Phase 2 – Org Setup & Configuration

Goal:
Prepare Salesforce Developer Org environment.

Salesforce Edition:
Use Salesforce Developer Edition (free) for full customization.

Company Profile Setup:
Add company details, time zone, set currency (INR/USD).

Business Hours & Holidays:
Define working hours (9 AM – 6 PM) and public holidays.

Fiscal Year Setup:
Use Standard fiscal year (Jan–Dec) for reporting.

User Setup & Licenses:
Create users: Agent, Manager with Salesforce licenses.

Profiles & Roles:
- Agent Profile → CRUD on Bookings only. - Manager Profile → Full access. - Role hierarchy:
Manager > Agents.

Permission Sets & OWD:
- Car object: Public Read Only. - Rental Booking object: Private.

Sharing Rules:
Optionally share bookings with other agents if required.

Login Access Policies:
Restrict Agent login hours (9 AM – 6 PM).

Sandbox Usage:
Use Sandbox for development, deploy to Production via Change Sets.