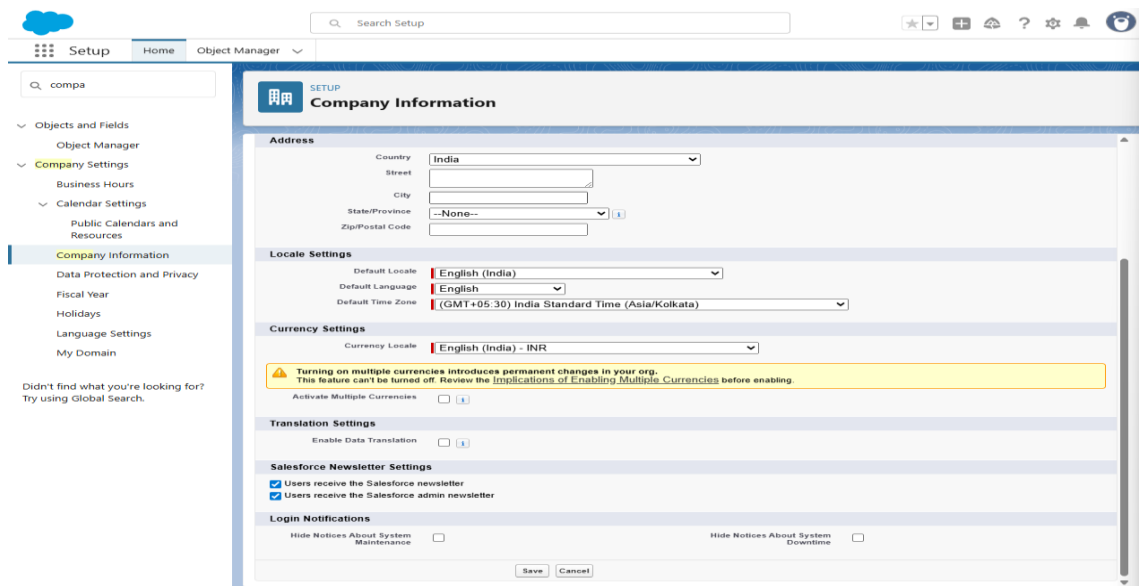


Phase 2 — Org setup & configuration

Project Title: Event Hub Suite

2.1 Basic org settings

1. Setup → *Company Settings* → Company Information → update Default Locale, Time Zone, Default Currency.

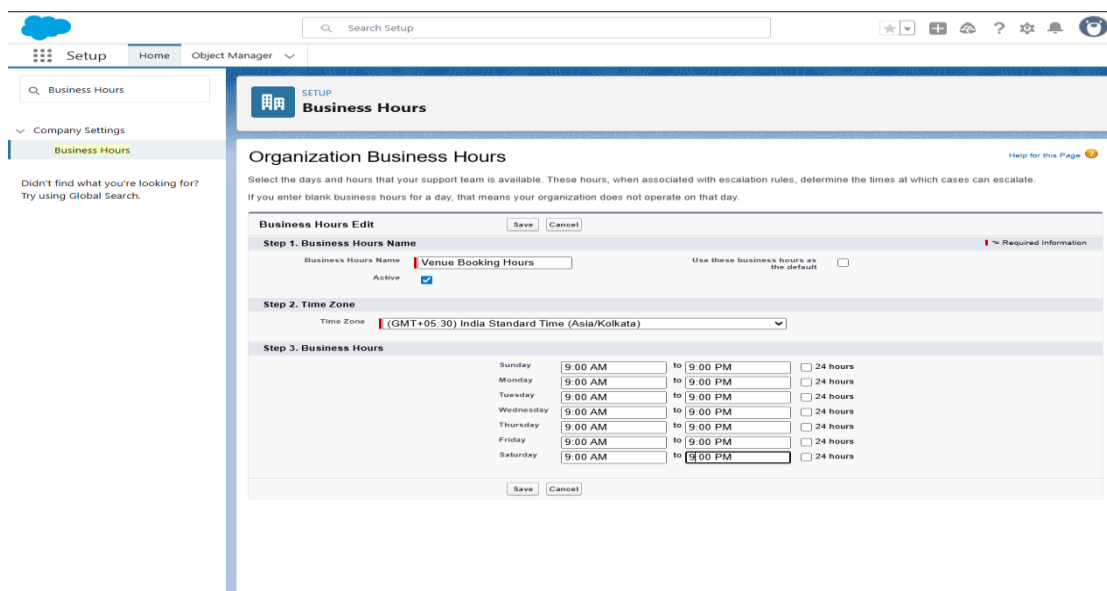


The screenshot shows the Salesforce Setup interface with the 'Company Information' page selected. The left sidebar contains a navigation menu with 'Company Settings' expanded, showing 'Company Information' as the active item. The main content area displays the 'Company Information' form with the following sections:

- Address:** Country (India), Street, City, State/Province (None), Zip/Postal Code.
- Locale Settings:** Default Locale (English (India)), Default Language (English), Default Time Zone ((GMT+05:30) India Standard Time (Asia/Kolkata)).
- Currency Settings:** Currency Locale (English (India) - INR).
- Translation Settings:** Enable Data Translation (checkbox).
- Salesforce Newsletter Settings:** Users receive the Salesforce newsletter (checked), Users receive the Salesforce admin newsletter (checked).
- Login Notifications:** Hide Notices About System Maintenance (checkbox), Hide Notices About System Downtime (checkbox).

A yellow warning banner states: "Turning on multiple currencies introduces permanent changes in your org. This feature can't be turned off. Review the [Implications of Enabling Multiple Currencies](#) before enabling." Below this, there is a checkbox for 'Activate Multiple Currencies'.

2. Setup → *Business Hours* → New → create Venue Booking Hours.

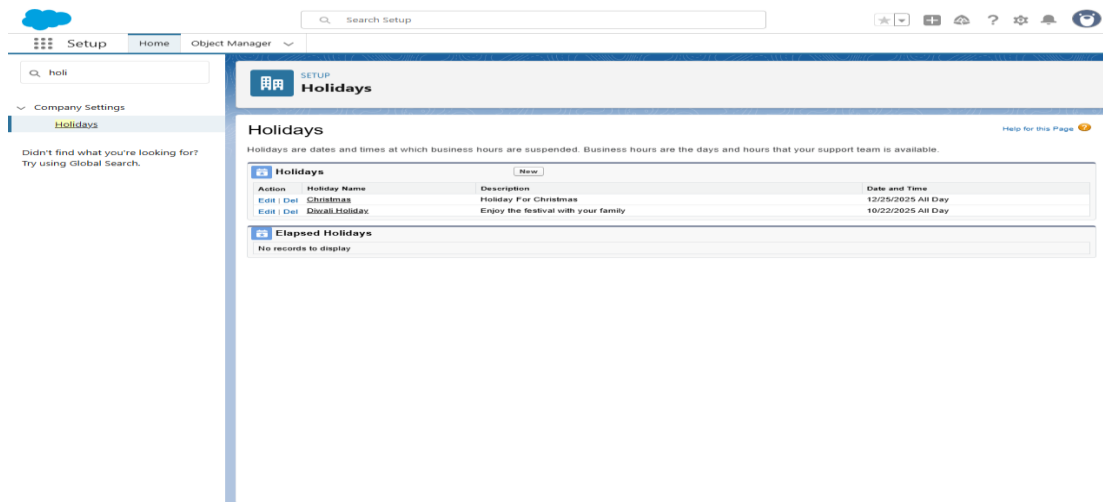


The screenshot shows the Salesforce Setup interface with the 'Business Hours' page selected. The left sidebar contains a navigation menu with 'Company Settings' expanded, showing 'Business Hours' as the active item. The main content area displays the 'Organization Business Hours' form with the following sections:

- Business Hours Edit:** Business Hours Name (Venue Booking Hours), Active (checked), Use these business hours as the default (checkbox).
- Step 2. Time Zone:** Time Zone ((GMT+05:30) India Standard Time (Asia/Kolkata)).
- Step 3. Business Hours:** A table for defining business hours for each day of the week.

Day	Start Time	End Time	24 hours
Sunday	9:00 AM	9:00 PM	<input type="checkbox"/>
Monday	9:00 AM	9:00 PM	<input type="checkbox"/>
Tuesday	9:00 AM	9:00 PM	<input type="checkbox"/>
Wednesday	9:00 AM	9:00 PM	<input type="checkbox"/>
Thursday	9:00 AM	9:00 PM	<input type="checkbox"/>
Friday	9:00 AM	9:00 PM	<input type="checkbox"/>
Saturday	9:00 AM	9:00 PM	<input type="checkbox"/>

