Phase 2

Org Setup & Configuration for Home-Maintenance-Repair-Management-System

Objective :

Configure a Salesforce Developer Edition org specifically for the Home Maintenance Repair Management system with company details, user roles, profiles, security, and sharing rules to ensure proper data visibility and access control for various stakeholders.

Dev Org Setup :

- Provision a Salesforce Developer Edition org for development and testing.
- This org supports custom objects, flows, Apex, dashboards, and app integrations for the project.
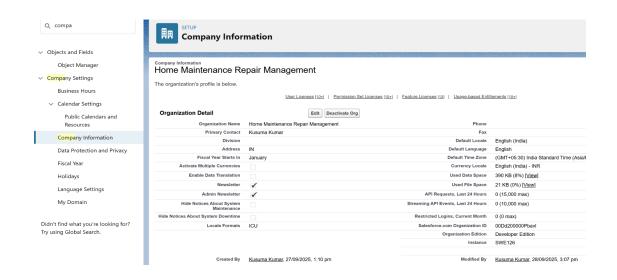
Company Profile Setup :

- Company Name: Home Maintenance Repair Management
- Default Time Zone: Asia/Kolkata (GMT +05:30)
- Default Locale: English (India)
- Default Currency: INR

User Setup, Roles & Profiles :

Roles

Create the following role hierarchy suitable for system users:
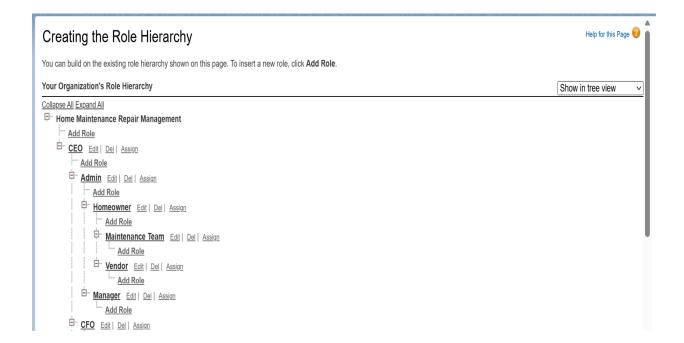
- Admin (root)
    - Homeowner
        - Maintenance Team
        - Vendor
    - Manager (for overseeing operations)

Users

- Create test users for each role to test data visibility and permissions:
    - One user each for Admin, Homeowner, Maintenance Team, Vendor, and Manager.

Profiles

- For simplicity, assign the Standard User profile to all roles initially.
- Customize profiles later for specific permissions as needed.

OWD (Organization-Wide Defaults) & Sharing Rules :

Organization-Wide Defaults

Set data visibility defaults aligned to project requirements:

- Maintenance Request (or Work Order) → Private (only owner & shared users access)
- Asset (property items) → Public Read Only (viewable by all users)
- Vendor → Public Read Only (for transparency)
- User → Private (restrict user data)

Sharing Rules

Create sharing rules so that Managers and relevant users have access to maintenance requests and assets owned by their teams:

- Share Maintenance Requests owned by Maintenance Team users to their Manager role.
- Share Assets owned by Home owner role as needed.

Login Access Policies

- Enable "Administrators Can Log in as Any User" for testing role-based record access and permissions.

Testing and Validation

Administrators verify the setup by using the "Login As" feature to impersonate users in different roles. Sample records in custom objects are created under various users to test and confirm that access levels, sharing rules, and OWD settings work according to the design.

Deployment and Backup

Configurations including custom objects, roles, sharing rules, and profiles can be packaged into an unmanaged package. This package serves for backup purposes or future deployment into other Salesforce environments, ensuring consistent configurations.