Project Title

Customer Ordering & Stock Management System

🧩 Phase 2: Org Setup & Configuration

Project: WhatsNext Vision Motors

Salesforce Edition

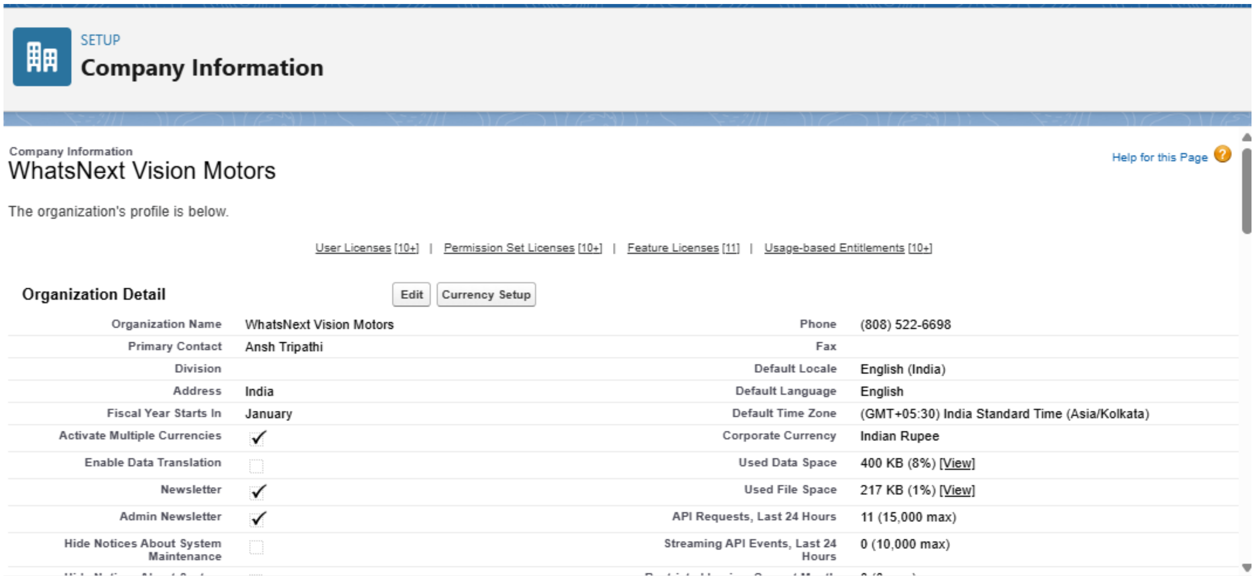
- Go to **Setup → Company Information**.
- Check **Organization Edition** → **Developer Edition**.

Company Profile Setup

Path: Setup → Company Information → Edit

- **Organization Name**: WhatsNext Vision Motors
- **Primary Contact**: Add your Admin name/email.
- **Default Time Zone**: GMT+05:30 Asia/Kolkata
- **Default Locale**: English (India)
- **Default Language**: English
- **Corporate Currency**: INR (enable Multi-Currency if needed for dealers abroad)

- Save.



