

# PHASE 2 – Org Setup & Configuration

## HandsMenThreads – Salesforce Retail CRM Setup

### 1. Introduction

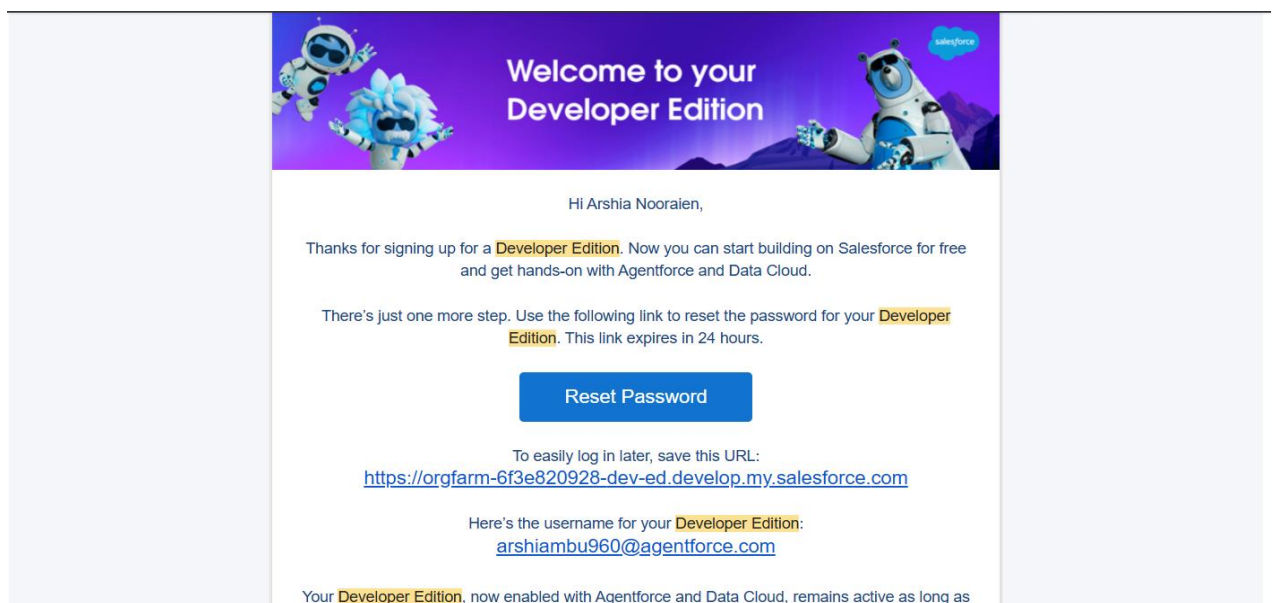
Phase 2 focuses on preparing the Salesforce environment to support HandsMenThreads' retail operations. This includes configuring the org, defining user roles, setting up permissions, and establishing the foundational structure that will support data modeling and automation in later phases. Proper configuration 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.

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'compa' and a list of setup categories: Objects and Fields, Company Settings, Calendar Settings, Company Information (highlighted), Data Protection and Privacy, Fiscal Year, Holidays, Language Settings, and My Domain. The main content area is titled 'Company Information' and shows the 'Edit Organization Profile' for 'Mohan Babu University'. The form includes sections for 'General Information' (Organization Name, Primary Contact, Division, Phone, Fax) and 'Address' (Country, Street, City, State/Province, Zip/Postal Code). A 'Locale Settings' section is partially visible at the bottom. A red error message 'Required Information' is shown next to the Phone field.

Setup

Search Setup

Company Information

Edit Organization Profile

Mohan Babu University

Use the form below to edit your organization profile.

Organization Edit

General Information

Organization Name: Mohan Babu University

Primary Contact: OrgFarm EPIC

Division:

Phone:

Fax:

Address

Country: United States

Street:

City:

State/Province: --None--

Zip/Postal Code:

Locale Settings

SETUP

Business Hours

Organization Business Hours

Help for this Page

Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate.  
If you enter blank business hours for a day, that means your organization does not operate on that day.

