

Project Title

Customer Ordering & Stock Management System

Phase 2: Org Setup & Configuration

Project: WhatsNext Vision Motors

Salesforce Edition

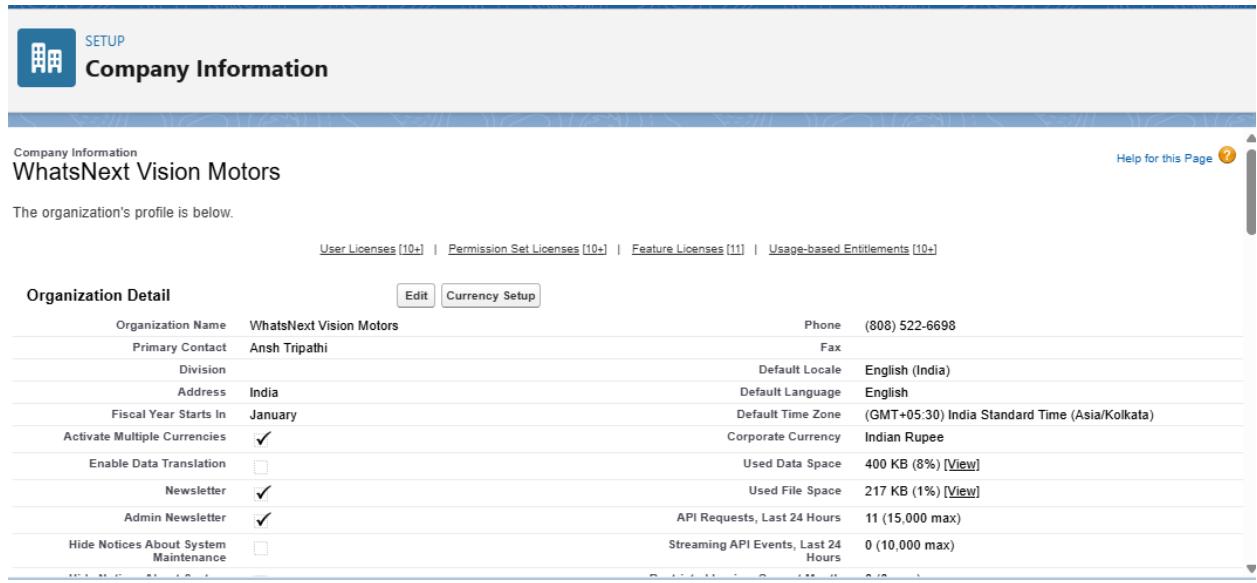
- Go to **Setup** → **Company Information**.
 - Check **Organization Edition** → **Developer Edition**.
-

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.



The screenshot shows the 'Company Information' setup page. At the top, there's a 'SETUP' icon and a 'Company Information' section with a building icon. Below that, the company name 'WhatsNext Vision Motors' is displayed. A 'Help for this Page' link is in the top right corner. The main content area is titled 'Organization Detail' with tabs for 'Edit' and 'Currency Setup'. The organization details are listed in a table:

Organization Name	WhatsNext Vision Motors	Phone	(808) 522-6698
Primary Contact	Ansh Tripathi	Fax	
Division		Default Locale	English (India)
Address	India	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input checked="" type="checkbox"/>	Corporate Currency	Indian Rupee
Enable Data Translation	<input type="checkbox"/>	Used Data Space	400 KB (8%) [View]
Newsletter	<input checked="" type="checkbox"/>	Used File Space	217 KB (1%) [View]
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	11 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)

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)

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

Business Hours Name	Standard Business Hours	Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)														
Business Hours	<table border="1"> <tr><td>Sunday</td><td>No Hours</td></tr> <tr><td>Monday</td><td>9:00 AM to 6:00 PM</td></tr> <tr><td>Tuesday</td><td>9:00 AM to 6:00 PM</td></tr> <tr><td>Wednesday</td><td>9:00 AM to 6:00 PM</td></tr> <tr><td>Thursday</td><td>9:00 AM to 6:00 PM</td></tr> <tr><td>Friday</td><td>9:00 AM to 6:00 PM</td></tr> <tr><td>Saturday</td><td>9:00 AM to 6:00 PM</td></tr> </table>	Sunday	No Hours	Monday	9:00 AM to 6:00 PM	Tuesday	9:00 AM to 6:00 PM	Wednesday	9:00 AM to 6:00 PM	Thursday	9:00 AM to 6:00 PM	Friday	9:00 AM to 6:00 PM	Saturday	9:00 AM to 6:00 PM	Default Business Hours	<input checked="" type="checkbox"/>
Sunday	No Hours																
Monday	9:00 AM to 6:00 PM																
Tuesday	9:00 AM to 6:00 PM																
Wednesday	9:00 AM to 6:00 PM																
Thursday	9:00 AM to 6:00 PM																
Friday	9:00 AM to 6:00 PM																
Saturday	9:00 AM to 6:00 PM																
Active	<input checked="" type="checkbox"/>																
Created By	OrgFarm EPIC	Created On	7/20/2025, 9:31 AM														
Last Modified By	OrgFarm EPIC	Last Modified On	9/18/2025, 4:37 AM														

