PHASE 2 – Org Setup & Configuration

HandsMenThreads – Salesforce Retail CRM Setup

1. Introduction

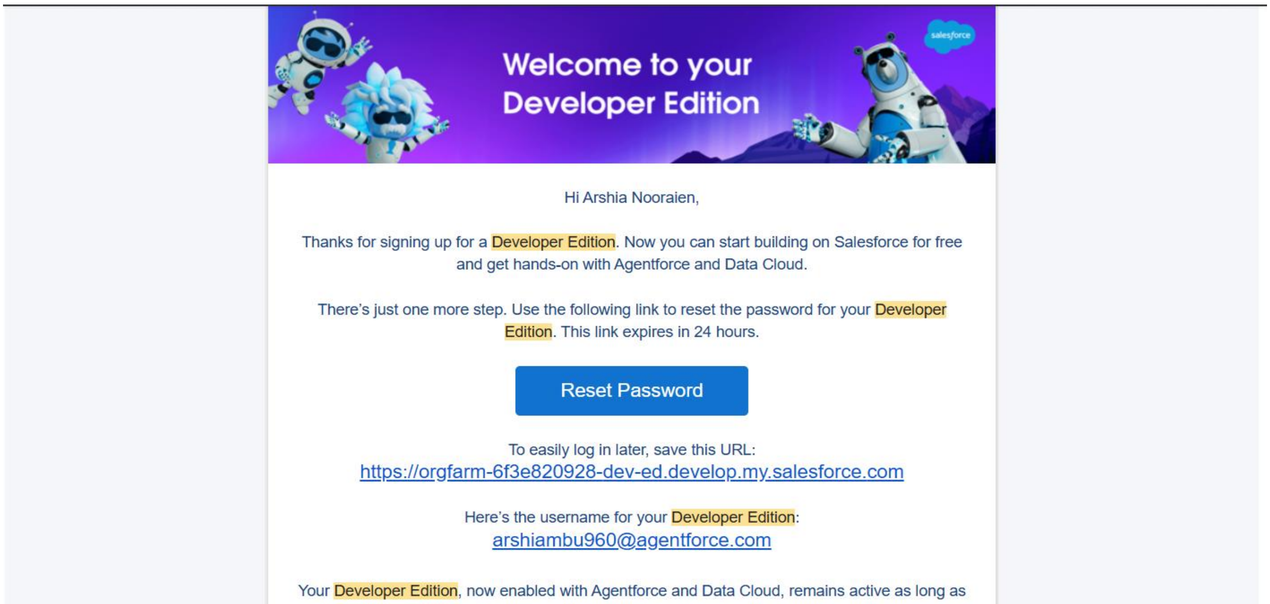
Phase 2 focuses on preparing the Salesforce environment to support HandsMenThreads' retail operations. This includes configuring the org, defining user roles, setting up permissions, and establishing the foundational structure that will support data modeling and automation in later phases. Proper configuration ensures that the CRM is secure, scalable, and aligned with the workflow requirements of sales executives, inventory managers, marketing staff, and administrators.

2. Salesforce Org Setup

A new Salesforce Developer org was created and configured with the following details:

- **Org Name:** HandsMenThreads CRM
- **Locale:** English (India)
- **Currency:** INR
- **Time Zone:** India Standard Time (IST)
- **Business Hours:** Configured for retail operating hours
- **Company Settings:** Updated address and fiscal year preferences

These configurations ensure that all system timestamps, reports, and workflows align with the business's regional requirements.



