

Phase-2 (RetailHub)

Phase 2.1: Dev Org Setup

The foundation of the **RetailHub CRM project** was established within a **Salesforce Developer Edition org**. This environment served as a **self-contained sandbox**, providing a safe and isolated space to carry out all development and testing activities without any risk to the live production system.

Key Deliverables

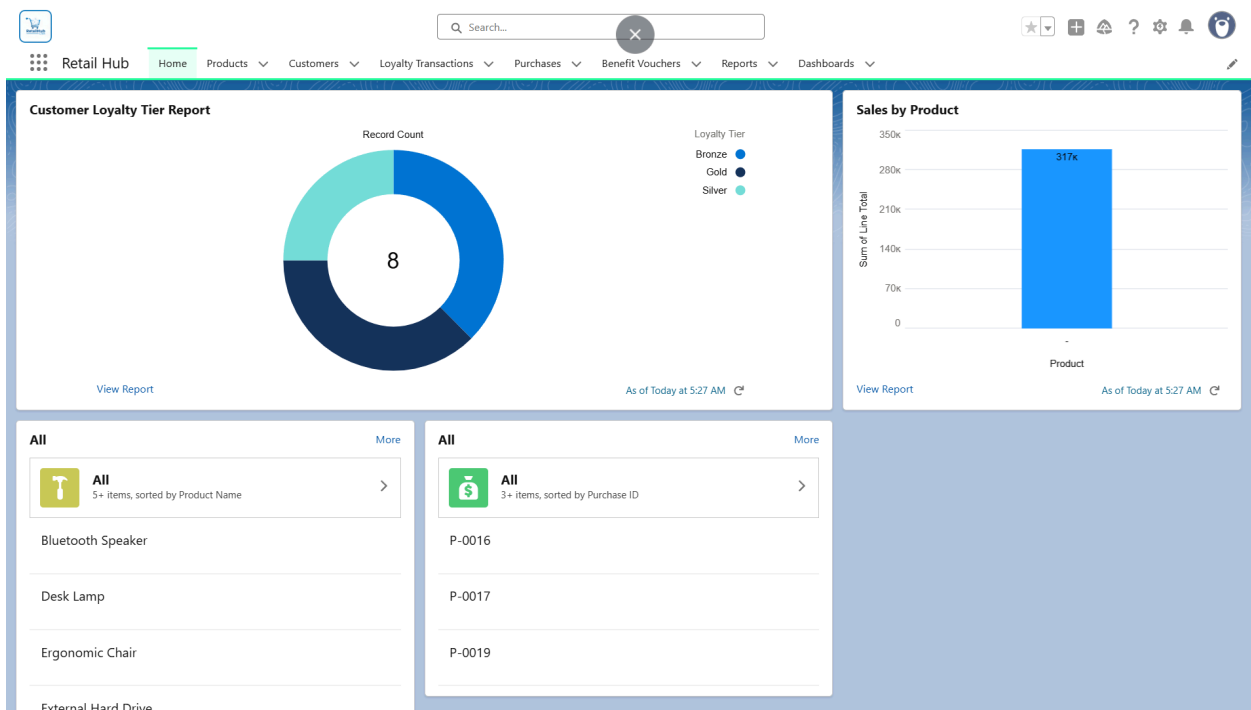
1. Developer Org Configuration

- A dedicated Salesforce Developer Edition org was set up as the primary development environment.
- This ensured that all customizations and testing could be performed independently before deployment to higher environments.

2. Custom Lightning App: “Retail Hub”

- A **Retail Hub Lightning App** was created as part of the setup.
- The app was designed to deliver a **branded and tailored user experience** for project stakeholders.
- The custom navigation bar was configured to include all project-specific objects and tools:
 - **Products**
 - **Customers**
 - **Purchases**
 - **Reports**
 - **Dashboards**

This initial setup provided the structural base for all further development activities in the project lifecycle.



