# Phase 2: Org Setup & Configuration

## ❖ Objective

➢ Establish a secure Salesforce environment with apps, profiles, roles, and permissions tailored

to support CPQ, Inventory, Production Orders, and Shipments.

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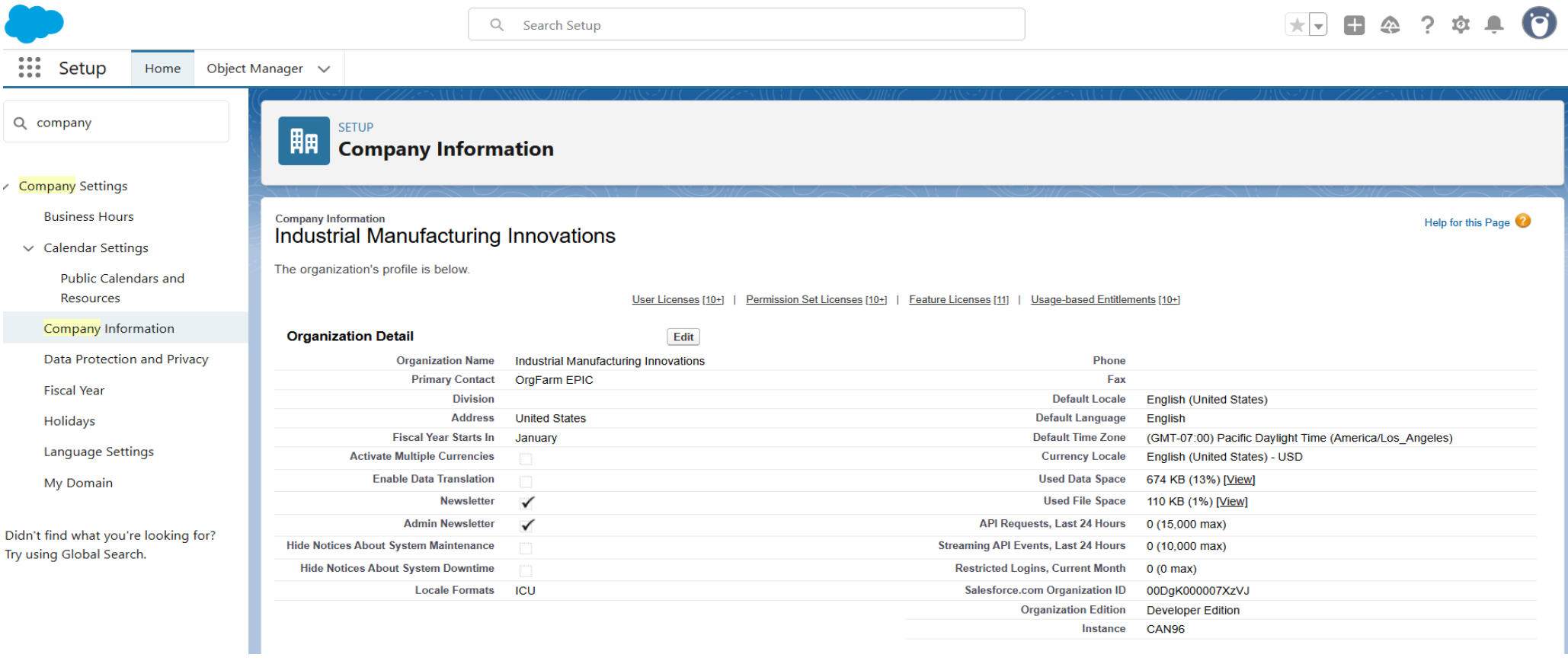
## Activities

### Salesforce Editions

- Using Developer Edition (Free) org.
- Suitable for CPQ prototyping and custom objects (Inventory, Production Order, Shipment).