3. Setup → *Holidays* → add semester breaks.

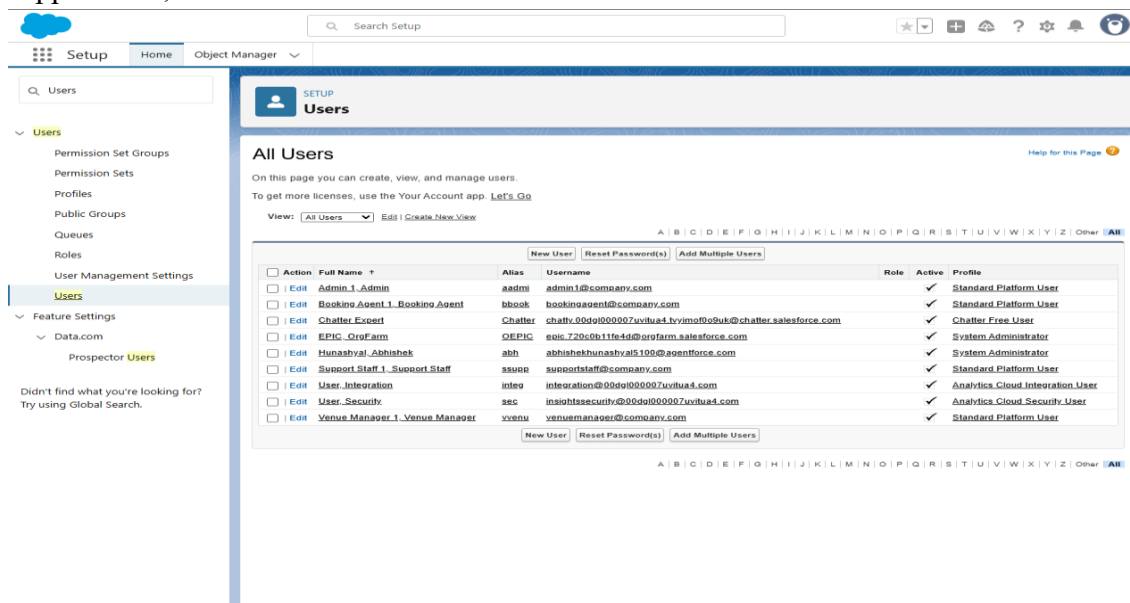


2.2 Enable features

1. Setup → *Quick Find* → Digital Experiences → enable if you want a customers to request bookings online.

2.3 Users, Profiles, Roles

1. Setup → *Users* → New User → create sample accounts: VenueManager, supportStaff,....

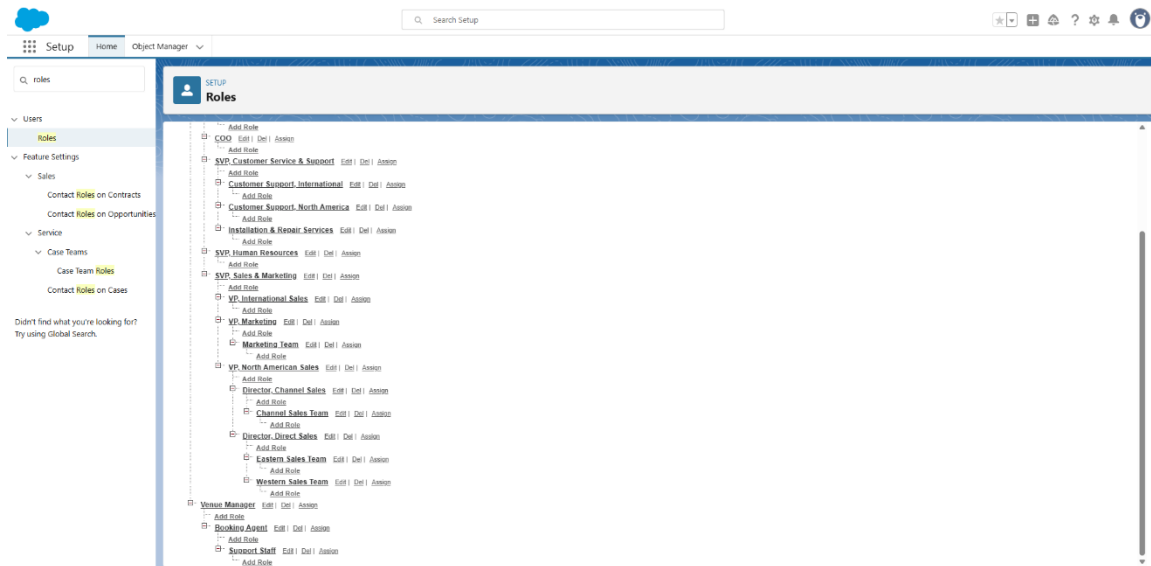


Setup → Profiles → Clone *Standard User*.

- Booking_Agent_Profile → Create/Edit Bookings only.
- Venue_Manager_Profile → Full access to Venues & Bookings.
- Support_Staff_Profile → Read-only access.

2. Setup → *Roles* → Set Up Roles → create hierarchy:

- Admin
 - Venue Manager
 - Booking Agent
 - Support Staff



Setup → Permission Sets → New → *High_Value_Booking_PS*.

Grant special permissions (e.g., approve bookings > ₹1,00,000, export reports).

