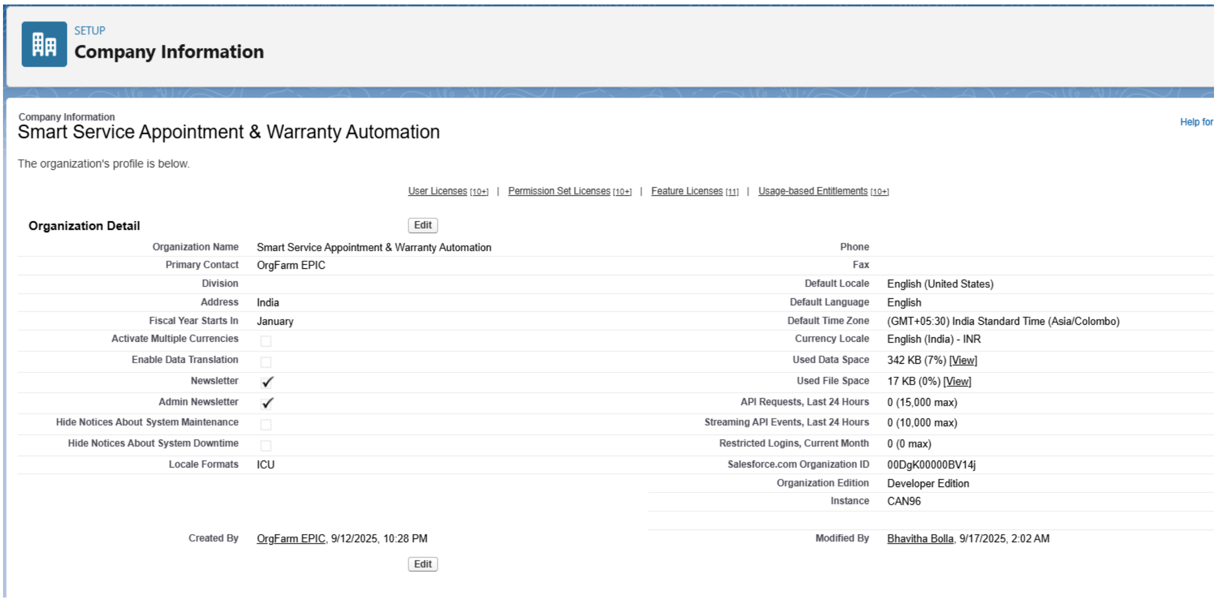
Project Title – "Smart Subscription Tracker"

PHASE 2 - Org Setup & Configuration

Company Profile Setup

Set basic org details under *Setup → Company Information → Edit*:

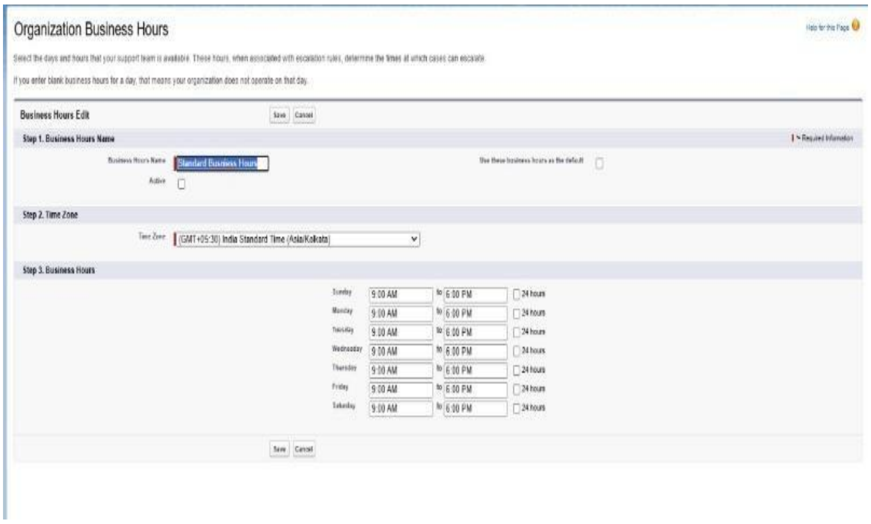
- **Name**: Smart Service Appointment & Warranty Automation
- **Time Zone**: Default working timezone (e.g., *GMT+05:30 Kolkata*).
- **Locale**: Controls date/number formats (e.g., *English (India/US)*).
- **Language**: English (India)
- **Currency**: Corporate currency (e.g., *INR, USD*).



