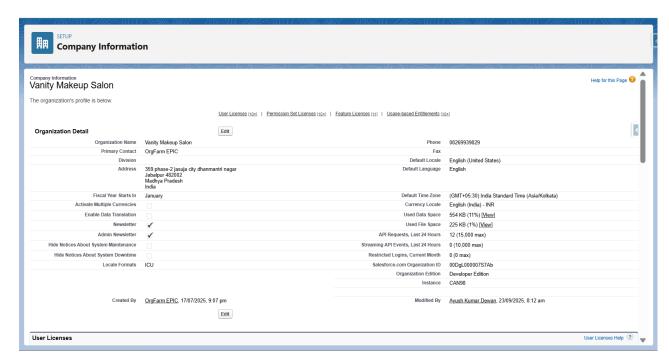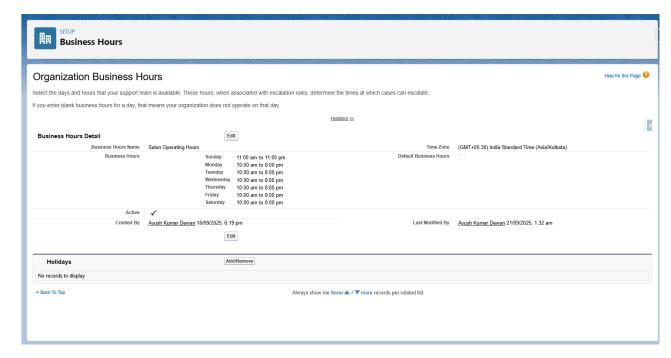# Phase-2: Org Setup & Configuration

1. Company Configuration

- **Salesforce Org Edition**
  - **Action Taken:** Selected and signed up for a **Developer Edition Org**.
  - **Purpose:** To have a free, full-featured, and safe environment for building the entire application from scratch.
- **Company Information**
  - **Action Taken:**
    1. Navigated to **Setup > Company Information**.
    2. Updated the company name, address, and phone number.
    3. Set the **Default Time Zone** to (GMT+05:30) India Standard Time.
  - **Purpose:** To ensure the org's core identity and location settings were correct for all users and system functions.

- **Business Hours & Holidays**
  - **Action Taken:**

    1. Navigated to **Setup > Business Hours** and created a new record for the salon's schedule (e.g., 9 AM - 7 PM, Mon-Sat).
    2. Navigated to **Setup > Holidays** and added relevant public holidays.
  - **Purpose:** To define the salon's official working schedule, which can be used later for automation and scheduling rules.

- **Fiscal Year**
  - **Action Taken:**
    1. Navigated to **Setup > Fiscal Year**.
    2. Set the fiscal year start month to April.
  - **Purpose:** To align the org's financial reporting and forecasting tools with the Indian financial year.

2. User & Security Setup

- **User Creation & Licenses**
  - **Action Taken:**
    1. Navigated to **Setup > Users > New User**.
    2. Created user records for the Owner, Receptionist, and Stylist roles.
    3. Assigned a **Salesforce** license to each user.
  - **Purpose:** To create individual and secure login accounts for all employees who will use the app.
- **Role Hierarchy**
  - **Action Taken:**

    1. Navigated to **Setup > Roles**.
    2. Created three roles: `Salon Owner` (top level), `Receptionist` (reporting to Owner), and `Stylist` (reporting to Owner).
  - **Purpose:** To create a data access hierarchy where management can automatically see and report on the records of their staff.

- **Custom Profiles**
  - **Action Taken:**

    1. Navigated to **Setup > Profiles**.
    2. Cloned the `Standard User` profile to create two new profiles: `Receptionist` and `Stylist`.
  - **Purpose:** To create unique and editable sets of permissions for different job functions, which is a security best practice.

Profile
Stylist Profile

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges [0] | Enabled Apex Class Access [0] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] | Enabled External Credential Principal Access [0] | Enabled Custom Metadata Type Access [0] | Enabled Custom Setting Definitions Access [0] | Enabled Flow Access [0] | Enabled Service Presence Status Access [0] | Enabled Custom Permissions

