Phase 2: Org Setup & Configuration

In this phase, we set up the Salesforce development environment and configured the foundational organizational settings required for the End-to-End Salesforce CRM Implementation, covering Admin, Development, and Community features.

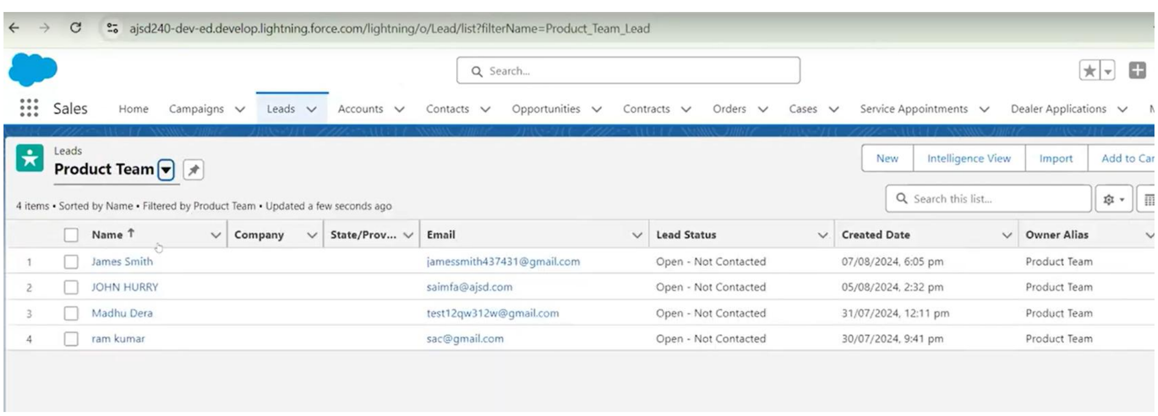
Salesforce Editions

We worked on a Developer Edition Org, which provides complete functionality for building and testing CRM features like Lead & Case Management, Opportunity Tracking, and Community portals. This edition allowed us to configure Admin settings, develop Apex and Lightning components, and test Experience Cloud features.

Company Profile Setup

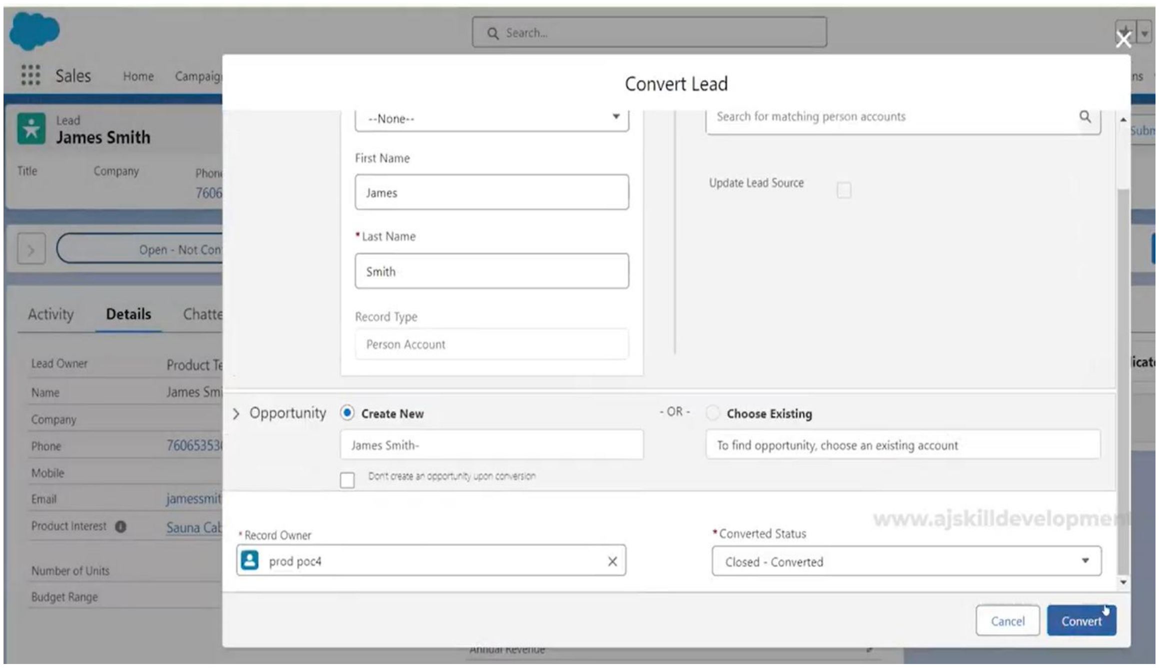
The company profile was configured with:

1. Organization details (name, address, and industry).
2. Default language as English (US).
3. Default currency set to INR for consistency in financial tracking.



Business Hours & Holidays

--> Business hours were set to IST (Indian Standard Time) to align follow-ups and support operations with the working schedule.
--> Holidays (such as national holidays and weekends) were added to ensure workflows, approvals, and automated reminders skip non-working days.

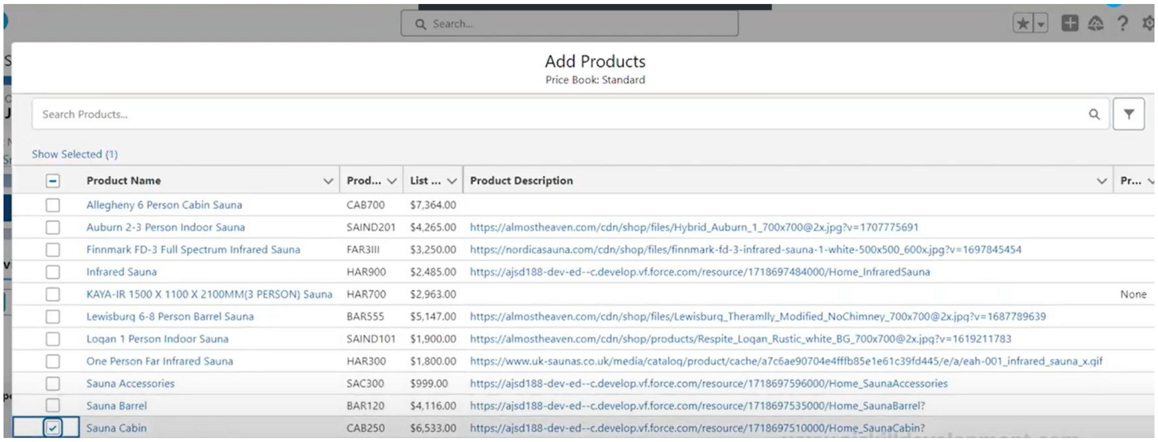


Fiscal Year Settings

--> Standard fiscal year settings were adopted for revenue forecasting, opportunity tracking, and reporting.
- These settings allow managers to monitor pipeline performance and customer conversions across defined time periods.

User Setup & Licenses

Users were created to represent different organizational roles:
- Admin – Responsible for CRM configuration and maintenance.
- Sales Executive – Manages leads, opportunities, and follow-ups.
- Service Agent – Handles customer cases, complaints, and resolutions.



Add Products
Price Book: Standard

Search Products...