Holidays

Holiday Name	Description	Date and Time
Sunday Holiday	Company closed on Sunday	9/21/2025 All Day

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.

Fiscal Year

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.

Change Fiscal Year Period

Standard Fiscal Year [i](#)

Custom Fiscal Year [i](#)

Change Fiscal Year Period

Name: Customer Ordering & Stock Management System

Fiscal Year Start Month: **January**

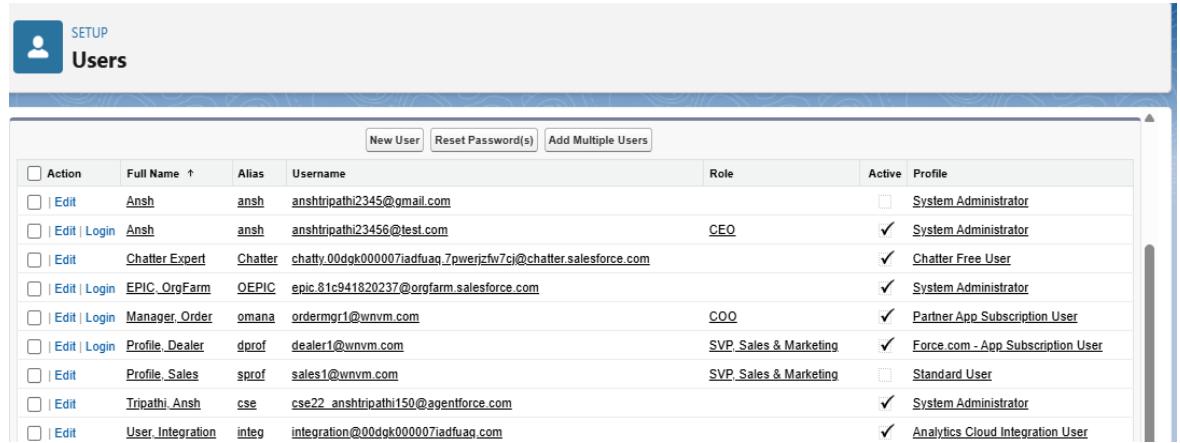
Fiscal Year is Based On:
 The ending month
 The starting month

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



Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Ansh	ansh	anshtripathi2345@gmail.com		<input type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit Login	Ansh	ansh	anshtripathi23456@test.com	CEO	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00dgk000007iadfuag.7pwerjcfw7cj@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit Login	EPIC_OrgFarm	OEPIC	epic.81c941820237@orgfarm.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit Login	Manager_Order	omana	ordermgr1@wnvm.com	COO	<input checked="" type="checkbox"/>	Partner App Subscription User
<input type="checkbox"/> Edit Login	Profile_Dealer	dprof	dealer1@wnvm.com	SVP_Sales & Marketing	<input checked="" type="checkbox"/>	Force.com - App Subscription User
<input type="checkbox"/> Edit	Profile_Sales	sprof	sales1@wnvm.com	SVP_Sales & Marketing	<input type="checkbox"/>	Standard User
<input type="checkbox"/> Edit	Tripathi_Ansh	cse	cse22_anshtripathi150@agentforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User_Integration	integ	integration@00dgk000007iadfuag.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User

