**Phase 2: Org Setup & Configuration**

1. **Salesforce Editions**

* We’re using Developer Edition (free) since it gives full Admin + Developer access.
* In real companies, they may use **Enterprise Edition** (more features like advanced permissions, APIs, and Sandboxes).

1. **Company Profile Setup**

* **Define Company Info:** Organization name, default currency, fiscal year, time zone, primary contact.
* **Configure Business Hours & Holidays:**
* Example: Business hours: 9 AM – 9 PM, Monday–Sunday.
* Add Holidays like “Independence Day” or “Diwali” → ensures SLAs and automation respect downtime.
* **Fiscal Year Settings:** Standard (Jan–Dec) or custom if EV operators want to track differently.

1. **User Setup & Licenses**

* **Users are created to represent real people:**
* Admin
* Operators
* Managers
* EV Customers
* Each user gets a **license** (Salesforce, Platform, or Community license)
* Example: Operators use Salesforce Platform license; Customers use Community

1. **Profiles**

* **System Admin** → default full access.
* **Operator** → clone from Standard User, allow access to Booking, Station, Payment.
* **Manager** → clone from Standard Manager, give reporting + approval rights.
* **Customer** → custom profile for Experience Cloud access (can book slots, make payments, view history).

1. **Roles**

**Roles define data visibility in hierarchy.**

* **Manager** (can view all operator + customer data).
* **Operator** (can view station/bookings they manage).
* **Customer** (sees only their own bookings).

1. **Permission Sets**

Used to grant **extra permissions** without changing profiles.

* Example:
  + “Refund Management” permission set for managers only.
  + “Payment Gateway Access” permission set for operators who need to manage external APIs.

1. **Org-Wide Defaults**

Set default data sharing:

* **Charging Stations** → Public Read Only.
* **Bookings** → Private (only owner/operator sees).
* **Payments** → Private (sensitive info).
* **Customers** → Private.

This ensures customer privacy and compliance.

1. **Sharing Rules**

* Managers → can view all bookings/payments of their operators.
* Operators → can share booking access temporarily with other operators if needed.

1. **Login Access Policies**

* Define trusted IP ranges
* Set password policies

1. **Dev Org Setup**

* Already done
* We’ll use this org for full project build

1. **Sandbox Usage**

* In real companies → Sandboxes are used for testing before production.
* Example: Developer Sandbox → test Apex triggers; UAT Sandbox → test new booking flow with managers.

1. **Deployment Basics**

* For now, changes are made directly in Developer Org.
* Later phases will cover **Change Sets, VS Code + SFDX, GitHub version control** for deployments.