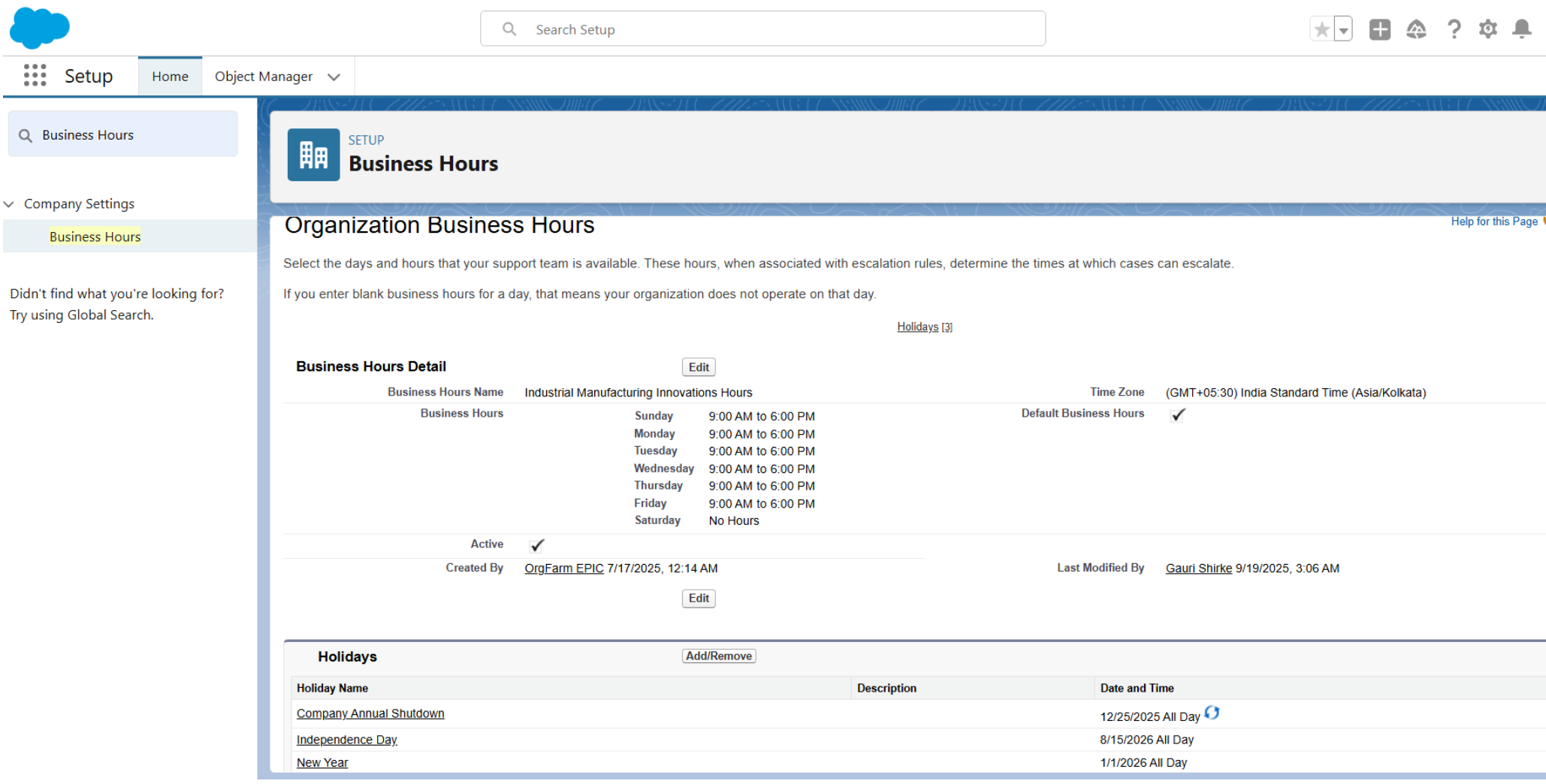
### Company Profile Setup

- Go to Setup → Company Information.
- Company: *Industrial Manufacturing Demo*.
- Default Time Zone: *GMT+5:30*.
- Default Currency: *USD* (Multi-Currency optional).



