

## Phase 2 – Org Setup & Configuration

**Project:** Smart Retail Customer Insights Tracker

### Company Information

**Purpose:** Configure the Salesforce org to reflect the company details for accurate reporting and automation.

#### Details:

- Company Name: Smart Retail
- CEO: Pusarla Manaswini
- Currency: INR
- Locale: India
- Time Zone: India Standard Time
- Email Deliverability: All Email enabled

The screenshot shows the 'Company Information' setup page in Salesforce. The page title is 'Company Information' with a sub-header 'Smart Retail'. Below the title, it states 'The organization's profile is below.' and provides links for 'User Licenses [10+]', 'Permission Set Licenses [10+]', 'Feature Licenses [11]', and 'Usage-based Entitlements [10+]'. The 'Organization Detail' section is highlighted, showing a table of configuration options. The table has two columns: 'Organization Detail' and 'Value'. The 'Edit' button is visible next to the 'Organization Detail' header. The table includes fields for Organization Name, Primary Contact, Division, Address, Fiscal Year Starts In, Activate Multiple Currencies, Enable Data Translation, Newsletter, Admin Newsletter, Phone, Fax, Default Locale, Default Language, Default Time Zone, Currency Locale, Used Data Space, Used File Space, and API Requests, Last 24 Hours.

Organization Detail	Value
Organization Name	Smart Retail
Primary Contact	OrgFarm EPIC
Division	
Address	India
Fiscal Year Starts In	January
Activate Multiple Currencies	<input type="checkbox"/>
Enable Data Translation	<input type="checkbox"/>
Newsletter	<input checked="" type="checkbox"/>
Admin Newsletter	<input checked="" type="checkbox"/>
Phone	
Fax	
Default Locale	English (India)
Default Language	English
Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Currency Locale	English (United States) - USD
Used Data Space	342 KB (7%) <a href="#">[View]</a>
Used File Space	17 KB (0%) <a href="#">[View]</a>
API Requests, Last 24 Hours	839 (15,000 max)

Fig : Company Information

- Proper setup ensures dashboards, reports, and automation functions correctly.

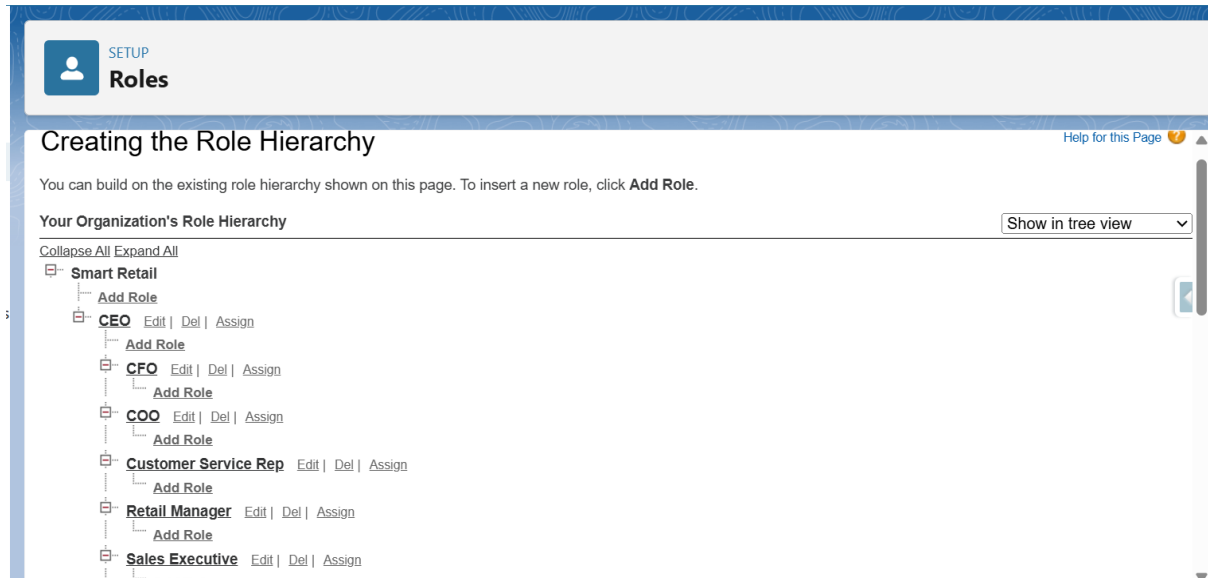
### Roles

**Purpose:** Define hierarchy to manage user access, record visibility, and reporting structure.

#### Custom Roles Created:

1. **Retail Manager** – Can view dashboards/reports and oversee customer activity

