

Project Title

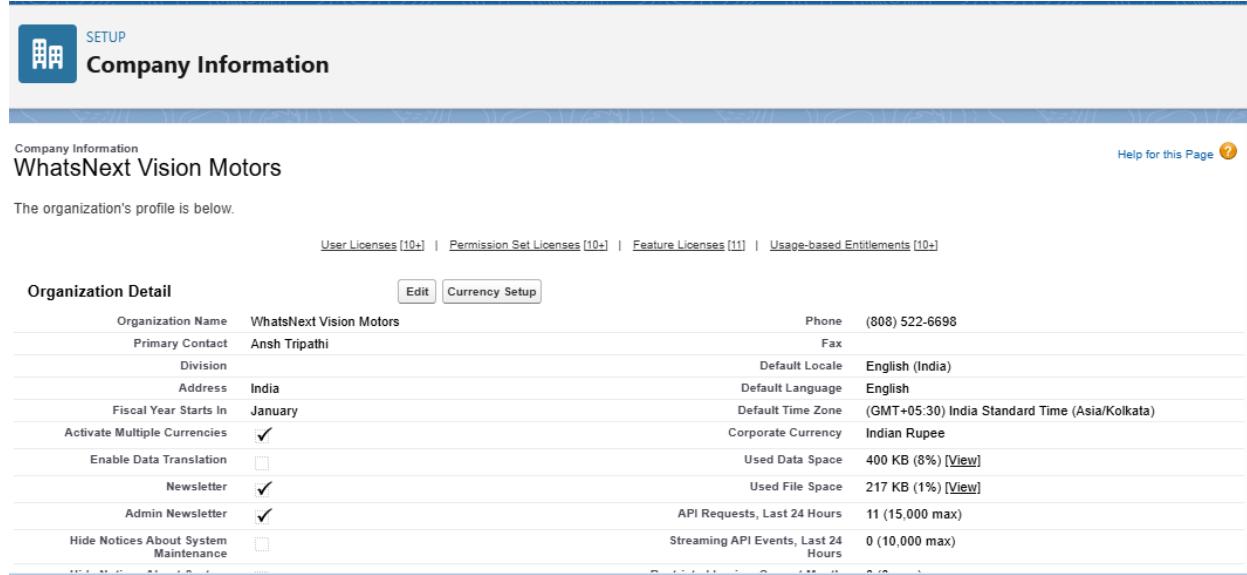
Customer Ordering & Stock Management System

❖ Phase 2: Org Setup & Configuration

Project: WhatsNext Vision Motors

Salesforce Edition

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



The screenshot shows the 'Company Information' page in the Salesforce setup. The page title is 'Company Information' with a 'SETUP' button. The organization name is 'WhatsNext Vision Motors'. The 'Organization Detail' section contains the following data:

Organization Detail		Edit	Currency Setup
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)

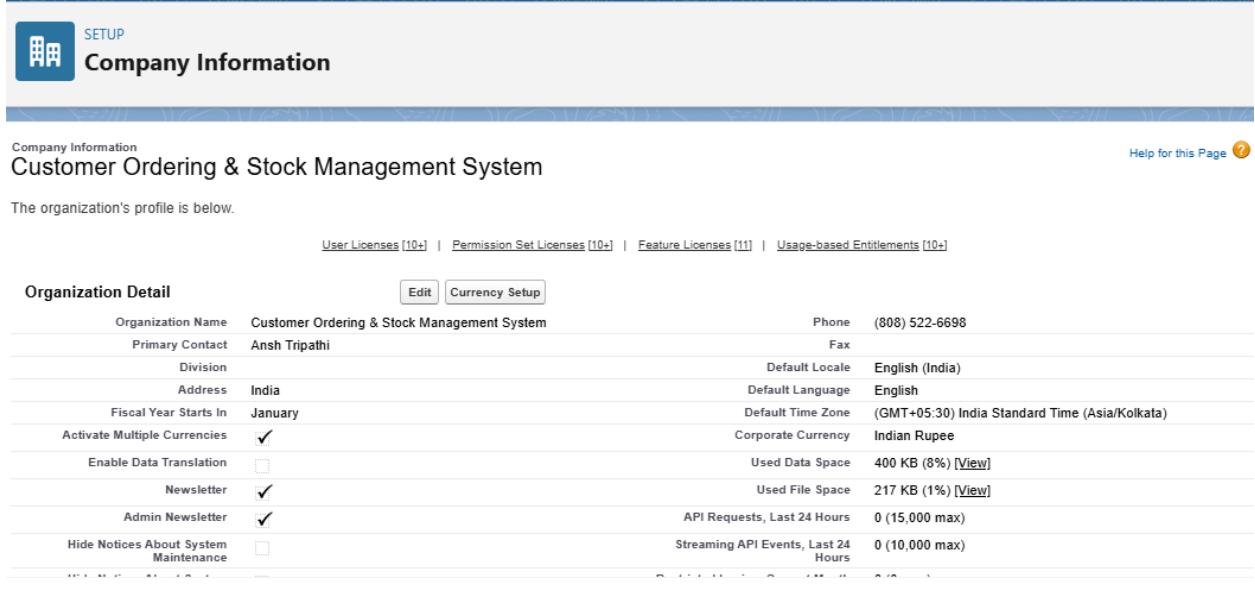
Below the table, there are sections for 'User Licenses', 'Permission Set Licenses', 'Feature Licenses', and 'Usage-based Entitlements'. A 'Help for this Page' link is also present.