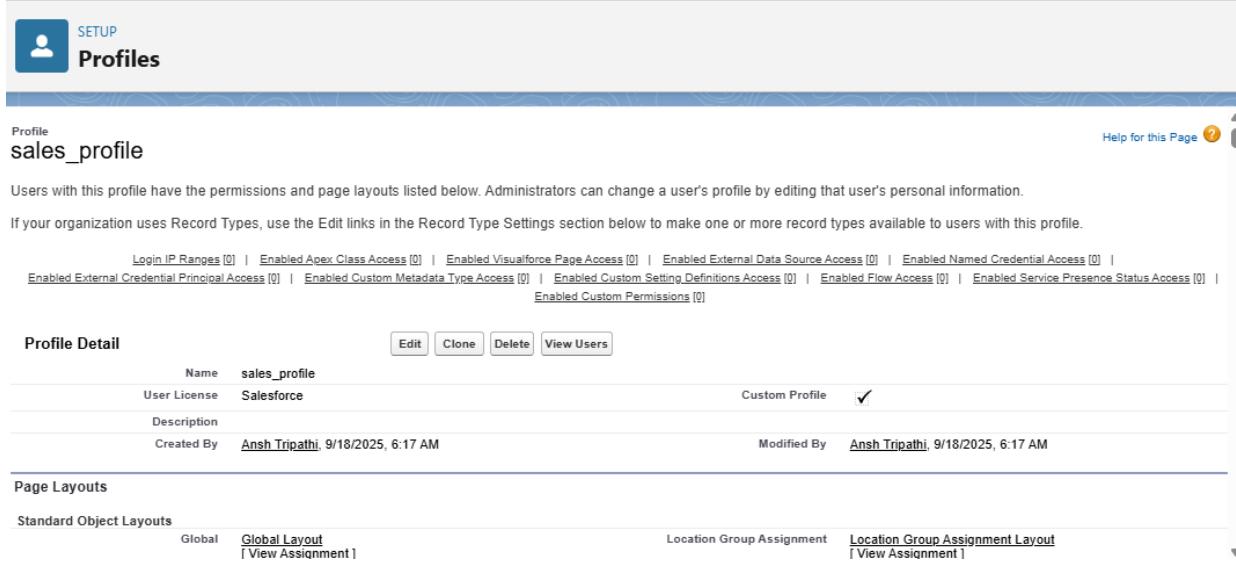
Profiles, Roles & Permission Sets

Profiles (baseline access)

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

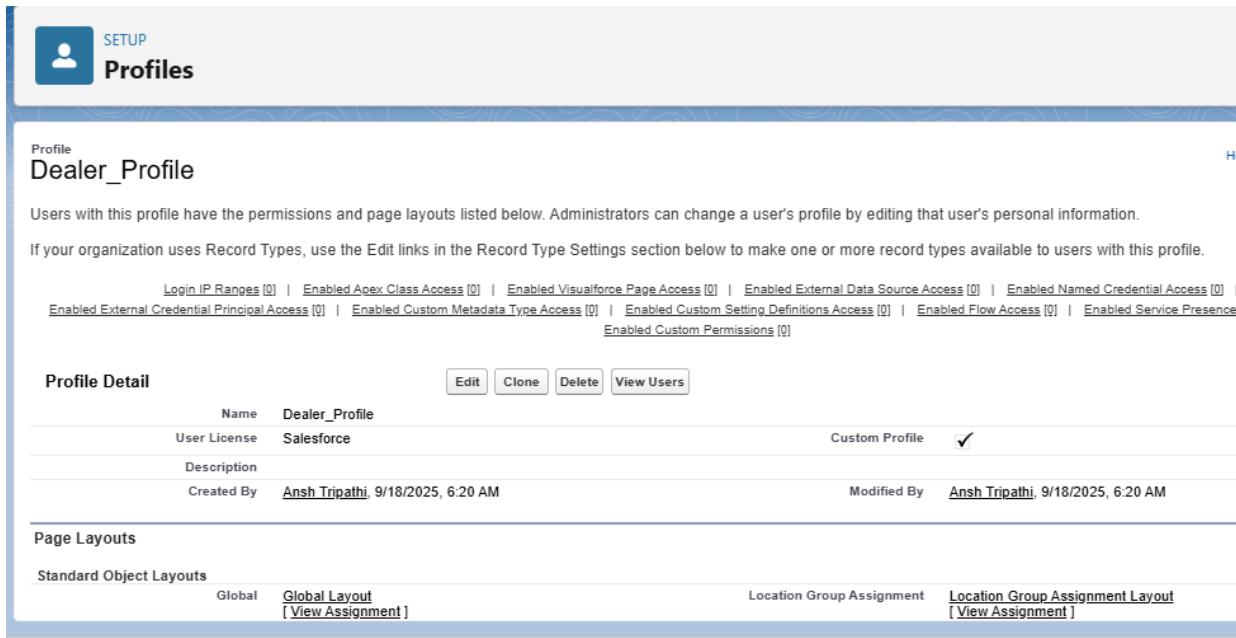
- Create:

Sales_Profile → read/write on Accounts, Opportunities, Orders



The screenshot shows the 'Profiles' section in the Salesforce Setup. A blue header bar at the top has a person icon and the word 'SETUP' on the left, and 'Profiles' on the right. Below the header, the title 'Profile sales_profile' is displayed. A sub-header 'Profile sales_profile' is followed by a paragraph of text: 'Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.' Below this text, there is a list of permissions: 'Login IP Ranges [0] | Enabled Apex Class Access [0] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] | Enabled External Credential Principal Access [0] | Enabled Custom Metadata Type Access [0] | Enabled Custom Setting Definitions Access [0] | Enabled Flow Access [0] | Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]'. A 'Profile Detail' section follows, containing fields for Name (sales_profile), User License (Salesforce), Description, Created By (Ansh Tripathi, 9/18/2025, 6:17 AM), and Modified By (Ansh Tripathi, 9/18/2025, 6:17 AM). Below this is a 'Page Layouts' section, which is currently empty. At the bottom right of the page, there is a 'Help for this Page' link with a question mark icon.

Dealer_Profile → limited access, only their assigned Orders/Accounts



The screenshot shows the 'Profiles' section in the Salesforce Setup. A blue header bar at the top has a person icon and the word 'SETUP' on the left, and 'Profiles' on the right. Below the header, the title 'Profile Dealer_Profile' is displayed. A sub-header 'Profile Dealer_Profile' is followed by a paragraph of text: 'Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.' Below this text, there is a list of permissions: 'Login IP Ranges [0] | Enabled Apex Class Access [0] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] | Enabled External Credential Principal Access [0] | Enabled Custom Metadata Type Access [0] | Enabled Custom Setting Definitions Access [0] | Enabled Flow Access [0] | Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]'. A 'Profile Detail' section follows, containing fields for Name (Dealer_Profile), User License (Salesforce), Description, Created By (Ansh Tripathi, 9/18/2025, 6:20 AM), and Modified By (Ansh Tripathi, 9/18/2025, 6:20 AM). Below this is a 'Page Layouts' section, which is currently empty. At the bottom right of the page, there is a 'Help for this Page' link with a question mark icon.

OrderManager_Profile → full CRUD on Orders + Reports

Profile
OrderManager_Profile

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges](#) | [Enabled Apex Class Access](#) | [Enabled Visualforce Page Access](#) | [Enabled External Data Source Access](#) | [Enabled Named Credential Access](#) | [Enabled External Credential Principal Access](#) | [Enabled Custom Metadata Type Access](#) | [Enabled Custom Setting Definitions Access](#) | [Enabled Flow Access](#) | [Enabled Service Presence Status Access](#) | [Enabled Custom Permissions](#)

Profile Detail

Name	OrderManager_Profile	Edit	Clone	Delete	View Users
User License	Salesforce	Custom Profile <input checked="" type="checkbox"/>			
Description					
Created By	Ansh Tripathi	9/18/2025, 6:22 AM	Modified By	Ansh Tripathi	9/18/2025, 6:22 AM

Page Layouts

Standard Object Layouts	Global Global Layout View Assignment	Location Group Assignment Location Group Assignment Layout View Assignment
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Roles (hierarchy)

Path: Setup → Roles → Set Up Roles

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

Creating the Role Hierarchy

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

Help for this Page ?

Your Organization's Role Hierarchy

Customer Ordering & Stock Management System

- CEO** Edit | Del | Assign
- COO** Edit | Del | Assign
- Order_Operations_Manager** Edit | Del | Assign
- SVP_Sales** Edit | Del | Assign
- Dealer_Manager** Edit | Del | Assign
- Regional_Manager** Edit | Del | Assign

Add Role

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

Login Access Policies

Path: Setup → Security → Login Access Policies

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

Manage Support Options

Setting	Packages	Available to Users	Available to Administrators Only
Administrators Can Log in as Any User		<input checked="" type="radio"/>	<input type="radio"/>
Salesforce.com Support		<input checked="" type="radio"/>	<input type="radio"/>

Save Cancel

- 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