Business Hours Setup

Configure working hours for escalation rules and SLA tracking:

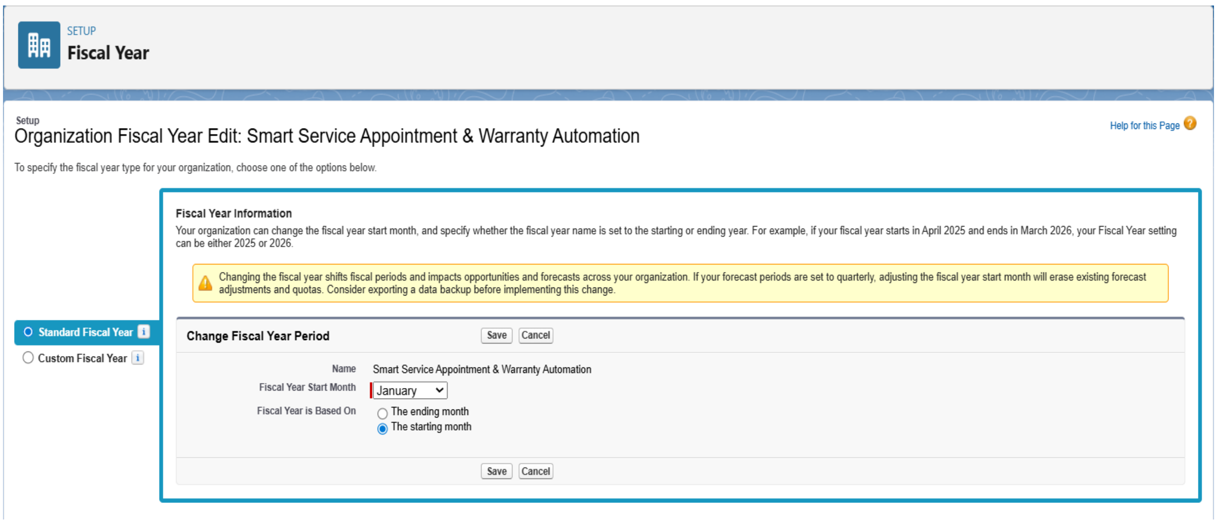
- **Path**: *Setup → Business Hours → New*.
- **Name**: Define (e.g., *Standard Business Hours*).
- **Time Zone**: Select org or regional timezone (e.g., *GMT+05:30 Asia/Kolkata*).
- **Working Hours**: Set daily schedule (e.g., Mon–Sat 9:00 AM–6:00 PM; Sunday closed).
- **Save**: Apply as default if needed.



Fiscal Year Setup

Defines reporting boundaries for forecasts and opportunities.

- **Path**: *Setup → Fiscal Year*.
- **Type**: Choose *Standard Fiscal Year* (Jan–Dec) or *Custom Fiscal Year* if months differ.
- **Configuration**: Select the starting month (e.g., *January*).
- **Save**: Apply settings to define fiscal periods.



👉 User Setup (Profiles, Roles, Permission Sets, Users)

a) Profiles

Profiles control what users can do (object-level permissions)

1. **Service_Agent_Profile**
   - For service reps handling appointments & customer issues.
2. **Warranty_Manager_Profile**
   - For users who manage warranty claims and approvals.
3. **Admin_Profile**
   - For project manager/system admin who has wider control.