Business Hours & Holidays

Business Hours

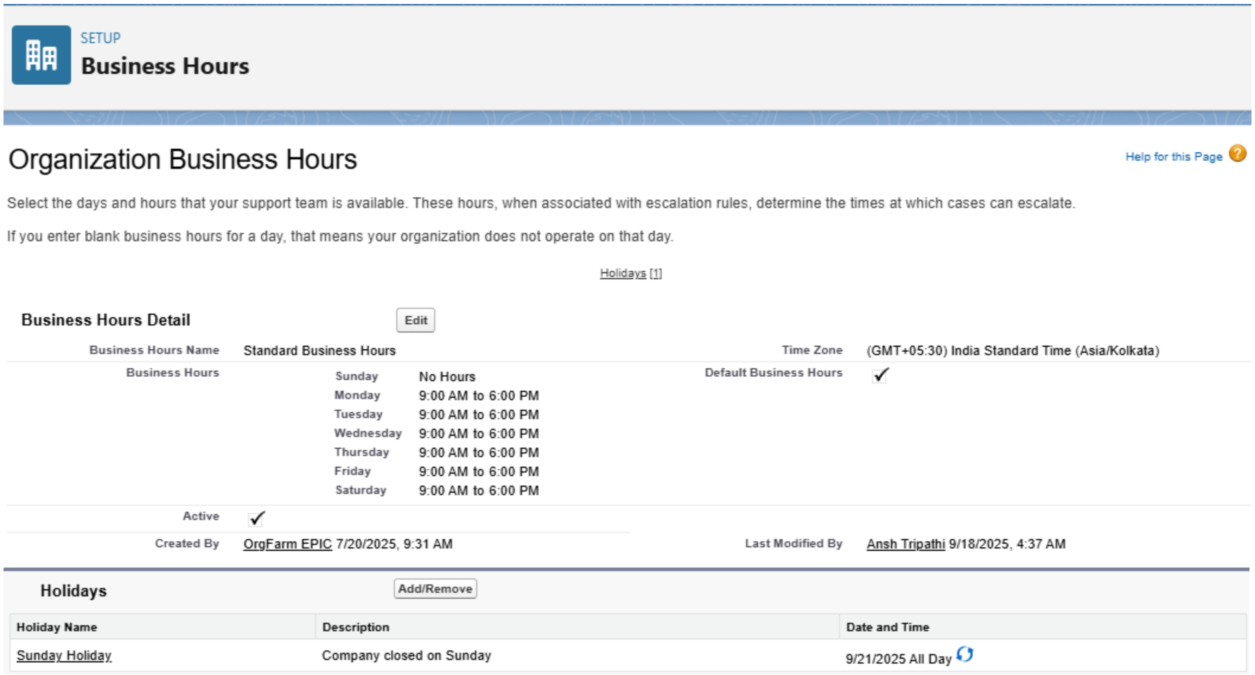
Path: Setup → Business Hours → New

- **Name**: Standard Business Hours
- **Time Zone**: Asia/Kolkata (GMT+05:30)
- **Hours**: Mon–Sat → 9:00 AM – 6:00 PM, Sunday closed
- Save & set as **Default Business Hours**.

Holidays

Path: Setup → Holidays → New

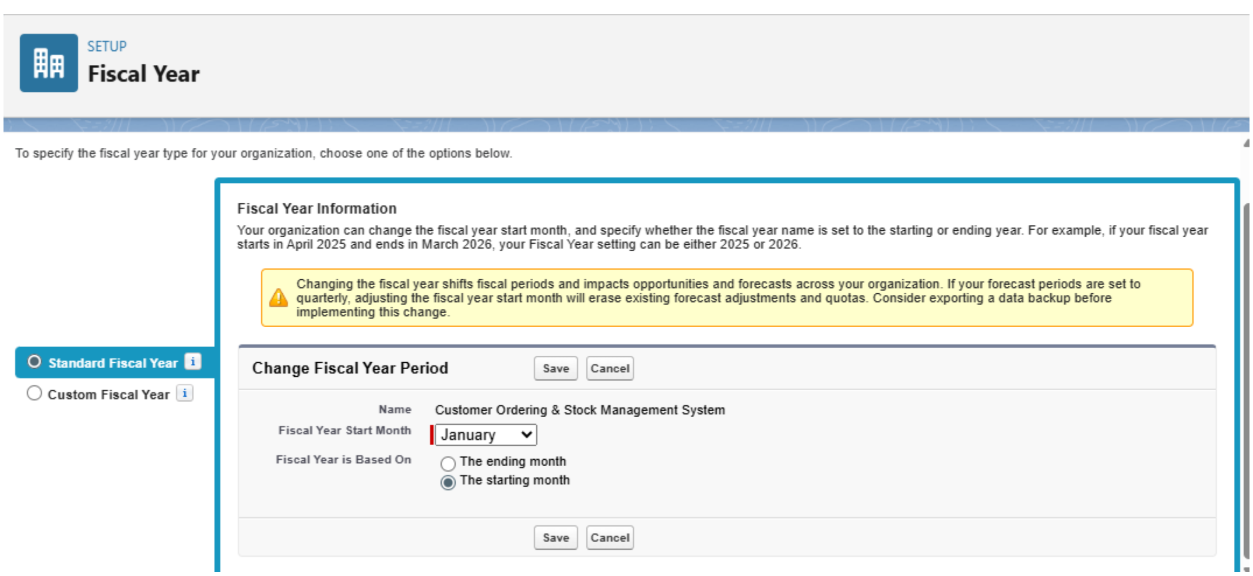
- **Holiday Name**: Sunday Holiday (or Weekly Sunday Off)
- **Description**: Company closed on Sundays
- **Date**: Pick a Sunday date
- **All Day**: ✅
- **Recurring Holiday**: ✅ if every Sunday should be blocked (Weekly → Sunday)