3. User Setup & Profiles

The fashion retail workflow includes different teams with distinct responsibilities. Based on interviews and business understanding, four key user profiles were created:

1. System Administrator

- Full access to all objects
- Responsible for maintenance, enhancements, and user management

2. Sales Executive

- Handles customer interactions
- Creates orders
- Updates order status

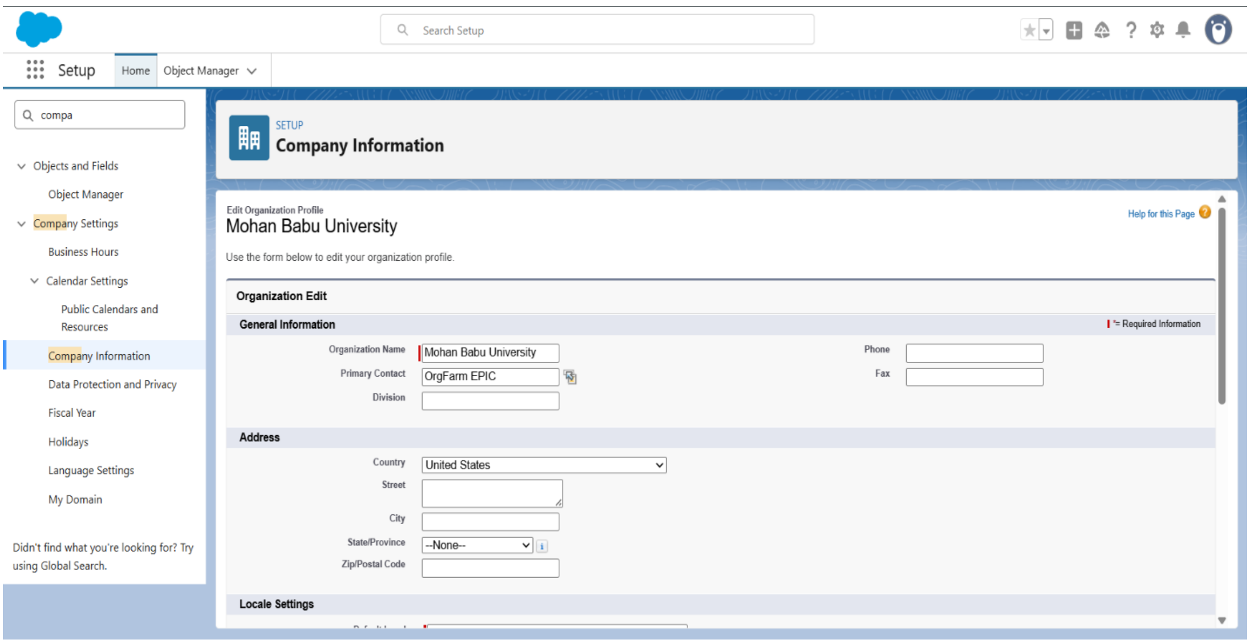
3. Inventory Manager

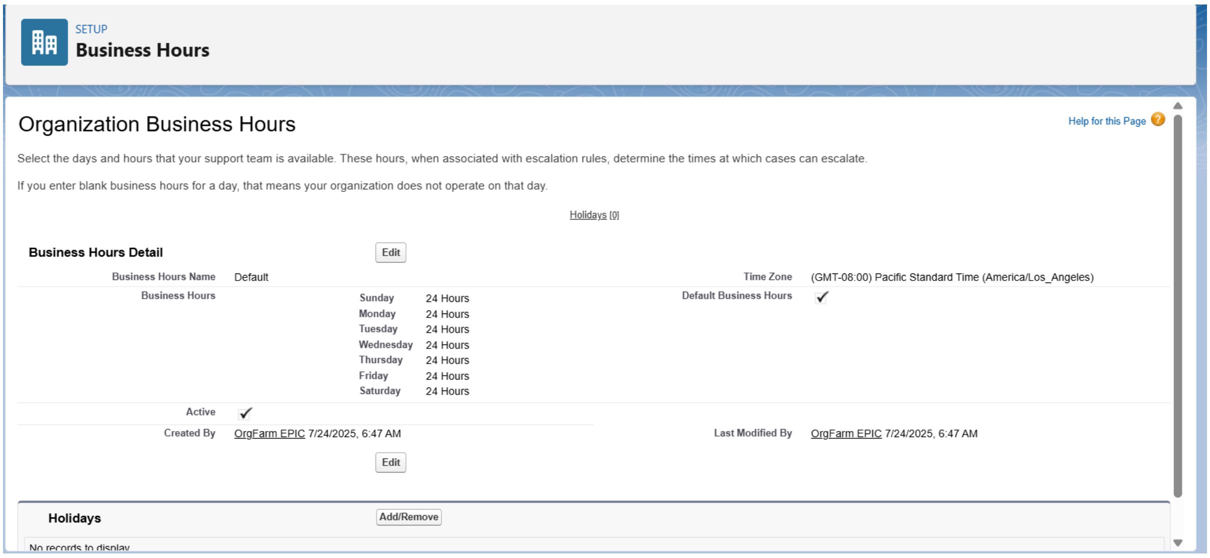
- Manages products and stock
- Receives low-stock alerts
- Updates pricing and SKUs

