

PHASE 2 – Org Setup & Configuration

HandsMenThreads – Salesforce Retail CRM Setup

1. Introduction

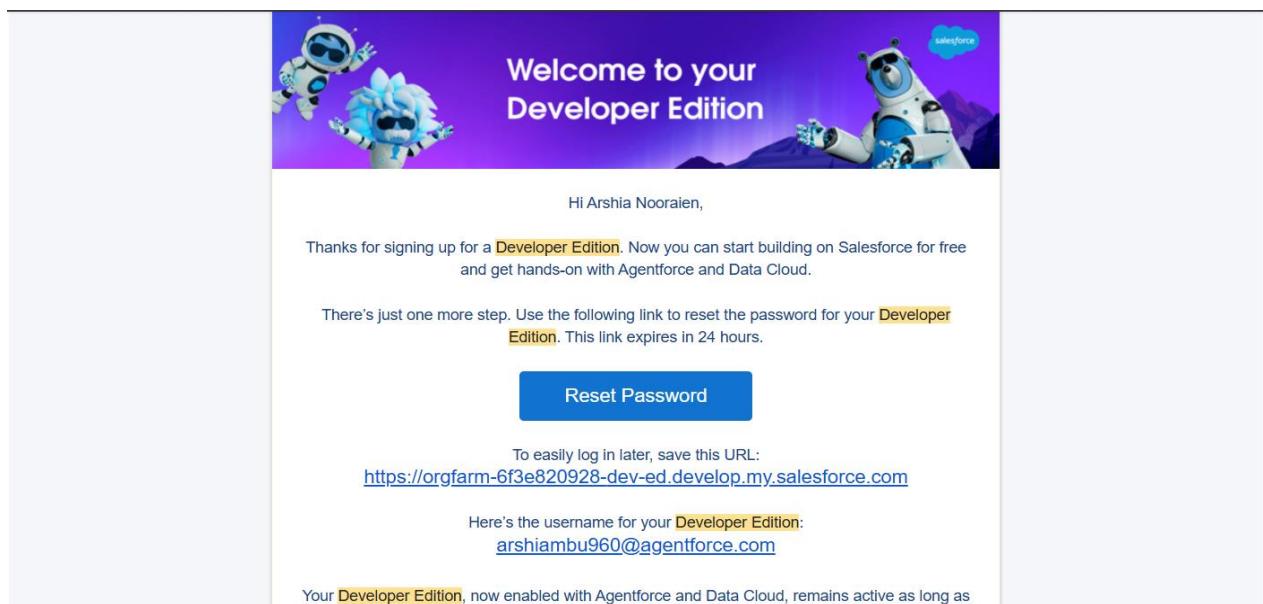
Phase 2 focuses on preparing the Salesforce environment to support HandsMenThreads' retail operations. This includes configuring the org, defining user roles, setting up permissions, and establishing the foundational structure that will support data modeling and automation in later phases. Proper configuration 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 top navigation bar includes a cloud icon, a search bar labeled "Search Setup", and various global buttons. The main menu on the left is under the "Setup" tab and includes sections like "Objects and Fields", "Company Settings", "Calendar Settings", and "Company Information". The "Company Information" section is currently selected and highlighted in blue. The main content area displays the "Edit Organization Profile" screen for "Mohan Babu University". The page title is "Company Information" and it says "Edit Organization Profile". It includes a "Help for this Page" link. The form has sections for "General Information" and "Address". In the "General Information" section, fields include "Organization Name" (Mohan Babu University), "Primary Contact" (OrgFarm EPIC), "Division" (empty), "Phone" (empty), and "Fax" (empty). A note indicates that "Phone" and "Fax" are required fields. In the "Address" section, fields include "Country" (United States), "Street" (empty), "City" (empty), "State/Province" (empty), and "Zip/Postal Code" (empty). At the bottom, there's a "Locale Settings" section which is mostly empty. The overall layout is clean and organized, typical of the Salesforce user interface.

The screenshot shows the 'Business Hours' setup page under the 'SETUP' tab. At the top, there's a header 'Business Hours' with a help link 'Help for this Page'. Below the header, a section titled 'Organization Business Hours' contains a note: '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.' It also states, 'If you enter blank business hours for a day, that means your organization does not operate on that day.' A table titled 'Business Hours Detail' lists the days of the week and their corresponding hours. The table includes columns for 'Business Hours Name' (set to 'Default'), 'Time Zone' (set to '(GMT-08:00) Pacific Standard Time (America/Los_Angeles)'), and 'Default Business Hours' (with a checked checkbox). The table shows the following data:

Business Hours	Sunday	24 Hours	Monday	24 Hours	Tuesday	24 Hours	Wednesday	24 Hours	Thursday	24 Hours	Friday	24 Hours	Saturday	24 Hours

Below the table, it says 'Active' with a checked checkbox. Under 'Created By' and 'Last Modified By', both are listed as 'OrgFarm EPIC 7/24/2025, 6:47 AM'. There's an 'Edit' button and a 'Holidays' section with an 'Add/Remove' button. The 'Holidays' section notes 'No records to display'.