Fiscal Year Settings

Path: Setup → Fiscal Year

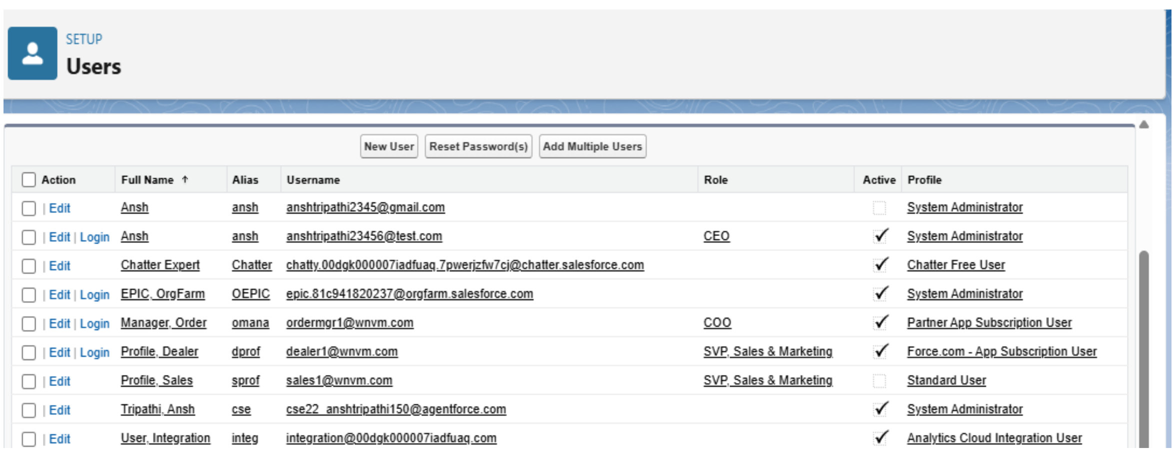
- **Standard Fiscal Year** → Choose Jan–Dec (or custom if Finance uses Apr–Mar)
- Save.
  ⚠️ Don't enable **Custom Fiscal Year** unless required — it's irreversible without Salesforce support.