The screenshot shows the 'App Settings' page in the Lightning App Builder. The 'App Details & Branding' section is active, allowing users to configure the app's name, description, and branding. The 'App Details' section includes fields for 'App Name' (Retail Hub), 'Developer Name' (Amod_Khursiya), and 'Description' (This is Retail Hub CRM platform for managing the Customer and seller Loyalty). The 'App Branding' section includes an 'Image' field (Retail Hub logo) and a 'Primary Color Hex Value' field (#25FD9C). The 'App Launcher Preview' section shows a preview of the app's launcher icon and name.

App Settings

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.


App Details

*App Name ¹ Retail Hub

*Developer Name ¹ Amod_Khursiya

Description ¹ This is Retail Hub CRM platform for managing the Customer and seller Loyalty

App Branding


Image ¹ 

Primary Color Hex Value ¹

Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

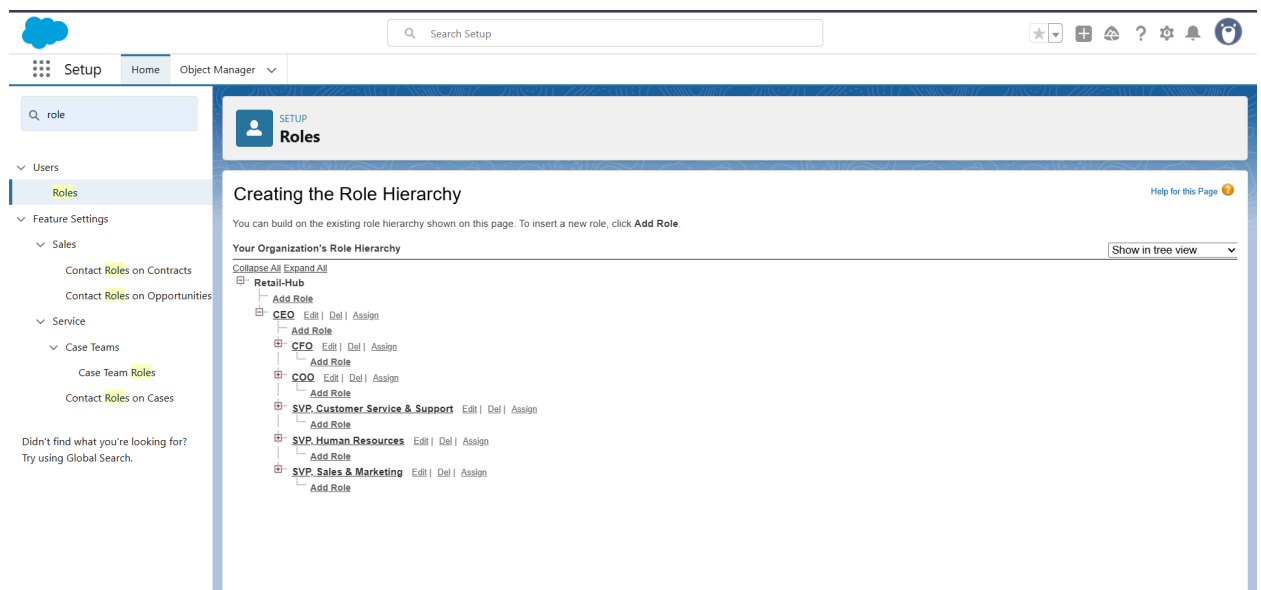
 Retail Hub
This is Retail Hub CRM platform for managing the Custo...

Phase 2.2: User Setup (Profiles & Roles)

To ensure **data security** and provide a **relevant user experience**, a user access model was designed based on the distinct responsibilities of retail staff. This model leveraged Salesforce's native security features, namely **Roles** and **Profiles**.

Role Hierarchy

- A role hierarchy was planned to reflect the reporting structure of the retail organization.
- **Store Manager** role was positioned **above** the **Sales Representative** role.
- This structure ensures that managers have **visibility into the records and activities** created by their assigned sales representatives, supporting oversight and team management.



