Phase 2: Org Setup & Configuration

Project: *Sports Equipment Rental System*

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1. Salesforce Edition

- **Edition Used:** Salesforce Developer Edition

- **Purpose:** Used for development, testing, and customization of the rental management system without affecting live data.

- **Reason for Choice:** Developer Edition provides full platform capabilities with limited users and storage, suitable for prototype and academic projects.

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2. Company Profile Setup

Company Information

Field	Value
Organization Name	Sports Equipment Rental System
Primary Contact	Neha Kullolli
Country	India
State/Province	Karnataka
Default Locale	English (India)
Default Language	English
Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Currency	INR – Indian Rupee
Multiple Currencies	Not Activated
Data Translation	Not Enabled
System Notifications	Hidden for Maintenance and Downtime

Procedure:

1. Navigate to **Setup → Company Settings → Company Information**.

2. Click **Edit**.

3. Enter details for organization name, contact info, and locale settings.

4. Save the configuration.
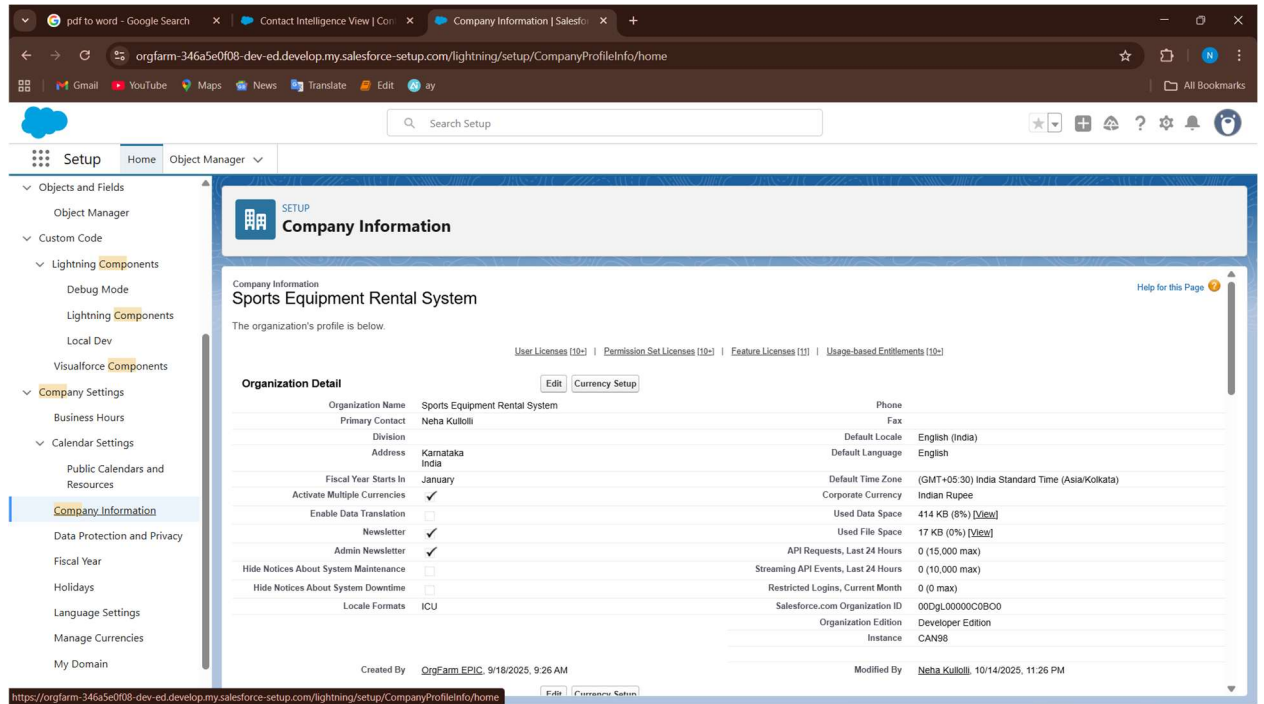
3. Business Hours & Holidays

Business Hours Detail

Day	Working Hours
Sunday	24 Hours Holiday
Monday	8:00 AM – 8:00 PM
Tuesday	8:00 AM – 8:00 PM
Wednesday	8:00 AM – 8:00 PM
Thursday	8:00 AM – 8:00 PM
Friday	8:00 AM – 8:00 PM
Saturday	8:00 AM – 8:00 PM

