

## 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:**
  - 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
```

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### 4) Security Model Foundations

#### 4.1 Org-Wide Defaults (OWD)

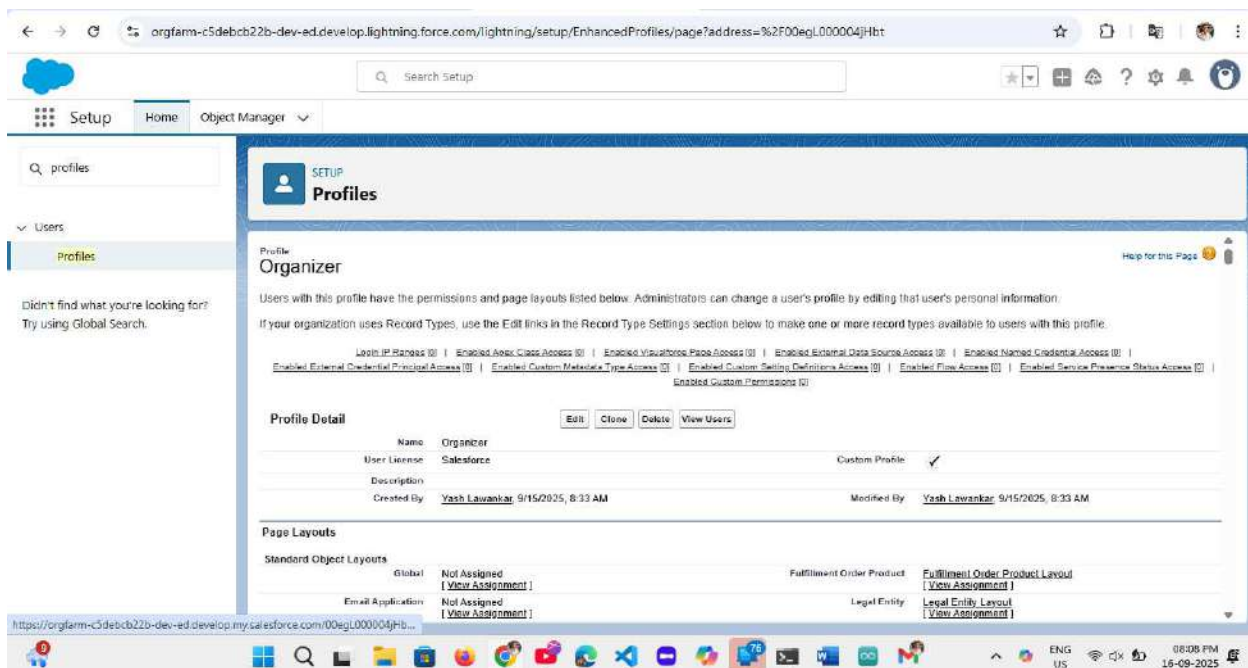
- Minimal custom objects created with **Private sharing model**:
  - Event\_\_c
  - Attendee\_\_c

#### 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)



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