Profiles and Permissions

Profiles were created to define each user's **baseline access level** to objects, fields, and system features.

1. Store Manager Profile

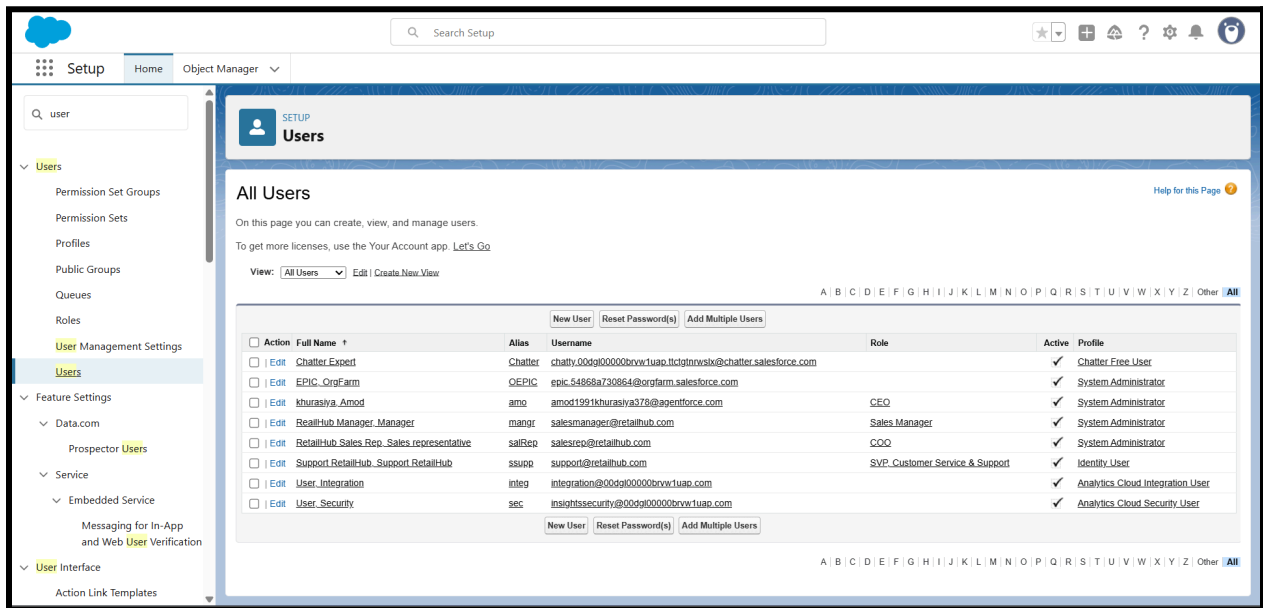
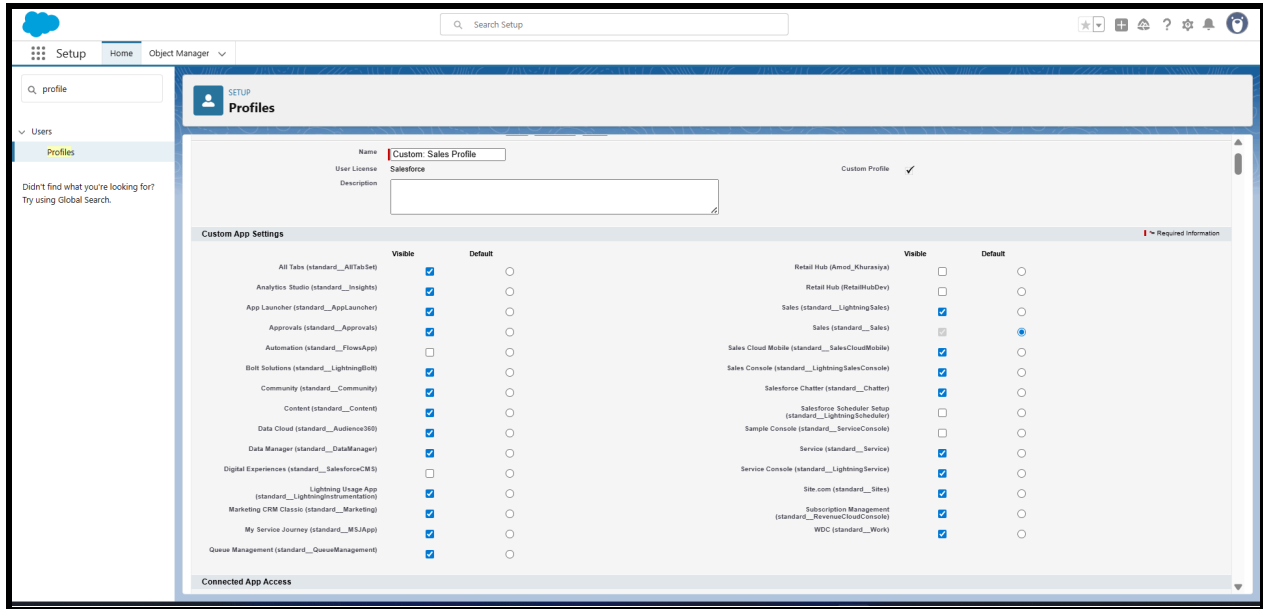
- Access to **Reports and Dashboards** for performance monitoring.
- Ability to view and manage **Product, Customer, and Purchase data** across their store.
- Broader visibility to ensure oversight of sales representatives' work.