Time Zone: (GMT+05:30) India Standard Time
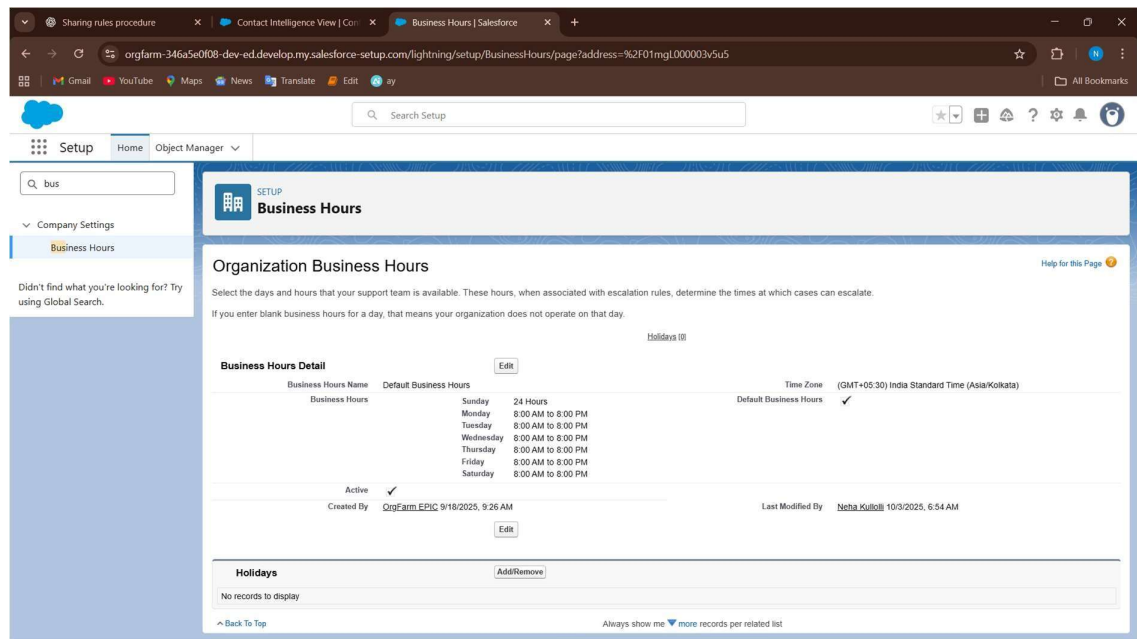**Default Business Hours:** Checked
Active: Checked

Procedure:

1. Go to **Setup → Company Settings → Business Hours**.

2. Create **Default Business Hours** record.

3. Enter open and close timings for each day.

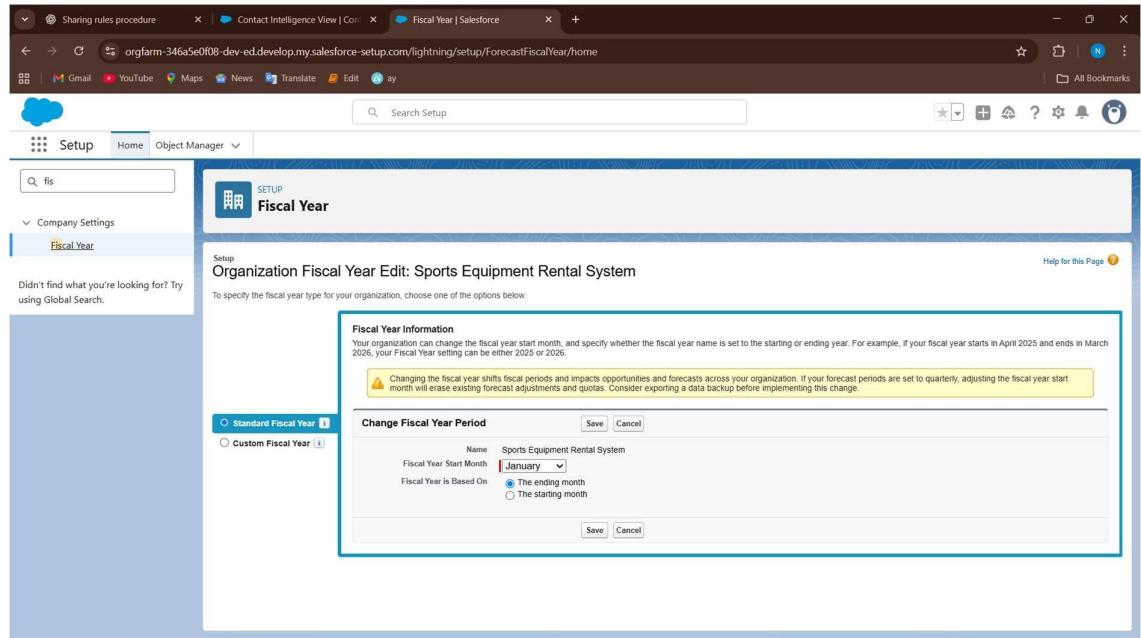4. Check *Active* and *Default Business Hours*.

