

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

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'compan' and a list of settings categories: Company Settings (Business Hours, Calendar Settings, Public Calendars and Resources), Company Information (Data Protection and Privacy, Fiscal Year, Holidays, Language Settings, My Domain), and a message 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Company Information' and contains several sections: General Information (Organization Name: Sub Tracker, Primary Contact: OrgFarm EPIC, Division, Phone, Fax), Address (Country: India, Street, City, State/Province: Telangana, Zip/Postal Code), Locale Settings (Default Locale: English (India), Default Language: English, Default Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)), and Currency Settings (Currency Locale: Kannada (India) - INR). A red icon in the top right corner of the main content area indicates 'Required Information'.

2. Business Hours

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

Setup Home Object Manager

Search Setup

business

Company Settings

Business Hours

Didn't find what you're looking for? Try using Global Search.

Business Hours

If you enter blank business hours for a day, that means your organization does not operate on that day.

Business Hours Edit Save Cancel

Step 1. Business Hours Name Required Information

Business Hours Name Subscription Hours Use these business hours as the default ☐

Active ☒

Step 2. Time Zone

Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata)

Step 3. Business Hours

Day	Start Time	End Time	24 hours
Sunday	9:00 AM	6:00 PM	<input type="checkbox"/>
Monday	9:00 AM	6:00 PM	<input type="checkbox"/>
Tuesday	9:00 AM	6:00 PM	<input type="checkbox"/>
Wednesday	9:00 AM	6:00 PM	<input type="checkbox"/>
Thursday	9:00 AM	6:00 PM	<input type="checkbox"/>
Friday	9:00 AM	6:00 PM	<input type="checkbox"/>
Saturday	9:00 AM	6:00 PM	<input type="checkbox"/>

Save Cancel

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

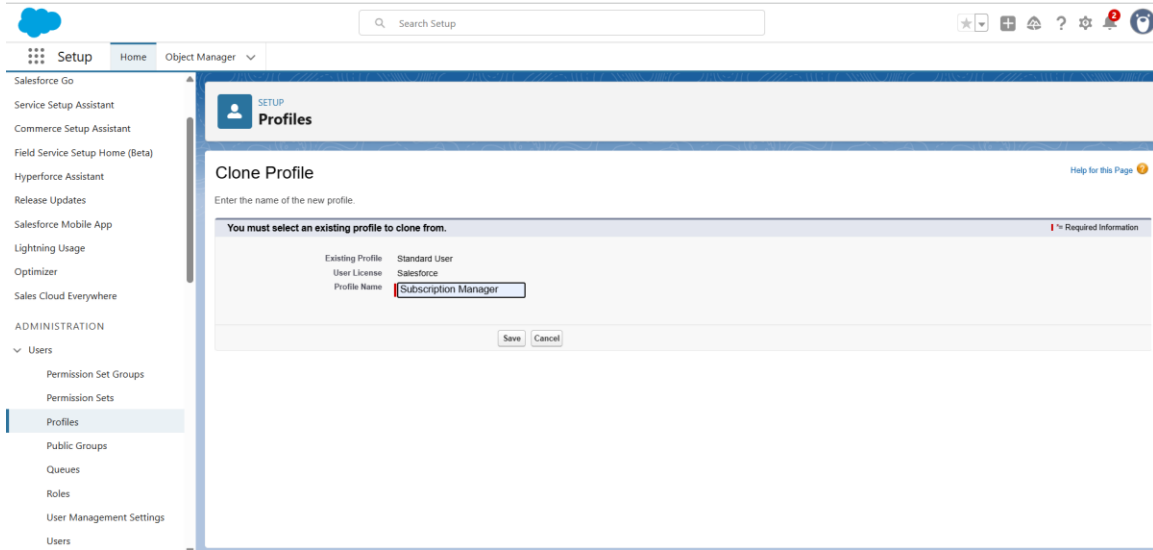
Setup → Email Alerts → Created email templates and alert configurations for:

- 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.

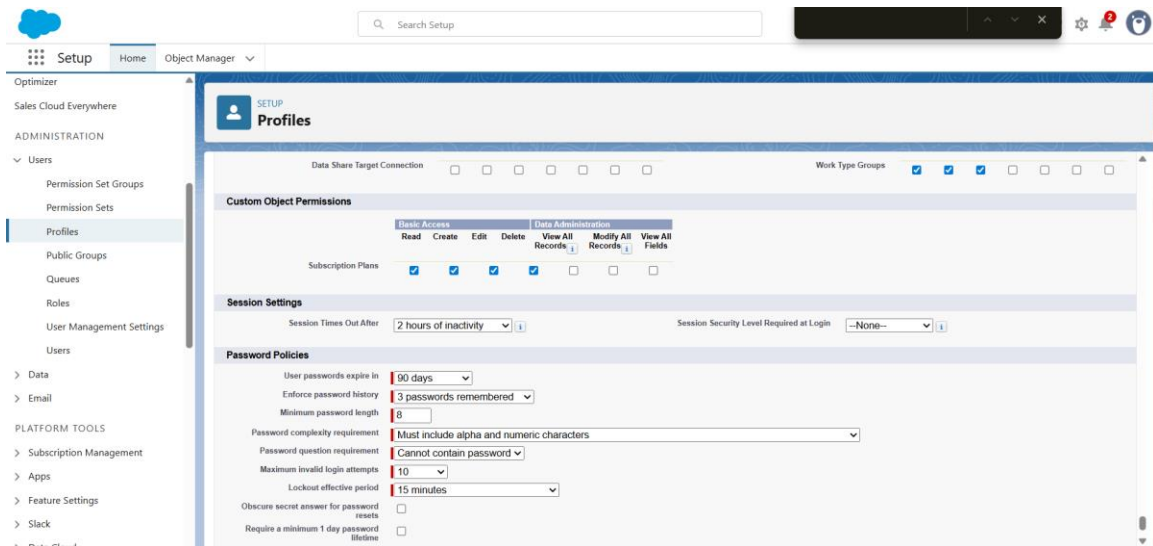


2. Create Role Hierarchy

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.

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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.