**📌 Phase 2: Org Setup & Configuration**

In this phase, we prepared the Salesforce development environment and configured the basic organizational settings required for BizConnect360.

* **Salesforce Editions:** We worked on a **Developer Edition Org**, which provides full features for building and testing apps like BizConnect360.
* **Company Profile Setup:** The company profile was configured with details such as organization name and default currency (INR).
* **Business Hours & Holidays:** Default business hours were set to IST (Indian Standard Time). This ensures proper SLA tracking for sales and service processes. Holidays can be added for accurate case and task management.
* **Fiscal Year Settings:** Standard fiscal year was adopted for financial tracking and reporting in BizConnect360.
* **User Setup & Licenses:** Multiple users were created to represent different roles:
  + **Sales Rep** (to handle Leads and Opportunities)
  + **Service Agent** (to manage Cases, Field Visits, Feedback)
  + **Accountant** (to handle Invoices)  
    Each user was assigned a Salesforce license.
* **Profiles:** Custom profiles were created by cloning the Standard User profile, e.g., *Sales Profile* and *Accountant Profile*, to control object-level permissions.
* **Roles:** Roles can be defined to control record-level hierarchy (e.g., Sales → Service → Finance), though for our demo we focused on profiles and sharing rules.
* **Permission Sets:** A special Permission Set named **Invoice Access** was created to give extra permissions to the Accountant for Invoice object operations.
* **OWD (Org-Wide Defaults):** By default, sharing settings were kept private for sensitive objects like Invoices, while Accounts and Opportunities followed standard sharing rules.
* **Sharing Rules:** Could be applied to share records automatically with specific groups (e.g., allowing Service Agents to view Invoices related to their Accounts).
* **Login Access Policies:** Configured to ensure secure access and session handling.
* **Dev Org Setup:** The Developer Org served as the primary environment.
* **Sandbox Usage & Deployment Basics:** While a sandbox wasn’t mandatory for this project, Salesforce change sets and VS Code with SFDX CLI were used for deployments.

👉 Overall, Phase-2 ensured that the environment was ready with proper **users, access controls, and baseline configurations** before starting development.