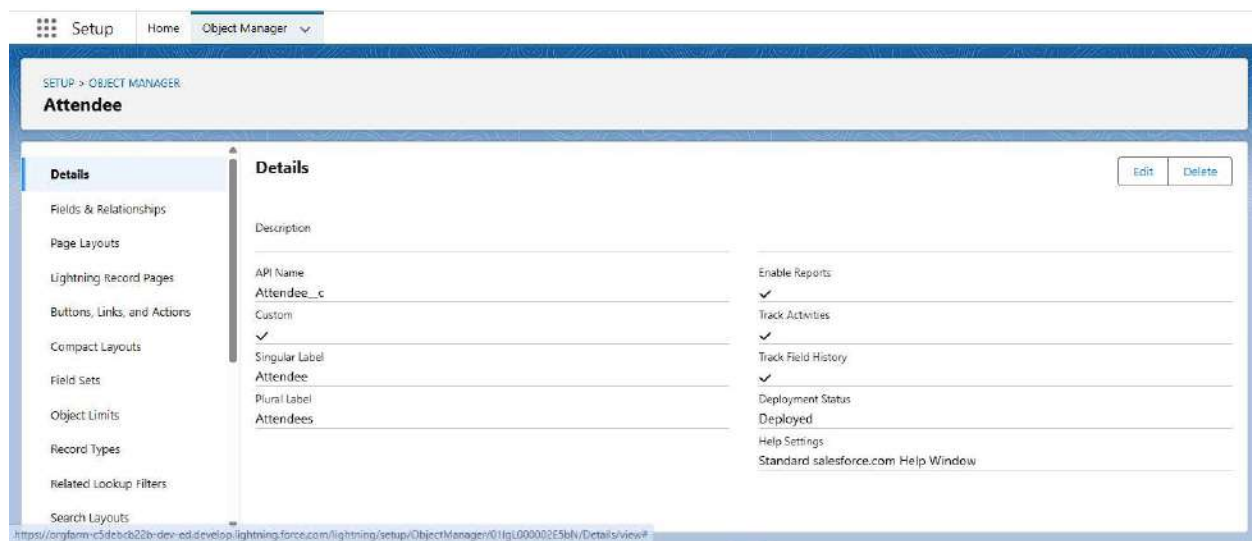
**Rationale:** Minimal scaffolds delivered because full object/field permissions will be handled via Permission Sets in later phases.

## 6) Permission Set (Seed for AI Access)

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

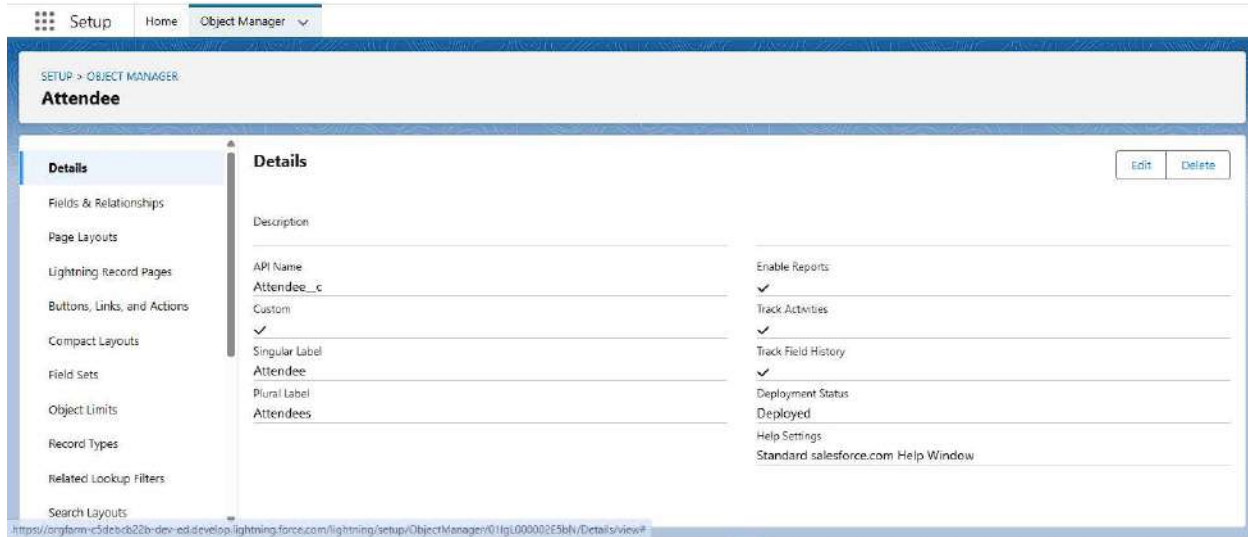
## 7) Custom Objects

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
```

