


## Phase 2: Org Setup & Configuration

### 1. Salesforce Edition

- Use a Developer Edition Org (free). This acts as our project environment.

### 2. Company Profile Setup

- Path: Setup → Company Settings → Company Information.
- Fill in:
  - Company Name: Membership & Subscription Manager
  - Time Zone: Asia/Kolkata (for India)
  - Currency: INR (or USD if needed).

 **SETUP**  
**Company Information**

Company Information

**Membership&Subscription Manager**

The organization's profile is below.

[User Licenses \(10+\)](#) | [Permission Set Licenses \(10+\)](#) | [Feature Licenses \(11\)](#) | [Usage-based Entitlements \(10+\)](#)

**Organization Detail**

Edit

Organization Name	Membership&Subscription Manager	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (India)
Address	United States	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	422 KB (8%) <a href="#">[View]</a>
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) <a href="#">[View]</a>
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)

### 3. Business Hours & Holidays

- Path: Setup → Company Settings → Business Hours.
- Create:
  - Name: Default Hours
  - Time: 9:00 AM – 6:00 PM (Mon–Fri).
- Add Holidays: (e.g., Jan 26 Republic Day, Aug 15 Independence Day)



SETUP

## Business Hours

## Organization Business Hours

[Help for this Page](#) ?A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other **All**

New Business Hours				
Action	Business Hours Name ↑	Active	Time Zone	Default
<a href="#">Edit</a>	Default	✓	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	✓
<a href="#">Edit</a>	Default Hours	✓	(GMT+05:30) India Standard Time (Asia/Kolkata)	<input type="checkbox"/>

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other **All**

## 4. Fiscal Year Settings

- Path: Setup → Company Settings → Fiscal Year.
- Select Standard Fiscal Year (Jan–Dec). Useful later for Revenue Reports.

## 5. User Setup &amp; Licenses

- Path: Setup → Users → New User.
- Create users:
  - Admin (You) → System Administrator
  - Agent → Standard User Profile
  - Manager → System Administrator or Custom Profile

## 6. Profiles

- Agent Profile:
  - Can create/manage subscriptions.
  - Cannot edit sharing rules.
- Manager Profile:
  - Full Access → can approve, manage reports, invoices.

## 7. Roles

- Path: Setup → Roles → Set up Roles.

- Create hierarchy:
  - Manager (Top)
  - Agents (Below Manager)
- Ensures record visibility flows upward.

#### 8. Permission Sets

- If Agents need extra access (like Reports), create a Permission Set instead of modifying profile.

#### 9. Org-Wide Defaults (OWD)

- Path: Setup → Sharing Settings.
- Set defaults:
  - Member Object: Public Read Only.
  - Subscription Object: Private → Only Owner & Manager can see.
  - Invoice Object: Private.

#### 10. Sharing Rules

- If needed, create rule:
  - Example: All Agents can view each other's subscriptions.

#### 11. Login Access Policies

- Restrict login hours for Agents → 9:00 AM – 6:00 PM.
- Prevents unauthorized access after hours.

#### 12. Dev Org Setup

- Treat this as sandbox. We build & test features here.

#### 13. Deployment Basics (Future Step)

- If this were real, we'd:
  - Build in Sandbox.
  - Move to Production using Change Sets.