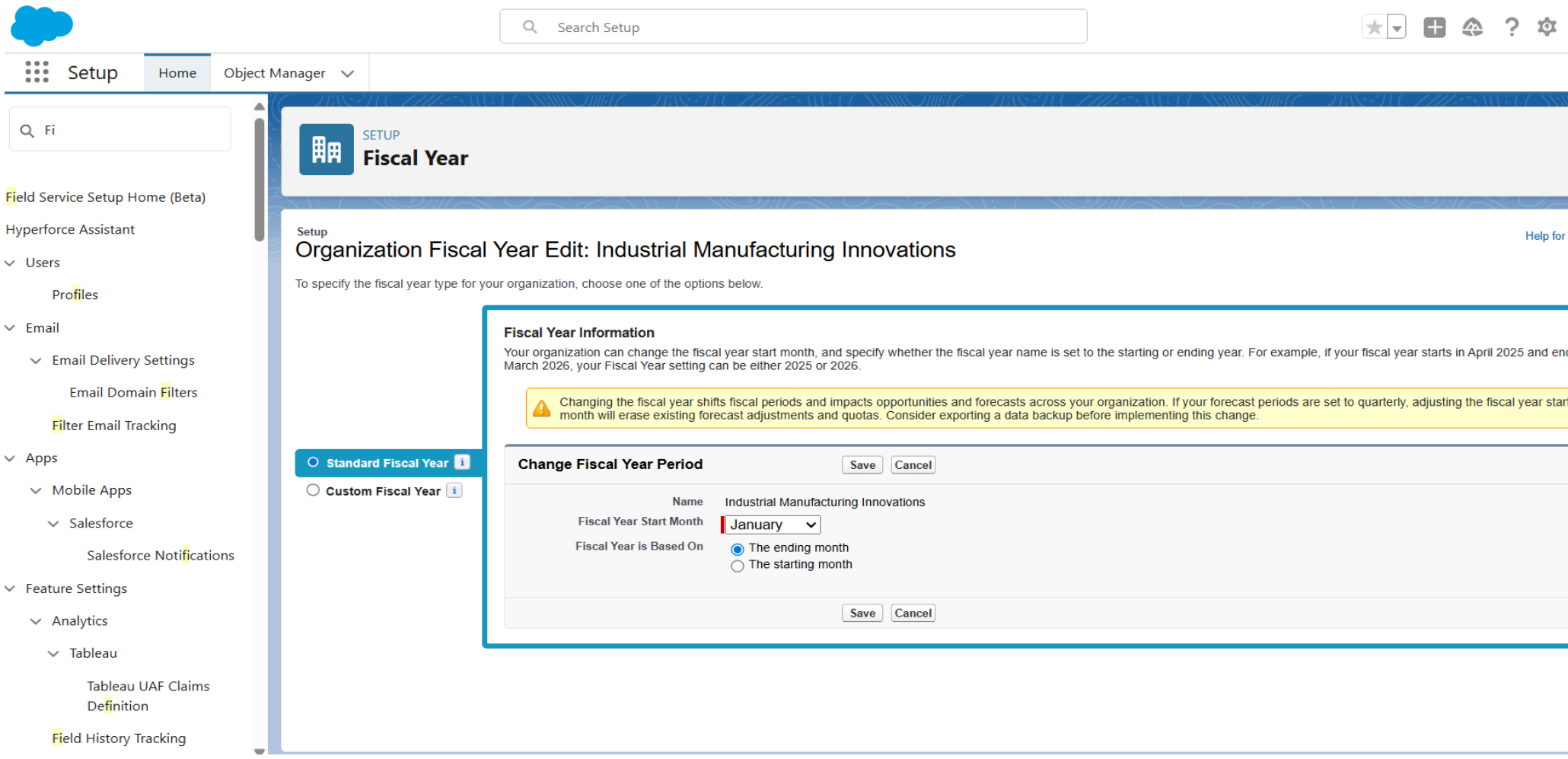

## Business Hours & Holidays

- Business Hours: *Mon–Fri, 9 AM – 6 PM*.
- Holidays: *New Year, Independence Day, Company Annual Shutdown*.



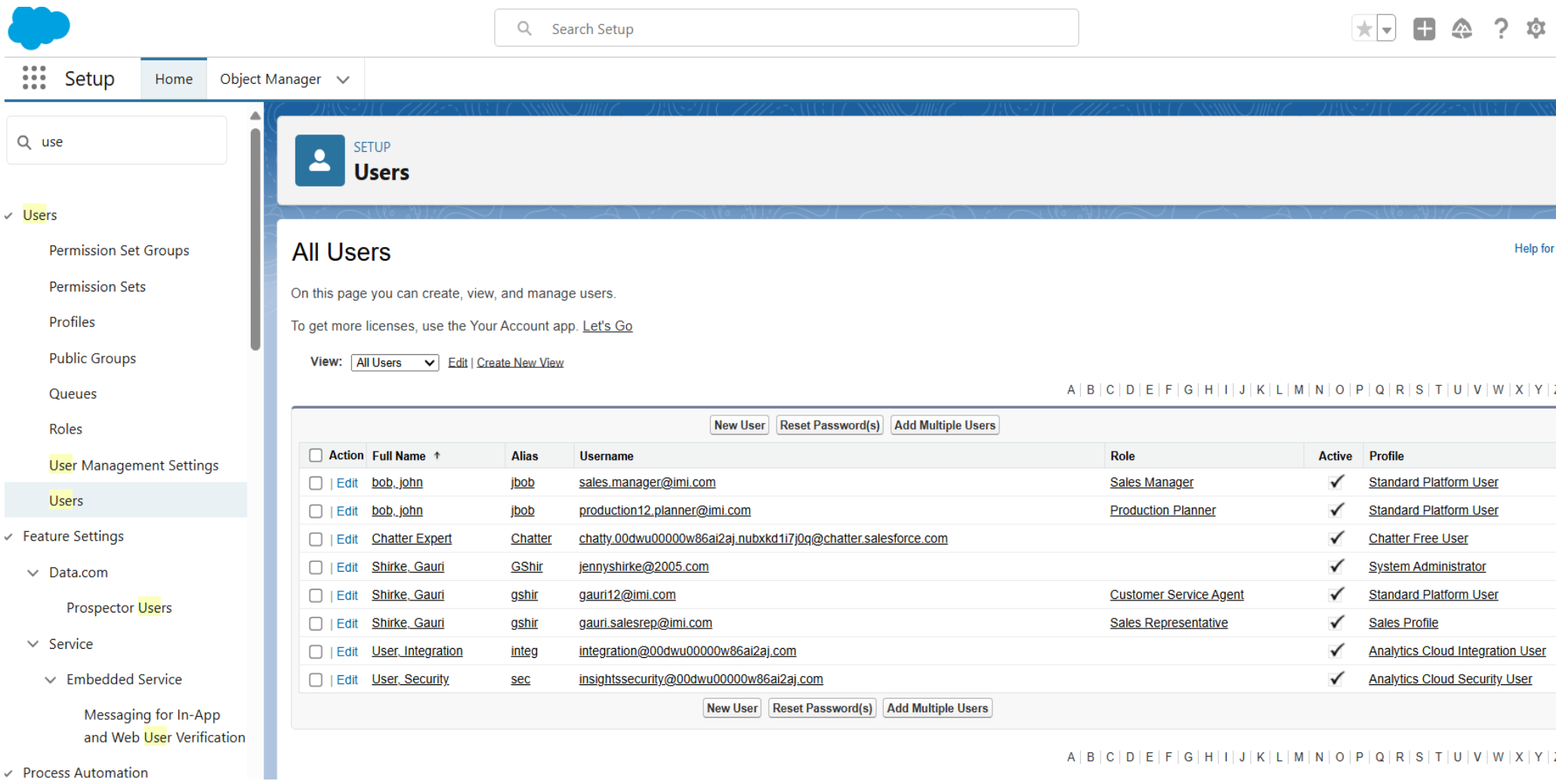
## Fiscal Year Settings

- Standard Fiscal Year (Jan–Dec).
- Custom fiscal years not required for this project.