5. Save the record.

4. Fiscal Year Settings

- **Type:** Standard Fiscal Year

- **Start Month:** January

- **End Month:** December

Procedure:

1. Navigate to **Setup → Company Settings → Fiscal Year**.

2. Select **Standard Fiscal Year** (default).
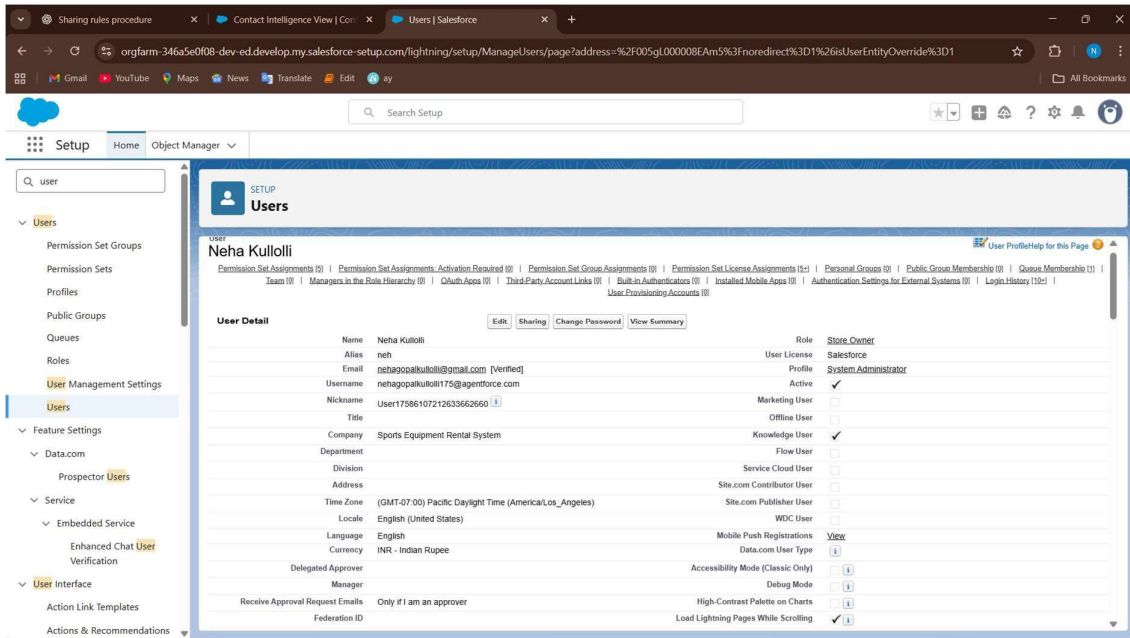
3. Confirm fiscal year start month and save.

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5. User Setup & Licenses

User 1: System Administrator

Field	Value
Name	Neha Kullolli
Role	Store Owner
Profile	System Administrator
User License	Salesforce
Username	nehagopalkullolli175@agentforce.com
Email	nehagopalkullolli@gmail.com
Active	Yes