User Setup & Licenses

Path: Setup → Users → Users → New User

- **Create sample users**:
    1. sales1@wnvm.com → **Salesforce License** → Profile: Sales_Profile → Role: Sales Rep
    2. dealer1@wnvm.com → **Partner Community License** (if using Experience Cloud) → Profile: Dealer_Profile → Role: Dealer Manager
    3. ordermgr1@wnvm.com → **Salesforce License** → Profile: OrderManager_Profile → Role: Order Manager


SETUP
Users

New User | Reset Password(s) | Add Multiple Users

Action	Full Name ↑	Alias	Username	Role	Active	Profile
Edit	Ansh	ansh	anshtripathi2345@gmail.com			System Administrator
Edit | Login	Ansh	ansh	anshtripathi23456@test.com	CEO	✓	System Administrator
Edit	Chatter Expert	Chatter	chatty.00dgk000007iadfuaq.7pwerjzfw7cj@chatter.salesforce.com		✓	Chatter Free User
Edit | Login	EPIC, OrgFarm	OEPIC	epic.81c941820237@orgfarm.salesforce.com		✓	System Administrator
Edit | Login	Manager, Order	omana	ordermgr1@wnvm.com	COO	✓	Partner App Subscription User
Edit | Login	Profile, Dealer	dprof	dealer1@wnvm.com	SVP, Sales & Marketing	✓	Force.com - App Subscription User
Edit	Profile, Sales	sprof	sales1@wnvm.com	SVP, Sales & Marketing		Standard User
Edit	Tripathi, Ansh	cse	cse22_anshtripathi150@agentforce.com		✓	System Administrator
Edit	User, Integration	integ	integration@00dgk000007iadfuaq.com		✓	Analytics Cloud Integration User

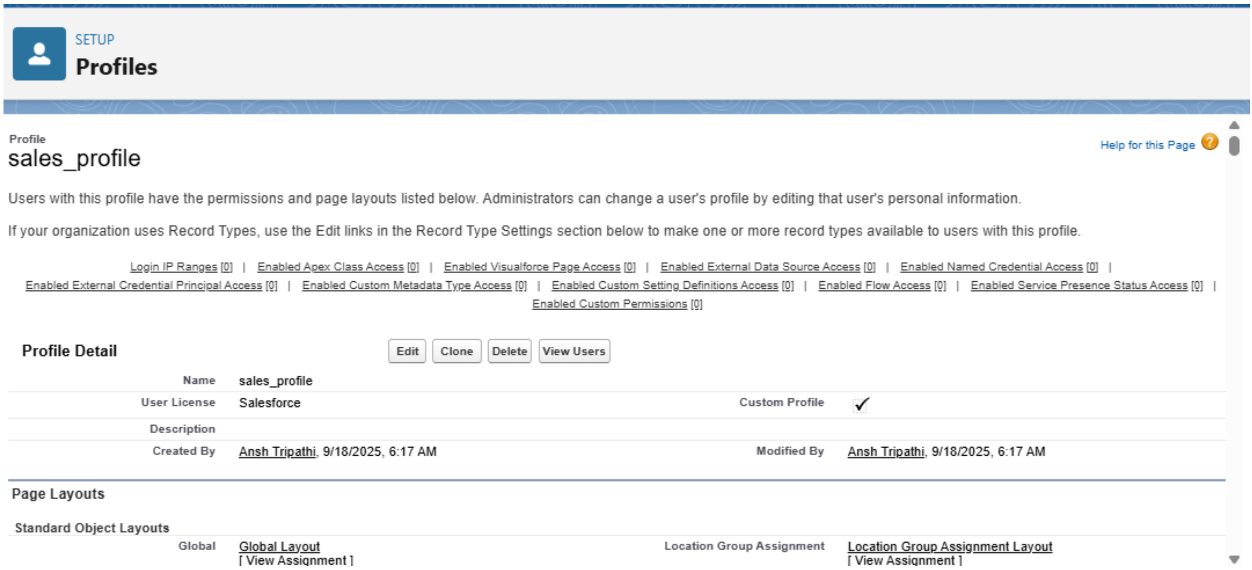
Profiles, Roles & Permission Sets

Profiles (baseline access)