Holidays (0)

Business Hours Detail

Edit

Business Hours Name	Default	Time Zone
Business Hours	<div><div>Sunday</div><div>Monday</div><div>Tuesday</div><div>Wednesday</div><div>Thursday</div><div>Friday</div><div>Saturday</div></div> <div><div>24 Hours</div><div>24 Hours</div><div>24 Hours</div><div>24 Hours</div><div>24 Hours</div><div>24 Hours</div></div>	(GMT-08:00) Pacific Standard Time (America/Los_Angeles) Default Business Hours ✓
Active	✓	
Created By	OrgFarm EPIC 7/24/2025, 6:47 AM	Last Modified By OrgFarm EPIC 7/24/2025, 6:47 AM

Edit

Holidays

Add/Remove

No records to display

## 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.

SETUP

Roles

Creating the Role Hierarchy

Help for this Page

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

Collapse All Expand All

Show in tree view

Mohan Babu University

Add Role

CEO Edit Del Assign

Add Role

CFO Edit Del Assign

Add Role

COO Edit Del Assign

Add Role

Inventory Edit Del Assign

Add Role

Marketing Edit Del Assign

Add Role

Sales Edit Del Assign

Add Role

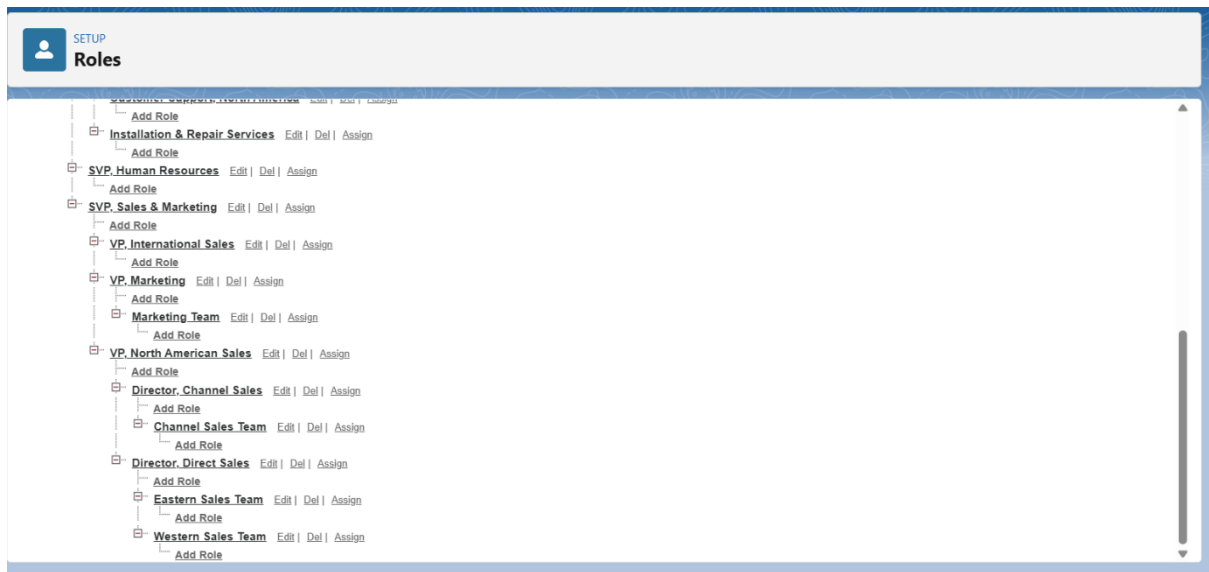
SVP, Customer Service & Support Edit Del Assign

