Phase 2: Org Setup & Configuration (Online Laptop Ordering)

1. Salesforce Editions

- **Chosen Edition:** Enterprise Edition
- **Reason:**
  - Supports **full customization**, including **custom objects, fields, and automation**.
  - Includes **role hierarchy, profiles, permission sets, and sharing rules**, which are essential for your multi-user order system.
  - Allows for **Apex coding, batch jobs, and API integrations** for dealer notifications and service tracking.
- **Impact on Project:**
  - You can create **Laptop, Dealer, Customer, Order, Testing, and Service Testing objects** with complex relationships.
  - Automations like **approval processes, flows, and triggers** are supported.

2. Company Profile Setup

- **Steps Taken:**
  - Defined company details: Name, address, contact information
  - Set default currency: Ensures consistent pricing in all orders
  - Fiscal year: Determines reporting periods, financial analysis, and dashboards
- **Importance:**
  - Enables correct **currency calculations** for orders and payments.
  - Fiscal year settings are essential for **revenue tracking, KPIs, and executive dashboards**.

3. Business Hours & Holidays

- **Configured:**
  - Standard working hours for order processing and support (e.g., 9 AM – 6 PM, Mon – Fri)
  - Holidays (public holidays, company-specific holidays)

4. User Setup & Licenses

- **Created Users:**

  - Admin: Full access for configuration, automation, and reporting

  - Sales: Can create orders and view customer details

  - Dealer: Can access orders assigned to them, update stock, and testing results

  - Support: Handles service testing and issue resolution

- **Licenses:**

  - Salesforce **Sales Cloud license** for Sales and Admin users

  - Salesforce **Platform license** for Dealers and Support (if they do not need full CRM access)

5. Profiles, Roles & Permission Sets

Profiles define **what a user can do in Salesforce**; **roles define hierarchy**, and **permission sets grant extra access**.

- **Profiles:**

  - Admin: Full CRUD (Create, Read, Update, Delete) on all objects

  - Sales: Access to customers, orders, and related dashboards

  - Dealer: Limited access to laptops and orders assigned to them

  - Support: Access to testing and service records

- **Roles:**

  - CEO → Sales Manager → Dealer → Support Agent

  - Role hierarchy ensures **data visibility flows upward**, e.g., Sales Manager sees all Dealer orders.

- **Permission Sets:**

  - Added to supplement profile restrictions, e.g., Sales profile might not have full access to testing objects, so a permission set grants **view/edit access**.

- **Importance:**

  - **Security:** Users see only what they are supposed to see.

  - **Flexibility:** Easy to give temporary or additional access without changing the profile.

6. Organization-Wide Defaults (OWD) & Sharing Rules

- **OWD (Default Sharing Settings):**
  - Set to **Private**: Each record is visible only to the owner and those above in the role hierarchy.
- **Sharing Rules:**
  - Allowed **dealers to see orders assigned to them**.
  - Allowed **sales team to see all customer orders** in their region.
- **Impact:**
  - Ensures **data security** and prevents unauthorized access.
  - Supports **multi-dealer environment** where dealers only see their orders.

7. Login Access Policies & Sandbox Usage

- **Login Policies:**
  - Implemented **IP restrictions** to allow only company devices or specific networks.
  - Session timeout and login hours configured for security.
- **Sandbox Usage:**
  - **Developer Sandbox** for testing custom objects, triggers, and flows.
  - Changes tested here before deploying to Production.
- **Importance:**
  - Prevents unauthorized access and ensures **safe testing environment**.
  - Reduces risk of breaking live data with new automation or Apex code.

8. Deployment Basics

- **Deployment Method:** Change Sets
  - Tested in Sandbox → Moved to Production
  - Includes objects, fields, automation, profiles, and permission sets.
- **Alternative Options:** VS Code + SFDX or ANT migration tool for larger deployments
- **Why it matters:**
  - Ensures **smooth migration** of customizations and data model changes.
  - Minimizes downtime and errors in production org.

Summary of Phase 2

Phase 2 ensures your Salesforce org is **secure, structured, and ready for custom development**:

1. Chose **Enterprise Edition** for full functionality.

2. Configured **company info, fiscal year, and business hours** for automation and reporting.

3. Set up **users, profiles, roles, and permission sets** to manage access.

4. Defined **OWD and sharing rules** for secure data visibility.

5. Implemented **login policies** and used **sandbox** for safe testing.

6. Prepared **deployment strategy** using Change Sets.