Profile Detail

	Edit	Clone	Delete	View Users	

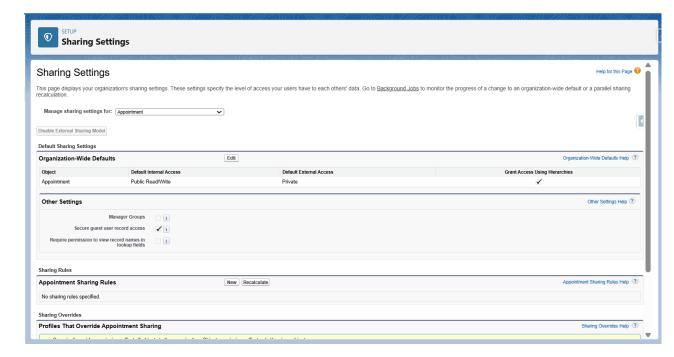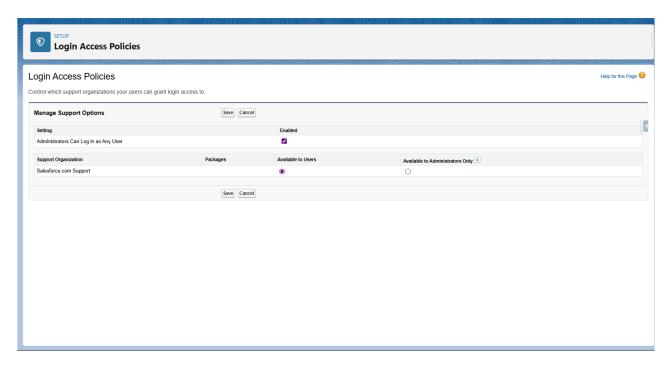|				
Name	Stylist Profile		Custom Profile	✓
User License	Salesforce			
Description				
Created By	Ayush Kumar Dewan, 16/09/2025, 6:44 pm		Modified By	Ayush Kumar Dewan, 24/09/2025, 2:48 pm

Page Layouts

Standard Object Layouts

Global	Global Layout [View Assignment]	Location Group Assignment	Location Group Assignment Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Macro	Macro Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Account	Account Layout [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Opportunity	Opportunity Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Opportunity Product	Opportunity Product Layout [View Assignment]
Asset	Asset Layout [View Assignment]	Order	Order Layout [View Assignment]
Asset Action	Asset Action Layout [View Assignment]	Order Product	Order Product Layout [View Assignment]
Asset Action Source	Asset Action Source Layout	Payment	Payment Layout

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Profile
Receptionist Profile

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges [1] | Enabled Apex Class Access [0] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] | Enabled External Credential Principal Access [0] | Enabled Custom Metadata Type Access [0] | Enabled Custom Setting Definitions Access [0] | Enabled Flow Access [0] | Enabled Service Presence Status Access [0] | Enabled Custom Permissions

Profile Detail

	Edit	Clone	Delete	View Users	

Name	Receptionist Profile		Custom Profile	✓
User License	Salesforce			
Description				
Created By	Ayush Kumar Dewan, 16/09/2025, 6:43 pm		Modified By	Ayush Kumar Dewan, 24/09/2025, 2:48 pm

Page Layouts

Standard Object Layouts

Global	Global Layout [View Assignment]	Location Group Assignment	Location Group Assignment Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Macro	Macro Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Account	Account Layout [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Opportunity	Opportunity Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Opportunity Product	Opportunity Product Layout [View Assignment]
Asset	Asset Layout [View Assignment]	Order	Order Layout [View Assignment]
Asset Action	Asset Action Layout [View Assignment]	Order Product	Order Product Layout [View Assignment]
	Action Source Layout	Payment	Payment Layout

Permission Sets

- o **Action Taken:** Reviewed the functionality of **Permission Sets** in Setup.
- o **Purpose:** To understand how to grant extra, specific permissions to individual users in the future without having to create a new profile.
- **Organization-Wide Defaults (OWD)**
  - o **Action Taken:**

    1. Navigated to **Setup > Sharing Settings**.
    2. Set the OWD for all custom salon objects to **Private**.
  - o **Purpose:** To create the most secure data foundation where, by default, users can only see their own records, protecting data privacy.
- **Sharing Rules**
  - o **Action Taken:** Reviewed the functionality of **Sharing Rules** in Setup.
  - o **Purpose:** To understand how to open up record access between users (e.g., let all stylists see each other's schedules) when the OWD is set to Private.

- **Login Access Policies**
  - **Action Taken:**

    1. Navigated to the `Receptionist` profile and configured **Login IP Ranges**.
    2. Reviewed **Session Settings** in Setup to understand session timeout values.
  - **Purpose:** To secure the application by controlling *where* and for *how long* users can be logged in.

3. Deployment & Environment Review

- **Sandbox Usage**
  - **Action Taken:** Reviewed the concept of **Sandboxes** in Setup.
  - **Purpose:** To learn the best practice for how development is managed in a real company, where changes are made in a copy (sandbox) before being moved to the live environment.
- **Deployment Basics**
  - **Action Taken:** Reviewed the functionality of **Change Sets** in Setup.
  - **Purpose:** To understand the standard tool used to move customizations from a sandbox to a live production org.