## User Setup & Licenses

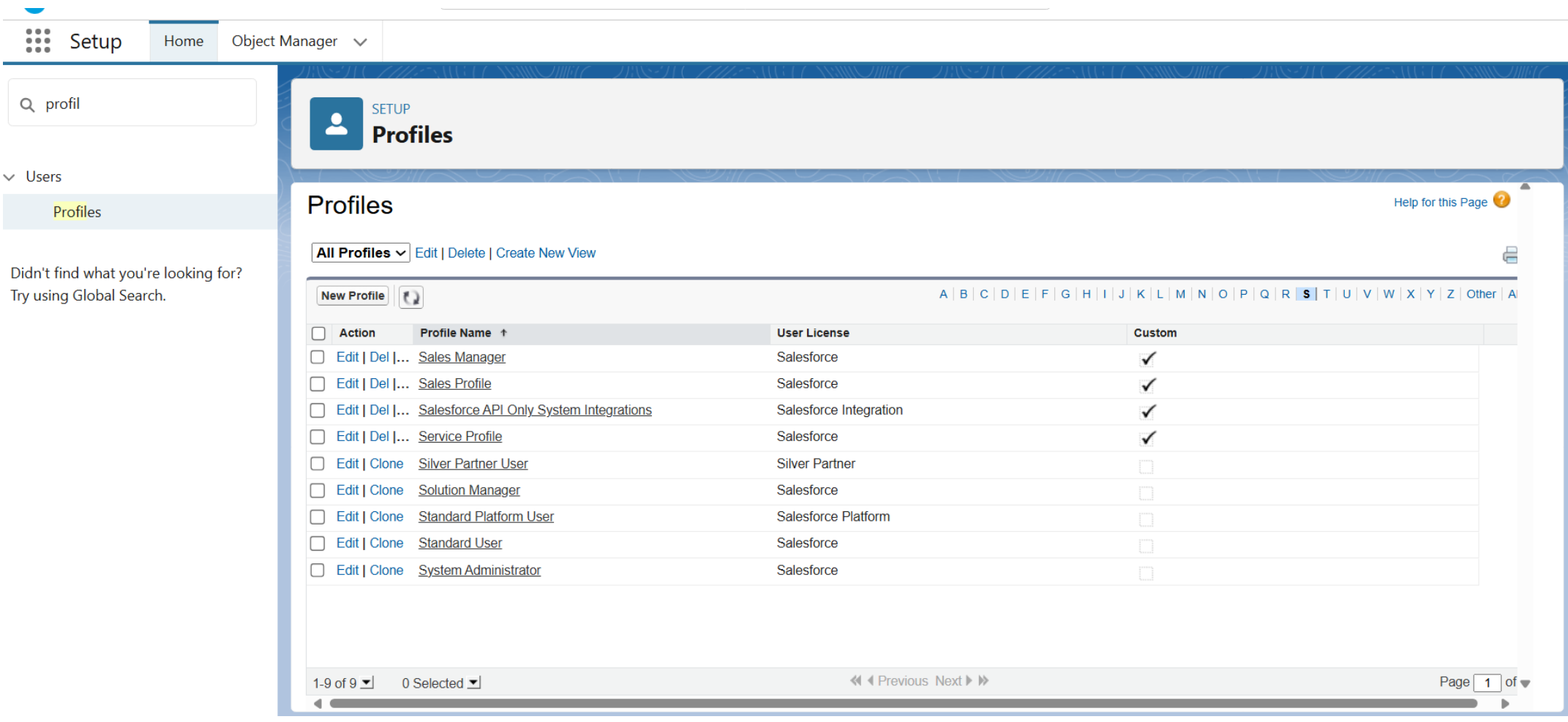
- Sales Representative
- Customer Service Agent
- Sales Manager
- Production Planner

