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.

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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:**

  o Edition: Enterprise

  o Features: EnableSetPasswordInApi

  o 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**:

  o Event__c

  o Attendee__c

4.2 Role Hierarchy

- **Roles delivered:**

  o Admin → Event_Manager → Organizer (intended hierarchy)

- **Namespaced EventEase roles:**

  o EventEase_Admin

  o EventEase_Event_Manager

o 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)

- 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
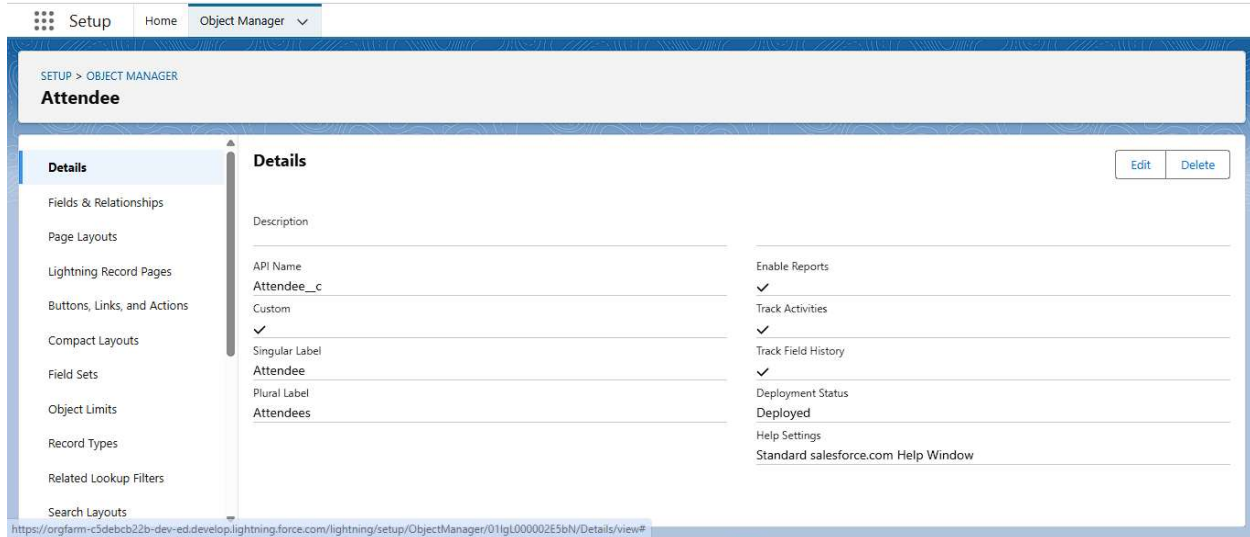
7) Custom Objects

Event__c
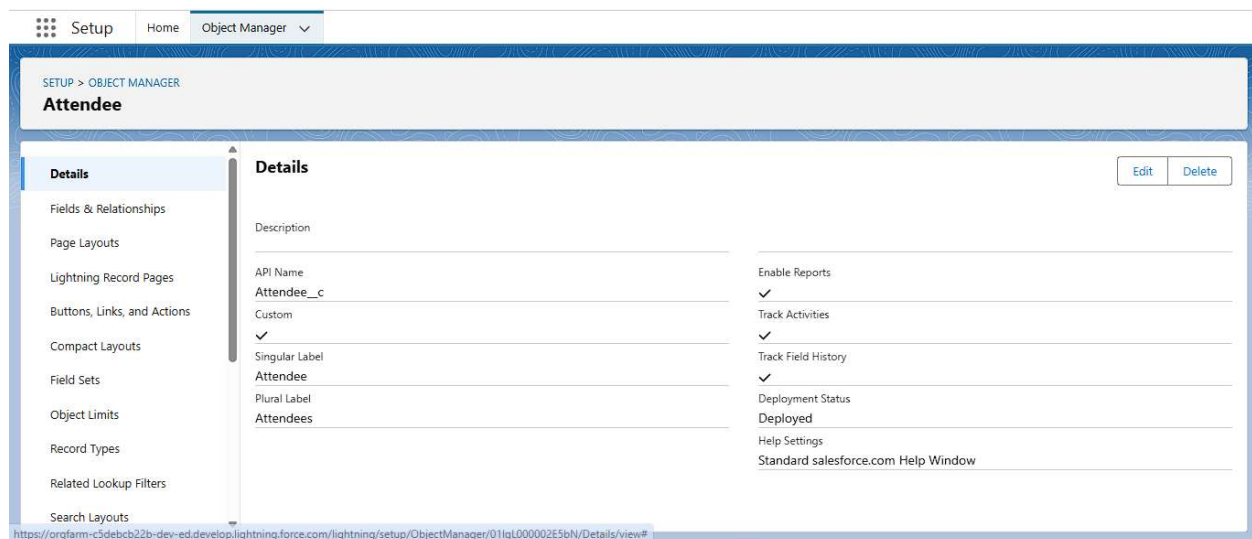
- Label/Plural: Event / Events

- 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

10) Appendix — File Inventory

Config:

- config/project-scratch-def.json

Roles:

- 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:

- AI_Recommendations.permissionset-meta.xml

Custom Objects:

- Event__c.object-meta.xml

- Attendee__c.object-meta.xml

Manifest:

- package.xml