**Phase 2: Org Setup & Configuration**

As part of building a strong Salesforce foundation, **WhatNext Vision Motos** focuses on configuring its Salesforce Org to align with itss vision of *shaping the future of mobility with innovation and excellence*. Each configuration ensures secure, scalable, and business-aligned operations.

**Salesforce Editions**

* Selection of the appropriate Salesforce Edition (Enterprise/Unlimited) to balance scalability and cost.
* Ensures flexibility for future mobility innovations and customer-centric growth.

**Company Profile Setup**

* Accurate company information, primary contact, and default currency setup.
* Aligns Salesforce with organizational branding and compliance needs.

**Business Hours & Holidays**

* Defining working hours and holiday calendars for customer service and internal operations.
* Supports seamless mobility service operations and after-sales support.

**Fiscal Year Settings**

* Aligning fiscal year with corporate financial planning cycles.
* Provides accurate revenue tracking and reporting for mobility solutions.

**User Setup & Licenses**

* Assigning licenses to employees across sales, service, and R&D departments.
* Enables each team to contribute effectively towards innovation and customer excellence.

**Profiles**

* Configuring standard and custom profiles to manage feature access.
* Ensures proper balance of security and user productivity.

**Roles**

* Hierarchical role structure reflecting organizational mobility divisions (e.g., Sales, Service, Engineering).
* Helps maintain data visibility aligned with business responsibilities.

**Permission Sets**

* Assigning additional permissions for specialized tasks like analytics, IoT integration, or field service.
* Facilitates innovation without compromising security.

**OWD (Organization-Wide Defaults)**

* Defining baseline data-sharing settings to protect sensitive customer and product data.
* Enhances trust while enabling collaboration across teams.

**Sharing Rules**

* Configuring rules to allow controlled data access among departments.
* Promotes collaborative innovation in mobility solutions.

**Login Access Policies**

* Implementing security standards like trusted IP ranges and multi-factor authentication.
* Protects intellectual property and customer trust.

**Dev Org Setup**

* Setting up development environments for testing new mobility solutions and features.
* Encourages continuous innovation before production deployment.

**Sandbox Usage**

* Utilizing sandboxes for development, testing, and training purposes.
* Ensures error-free rollouts of mobility service enhancements.

**Deployment Basics**

* Establishing deployment pipelines for seamless migration of changes from sandbox to production.
* Guarantees stability while driving excellence in operations.