

Phase 2

1) Executive Summary

Phase 2 focused on **org setup and configuration** to lay a strong foundation for future data modeling, automation, and AI features. The key deliverables include:

- Scratch org configuration
- Minimal security model (roles and private sharing)
- Profile scaffolding
- Seed Permission Set for AI access
- Minimal custom objects: Event__c and Attendee__c

During deployment to the target org, some **role access alignment issues** and an **internal error** for the Organizer role occurred. A temporary workaround was applied using `.forceignore`.

2) Scope & Objectives

In Scope (Phase 2):

- Org setup & configuration baselining
- Minimal security model: Role hierarchy + private sharing posture
- Profiles scaffolding + seed Permission Set
- Minimal custom objects (Event__c, Attendee__c)
- Deployment scripts, commands, and validation

3) Environment & Project Settings

- **Project Name:** EventEase
- **Default Package Directory:** force-app/
- **Salesforce CLI + API Version:** sourceApiVersion 64.0
- **Scratch Org Definition:**
 - Edition: Enterprise
 - Features: EnableSetPasswordInApi
 - Settings: Lightning Experience enabled, end-user & platform languages enabled, mobile encrypted storage disabled

Note: If deploying to a real org using yashlawankar721@salesforce.com, authorize it first:

```
sf auth web login --set-default --username yashlawankar721@salesforce.com
```

4) Security Model Foundations

4.1 Org-Wide Defaults (OWD)

- Minimal custom objects created with **Private sharing model**:
 - Event__c
 - Attendee__c

4.2 Role Hierarchy

- **Roles delivered:**
 - Admin → Event_Manager → Organizer (intended hierarchy)
- **Namespaced EventEase roles:**
 - EventEase_Admin
 - EventEase_Event_Manager

- EventEase_Organizer
- **Access adjustments:** Case, Contact, Opportunity set to Edit where necessary to avoid “access below OWD” errors
- **Known issue:** Organizer role caused internal error (ErrorId: 1306876300); temporarily ignored via .forceignore

5) Profiles (Minimal Scaffolds)

The screenshot shows the Salesforce Setup interface for the 'Profiles' page. The left sidebar contains a search bar and a list of setup items, with 'Profiles' selected. The main content area shows the 'Organizer' profile details. The profile is named 'Organizer' and has a 'Salesforce' user license. It is a 'Custom Profile' with a checkmark. The 'Page Layouts' section shows assignments for various object layouts, including 'Global', 'Fulfillment Order Product', 'Email Application', and 'Legal Entity'.

- Admin.profile-meta.xml
- Organizer.profile-meta.xml

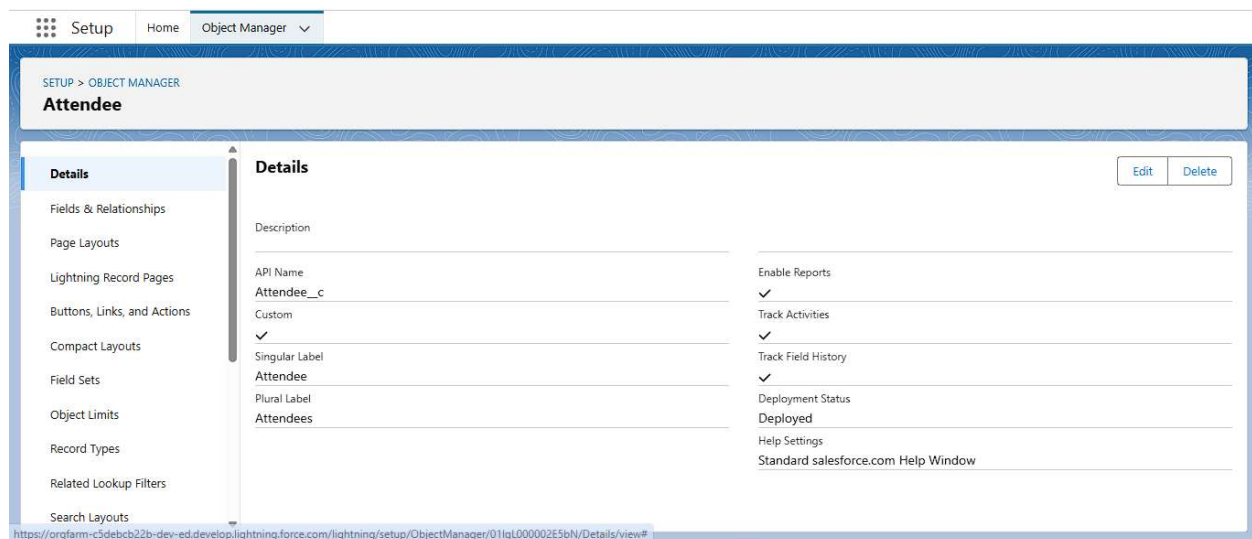
Rationale: Minimal scaffolds delivered because full object/field permissions will be handled via Permission Sets in later phases.