(Later in Phase 3, when you create objects like Appointment, Warranty, Claim, etc., you'll adjust permissions here).

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b) Roles

Create the following hierarchy:

CEO

└── Service Manager

  └── Service Agent

└── Warranty Manager

- **CEO** → Top-level (sees everything).
- **Service Manager** → Supervises service agents.
- **Service Agent** → Handles appointments and service requests.
- **Warranty Manager** → Approves/rejects warranty claims, works parallel to service team.

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c) Permission Sets

Permission sets provide **extra permissions** beyond profile.

👉 Create one for Phase 3 (leave empty for now):

- **Warranty_Access_PS** → will grant extra access to Warranty object later.
- **Appointment_Access_PS** → will grant extra access to Appointment object later.

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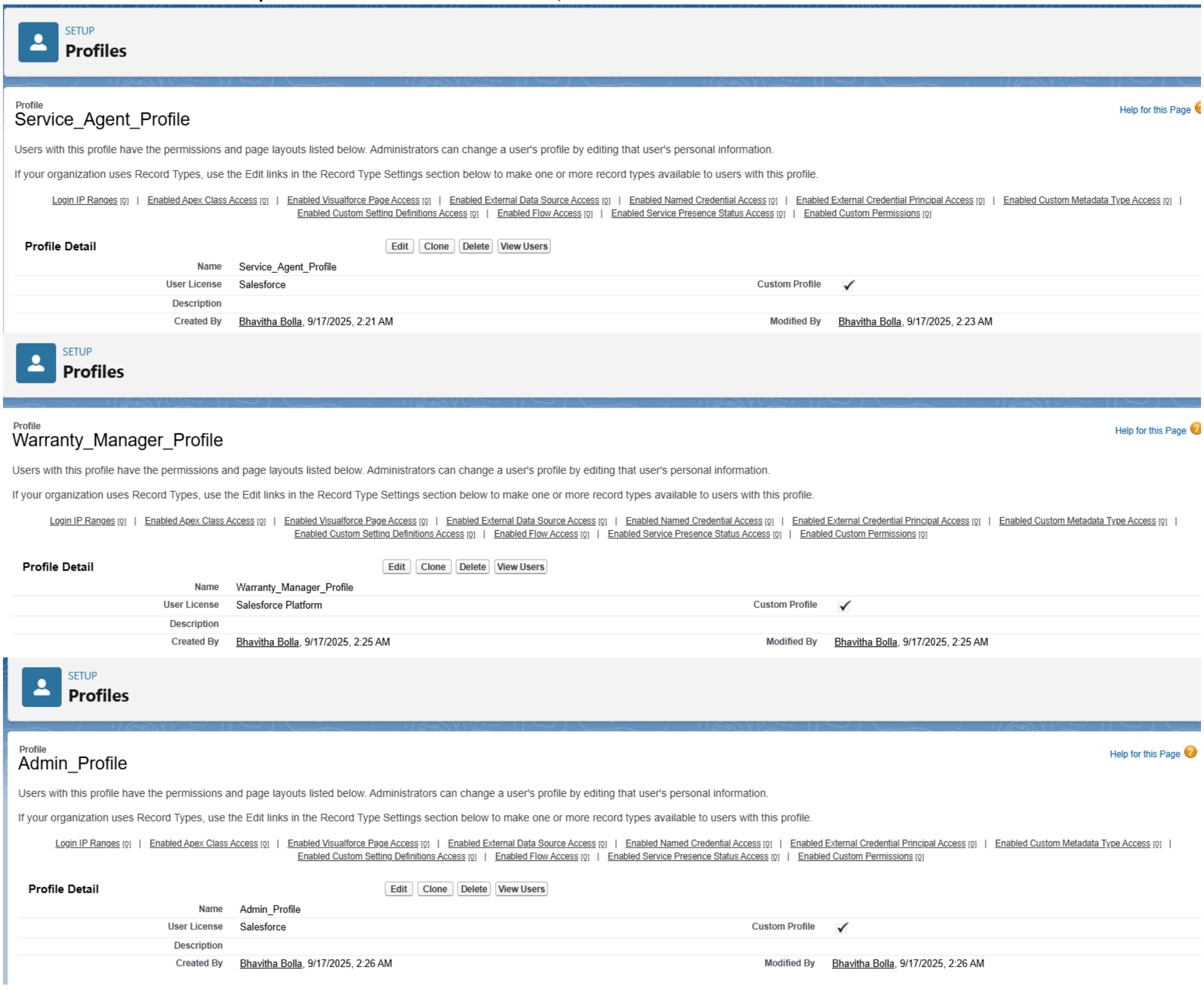
d) Users