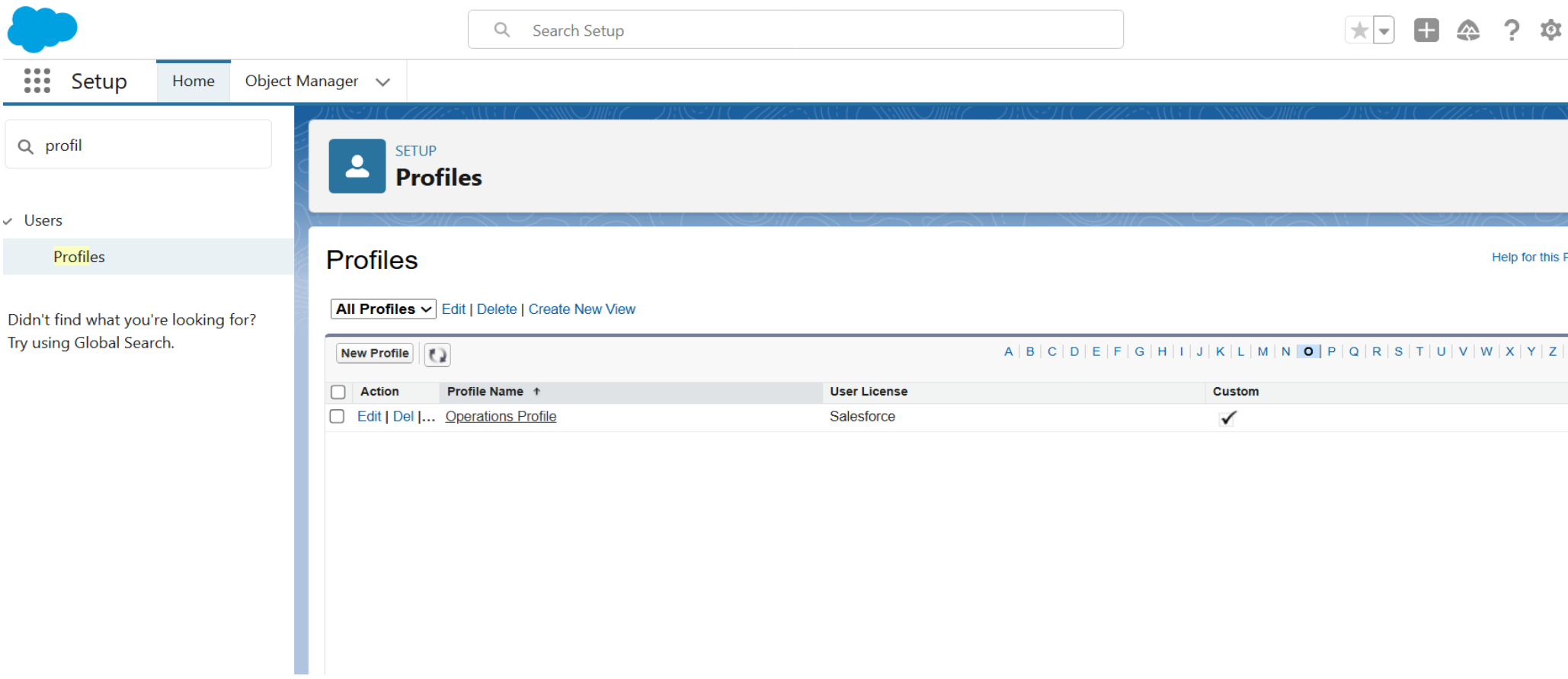



## Profiles

Custom profiles created by cloning Standard User:

- Sales Profile → Access to Quotes, Orders, Products.
- Service Profile → Access to Shipments (Edit).
- Operations Profile → Access to Production Orders, Inventory.