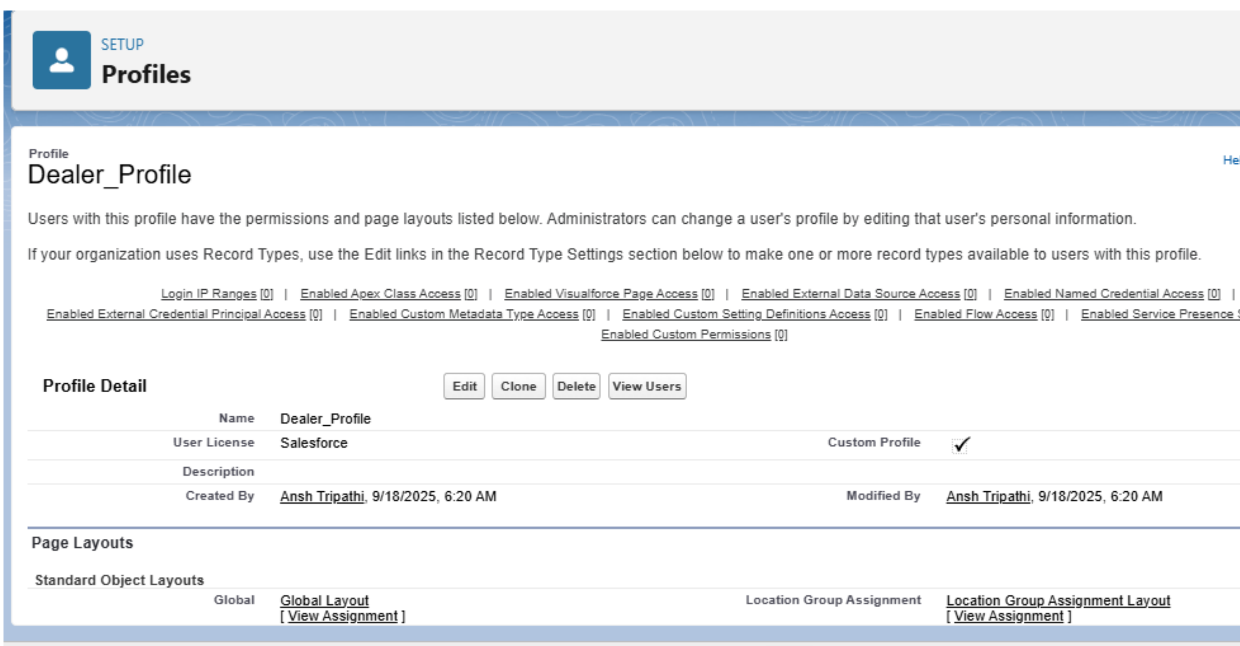
Path: Setup → Profiles → New Profile (Clone “Standard User”)

- Create:

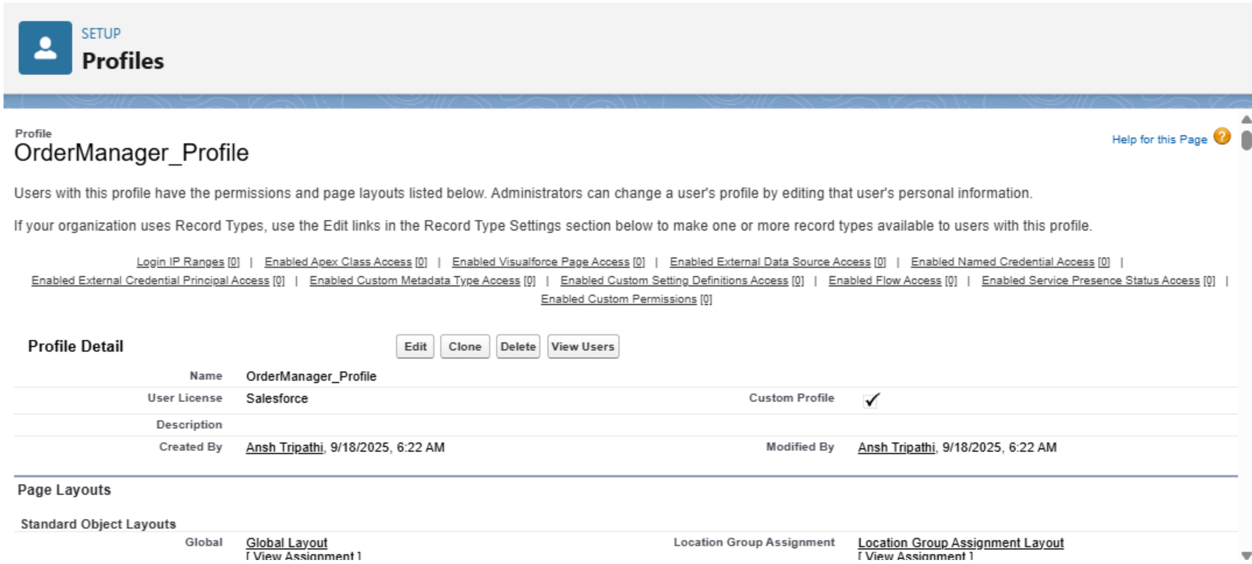
Sales_Profile → read/write on Accounts, Opportunities, Orders