Add Role

Customer Support, International Edit Del Assign

Add Role

Customer Support, North America Edit Del Assign



## 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

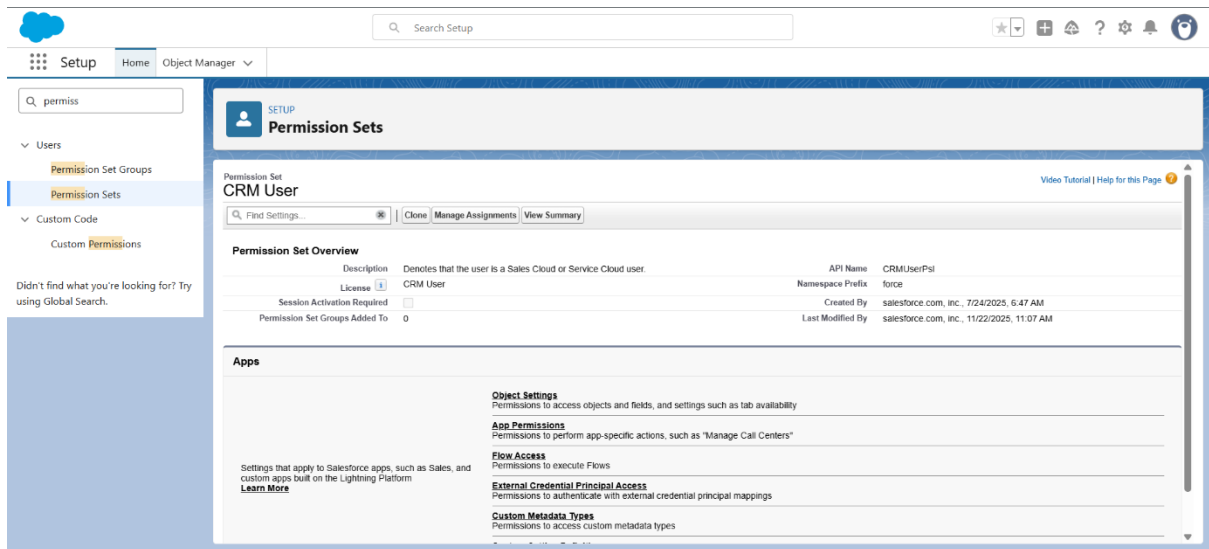
- Admin: Full access
- Inventory Manager: Read/Create/Edit/Delete
- Sales Executive: Read
- Marketing: Read

### 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

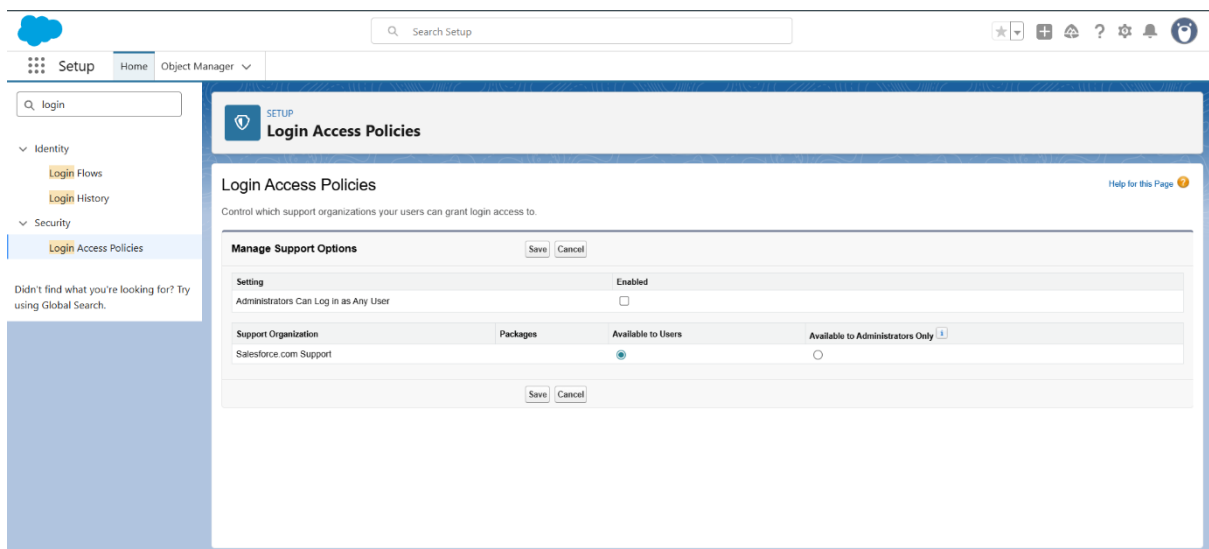
- Orders
- Order Items
- Loyalty Dashboard
- Campaigns
- Reports
- Dashboards

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.