System Admin, Standard User).
 - Clone *Standard User* → create “**Inventor Profile**”.
 - Restrict object access (e.g., Inventors shouldn't edit Legal Notices).
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7. Roles

- **Setup** → **Roles**.
 - Create simple hierarchy:
 - CEO (top)
 - IP Admin
 - Inventors
 - Legal Team
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8. Permission Sets

- Create Permission Set: **Patent Manager Access**.
 - Add extra rights (Modify All on Patent object).
 - Assign to IP Admin user.
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9. OWD (Org-Wide Defaults)

- **Setup → Sharing Settings**.
 - Set **Patent, Filing, Renewal, Legal Notice → Private**.
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10. Sharing Rules

- Add Sharing Rule:
 - If Role = *Legal Team*, then share **Legal Notices** read/write.
 - If Role = *Inventor*, then share their own filings only.
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11. Login Access Policies

- **Setup → Login Access Policies**.
 - Enable: “Admins can log in as any user.”
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12. Dev Org Setup

- Enable **Dev Hub** (Setup → Dev Hub).
 - Create a simple **Scratch Org (optional)** if you want practice with SFDX.
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13. Deployment Basics

- Use **Change Sets** if you spin up a 2nd Dev Org (optional).
- Or use **SFDX Git workflow**:
 - `sfdx force:source:retrieve` → get metadata.
 - Push to GitHub.
 - `sfdx force:source:deploy` → deploy to target org.