Dealer_Profile → limited access, only their assigned Orders/Accounts



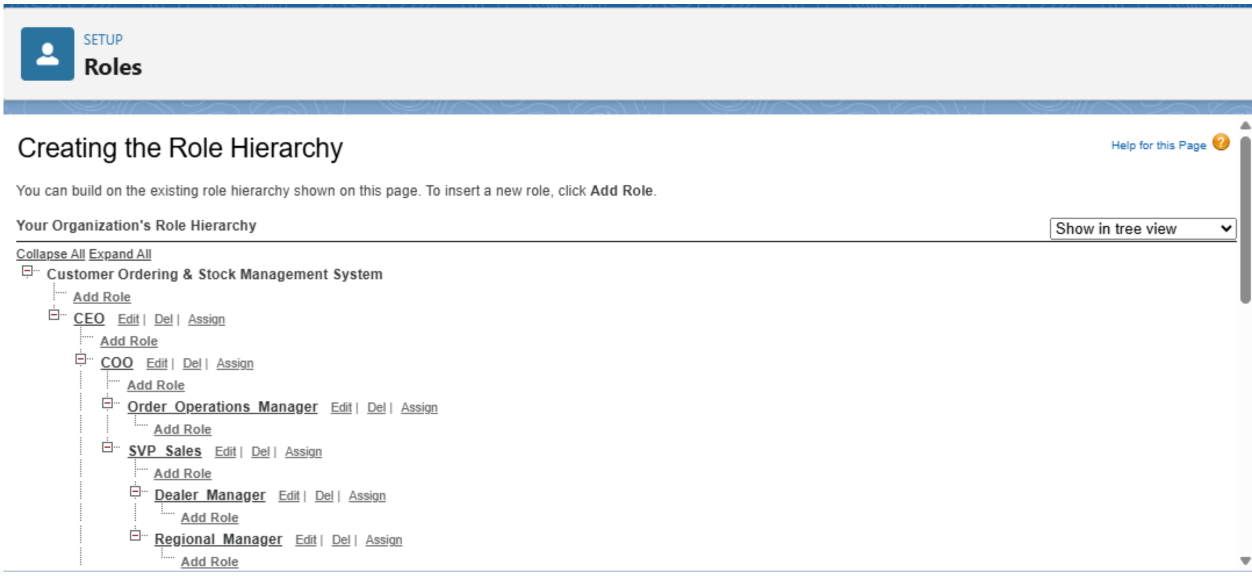
OrderManager_Profile → full CRUD on Orders + Reports



Roles (hierarchy)

Path: Setup → Roles → Set Up Roles

- CEO (Top)
    - SVP_Sales
        - Regional_Manager
            - Dealer_Manager
    - Order_Operations_Manager (parallel under VP_Sales)