2. **Sales Executive** – Can manage customer purchases and product records
3. **Customer Service Rep** – Limited access to customer records
4. Admin user uses default **System Administrator** role



**Roles**

### Creating the Role Hierarchy

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

**Smart Retail**

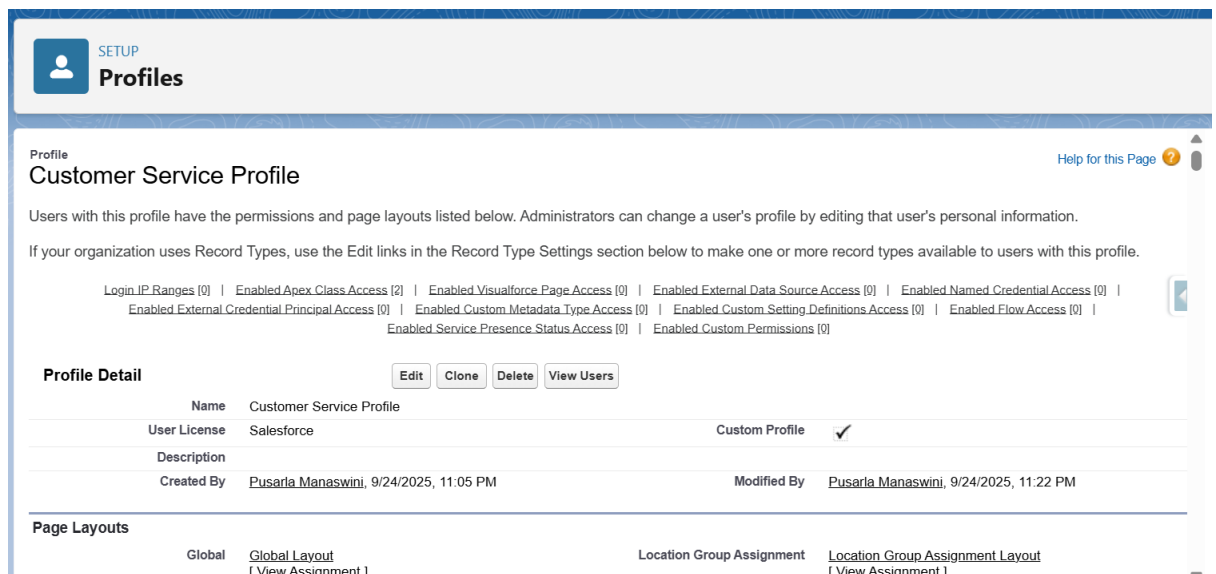
- Add Role**
- CEO** [Edit](#) | [Del](#) | [Assign](#)
  - Add Role**
  - CFO** [Edit](#) | [Del](#) | [Assign](#)
    - Add Role**
  - COO** [Edit](#) | [Del](#) | [Assign](#)
    - Add Role**
  - Customer Service Rep** [Edit](#) | [Del](#) | [Assign](#)
    - Add Role**
  - Retail Manager** [Edit](#) | [Del](#) | [Assign](#)
    - Add Role**
  - Sales Executive** [Edit](#) | [Del](#) | [Assign](#)
    - Add Role**

## Profiles

**Purpose:** Assign object permissions and access levels to users based on their responsibilities.

### Profiles Created:

1. **System Administrator** – Full access to all objects, settings, and features in Salesforce; can create/edit/delete records, configure flows, dashboards, and automation.



**Profiles**

### Customer Service 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 \[2\]](#) | 
 [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** [Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name	Customer Service Profile		
User License	Salesforce	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	Pusarla Manaswini, 9/24/2025, 11:05 PM	Modified By	Pusarla Manaswini, 9/24/2025, 11:22 PM

**Page Layouts**

Global	<a href="#">Global Layout</a> ( View Assignment )	Location Group Assignment	<a href="#">Location Group Assignment Layout</a> ( View Assignment )
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2. **Retail Manager** – Read-only access to Customer, Product, and Purchase objects; can view dashboards and reports; cannot delete records.