User 2: Store Manager

Field	Value
Name	Naveen K
Role	Store Manager
Profile	Store Manager
User License	Salesforce
Username	shopowner@sportsrent.com
Email	suvarna2421@gmail.com
Active	Yes
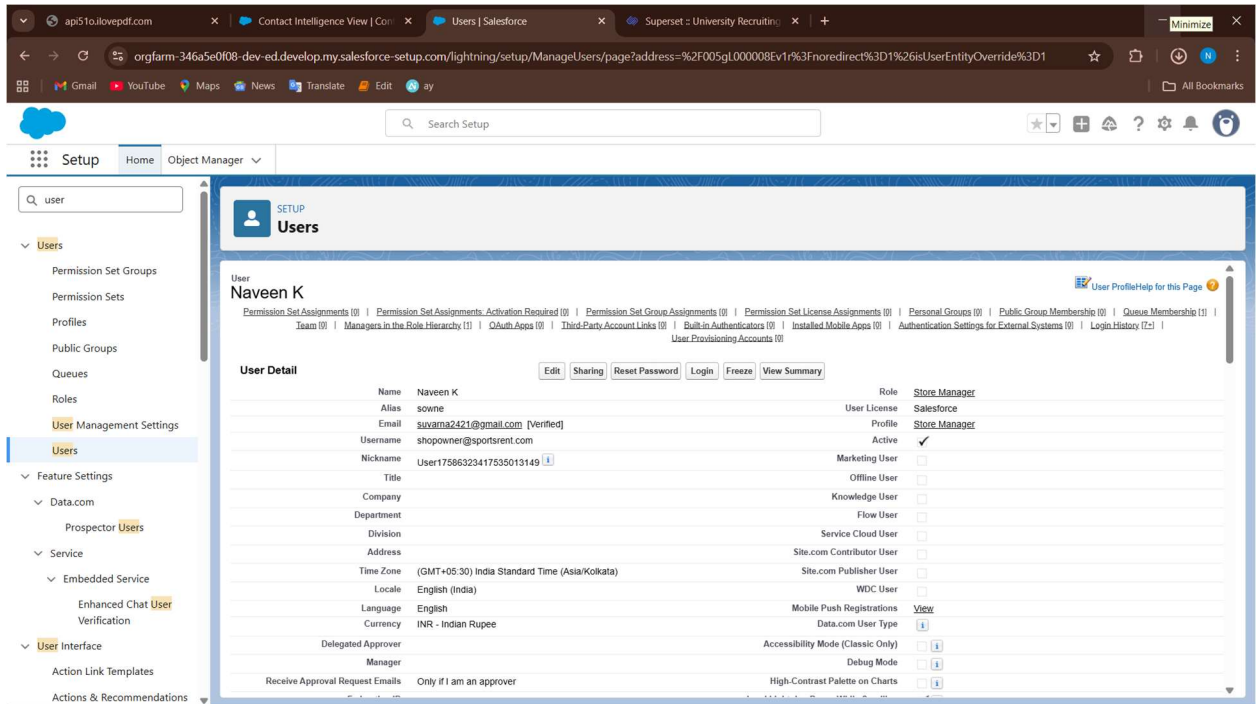
Procedure:

1. Navigate to **Setup → Users → Users → New User**.

2. Fill in name, alias, email, and username.

3. Assign **User License** as *Salesforce*.

4. Assign appropriate **Profile** and **Role**.

5. Check *Active* and Save.

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6. Profiles

Profile 1: System Administrator (Sports Owner)

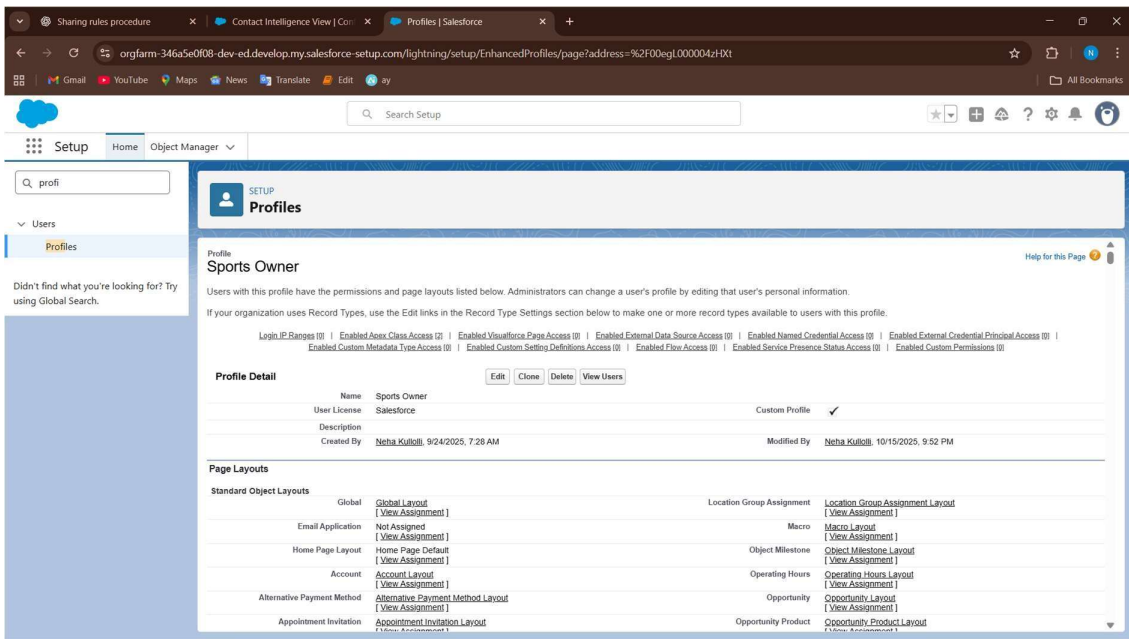| Field	Details
Profile Name	System Administrator
Role Assigned	Sports Owner
User	Neha Kullolli
User License	Salesforce
Description	Default administrator profile with full system-level access.

