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).

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)

Organization Business Hours

Help for this Page

New Business Hours

Action	Business Hours Name ↑	Active	Time Zone	Default
Edit	Default	✓	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	✓
Edit	Default Hours	✓	(GMT+05:30) India Standard Time (Asia/Kolkata)	☐

4. Fiscal Year Settings

- Path: Setup → Company Settings → Fiscal Year.

- Select Standard Fiscal Year (Jan–Dec). Useful later for Revenue Reports.

5. User Setup & 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.