4. Marketing Manager

- Creates and analyzes marketing campaigns
- Runs customer segmentation

Each of these profiles was created by cloning the Standard User profile and customizing object permissions according to job function.



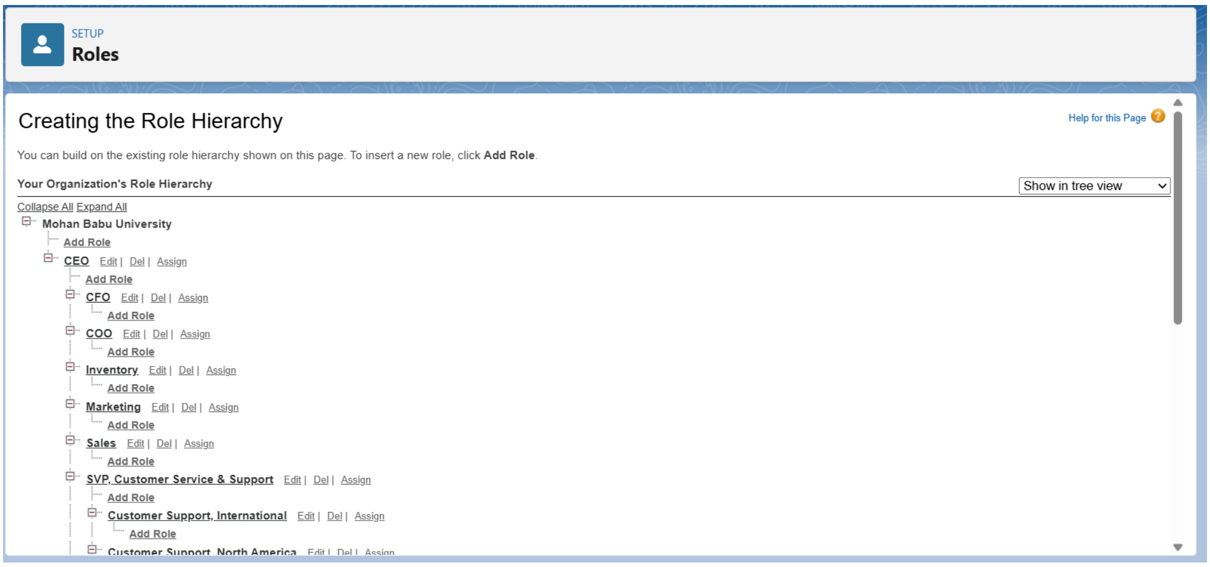


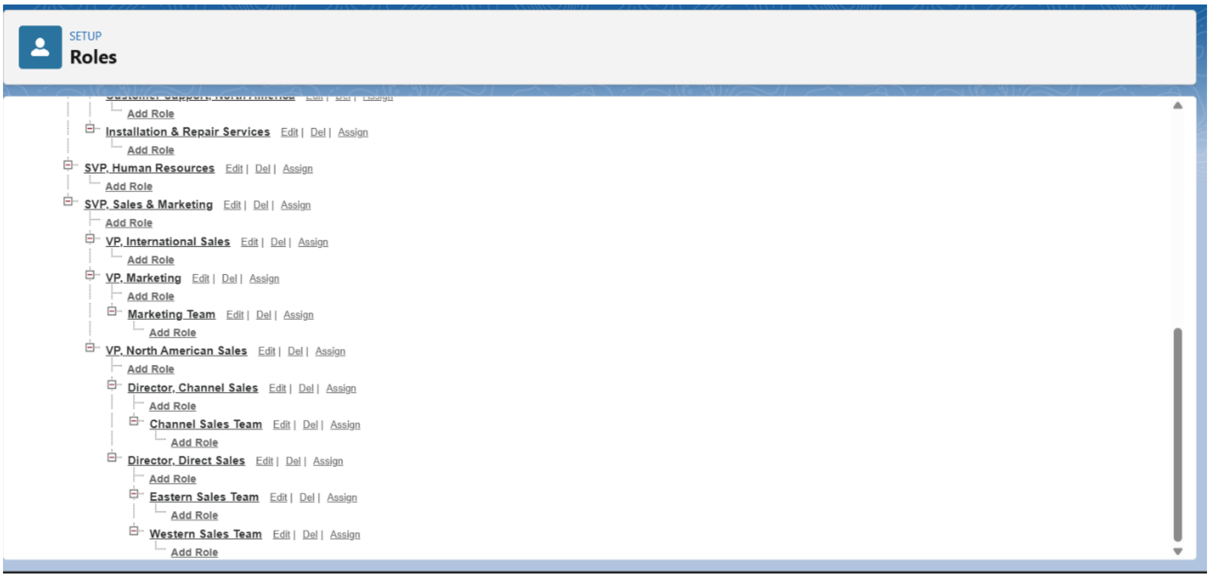
4. Role Hierarchy

The role hierarchy ensures visibility aligns with business reporting structure.

```
CEO / Business Owner
        |
    Admin
        |
Sales Manager
        |
Sales Executive
        |
Inventory Manager