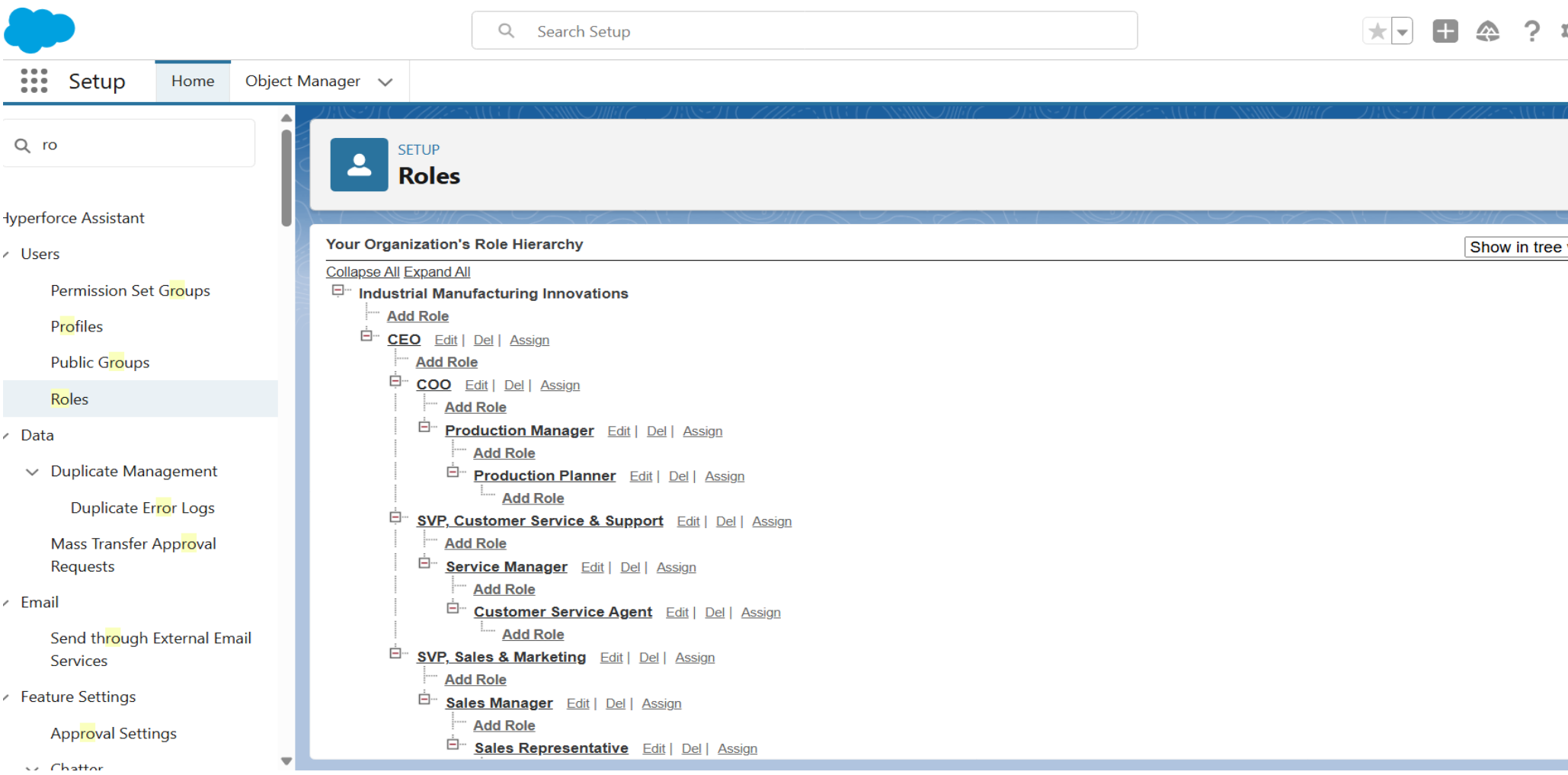





## Roles

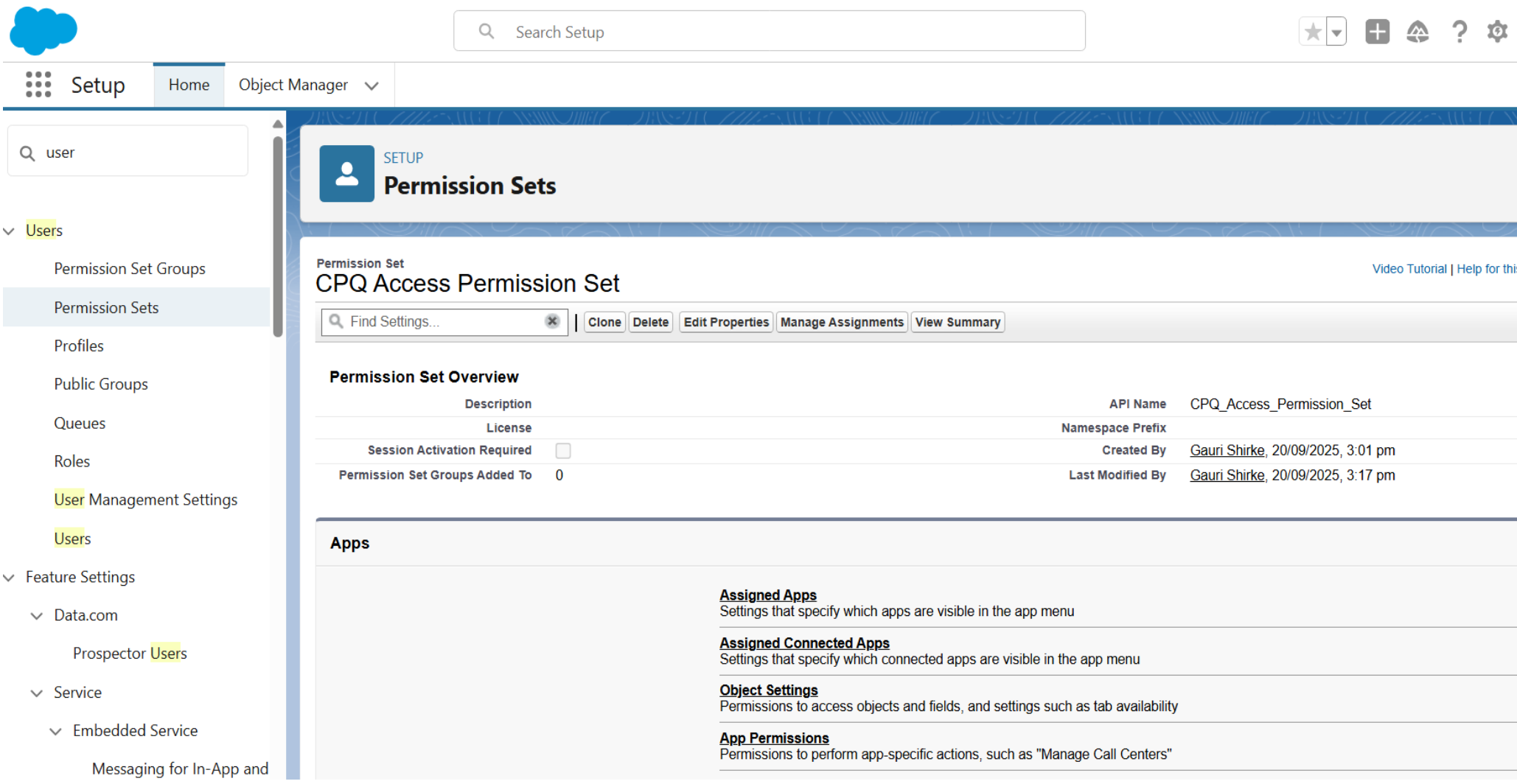
CEO

- COO
  - Production Manager
    - Production Planner
- SVP, Sales & Marketing
  - Sales Manager
    - Sales Representative
- SVP, Customer Service & Support