2.4 Security / OWD / Sharing

Setup → Sharing Settings → Edit

- Venues = Public Read Only
- Bookings = Private
- Customers = Private

Sharing Settings

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

⚠ One or more sharing operations has been initiated. See below for additional details. Certain operations may not be available.

Manage sharing settings for: All Objects

[Disable External Sharing Model](#)

Default Sharing Settings

Organization-Wide Defaults [Edit](#) [Organization-Wide Defaults Help](#)

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓
Product	Public Read/Write	Public Read/Write	✓
Individual	Public Read/Write	Private	✓
Voice Call	Private	Private	✓
Activation Target	Private	Private	✓

1. Create Sharing Rules: e.g., Share Bookings where *Booking: Number of guests greater than 200* → Role = Venue Manager (Read/Write).

Guest User [Sharing Rule Access Report](#)

[Sharing Settings](#)

Didn't find what you're looking for? Try using Global Search.

Work Plan Template Sharing Rules [New](#) [Recalculate](#) [Work Plan Template Sharing Rules Help](#)

No sharing rules specified.

Work Step Template Sharing Rules [New](#) [Recalculate](#) [Work Step Template Sharing Rules Help](#)

No sharing rules specified.

Work Type Sharing Rules [New](#) [Recalculate](#) [Work Type Sharing Rules Help](#)

No sharing rules specified.

Work Type Group Sharing Rules [New](#) [Recalculate](#) [Work Type Group Sharing Rules Help](#)

No sharing rules specified.

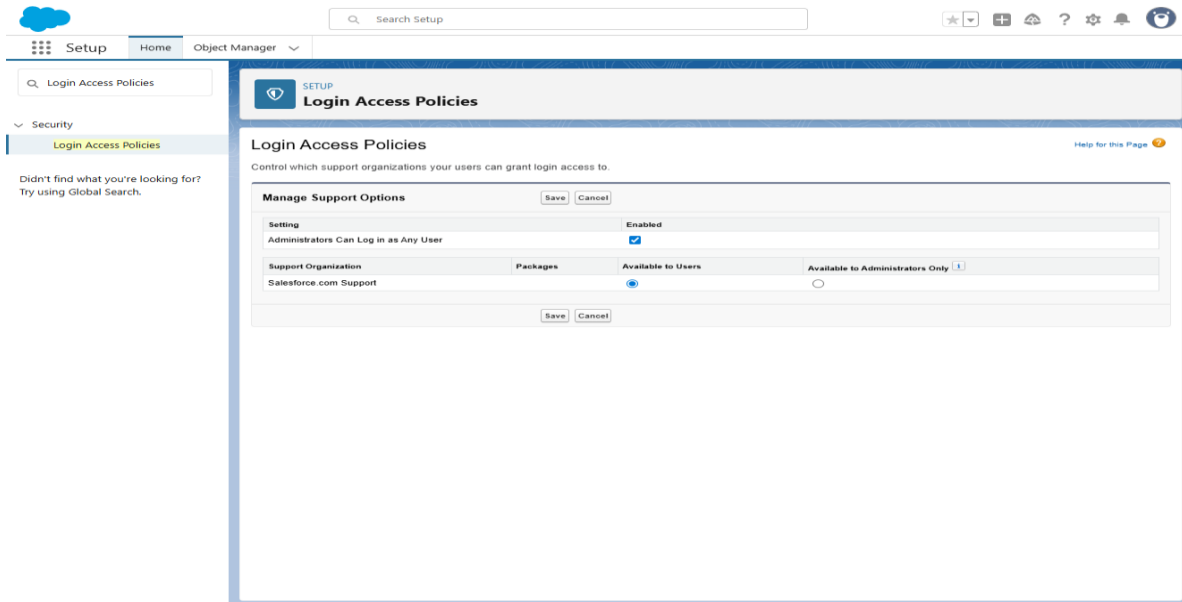
Booking Sharing Rules [New](#) [Recalculate](#) [Booking Sharing Rules Help](#)

Action	Criteria	Shared With	Access Level
Edit Del	Booking: Number of Guests GREATER THAN 200	Role: Venue Manager	Read/Write

Customer Sharing Rules [New](#) [Recalculate](#) [Customer Sharing Rules Help](#)

No sharing rules specified.

2. Setup → *Login Access Policies* → enable admin access if needed for troubleshooting.



2.4 Dev org & sandbox usage

- Use Developer org for building, Sandbox for UAT. Create a Partial Copy sandbox for more realistic data if available.
- Dev Org Setup
- To implement the following project a Salesforce Developer Edition org was setup.
- Made a GitHub Repository for source control.
- Setting up the VS Code and SFDX for the implementation of the LWC Component for development.