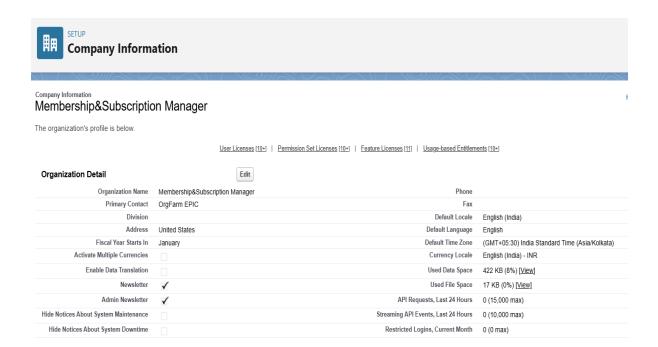
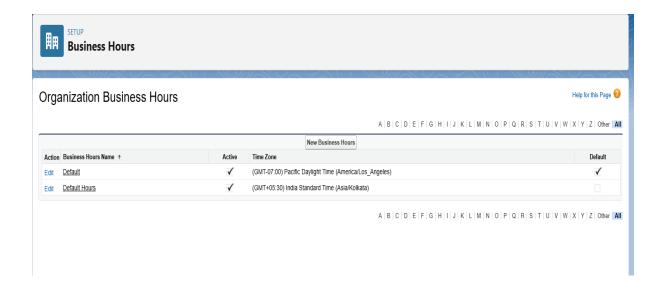
Phase 2: Org Setup & Configuration

- 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.