  - Service Manager
    - Customer Service Agent



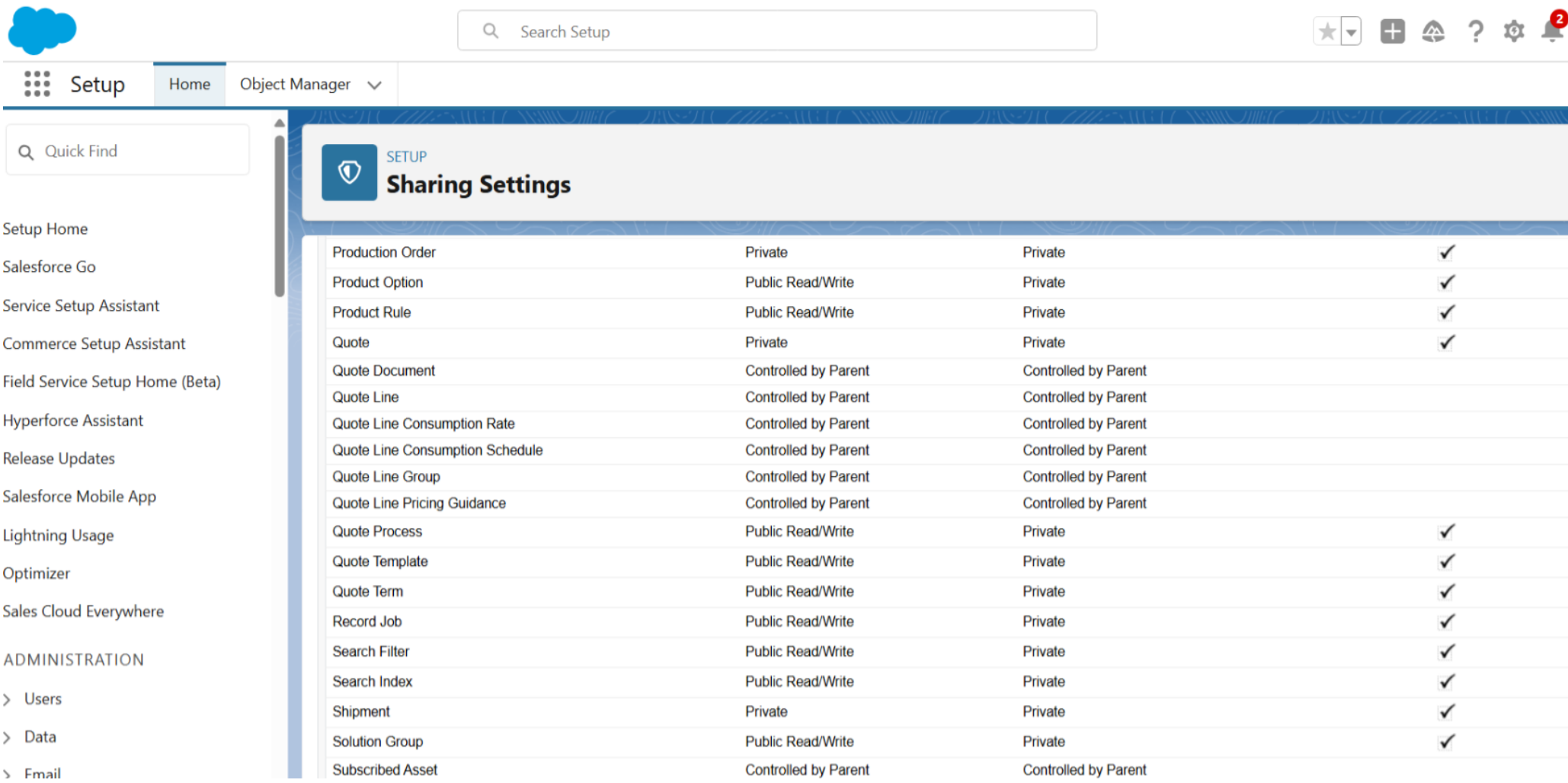

## Permission Sets

- CPQ Access Permission Set → Access to Quote, Quote Line, Price Book.
- Assigned to Sales Reps & Sales Managers.



