Phase 2 Report — Org Setup & Configuration

Goal: Prepare Salesforce environment for Pharmacy Delivery CRM.

1. Salesforce Edition

Use Developer Edition (free dev org) for building and testing. Ideal for small-scale projects and proof-of-concept.

2. Company Profile Setup

Navigate to Company Settings → add company information such as organization name, address, and set local time zone. Configure currency (INR/USD) to align with project needs.

3. Business Hours & Holidays

Define working hours (9am–6pm, Mon–Sat). Add public holidays (system prevents approvals on these days). Helps with SLA and escalation rules.

4. Fiscal Year Settings

Use Standard Fiscal Year (Jan–Dec) for revenue and operational reporting. This aligns with most small-medium businesses in the region.

5. User Setup & Licenses

Create different users: Pharmacist, Dispatcher, Delivery Staff, Manager, and Admin. Assign Salesforce Platform or Full CRM licenses depending on roles.

6. Profiles

Define role-based access. Pharmacist Profile: Verify orders and prescriptions. Dispatcher Profile: Assign deliveries. Manager Profile: Full access, reports and dashboards. Delivery Staff: Limited access to assigned deliveries only.

7. Roles

Set hierarchy: Manager → Pharmacist/Dispatcher → Delivery Staff. This ensures record visibility rolls up (manager sees all records).

8. Permission Sets

Instead of modifying profiles, create Permission Sets to provide extra access (e.g., Reports, Dashboards, or specific objects) for certain users.

9. Org-Wide Defaults (OWD)

Set security defaults. Order__c = Private (only owner and manager can view). Prescription__c = Private (for confidentiality). Delivery__c = Public Read Only (all can track deliveries).

10. Sharing Rules

Configure rules to expand access. Example: Dispatcher group can see all Verified Orders. Manager group sees everything by default.

11. Login Access Policies

Restrict login hours to 9am–6pm for Pharmacists and Dispatchers. Restrict IP ranges if required for security.

12. Dev Org Setup

Developer Org acts as a sandbox. Build and test all features in this environment before considering production setup.

13. Sandbox Usage

In real-world deployments, build in Sandbox and test with UAT before moving to Production. Ensures stability and minimizes downtime.

14. Deployment Basics

Deployment = moving configuration/code from Sandbox to Production. Use Change Sets for metadata migration or DevOps tools for larger orgs.

Stakeholder Roles in Org Setup

Role	Responsibilities
Admin	Configures Salesforce, manages profiles, roles, and permissions.
Pharmacist	Verifies prescriptions, updates order status.
Dispatcher	Assigns deliveries, monitors delivery status.
Manager	Monitors operations, views dashboards and reports.
Delivery Staff	Updates delivery status (Out for Delivery → Delivered).