**Freelance-Force-Suite Project – Full Explanation**

# Phase 1: Problem Understanding & Industry Analysis

👉 Goal: Understand what we’re building and why.

## 1. Requirement Gathering

* + Manage all client information and project details in one central location.
  + Track billable hours accurately against specific projects and tasks.
  + Automate the creation of professional invoices based on logged time.
  + Generate reports to analyze revenue and project profitability.

## 2. Stakeholder Analysis

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○ **The Freelancer** (Needs a simple, all-in-one system to manage their entire business lifecycle, from client acquisition to getting paid. This stakeholder acts as the Admin, End User, and Manager.).

## 3. Business Process Mapping

* + **Current Process:** A fragmented workflow using multiple tools: a spreadsheet for client tracking, a separate app for task management (like Trello), another for time tracking, and a word processor for manually creating invoices. This process is time-consuming and prone to data entry errors.
  + **Future Process:** A client (Account) has a Project\_\_c record created. The freelancer logs time against the project using Time\_Log\_\_c records. At the end of a billing cycle, a button click automatically generates an Invoice\_\_c record, summing up all unbilled hours. The freelancer then manually updates the invoice status to "Paid" upon receiving payment.

## 4. Industry-specific Use Case Analysis

* Freelancers often juggle multiple clients and projects simultaneously. The system needs to provide a clear, consolidated view of all ongoing work and outstanding payments. It must also handle both fixed-price projects and hourly billing models.

## 5. AppExchange Exploration

* **Decision for Payment Tracking:** To ensure the project remains **completely cost-free**, no paid payment processing integrations (like Stripe or PayPal connectors) will be used. The core business need will be met by creating a custom Invoice Status field, which the freelancer will manually update from "Sent" to "Paid" after receiving funds through their existing, external methods (e.g., bank transfer).

# Phase 2: Org Setup & Configuration

👉 Goal: Prepare Salesforce environment.

1. **Salesforce Editions**

○ A free **Developer Edition Org** has been created and is in use for all development and configuration.

## 2. Company Profile Setup

○ The freelancer's business profile, including a business name, address, default time zone, and primary currency, has been configured in Setup > Company Information.

## 3. Business Hours & Holidays

○ Standard business hours (e.g., 9:00 AM - 6:00 PM, Monday-Friday) have been defined to ensure any time-based automations run correctly.

1. **Fiscal Year Settings**

○ A **Standard Fiscal Year** (January-December) has been configured to simplify revenue reporting for the calendar year.

1. **User Setup & Licenses**

○ A single user record for the freelancer has been configured with a **Salesforce** license.

## 6. Profiles

○ The user is assigned the **System Administrator** profile, providing full access to build and customize the application.

7. **Roles**

○ A top-level role (e.g., "Freelancer") has been created and assigned to the user as a best practice for reporting and future scalability.

## 8. OWD (Org-Wide Defaults)

○ The Organization-Wide Defaults for all key standard objects (Account, Opportunity) and custom objects (Project\_\_c) have been set to **Private** to ensure maximum data security.

1. **Login Access Policies**

* + The default login and password policies for the org have been reviewed and confirmed.

## 10. Deployment Basics

* + The Developer Org has been successfully connected to a local VS Code project. All setup and configuration from this phase have been retrieved and pushed to a public GitHub repository for version control.