6) Permission Set (Seed for AI Access)

- File: AI_Recommendations.permissionset-meta.xml
- Purpose: Assignable handle for future AI-driven recommendations

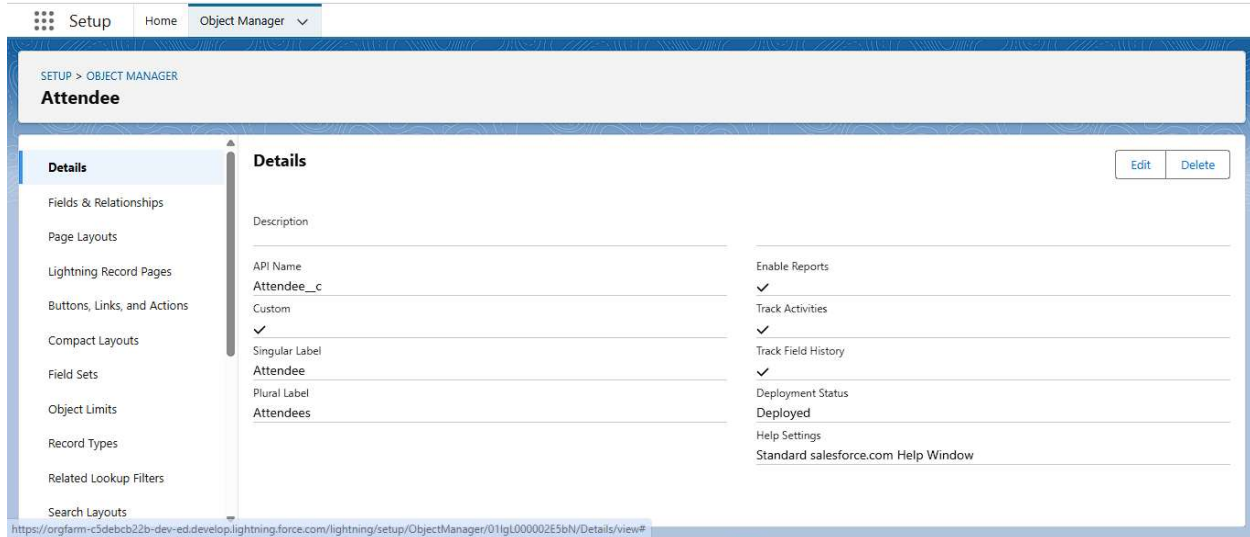
7) Custom Objects

Event__c



- Label/Plural: Event / Events
- Name Field: Text ("Event Name")
- Sharing Model: Private
- Enabled Features: Activities, History, Reports, Search

Attendee__c



- Label/Plural: Attendee / Attendees
- Name Field: Text ("Attendee Name")
- Sharing Model: Private
- Enabled Features: Activities, History, Reports, Search

8) Deployment & Validation

For Scratch Org (EventEase alias):

- ❖ `sf org create scratch --definition-file config/project-scratch-def.json --alias EventEase --duration-days 7 --set-default`
- ❖ `sf project deploy start --source-dir force-app --target-org EventEase`
- ❖ `sf org assign permset --name AI_Recommendations --target-org EventEase`
- ❖ `sf data query --target-org EventEase --query "SELECT Id, Name, DeveloperName, ParentRoleId FROM UserRole WHERE Name LIKE 'EventEase%' ORDER BY Name"`
- ❖ `sf org open --target-org EventEase`

For real org (yashlawankar721@salesforce.com):

`sf project deploy start --source-dir force-app --target-org yashlawankar721@salesforce.com`

```
sf org assign permset --name AI_Recommendations --target-org yashlawankar721@salesforce.com
sf data query --target-org yashlawankar721@salesforce.com --query "SELECT Id, Name, DeveloperName,
ParentRoleId FROM UserRole WHERE Name LIKE 'EventEase%' ORDER BY Name"
sf org open --target-org yashlawankar721@salesforce.com
```

9) Deployment Notes & Workarounds

- **Initial failures:** “access level below organization default” on some roles → fixed by setting access to Edit
- **Organizer role error:** internal error (ErrorId: 1306876300) → ignored temporarily using `.forceignore`

Recommended follow-ups:

1. Verify hierarchy; add `<parentRole>` if missing
 2. Deploy roles individually if needed
 3. Rename metadata (e.g., `EventEase_Organizer`) or update via Setup UI if conflict persists
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10) Appendix — File Inventory

Config:

- `config/project-scratch-def.json`

Roles:

The screenshot shows the Salesforce Setup Roles page. The left sidebar contains navigation links: Setup, Home, Object Manager, and a search bar. The main content area is titled 'Roles' and 'Creating the Role Hierarchy'. It displays a tree view of the organization's role hierarchy for 'Prof. Ram Meghe Institute Of Technology And Research'. The hierarchy is as follows:

- Prof. Ram Meghe Institute Of Technology And Research
 - Admin (Add Role, Edit, Del, Assign)
 - CEO (Add Role, Edit, Del, Assign)
 - Event_Manager (Add Role, Edit, Del, Assign)
 - EventEase_Admin (Add Role, Edit, Del, Assign)
 - EventEase_Event_Manager (Add Role, Edit, Del, Assign)
 - EventEase_Organizer (Add Role, Edit, Del, Assign)

The bottom of the screen shows the Windows taskbar with various application icons and the system clock indicating 08:53 PM on 16-09-2025.

- Admin.role-meta.xml
- Event_Manager.role-meta.xml
- Organizer.role-meta.xml
- EventEase_Admin.role-meta.xml
- EventEase_Event_Manager.role-meta.xml
- EventEase_Organizer.role-meta.xml

Profiles:

- Admin.profile-meta.xml
- Organizer.profile-meta.xml

Permission Sets:

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Setup, Home, Object Manager, Users, Permission Set Groups, Permission Sets (selected), Custom Code, and Custom Permissions. The main content area is titled 'Permission Sets' and shows a specific permission set named 'AI Recommendations Access'. The description is 'Grants access needed for AI-driven event recommendations (to be expanded in Phase 3+)'. The API Name is 'AI_Recommendations'. The created by is 'Yash Lawankar' on 9/15/2025 at 8:33 AM. The last modified by is also 'Yash Lawankar' on 9/15/2025 at 8:33 AM. Below the overview, there are sections for 'Apps' with links to 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings', and 'App Permissions'.

- AI_Recommendations.permissionset-meta.xml

Custom Objects:

- Event__c.object-meta.xml
- Attendee__c.object-meta.xml

Manifest:

- package.xml