## OWD (Org-Wide Defaults)

- Quotes = Private
- Orders = Private
- Inventory__c = Private
- Production_Order__c = Private
- Shipment__c = Private



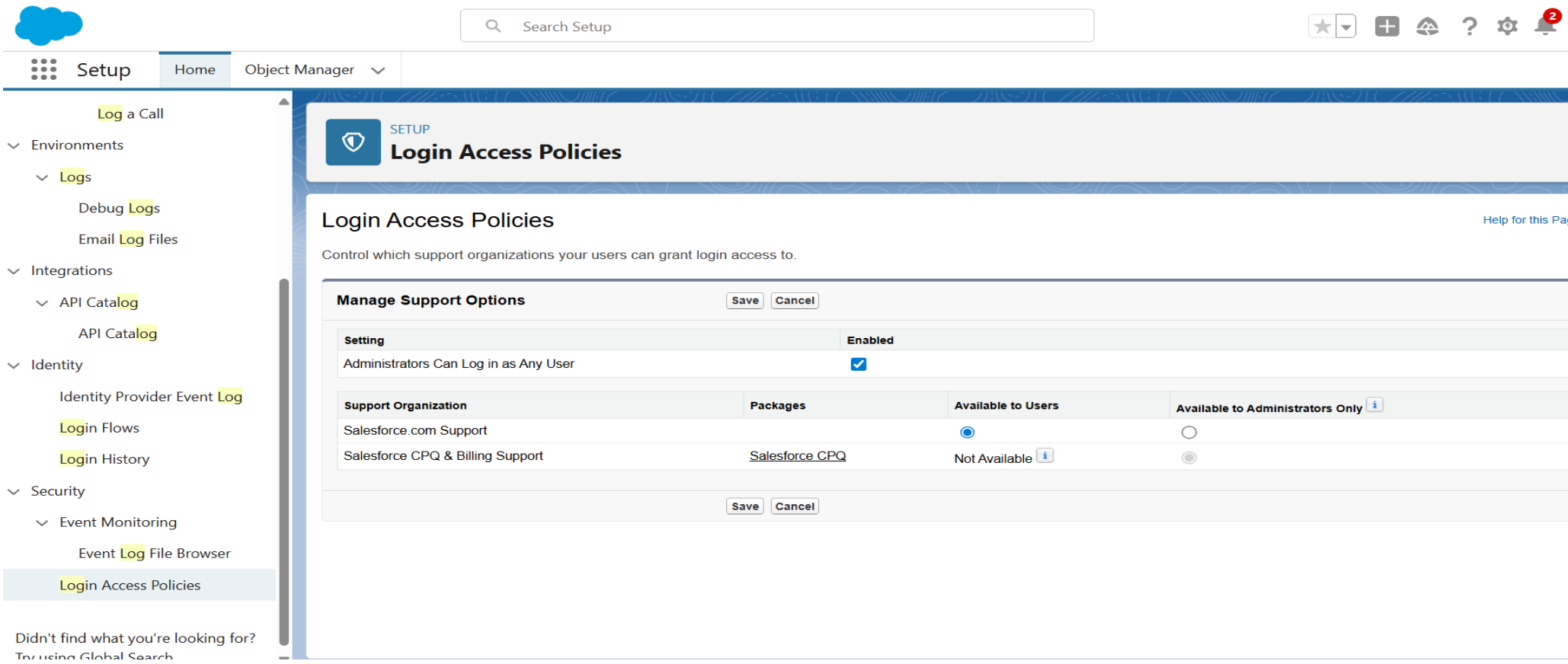

| | | | |
|---|---|---|---|
| Production Order | Private | Private | ✓ |
| Product Option | Public Read/Write | Private | ✓ |
| Product Rule | Public Read/Write | Private | ✓ |
| Quote | Private | Private | ✓ |
| Quote Document | Controlled by Parent | Controlled by Parent | |
| Quote Line | Controlled by Parent | Controlled by Parent | |
| Quote Line Consumption Rate | Controlled by Parent | Controlled by Parent | |
| Quote Line Consumption Schedule | Controlled by Parent | Controlled by Parent | |
| Quote Line Group | Controlled by Parent | Controlled by Parent | |
| Quote Line Pricing Guidance | Controlled by Parent | Controlled by Parent | |
| Quote Process | Public Read/Write | Private | ✓ |
| Quote Template | Public Read/Write | Private | ✓ |
| Quote Term | Public Read/Write | Private | ✓ |
| Record Job | Public Read/Write | Private | ✓ |
| Search Filter | Public Read/Write | Private | ✓ |
| Search Index | Public Read/Write | Private | ✓ |
| Shipment | Private | Private | ✓ |
| Solution Group | Public Read/Write | Private | ✓ |
| Subscribed Asset | Controlled by Parent | Controlled by Parent | |

## Sharing Rules

- Sales Manager → Access to all Sales Reps' quotes/orders.
- Service Manager → Access to all Shipments.
- Production Manager → Access to all Production Orders & Inventory.

## Login Access Policies

- Enable "Administrators Can Log in as Any User" → for testing scenarios.




## Dev Org Setup

- Developer Org created (via developer.salesforce.com).
- Installed Salesforce CPQ package for testing Quote-to-Cash flow.