4. Role Hierarchy

The role hierarchy ensures visibility aligns with business reporting structure.



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

The screenshot shows the 'Roles' setup page under the 'SETUP' tab. At the top, there's a header 'Roles' with a help link 'Help for this Page'. Below the header, a section titled 'Creating the Role Hierarchy' contains the note: 'You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.' A dropdown menu 'Show in tree view' is visible. The main area displays a hierarchical tree of roles for 'Mohan Babu University':

- Mohan Babu University
 - 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](#)

The screenshot shows the Salesforce Setup Roles page. At the top, there is a blue header bar with the word "SETUP" and a user icon. Below the header, the word "Roles" is displayed. The main content area is a hierarchical tree structure for defining roles:

- Add Role
- Installation & Repair Services
 - Add Role
- SVP_Human_Resources
 - Add Role
- SVP_Sales_&_Marketing
 - Add Role
 - VP_International_Sales
 - Add Role
 - VP_Marketing
 - Add Role
 - Marketing_Team
 - Add Role
 - VP_North_American_Sales
 - Add Role
 - Director_Channel_Sales
 - Add Role
 - Channel_Sales_Team
 - Add Role
 - Director_Direct_Sales
 - Add Role
 - Eastern_Sales_Team
 - Add Role
 - Western_Sales_Team
 - Add Role

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

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' tab selected. A search bar at the top right contains the text 'permis'. On the left sidebar, under 'Users', 'Permission Set Groups' is expanded, and 'Permission Sets' is selected. A message at the bottom left says, ' Didn't find what you're looking for? Try using Global Search.' The main content area displays the 'CRM User' permission set details. It includes a 'Description' field stating 'Denotes that the user is a Sales Cloud or Service Cloud user.', a 'License' field set to 'CRM User', and a 'Session Activation Required' checkbox. The 'API Name' is 'CRMUserPSI', 'Namespace Prefix' is 'force', 'Created By' is 'salesforce.com, inc.', and 'Last Modified By' is 'salesforce.com, inc.'. Under the 'Apps' section, there are several settings listed:

- Object Settings**: Permissions to access objects and fields, and settings such as tab availability.
- App Permissions**: Permissions to perform app-specific actions, such as "Manage Call Centers".
- Flow Access**: Permissions to execute Flows.
- External Credential Principal Access**: Permissions to authenticate with external credential principal mappings.
- Custom Metadata Types**: Permissions to access custom metadata types.

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

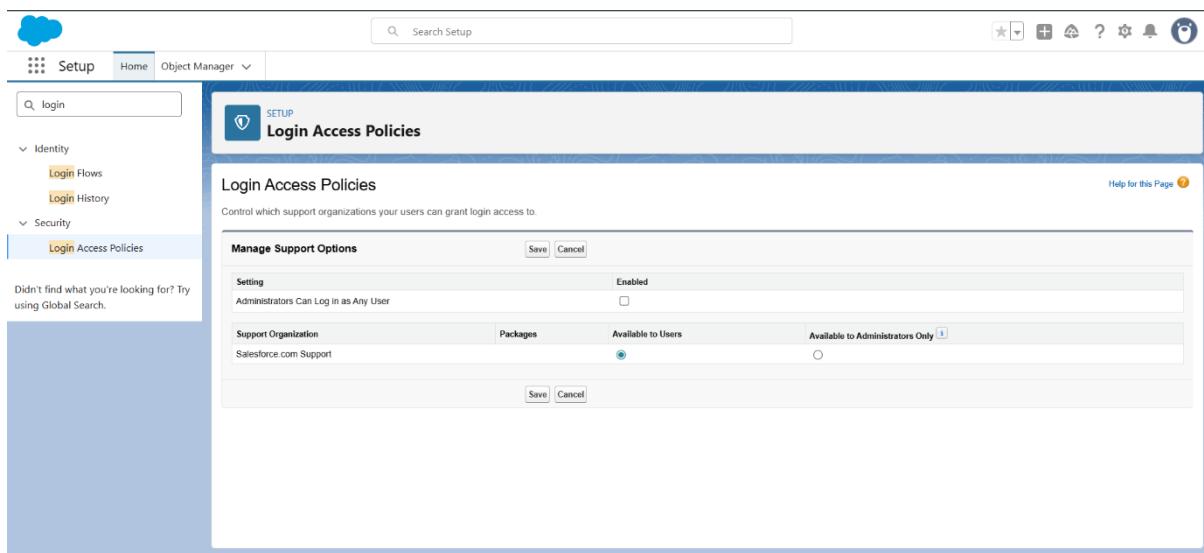
- Orders
- Order Items
- Loyalty Dashboard
- Campaigns
- Reports
- Dashboards

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.