Create sample users for testing the flow:

1. **agent1** → Profile: Service_Agent_Profile → Role: Service Agent

- Example: Handles new customer appointment bookings.

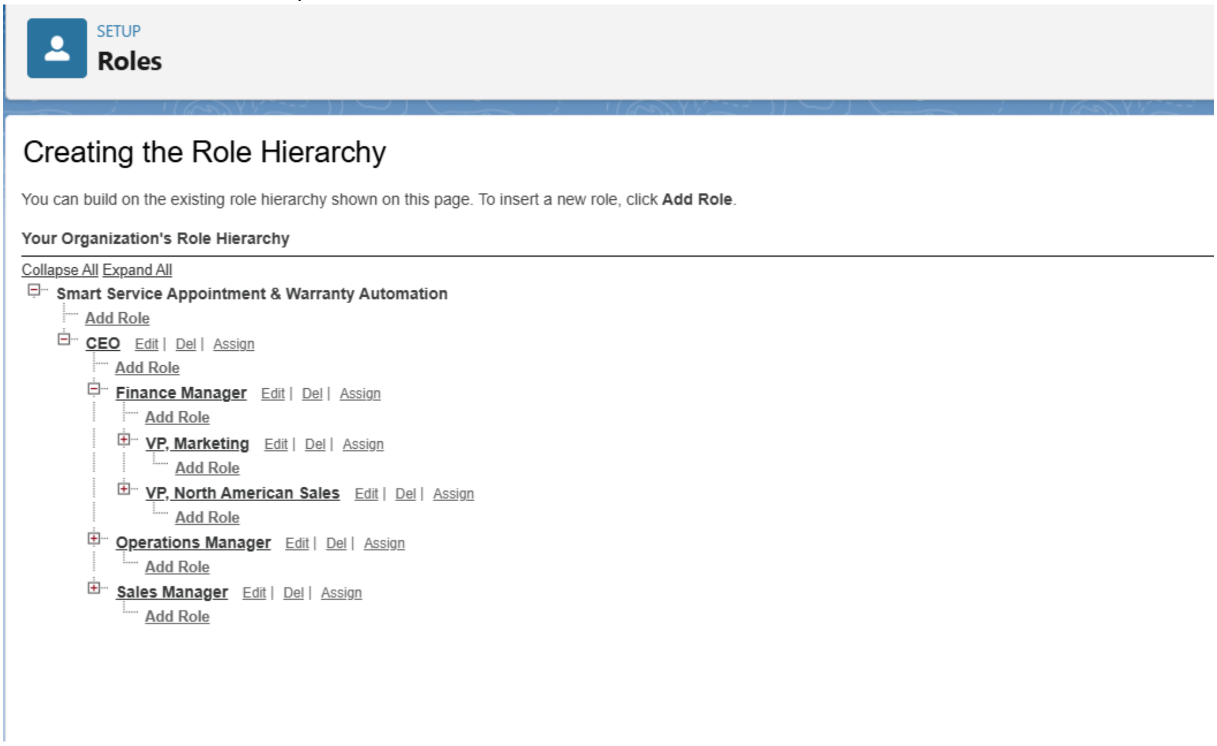
2. **warranty1** → Profile: Warranty_Manager_Profile → Role: Warranty Manager
   - Example: Reviews and approves warranty requests.
3. **manager1** → Profile: Admin_Profile → Role: Service Manager
   - Example: Oversees both teams, resolves escalations.