2. Sales Representative Profile

- Permissions focused on creating and managing **Purchase** and **Customer** records.
- Restricted access to advanced reporting tools to keep their interface simple and task-focused.
- Limited visibility, ensuring data access is aligned with their responsibilities only.

The screenshot shows the Salesforce Setup interface for Profiles. The main content area displays a table of profiles with the following columns: Action, Profile Name, User License, and Custom. The table lists various profiles, including 'Authenticated Website', 'B2B Reordering Portal Buyer Profile', 'Chatter External User', 'Chatter Free User', 'Chatter Moderator User', 'Contract Manager', 'Cross Org Data Proxy User', 'Custom Marketing Profile', 'Custom Sales Profile', 'Custom Support Profile', 'Customer Community Login User', 'Customer Community Plus Login User', 'Customer Community Plus User', 'Customer Community User', and 'Customer Portal Manager Custom'. The 'Custom' column has checkboxes for each profile, with some checked (e.g., 'External Apps Login', 'Salesforce', 'Salesforce', 'Salesforce', 'Customer Community Login', 'Customer Community Plus Login', 'Customer Community Plus', 'Customer Community', 'Customer Portal Manager Custom'). The page includes a search bar, navigation tabs (Setup, Home, Object Manager), and a sidebar with a search bar and a list of users.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit Del ...	B2B Reordering Portal Buyer Profile	External Apps Login	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter External User	Chatter External	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Contract Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom Sales Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom Support Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Community Login User	Customer Community Login	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Community Plus Login User	Customer Community Plus Login	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Community Plus User	Customer Community Plus	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Community User	Customer Community	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Customer Portal Manager Custom	Customer Portal Manager Custom	<input checked="" type="checkbox"/>



Phase 2.3: Company Profile & Operational Settings

A review of the core organizational settings was conducted to ensure a **stable and predictable platform environment**. This step involved validating the company-wide defaults for locale, currency, time zones, and the fiscal calendar, which collectively establish the foundation for consistent system behavior.

Company Profile Setup

The **Company Information** section was reviewed to confirm the organization's **primary business address, contact information, and default locale settings**. These defaults govern baseline elements such as language, date/time formats, and number formats for all users, thereby ensuring a consistent user experience across the application. For the scope of the RetailHub CRM project, the default settings of the Developer Edition org were retained, as the focus was primarily on custom functionality rather than corporate configuration.