Permission Sets (exception access)

Path: Setup → Permission Sets → New

- Create Order_Access_PS → Add object permissions for **Order** (Read/Edit)
- Assign later to ordermgr1 user

Org-Wide Defaults (OWD) & Sharing Rules

👉 Do this once **Order object is ready (Phase 3)**

- OWD → Setup → Sharing Settings → Set **Accounts, Orders, Opportunities = Private**
- Create **Sharing Rules** (criteria-based or owner-based) to give Dealers access to their Orders

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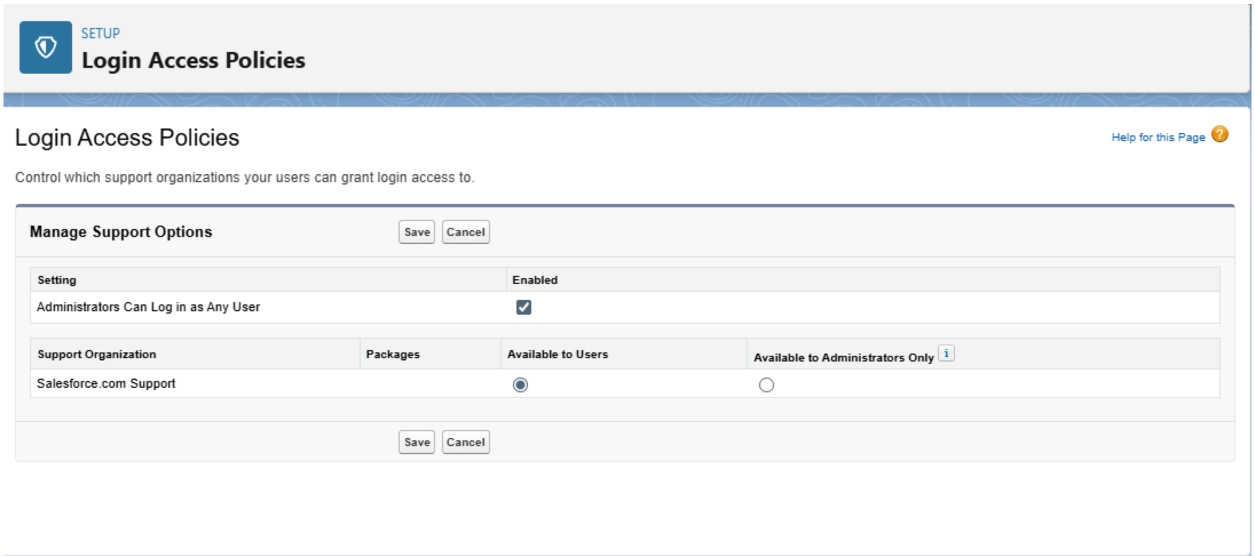
Login Access Policies

Path: Setup → Security → Login Access Policies

- Allow users to grant login access to Admin (for troubleshooting)



- Setup → Session Settings:
  - Session Timeout = 30 minutes
  - Lockout after 3 failed attempts
- Setup → Identity → MFA → Require MFA for all internal + partner users
- Setup → Identity → Single Sign-On → configure SAML/OAuth if integrating with IdP

- Connect to **VS Code + Salesforce CLI (SFDX)**
- Create **GitHub repo** for version control (metadata & code)

📌 Quick Summary (WhatsNext Vision Motors)

- **Profiles**: Sales, Dealer, Order Manager
- **Roles**: CEO → SVP Sales → Regional → Dealer Manager; CEO →SVP Sales → Order Ops Manager
- **Users**: Created for Sales, Dealer, and Order Manager

- **OWD**: Private (to be finalized in Phase 3)
- **Business Hours**: Mon–Sat 9am–6pm, Sundays closed
- **Holidays**: Weekly recurring Sunday off
- **Security**: MFA + Session control + SSO optional