Permissions

- Full access to all standard and custom objects.

- Can create, edit, delete, and manage all records.

- Can manage users, security settings, data, and customizations.

- Has complete visibility across the entire organization.

Profile 2: Store Manager (Custom Profile)

Field   **Details**

Profile Name Store Manager
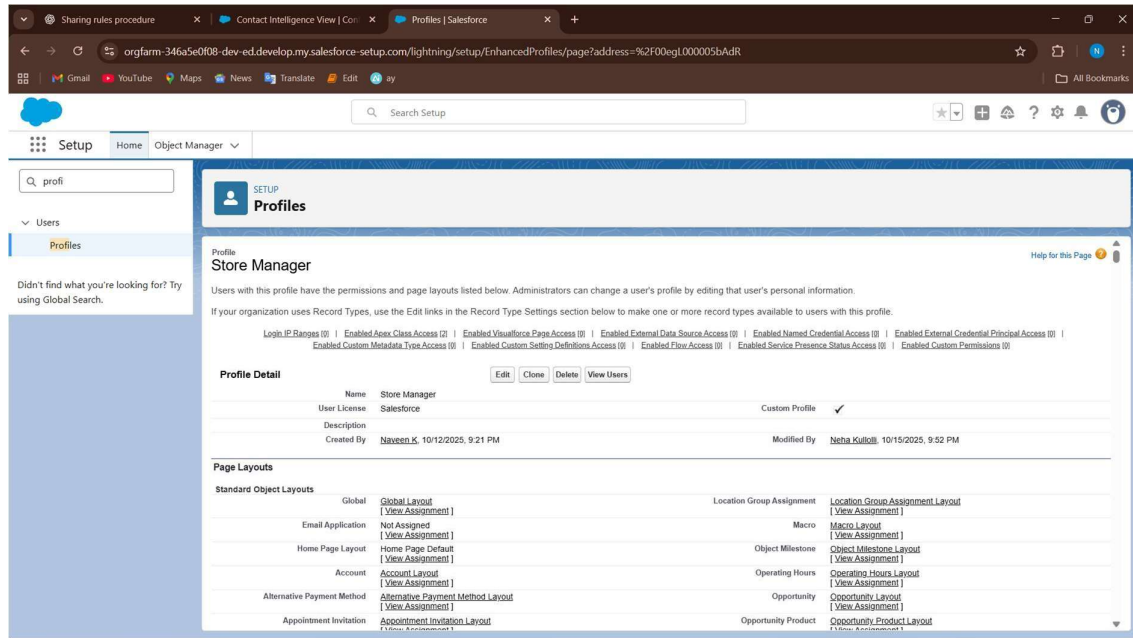
Base Profile Standard User

User   Naveen K

User License Salesforce

Description   Custom profile for store management users.

Permissions

- Create/Edit/View Equipment, Rental, and Customer Records.

- Limited administrative access (no setup or metadata access).

- Can manage inventory and rental operations.

Procedure:

