# Phase 2: Org Setup & Configuration - Digital Banking CRM

## 👉 Goal: Prepare Salesforce Environment

## Salesforce Editions

Use Developer Edition Developer Org (free dev org).

## Company Profile Setup

Go to Company Settings → add company info, local time zone.

Set currency to INR/USD depending on the project.

## Business Hours & Holidays

Define working hours (9am–6pm).

Add public holidays (no approvals on these days).

## Fiscal Year Settings

Standard (Jan–Dec) → good for revenue reporting.

## User Setup & Licenses

Create users: Rental Agent, Manager. Assign them Salesforce licenses.

## Profiles

Agents: Can create bookings but cannot change sharing rules.

Manager: Full access.

## Roles

Manager on top, Agents below → ensures record visibility rolls up.

## Permission Sets

If an Agent needs extra access (e.g., Reports), create a Permission Set instead of modifying Profile.

## OWD (Org-Wide Defaults)

Car object: Public Read Only.

Rental Booking: Private → only owner/manager sees.

## Sharing Rules

If bookings should be visible to other agents, add a rule.

## Login Access Policies

Restrict login hours (9am–6pm for agents).

## Dev Org Setup

This is your sandbox → where you build/test.

## Sandbox Usage

If this were a real company, we’d build in Sandbox, then deploy to Production.

## Deployment Basics

Deployment is moving config/code from sandbox → production using Change Sets.