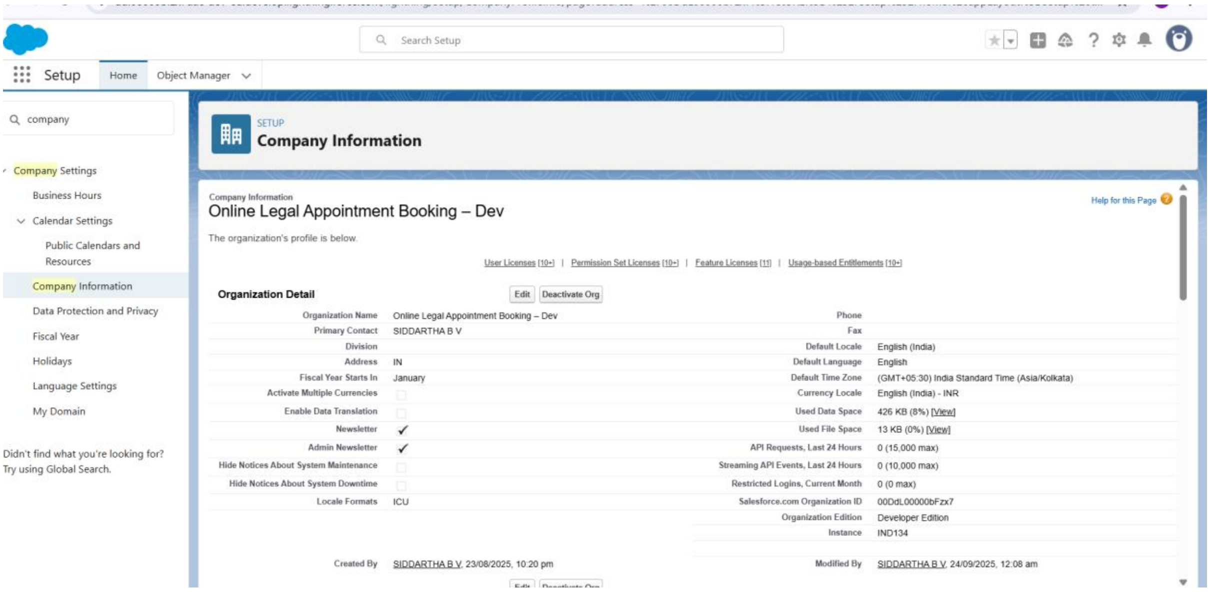
PHASE 2 – Org Setup & Configuration (Online Appointment Booking for Legal Services in INDIA)

Company Profile Setup

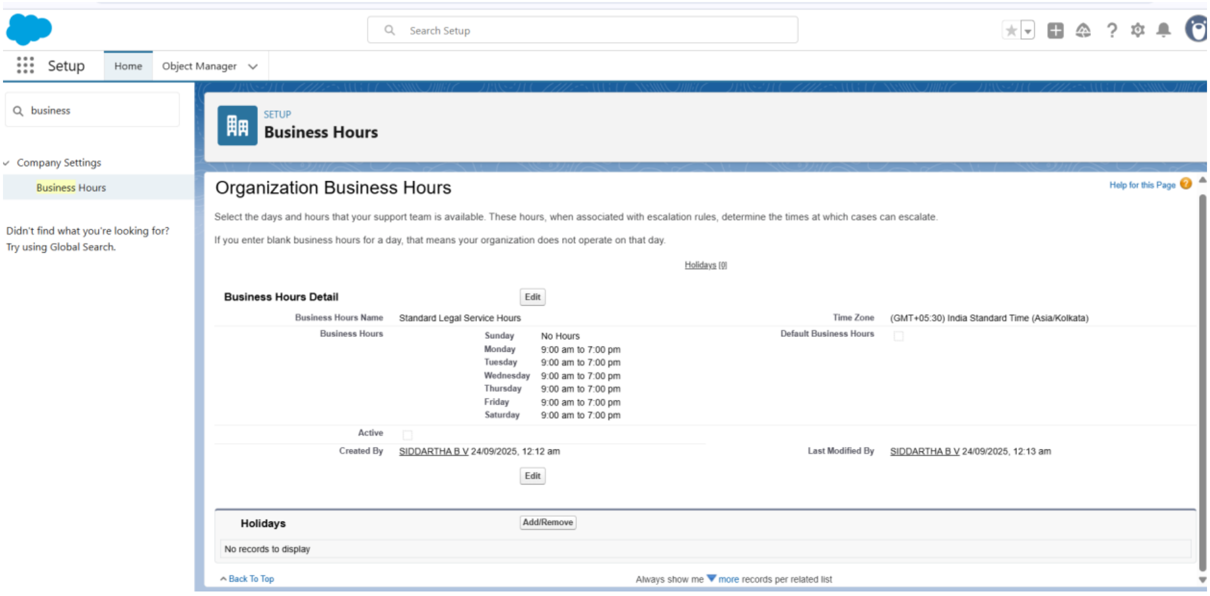
Set up the org details under **Setup → Company Information → Edit**:

- **Name:** Online Legal Appointment Booking – Dev.
- **Time Zone:** GMT+05:30 (Asia/Kolkata).
- **Locale:** English (India) – controls date/number formats.
- **Language:** English.
- **Currency:** INR (Corporate Currency).
- 

Business Hours Setup

These working hours will be used for appointment scheduling and lawyer availability tracking.

