

Project Title: Smart Pharmacy Inventory Tracker

PHASE 2 - Org Setup & Configuration

❖ **Company Profile Setup**

Set basic org details under Setup → Company Information → Edit:

- **Name:** Smart Pharmacy Inventory Tracker – Dev.
- **Time Zone:** GMT+05:30 Asia/Kolkata.
- **Locale:** English (India).
- **Language:** English.
- **Currency:** INR (₹).

The screenshot shows the 'Organization Detail' setup page in Salesforce. The page is divided into two main sections: 'Organization Detail' on the left and 'System Information' on the right. The 'Organization Detail' section includes fields for Organization Name, Primary Contact, Division, Address, Fiscal Year Starts In, Activate Multiple Currencies, Enable Data Translation, Newsletter, Admin Newsletter, Hide Notices About System Maintenance, Hide Notices About System Downtime, and Locale Formats. The 'System Information' section includes fields for Phone, Fax, Default Locale, Default Language, Default Time Zone, Currency Locale, Used Data Space, Used File Space, API Requests, Last 24 Hours, Streaming API Events, Last 24 Hours, Restricted Logins, Current Month, Salesforce.com Organization ID, Organization Edition, and Instance. The page also shows the 'Created By' and 'Modified By' information at the bottom.

Organization Detail		System Information	
Organization Name	Prof. Ram Meghe Institute of Technology and Research	Phone	
Primary Contact	OrgFarm EPIC	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 type="checkbox"/>	Currency Locale	Hindi (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	410 KB (8%) [View]
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) [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)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00DgK000007a8W5
		Organization Edition	Developer Edition
		Instance	CAN96
Created By	OrgFarm EPIC, 7/17/2025, 10:21 AM	Modified By	Shreyash Babhulkar, 9/18/2025, 7:05 AM

❖ **Business Hours Setup**

Configure working hours for escalation rules and expiry/reorder tracking:

- **Path:** Setup → Business Hours → New.
- **Name:** Pharmacy Business Hours.
- **Time Zone:** Asia/Kolkata.
- **Working Hours:** Mon–Sat (9:00 AM–9:00 PM), Sunday Closed.
- **Save:** Apply as default.

Organization Business Hours Help for this Page

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.

Holidays (0)

Business Hours Detail Edit

Business Hours Name	Pharmacy Business Hours	Time Zone
Business Hours	Sunday No Hours Monday 9:00 AM to 9:00 PM Tuesday 9:00 AM to 9:00 PM Wednesday 9:00 AM to 9:00 PM Thursday 9:00 AM to 9:00 PM Friday 9:00 AM to 9:00 PM Saturday 9:00 AM to 9:00 PM	(GMT+05:30) India Standard Time (Asia/Kolkata)
Default Business Hours	<input type="checkbox"/>	

Active ☒

Created By [Shreyash Babhulkar](#) 9/17/2025, 5:36 AM

Last Modified By [Shreyash Babhulkar](#) 9/18/2025, 7:08 AM

Edit

❖ Fiscal Year Setup

Defines reporting boundaries for inventory and supplier analysis.

- **Path:** Setup → Fiscal Year.
- **Type:** Standard Fiscal Year (Jan–Dec).
- **Configuration:** Starting month = January.
- **Save:** Apply settings.

Setup Help for this Page

Organization Fiscal Year Edit: Prof. Ram Meghe Institute of Technology and Research

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.

⚠ Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing this change.

☒ Standard Fiscal Year ?

☐ Custom Fiscal Year ?

Change Fiscal Year Period Save Cancel

Name Prof. Ram Meghe Institute of Technology and Research

Fiscal Year Start Month January

Fiscal Year is Based On

☐ The ending month

☒ The starting month

Save Cancel

❖ User Setup (Profiles, Roles, Permission Sets, Users)

Profiles: Cloned standard profiles to create custom ones for baseline access.

- Pharmacist_Profile → Manage Medicines & Orders.
- StoreManager_Profile → Full access to Medicines, Orders, Suppliers.
- Supplier_Profile → Limited access to Orders assigned.

Roles: Defined role hierarchy for access and reporting.

- CEO (Top role).
- Store Manager → child of CEO.
- Pharmacist → child of Store Manager.
- Supplier → child of Store Manager.

Users: Added sample users with respective profiles and roles.

- pharmacist1 → Pharmacist_Profile, Role: Pharmacist.
- storemanager1 → StoreManager_Profile, Role: Store Manager.
- supplier1 → Supplier_Profile, Role: Supplier.

Profile

Pharmacist Profile

Help for this Page

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

EditCloneDeleteView Users

Name	Pharmacist Profile	
User License	Salesforce	Custom Profile <input checked="" type="checkbox"/>
Description		
Created By	Shreyash Babhulkar, 9/18/2025, 7:18 AM	Modified By Shreyash Babhulkar, 9/18/2025, 7:18 AM

Profile

StoreManager Profile

Help for this Page

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

EditCloneDeleteView Users

Name	StoreManager Profile	
User License	Salesforce Platform	Custom Profile <input checked="" type="checkbox"/>
Description		
Created By	Shreyash Babhulkar, 9/18/2025, 7:19 AM	Modified By Shreyash Babhulkar, 9/18/2025, 7:19 AM

❖ Role Hierarchy Setup

Defines data visibility and reporting structure within the org.

- **Path:** Setup → Roles → Set Up Roles.
- **Top-Level Role:** CEO (root of hierarchy).
- **Store Manager Role:** Added as child of CEO.
- **Pharmacist Role:** Added as child under Store Manager.
- **Supplier Role:** Added as child under Store Manager.

Resulting Hierarchy (example):

CEO → Store Manager → Pharmacist

↳ Supplier

Creating the Role Hierarchy

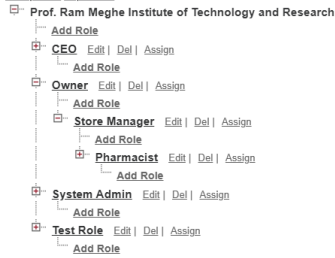
[Help for this Page](#)

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

Your Organization's Role Hierarchy

Show in tree view

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



❖ OWD (Org-Wide Defaults)

To be implemented in Phase 3 (as object-level sharing is required after object creation).

❖ Sharing Rules

To be implemented in Phase 3 (after Medicine__c and Order__c objects are available).

❖ Assign Permission Set(s)

After creating users, assign the permission set for inventory management:

- Path: Setup → Users → open storemanager1 → Permission Set Assignments → Edit Assignments → add Inventory_Manager_PS → Save.

Login Access Policies

[Help for this Page](#)

Control which support organizations your users can grant login access to.

Manage Support Options

[Save](#) [Cancel](#)

Setting		Enabled	
Administrators Can Log in as Any User		<input checked="" type="checkbox"/>	
Support Organization	Packages	Available to Users	Available to Administrators Only
Salesforce.com Support		<input checked="" type="radio"/>	<input type="radio"/>
Q Branch HQ Support	VideoFileViewer	Not Available	<input type="radio"/>

[Save](#) [Cancel](#)

❖ **Dev Org Setup**

- A Salesforce Developer Edition org was setup to implement the project.
- A GitHub Repository (Smart-Pharmacy-Inventory-Tracker) was created for source control.
- VS Code and Salesforce CLI were connected to the org for metadata retrieval and deployment.