1. Go to **Setup → Profiles → Clone Standard User**.

2. Rename it as *Store Manager*.

3. Customize object-level permissions.

4. Save and assign it to user *Naveen K*.

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7. Roles
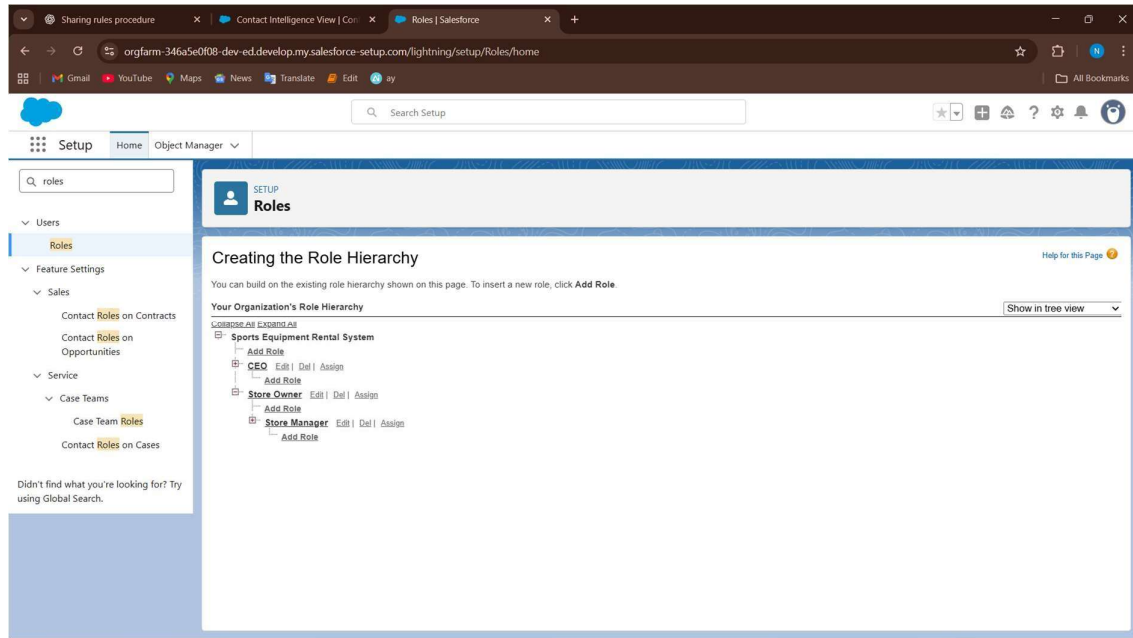
Role Hierarchy

Sports Owner

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Store Manager

- **Sports Owner:** Top role, has visibility over all store and rental operations.
- **Store Manager:** Manages individual store equipment and rental transactions.

Procedure:

1. Go to **Setup → Roles → Set Up Roles**.

2. Create **Sports Owner** as top-level role.

8. Org-Wide Defaults (OWD) & Sharing Rules.

Object	Default Internal Access	Default External Access
Equipment	Public Read/Write	Private
Maintenance	Public Read/Write	Private
Payment	Private	Private
Rental Agreement	Private	Private
Rental Plan	Public Read/Write	Private

Procedure:

1. Navigate to Setup → Security → Sharing Settings.

2. Scroll to Organization-Wide Defaults.

3. For each object, set access:

   o Equipment → Public Read/Write

   o Maintenance → Public Read/Write

   o Payment → Private

   o Rental Agreement → Private

   o Rental Plan → Public Read/Write

4. Save changes.
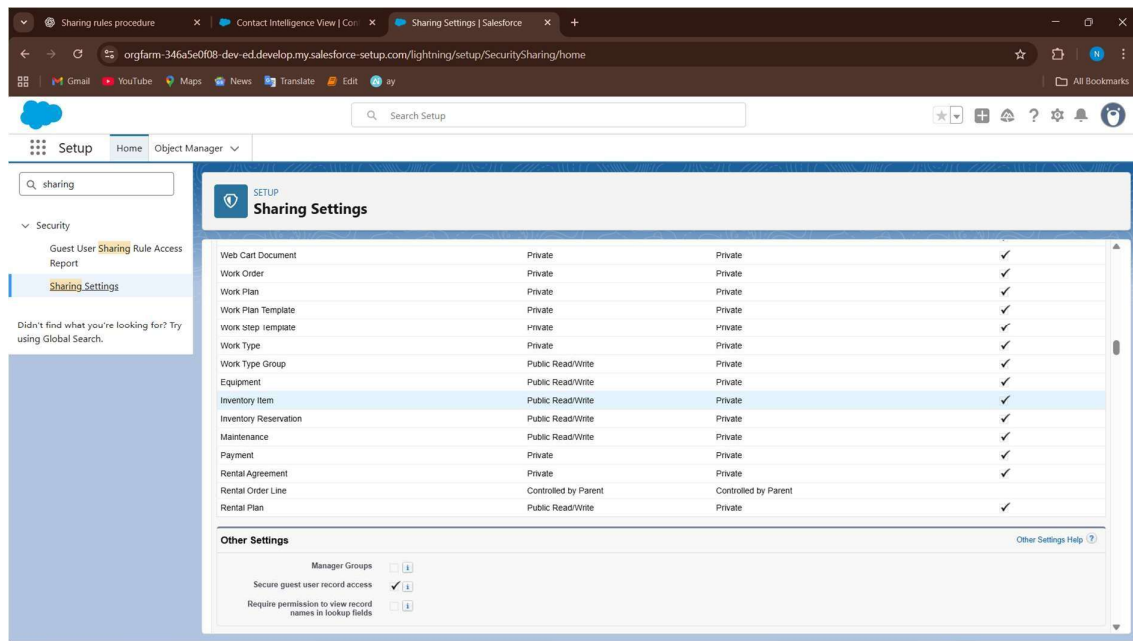
9. Permission Sets
Permission Set Name: Equipment Management Access
Purpose:
To grant additional permissions for store managers to manage rental operations without changing their assigned profile. This permission set provides access to core objects and the Sports Equipment Rental app for operational management.