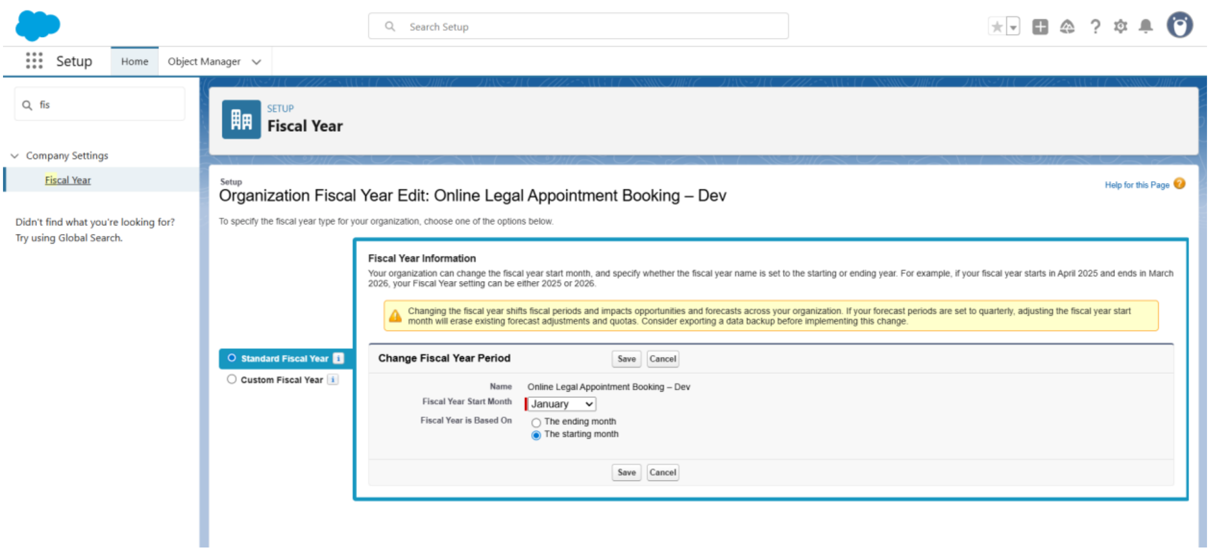
- **Path:** Setup → Business Hours → New.
- **Name:** Standard Legal Service Hours.
- **Time Zone:** Asia/Kolkata (GMT+05:30).
- **Working Hours:** Mon–Sat (9:00 AM – 7:00 PM), Sunday closed.
- **Save:** Apply as default.



Fiscal Year Setup

Required for reporting trends of appointments and revenue.

- **Path:** Setup → Fiscal Year.
- **Type:** Standard Fiscal Year (Jan–Dec).
- **Configuration:** Starting month – January.
- **Save:** Apply settings to define fiscal periods.



User Setup (Profiles, Roles, Permission Sets, Users)

Profiles

Clone standard profiles to customize object access. Example:

- **Lawyer_Profile** – Access to Lawyer, Appointment, and Service Category objects.
- **Client_Profile** – Minimal access to book and view appointments.
- **Admin_Profile** – Full system access for configuration.

Roles

Defines visibility for data sharing and hierarchy. Example:

- **CEO/Admin** (Top level).
- **Manager** (supervises lawyers).
- **Lawyer** (access to own appointments).
- **Client** (basic access).

Permission Sets

- **Appointment_Access_PS** – Permission to create/read/update Appointment records (for clients and lawyers).
- **ServiceCategory_Access_PS** – Permission to manage Service Categories (for admins).

Users

Create sample users:

- **lawyer1** → Lawyer_Profile, Role: Lawyer.
- **client1** → Client_Profile, Role: Client.
- **admin1** → Admin_Profile, Role: CEO/Admin.

Role Hierarchy Setup

Defines visibility of appointments and lawyer records.

- **CEO/Admin → Manager → Lawyer → Client**
- Managers can see all lawyers under them.
- Lawyers can see their own appointments.
- Clients can see only their own bookings.

OWD (Org Wide Defaults)

To be done in **Phase 3** since OWD applies to objects (Appointment, Lawyer, Service Category) which will be fully configured in the next phase.

Sharing Rules

Also to be configured in **Phase 3** after OWD setup. Example:

- Share appointment data with lawyers based on role.
- Managers get access to all appointments under their team.

Assign Permission Sets

After creating users, assign sets as needed:

- Setup → Users → Select user → **Permission Set Assignments → Edit Assignments → Add Appointment_Access_PS** → Save.

Dev Org Setup

- Created a Salesforce Developer Edition org for implementation.
- Configured **GitHub repository** for source control.
- Installed & set up **VS Code + Salesforce CLI (SFDX)**.
- Verified LWC creation setup for building front-end components.