Role Hierarchy Setup

- **CEO**: Full access to all modules.
- **Operations Manager**: Monitors service appointments and warranty processing.
- **Service Executive / Technician**: Works on service requests, updates status, logs issues.
- **Warranty Coordinator**: Reviews warranty claims, approves replacements, manages warranty data.
- **Sales Manager / Sales Rep**: Manages customer sales and links sales to service/warranty records.
- **Finance Manager / Executive**: Tracks payments, invoices, and warranty costs.

```
CEO
 ├─ Operations Manager
 |    ├─ Service Executive / Technician
 |    └─ Warranty Coordinator
 ├─ Sales Manager
 |    └─ Sales Representative
 └─ Finance Manager
      └─ Finance Executive / Accountant
```



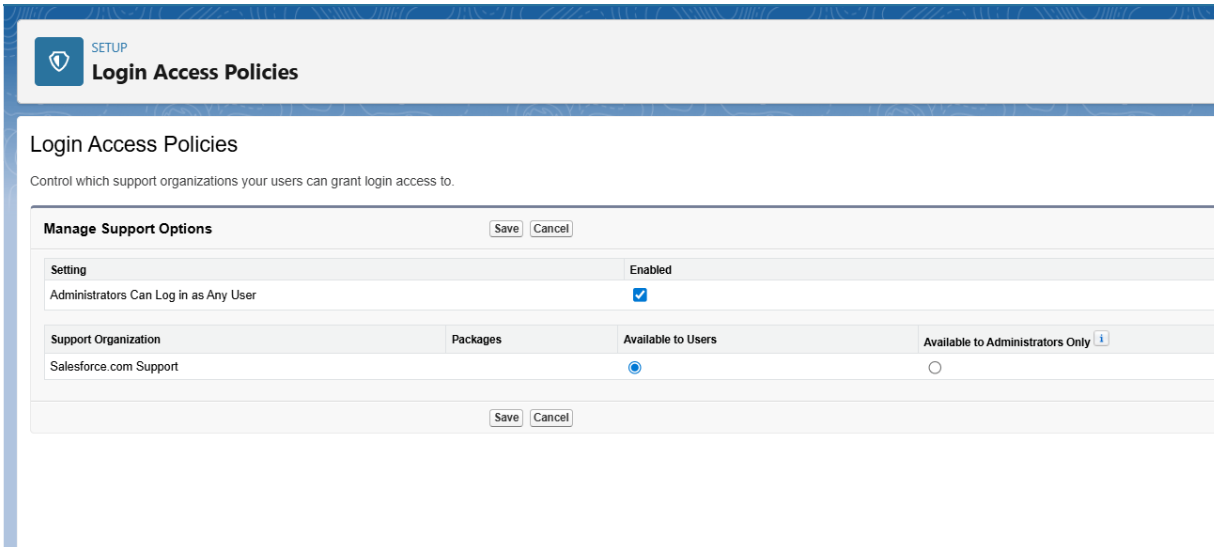
OWD (Org Wide Default)

This has to be done in the Phase 3, as the OWD setting are needed to be applied on an object which will be implemented in next phase of the project.

Sharing Rule

This has to be done in the Phase 3 as well considering it has to be implemented on an object.

Assign Permission Set(s)



Dev Org Setup

- To implement the following project a Salesforce Developer Edition org was setup.
- Made a GitHub Repository for source control.
- Setting up the VS Code and SFDX for the implementation of the LWC Component for development.