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## 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:

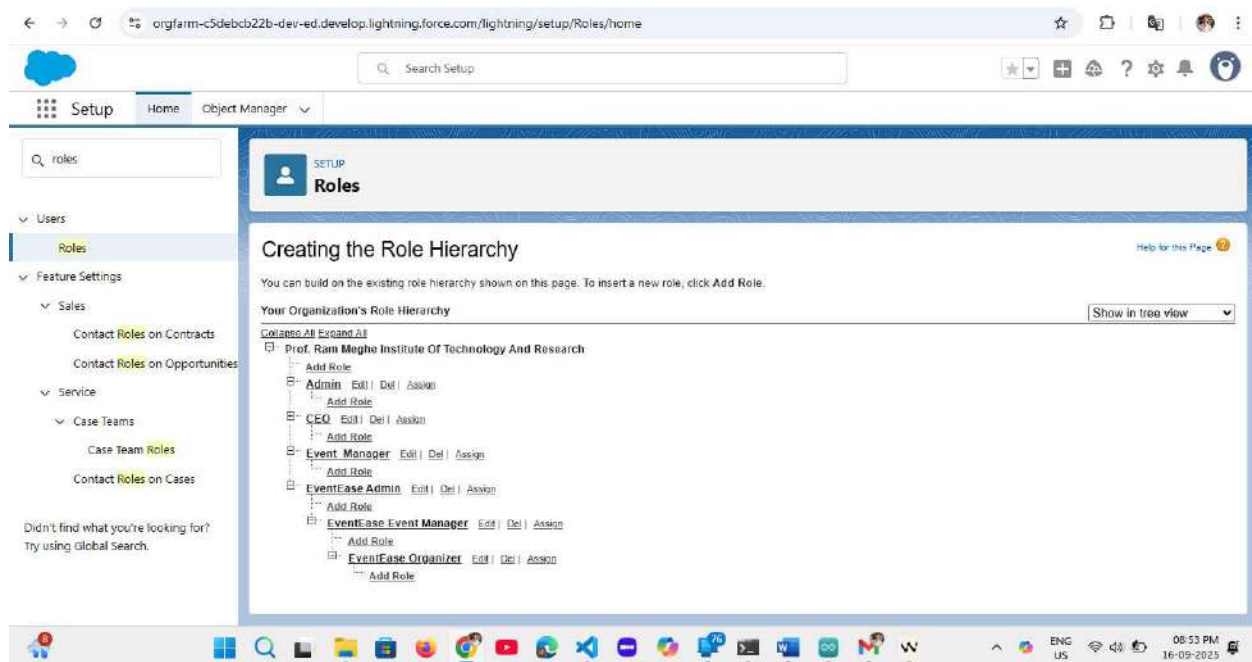
1. Verify hierarchy; add `<parentRole>` if missing
  2. Deploy roles individually if needed
  3. Rename metadata (e.g., EventEase\_Organizer) or update via Setup UI if conflict persists
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## 10) Appendix — File Inventory

### Config:

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

### Roles:

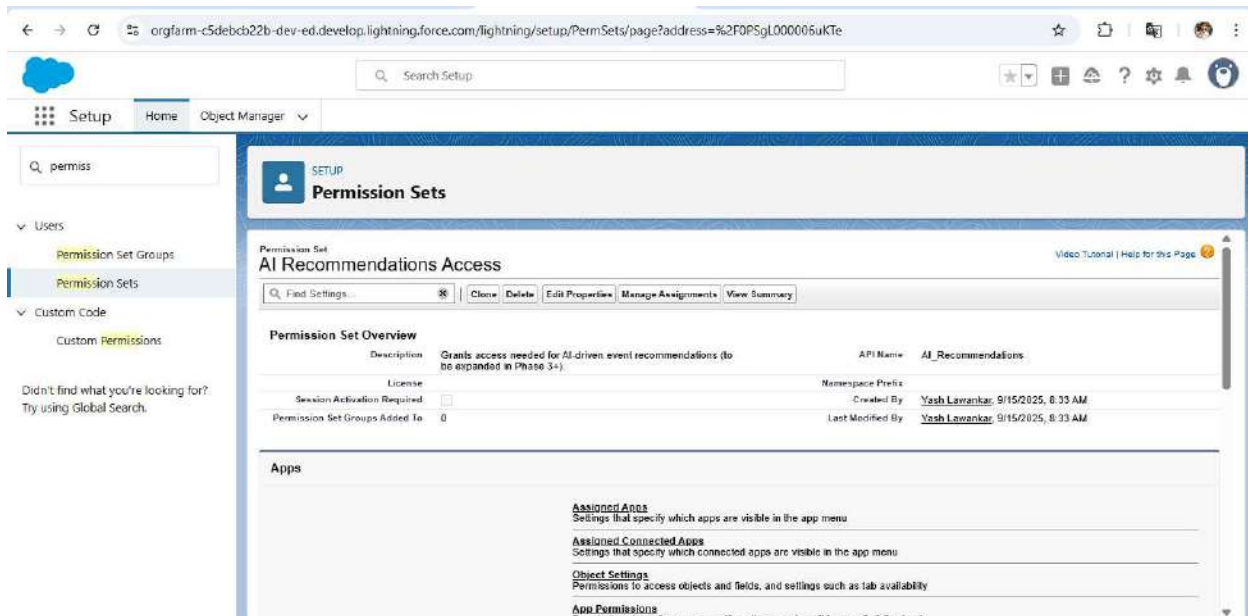


- Admin.role-meta.xml
- Event\_Manager.role-meta.xml
- Organizer.role-meta.xml
- EventEase\_Admin.role-meta.xml
- EventEase\_Event\_Manager.role-meta.xml
- EventEase\_Organizer.role-meta.xml

#### 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