        |
Marketing Manager
```

Admins and business owners have the highest-level access, while departmental roles can only see the data relevant to their operations.





5. Object Permissions

Permissions were defined to align with security best practices:

Customer__c

- Admin: Full access
- Sales Executive: Read/Create/Edit
- Inventory Manager: Read only
- Marketing: Read

Product__c

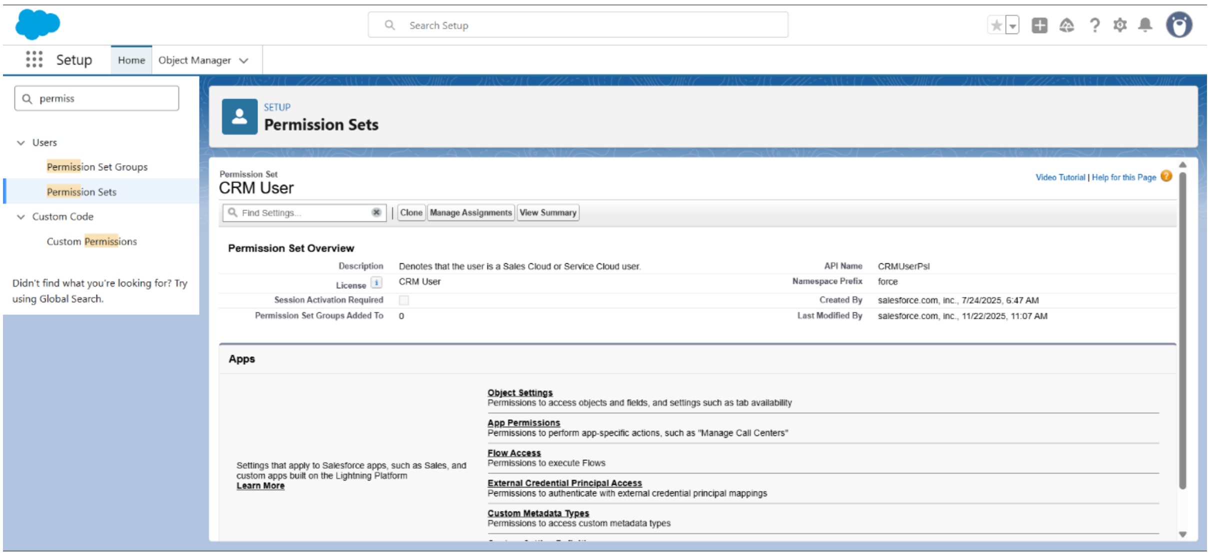
- Admin: Full access
- Inventory Manager: Read/Create/Edit/Delete
- Sales Executive: Read
- Marketing: Read

