Subscription / Personal Services Tracker CRM

Phase 2: Org Setup & Configuration

Objective:

Set up a Salesforce Developer Org and configure necessary settings to prepare for development of the Subscription Tracker CRM.

Set Company Information

Navigation:
Setup → Company Settings → Company Information

2. Business Hours

Setup → Business Hours → New → Created business hours (Mon–Sat: 9 AM to 6 PM) to match service timing.

3. Holidays

Setup → Holidays → Add Holidays → Defined public holidays to pause renewal email alerts during non-working days.

2.2 Enable Features:
1. Email Alerts

Setup → Email Alerts → Created email templates and alert configurations for:
- Upcoming subscription renewal (7 days prior)
- Overdue subscription payment reminders
- Welcome email for new subscribers

2.3 Users, Profiles, and Roles:
1. Create Custom Profiles

Setup → Profiles → Clone → Created profiles for Subscription Admin and Support Executive with relevant permissions.
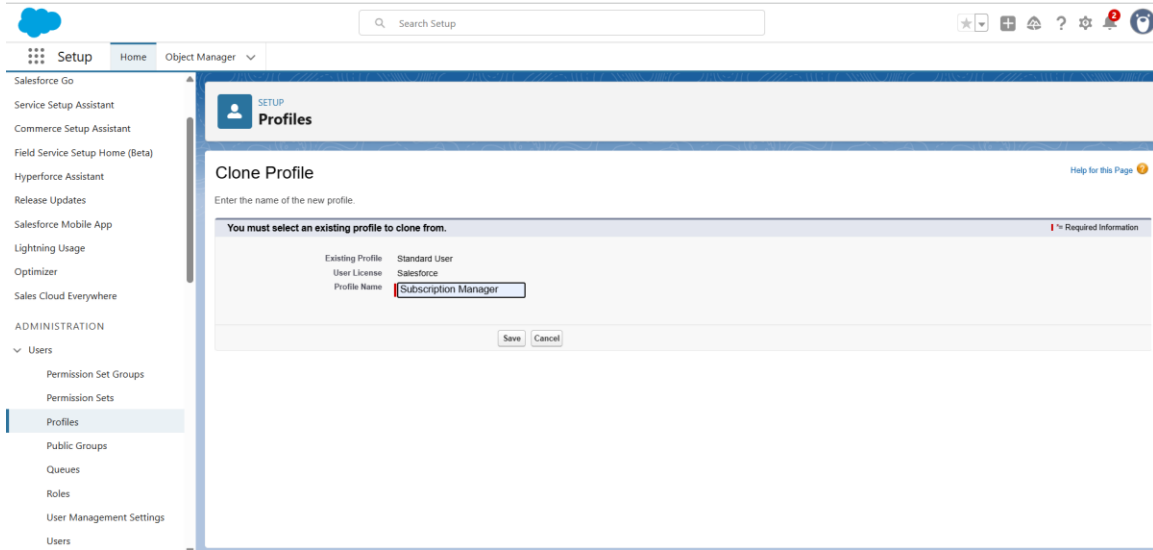
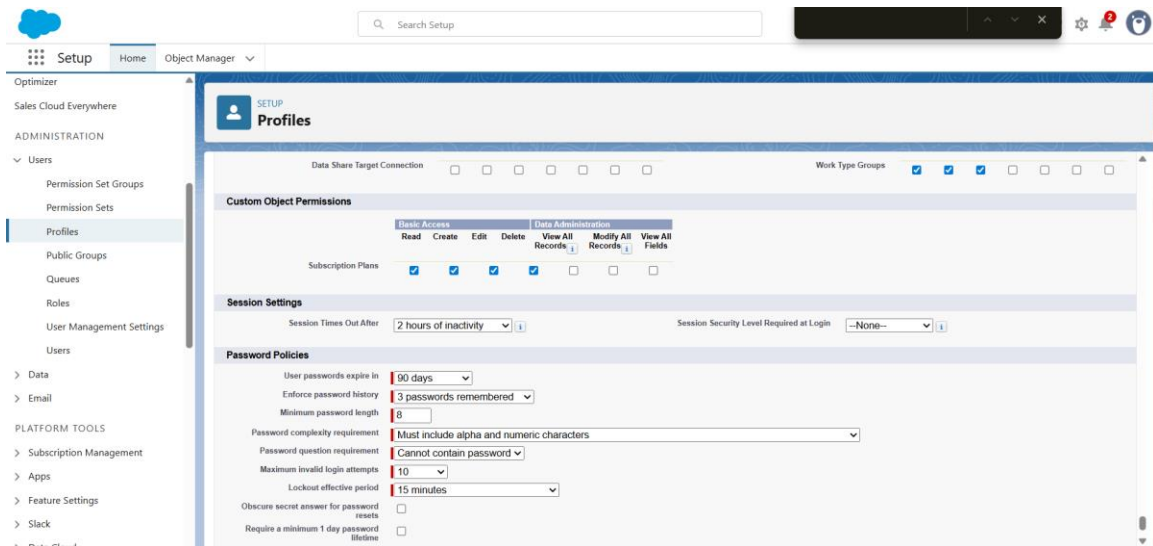## 2. Create Role Hierarchy

Setup → Roles → Set Up Roles → Defined roles such as Subscription Manager (top) and Subscription Support (subordinate).

3. Create Users

Setup → Users → New User → Created test users under each profile and role to simulate workflow access control.

4. Create Permission Sets

Setup → Permission Sets → New → Created 'Subscription Notification Manager' permission set to allow email sending and flow execution.

2.4 Security, OWD, and Sharing:

1. Set Organization-Wide Defaults (OWD)

Setup → Sharing Settings → Edit → Set Default Internal Access for custom object 'Subscription Details' to Private for secure record access.

2.5 VS Code – Setup:

• Project Setup

- Open VS Code > Open the Command Palette > SFDX: Create Project with Manifest > Enter project name: SubscriptionCRM_Project

• Org Authorization & Retrieval

- Open the Command Palette > SFDX: Authorize an Org > Select Project Default > Enter alias (SubscriptionCRM_Dev_Org) > Login in browser
- Command Palette > SFDX: Retrieve Source in Manifest from Org to sync local project with Salesforce org.