

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).

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.