Fiscal Year Settings

The **Fiscal Year** was configured to follow the **standard calendar year**, beginning in January. Although Salesforce supports custom fiscal years to align with an organization's financial reporting schedule, this level of customization was not required. The standard calendar setting was considered sufficient, since the initial scope of the RetailHub CRM project did not include advanced financial management or accounting integrations.

Business Hours & Holidays

The **Business Hours and Holidays** configuration was not applied for this project. These features are typically leveraged within Salesforce Service Cloud to support use cases such as **case escalation rules** and **service-level agreements (SLAs)**. As the project scope was focused on **retail operations and sales management**, these settings were not relevant at this stage.

Setup

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User

Q company

Company Settings

Business Hours

Calendar Settings

Public Calendars and Resources

Company Information

Data Protection and Privacy

Fiscal Year

Holidays

Language Settings

My Domain

Didn't find what you're looking for?

Try using Global Search.

SETUP

Company Information

Company Information

Retail-Hub

The organization's profile is below:

User Licenses (124)

Permission Set Licenses (124)

Feature Licenses (11)

License-based Entitlements (124)

Organization Detail

Organization Name

Retail-Hub

Phone

(912) 345-6789

Primary Contact

OrgFarm EPIC

Fax

Division

Default Locale

English (India)

Address

Ganga nagar, ganha, Jabalpur
Jabalpur 482003
Madhya Pradesh
India

Default Language

English

Fiscal Year Starts In

January

Default Time Zone

(GMT+05:30) India Standard Time (Asia/Kolkata)

Activate Multiple Currencies

☐

Currency Locale

English (India) - INR

Enable Data Translation

☐

Used Data Space

602 KB (12%) [View](#)

Newsletter

☒

Used File Space

757 KB (4%) [View](#)

Admin Newsletter

☒

API Requests, Last 24 Hours

0 (15,000 max)

Hide Notices About System Maintenance

☐

Streaming API Events, Last 24 Hours

0 (10,000 max)

Hide Notices About System Downtime

☐

Restricted Logins, Current Month

0 (0 max)

Locale Formats

ICU

Salesforce.com Organization ID

00Dg000000BRWN1

Organization Edition

Developer Edition

Instance

CAN56

Created By

OrgFarm EPIC: 9/11/2025, 7:20 PM

Modified By

Amod Khurasya: 9/16/2025, 6:16 AM

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SETUP

Fiscal Year

Setup

Organization Fiscal Year Edit: Retail-Hub

To specify the fiscal year type for your organization, choose one of the options below:

Fiscal Year information

Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example, if your fiscal year starts in April 2025 and ends in March 2026, your Fiscal Year setting can be either 2025 or 2026.

Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotes. Consider exporting a data backup before implementing this change.

Standard Fiscal Year

Custom Fiscal Year

Change Fiscal Year Period

Name

Retail-Hub

Fiscal Year Start Month

January

Fiscal Year is Based On

The ending month

The starting month

https://orgfarm-d06beef48c-dev-ed.develop.lightning.force.com/lightning/setup/ForecastFiscalYear/home

Setup
 Home
 Object Manager ▾

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Try using Global Search.

Organization Business Hours

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.

[Help for this Page](#)

Business Hours Detail		Edit	
Business Hours Name	RetailHub business hour	Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Business Hours	<div style="display: flex; justify-content: space-between;"> <div>Sunday Monday Tuesday Wednesday Thursday Friday Saturday</div> <div>24 Hours 9:00 AM to 10:00 PM 9:00 AM to 10:00 PM 9:00 AM to 10:00 PM 9:00 AM to 10:00 PM 9:00 AM to 10:00 PM 9:00 AM to 10:00 PM</div> </div>	Default Business Hours	<input checked="" type="checkbox"/>
Active	<input checked="" type="checkbox"/>	Created By	OrgFarm.EPIC 9/11/2025, 7:29 PM
	Edit	Last Modified By	Amod kharasheya 9/16/2025, 6:19 AM

Holidays

[Add/Remove](#)

Holiday Name	Description	Date and Time
Dussehra		10/20/2025 All Day

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Always show me [more records per related list](#)