Order__c

- Admin: Full access
- Sales Executive: Read/Create/Edit
- Inventory: Read
- Marketing: Read

Marketing_Campaign__c

- Admin & Marketing: Read/Create/Edit/Delete
- Sales & Inventory: Read only



6. Org-Wide Defaults (OWD)

OWD settings protect sensitive information:

- **Customer__c – Private**
  Ensures personal customer data is visible only to record owners and managers.
- **Order__c – Private**
  Prevents unauthorized access to sales performance and order details.
- **Product__c – Public Read Only**
  Allows everyone to view products while limiting edits to authorized roles.
- **Campaign__c – Public Read/Write for Marketing**
  Supports collaboration within the marketing team.

7. Sharing Rules

To support cross-team collaboration, sharing rules were set:

- **Orders shared from Sales Executives to Inventory Managers**
  Allows inventory staff to view quantities ordered.
- **Customers shared with Marketing**
  Enables targeted promotions without exposing edit permissions.

8. Lightning App Setup

A dedicated app named **HandsMenThreads CRM** was created, containing:

- Customers
- Products

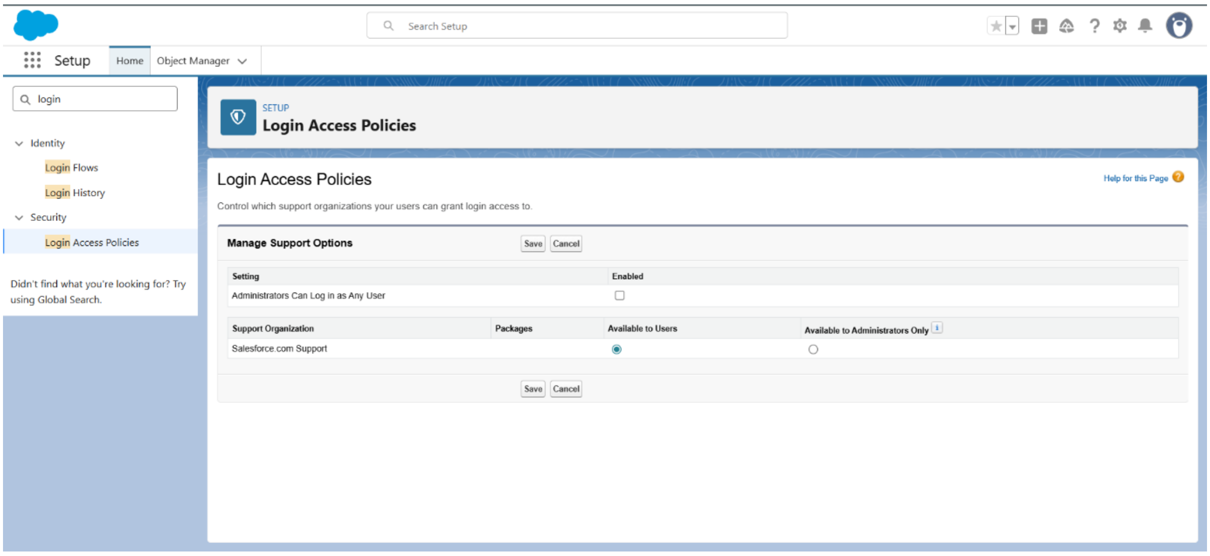
- Orders
- Order Items
- Loyalty Dashboard
- Campaigns
- Reports
- Dashboards

The app supports navigation tailored for retail operations.

9. Login Access Policy

Enabled:

- **Admins can log in as any user**
  Useful for troubleshooting permission errors or automation issues.



10. Testing the Setup

Test scenarios included:

- Logging in as Sales Executive to create customers and orders
- Logging in as Inventory Manager to edit stock and product details
- Validating that Marketing can view but not edit Orders
- Ensuring OWD prevents unauthorized access

Each test confirmed that the configuration aligns with intended business workflow.