Configuration Details

Field	Details
Permission Set Name	Equipment Management Access
Purpose	Provides Store Manager access to manage Equipment, Rental Plan, and Rental Agreement objects.
App Access	Sports Equipment Rental App
Object Access	Equipment, Rental Plan, Rental Agreement (Create, Read, Edit, Delete)
Assigned To	Store Manager (User: Naveen K)

Procedure:
1. Navigate to **Setup → Permission Sets → New**.
2. Enter details:
   o **Label:** Equipment Management Access
   o **User License:** Salesforce
3. Click **Save**.
4. Configure permissions:
   o **Object Settings → Equipment, Rental Plan, Rental Agreement → Edit → Enable Create, Read, Edit, Delete.**
   o **App Permissions → Assigned Apps → Select "Sports Equipment Rental App" → Save.**
   o **System Permissions:** (Optional) Allow "Run Reports" and "View Dashboards."
5. Assign Permission Set:
   o Click **Manage Assignments → Add Assignments → Select User (Naveen K) → Assign.**
6. Verify by logging in as the Store Manager to ensure the app and object access work as expected.
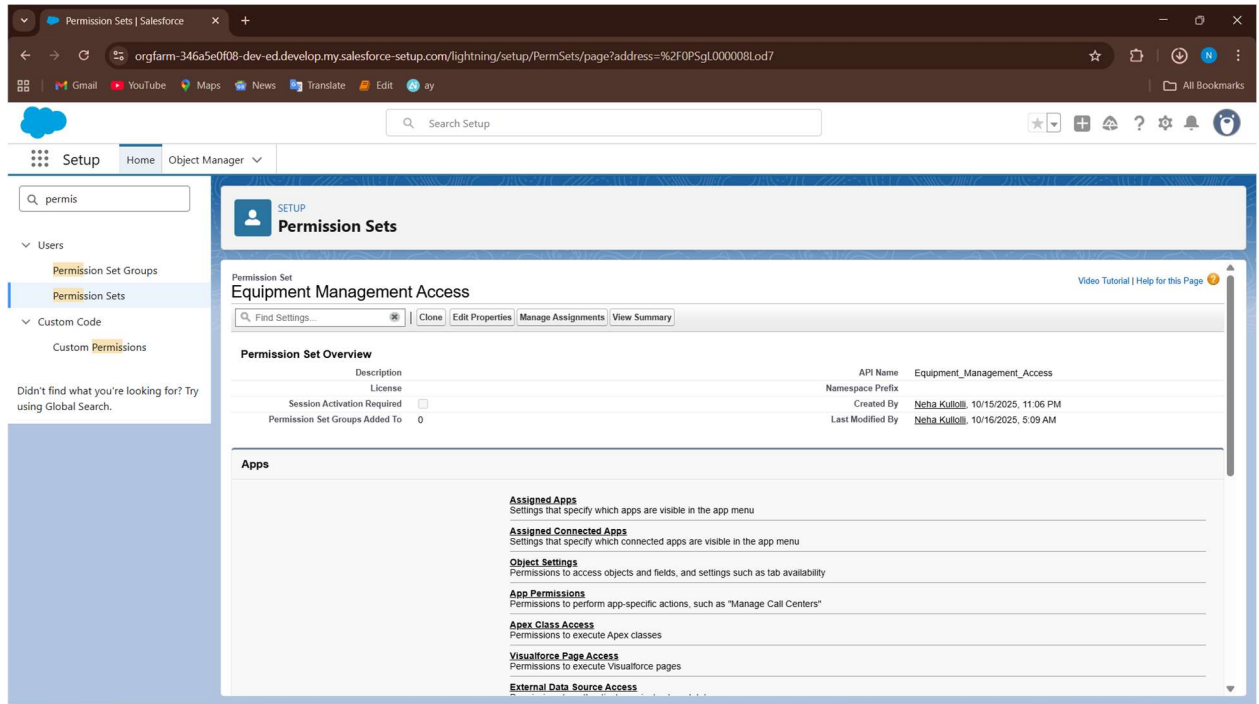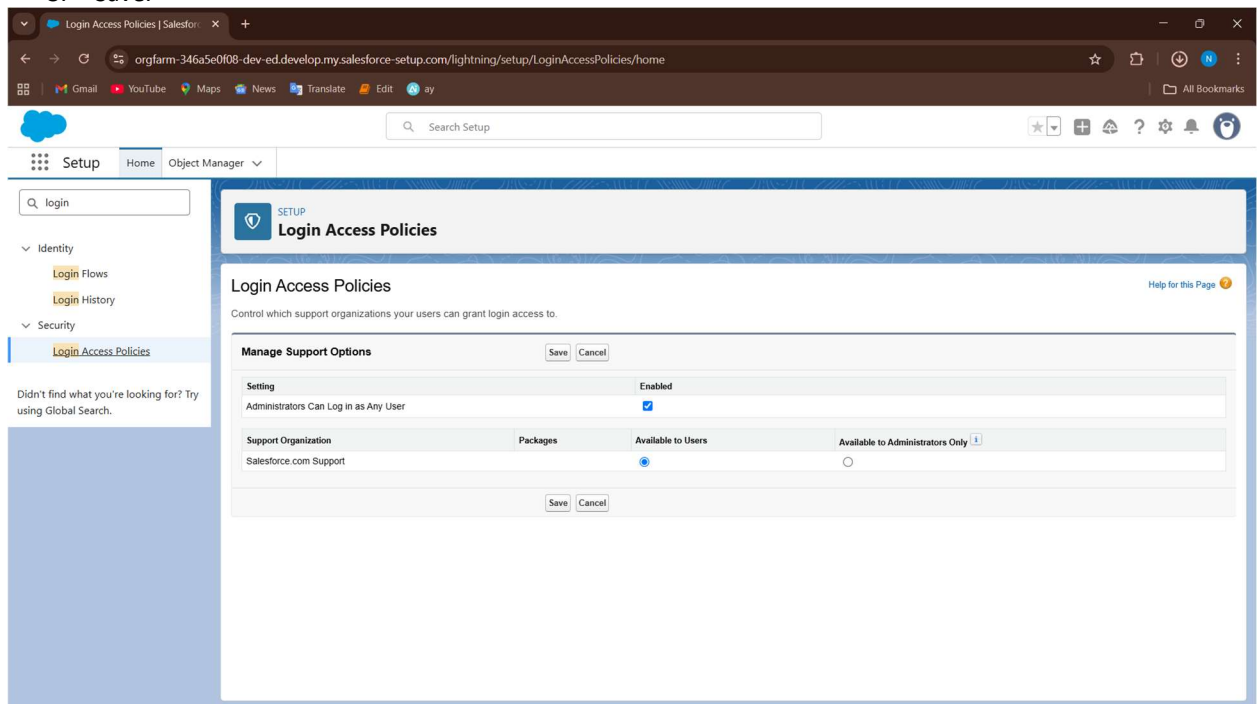
10. Login Access Policies
Purpose: Control how admins and delegated users can log in as other users.
Procedure:
1. Navigate to **Setup → Security → Login Access Policies**.
2. Configure:
   o **Administrators Can Log in as Any User** → Enable if needed for troubleshooting.
   o **Users Can Grant Access to Administrators** → Enable if required.
3. Save.

11. Developer Org Setup

- Created Salesforce Developer Edition org for building and testing.
- Enabled Experience Cloud for future customer/partner access.
- Used VS Code + SFDX for customization and deployment.
- Linked GitHub for version control and backup.

12. Sandbox Usage

- Used Developer Sandbox for configuration and UAT testing.
- Planned Partial Copy Sandbox for training and data validation.
- Future Full Sandbox for complete UAT before production.
- Environment flow: Dev Org → Sandbox → Production.

13. Deployment Basics

- Deployed configurations via Change Sets (objects, roles, flows).
- Used GitHub for version control of Apex and Lightning code.
- Validated permissions, data, and sharing after deployment.