Show Selected (1)

Product Name	Prod...	List ...	Product Description	Pr...
Allegheny 6 Person Cabin Sauna	CAB700	$7,364.00		
Auburn 2-3 Person Indoor Sauna	SAIND201	$4,265.00	https://almostheaven.com/cdn/shop/files/Hybrid_Auburn_1_700x700@2x.jpg?v=1707775691	
Finnmark FD-3 Full Spectrum Infrared Sauna	FAR3III	$3,250.00	https://nordicasauna.com/cdn/shop/files/finnmark-fd-3-infrared-sauna-1-white-500x500_600x.jpg?v=1697845454	
Infrared Sauna	HAR900	$2,485.00	https://ajsd188-dev-ed--c.develop.vf.force.com/resource/1718697484000/Home_InfraredSauna	
KAYA-IR 1500 X 1100 X 2100MM(3 PERSON) Sauna	HAR700	$2,963.00		None
Lewisburq 6-8 Person Barrel Sauna	BAR555	$5,147.00	https://almostheaven.com/cdn/shop/files/Lewisburq_Theramlly_Modified_NoChimney_700x700@2x.jpq?v=1687789639	
Loqan 1 Person Indoor Sauna	SAIND101	$1,900.00	https://almostheaven.com/cdn/shop/products/Respite_Loqan_Rustic_white_BG_700x700@2x.jpq?v=1619211783	
One Person Far Infrared Sauna	HAR300	$1,800.00	https://www.uk-saunas.co.uk/media/cataloq/product/cache/a7c6ae90704e4fffb85e1e61c39fd445/e/a/eah-001_infrared_sauna_x.qif	
Sauna Accessories	SAC300	$999.00	https://ajsd188-dev-ed--c.develop.vf.force.com/resource/1718697596000/Home_SaunaAccessories	
Sauna Barrel	BAR120	$4,116.00	https://ajsd188-dev-ed--c.develop.vf.force.com/resource/1718697535000/Home_SaunaBarrel?	
Sauna Cabin	CAB250	$6,533.00	https://ajsd188-dev-ed--c.develop.vf.force.com/resource/1718697510000/Home_SaunaCabin?	

- Partner User – Accesses leads, opportunities, and shared resources via the Community.
- Customer User – Accesses self-service portal for inquiries, FAQs, and case tracking.

Each user was assigned the appropriate Salesforce license, including Salesforce Platform and Community/Experience Cloud licenses.

Profiles

Custom profiles were created for specific roles:
- Sales Executive Profile → Edit access to Leads, Opportunities, and Contacts; read-only access to Cases.
- Service Agent Profile → Full access to Cases and Knowledge Articles; limited access to Leads and Opportunities.
- Community User Profiles → Restricted access to shared content, FAQs, and their own cases/opportunities.

Roles

A role hierarchy was designed to control visibility and ensure data security:
- Admin → Manager → Sales Executive → Service Agent → Community Users.

This setup ensured managers had visibility of team performance, while community users only accessed their own records.

Permission Sets

Additional permission sets were created to extend access without altering base profiles:

- Report Access – For generating detailed dashboards and reports.
- Integration Access – For developers managing API integrations.
- Community Contributor – For partners/customers contributing to shared content in the Community portal.

OWD (Org-Wide Defaults)

- Leads and Opportunities → Private (visible only to record owner and managers).
- Cases → Controlled by parent, so agents and managers could access linked records.
- Knowledge Articles & Community Content → Public read-only for transparency.

Sharing Rules

- Sharing rules were applied to allow cross-team collaboration when needed.
- Example: Managers can access all leads owned by sales executives; service agents can collaborate on escalated cases.

Login Access Policies

- Secure login policies enforced with IP range restrictions and session timeouts.
- Two-factor authentication (2FA) enabled for admins and managers for added security.

Dev Org Setup

- The Developer Org was used as the main environment for configuring Admin, developing custom Apex classes & Lightning Web Components, and testing Community features.

Sandbox Usage & Deployment Basics

- For this project, a sandbox was optional, but deployment concepts such as Change Sets, VS Code with SFDX CLI, and Metadata API were explored.
- This ensured that configurations and custom developments could be safely moved between environments in real-world scenarios.

Overall Summary

Overall, Phase 2 ensured that the Salesforce Org was well-prepared with organizational settings, user management, security, and access controls. This foundation allowed seamless implementation of Admin configurations, custom Development, and Community portal features in the later phases.