Profile

## Retail Manager 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 [2] | 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** [Edit](#) [Clone](#) [Delete](#) [View Users](#)


Name	Retail Manager Profile		
User License	Salesforce	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	Pusarla Manaswini, 9/24/2025, 11:19 PM	Modified By	Pusarla Manaswini, 9/24/2025, 11:23 PM

**Page Layouts**

Global	Global Layout <a href="#">[ View Assignment ]</a>	Location Group Assignment	Location Group Assignment Layout <a href="#">[ View Assignment ]</a>
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3. **Sales Executive** – Read/Edit access to Customer, Product, and Purchase objects; can add and update records but cannot delete; access limited to business-critical objects.

SETUP

 **Profiles**

Profile

## Sales Executive 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 [2] | 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** [Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name	Sales Executive Profile		
User License	Salesforce	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	Pusarla Manaswini, 9/25/2025, 1:16 AM	Modified By	Pusarla Manaswini, 9/25/2025, 1:18 AM

4. **Customer Service Rep** – Limited read-only or read/edit access to Customer object; cannot access Product or Purchase objects; can view dashboards relevant to customer support.

SETUP

Profiles

Profile

Customer Service 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 [2] | 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	Customer Service Profile		
User License	Salesforce	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	Pusarla Manaswini, 9/24/2025, 11:05 PM	Modified By	Pusarla Manaswini, 9/24/2025, 11:22 PM

Page Layouts

Global	Global Layout [ View Assignment ]	Location Group Assignment	Location Group Assignment Layout [ View Assignment ]
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## Users

**Purpose:** Create users and assign roles/profiles for testing and access control.

User	Profile	Role	License
Admin/Developer	System Administrator	Default Sys Admin	Salesforce
Retail Manager	Retail Manager	Retail Manager	Salesforce

SETUP

Users

User

Pusarla Manaswini

User ProfileHelp for this Page

Permission Set Assignments [0] | Permission Set Assignments: Activation Required [0] | Permission Set Group Assignments [0] | Permission Set License Assignments [0] | Personal Groups [0] | Public Group Membership [0] | Queue Membership [0] | Team [0] | Managers in the Role Hierarchy [0] | OAuth Apps [0] | Third-Party Account Links [0] | Built-in Authenticators [0] | Installed Mobile Apps [0] | Authentication Settings for External Systems [0] | Login History [0+] | User Provisioning Accounts [0]

User Detail

EditSharingReset PasswordFreezeView Summary

Name	Pusarla Manaswini	Role	CEO
Alias	pmana	User License	Salesforce
Email	pusarlamanaswini@gmail.com [Verify]	Profile	System Administrator
Username	pusarlamanaswini1@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User17587820231426845749	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>



SETUP

Users

User

## Retail Manager



User Profile Help for this Page



[Permission Set Assignments \[0\]](#) | [Permission Set Assignments: Activation Required \[0\]](#) | [Permission Set Group Assignments \[0\]](#) | [Permission Set License Assignments \[0\]](#) | [Personal Groups \[0\]](#) | [Public Group Membership \[0\]](#) | [Queue Membership \[0\]](#) | [Team \[0\]](#) | [Managers in the Role Hierarchy \[1\]](#) | [OAuth Apps \[0\]](#) | [Third-Party Account Links \[0\]](#) | [Built-in Authenticators \[0\]](#) | [Installed Mobile Apps \[0\]](#) | [Authentication Settings for External Systems \[0\]](#) | [Login History \[0+\]](#) | [User Provisioning Accounts \[0\]](#)

## User Detail

Edit

Sharing

Reset Password

Freeze

View Summary

Name	Retail Manager	Role	Retail Manager
Alias	rmana	User License	Salesforce
Email	retailmanager@retail.com [Verify]	Profile	Retail Manager Profile
Username	retailmanager@retail.com	Active	<input checked="" type="checkbox"/>
Nickname	User17587822167989316355	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>