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.



Company Information
Customer Ordering & Stock Management System

The organization's profile is below.

User Licenses [10+] | Permission Set Licenses [10+] | Feature Licenses [11] | Usage-based Entitlements [10+]

Organization Detail

Organization Name		Customer Ordering & Stock Management System	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	0 (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)

The screenshot shows the 'Business Hours' setup page in Salesforce. At the top, there is a 'SETUP' button and a 'Business Hours' section with a building icon. Below this, the title 'Organization Business Hours' is displayed, along with a 'Help for this Page' link. A note says: '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.'

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	Ansh Tripathi	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.

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

Name: Customer Ordering & Stock Management System
 Fiscal Year Start Month: January
 Fiscal Year is Based On: 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	anshtripathi2345@test.com	CEO	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00dgk000007iadfuag_7pwerjfw7cj@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

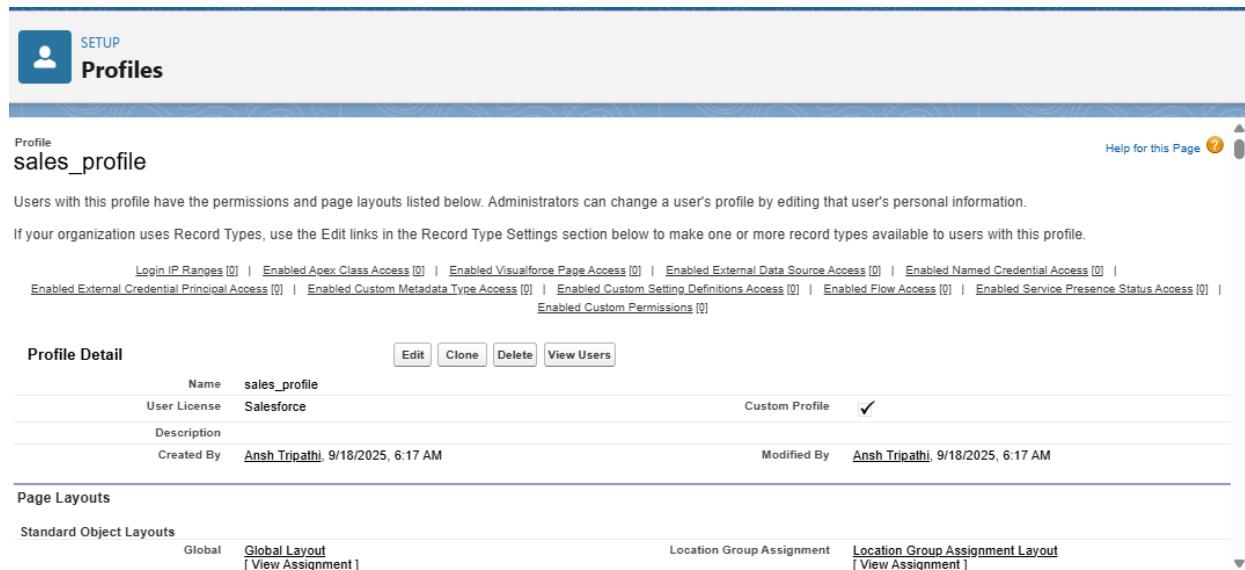
Profiles, Roles & Permission Sets

Profiles (baseline access)

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

- Create:

Sales_Profile → read/write on Accounts, Opportunities, Orders



The screenshot shows the Salesforce 'Profiles' page. At the top, there's a 'SETUP' button and a 'Profiles' section. Below that, the profile is named 'sales_profile'. A note says: '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.' Another note says: '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.' A permissions section lists various enabled access types. Below that is a 'Profile Detail' table with columns for Name, User License, Description, Created By, and Modified By. The 'Name' row shows 'sales_profile'. The 'User License' row shows 'Salesforce'. The 'Custom Profile' checkbox is checked. The 'Created By' and 'Modified By' rows both show 'Ansh Tripathi'. At the bottom, there's a 'Page Layouts' section with a table for 'Standard Object Layouts' showing 'Global Layout' and 'Location Group Assignment'.

Dealer_Profile → limited access, only their assigned Orders/Accounts

SETUP Profiles

Dealer_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 \[0\]](#) | [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 \[0\]](#)

Profile Detail

Name		Dealer_Profile	Edit	Clone	Delete	View Users
User License	Salesforce					Custom Profile <input checked="" type="checkbox"/>
Description						
Created By	Ansh Tripathi , 9/18/2025, 6:20 AM					Modified By Ansh Tripathi , 9/18/2025, 6:20 AM

Page Layouts

Standard Object Layouts	Global Global Layout [View Assignment]	Location Group Assignment Location Group Assignment Layout [View Assignment]

OrderManager_Profile → full CRUD on Orders + Reports

SETUP Profiles

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 \[0\]](#) | [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 \[0\]](#)

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]

Roles (hierarchy)

Path: Setup → Roles → Set Up Roles

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

SETUP

Roles

Creating the Role Hierarchy

Help for this Page

Your Organization's Role Hierarchy

[Show in tree view](#)

[Collapse All](#) [Expand All](#)

- Customer Ordering & Stock Management System
 - [Add Role](#)
 - CEO [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - COO [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - Order_Operations_Manager [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - [Add Role](#)
 - SVP_Sales [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - [Add Role](#)
 - Dealer_Manager [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - [Add Role](#)
 - 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

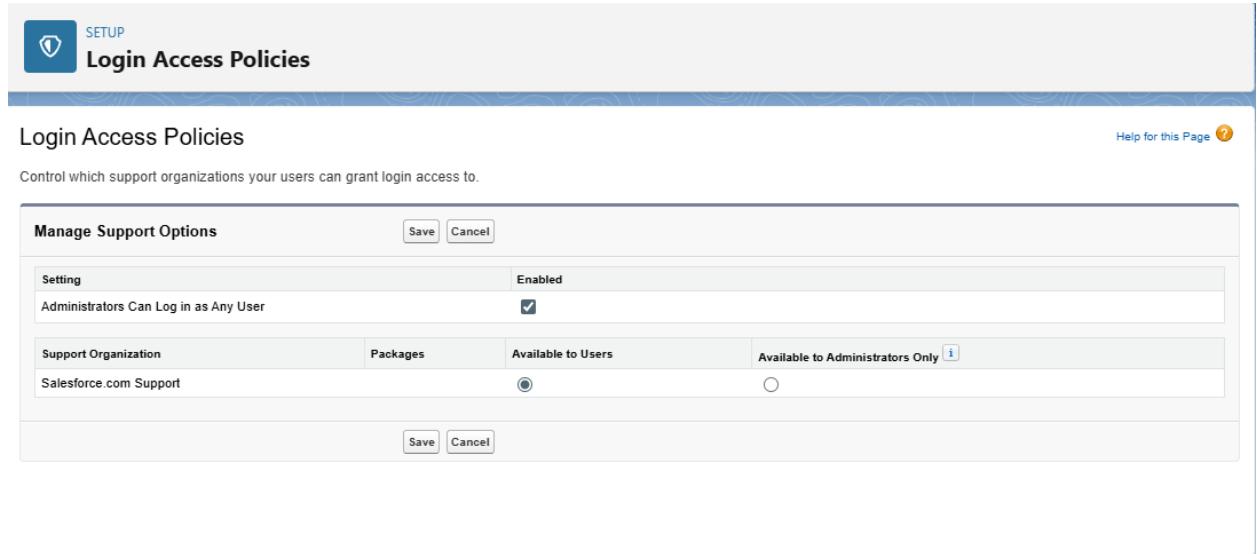
👉 Do this once **Order object is ready (Phase 3)**

- 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)



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

- 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