

# Phase 2 Org Setup and Configuration

## Salesforce Org Setup & Configuration – SmartBasket Project

This section documents the **Phase 2: Org Setup & Configuration** activities carried out for the **SmartBasket Inventory & Order Management System** project. It outlines the environment configuration, user management, and security settings implemented in Salesforce.

### 1. Salesforce Editions

- Project developed on **Salesforce Developer Edition**.
- This edition provides core features like Custom Objects, Profiles, Roles, and Permission Sets, sufficient for prototyping SmartBasket.
- Note: **Sandboxes** are not available in Developer Edition; simulated deployment was done using two Developer orgs.

### 2. Company Profile Setup

- Configured **Company Information** with project-specific details:

Company Information  
SmartBasket

The organization's profile is below.

User Licenses (10+)

Permission Set Licenses (10+)

Feature Licenses (11)

Usage-based Entitlements (10+)

Organization Detail

Edit

Organization Name	SmartBasket	Phone	
Primary Contact	System Administrator	Fax	
Division		Default Locale	English (India)
Address	Hyderabad Andhra Pradesh 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	English (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	342 KB (7%) <a href="#">[View]</a>
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) <a href="#">[View]</a>
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	00DgL00000BRKVo
		Organization Edition	Developer Edition
		Instance	CAN98

- Company Name: SmartBasket
- Primary Contact: System Administrator
- Default Currency: INR - Indian Rupee
- Default Locale: English (India)
- Default Time Zone: Asia/Kolkata

### 3. Business Hours & Holidays

Organization Business Hours

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 (3)

Business Hours Detail

Edit

Business Hours Name	SmartBasket	Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Business Hours	Sunday 24 Hours Monday 24 Hours Tuesday 24 Hours Wednesday 24 Hours Thursday 24 Hours Friday 24 Hours Saturday 24 Hours	Default Business Hours	<input checked="" type="checkbox"/>

- Defined **business hours** to simulate warehouse and order processing timelines:
  - Standard Hours: Mon–Sun 24Hours
- Configured **holidays** to prevent processing during non-working days:
  - Example: Christmas, New Year, Independence Day

### 4. Fiscal Year Settings

Fiscal Year

This page allows you to define and edit custom fiscal years, including the names used in reports and forecasts.  
Click the New button to define a new fiscal year. Click Edit to edit a previously defined fiscal year.

Custom Fiscal Years

New


Action	Year	FY Start Date	FY End Date	Description
Edit	2026	9/1/2025	8/31/2026	

- Adopted a **Standard Fiscal Year** configuration:
  - Start Month: September(aligns with Indian financial year).
  - Quarters: 12months

### 5. User Setup & Licenses

- Created **System Admin** and **End Users** to represent warehouse and order-processing roles.
- Each user assigned with a Salesforce **Standard User License** or **System Administrator License** depending on access needs.

## 6. Profiles

<input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Del</a>   ... <a href="#">Read Only</a>	Salesforce	✓
<input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Del</a>   ... <a href="#">Custom: Sales Profile</a>	 Salesforce	✓
<input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Del</a>   ... <a href="#">Custom: Marketing Profile</a>	Salesforce	✓
<input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Del</a>   ... <a href="#">Custom: Support Profile</a>	Salesforce	✓
<input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Del</a>   ... <a href="#">System Administrator</a>	Salesforce	✓
<input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Del</a>   ... <a href="#">Warehouse User</a>	Salesforce	✓
<input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Del</a>   ... <a href="#">Order Processor</a>	Salesforce	✓

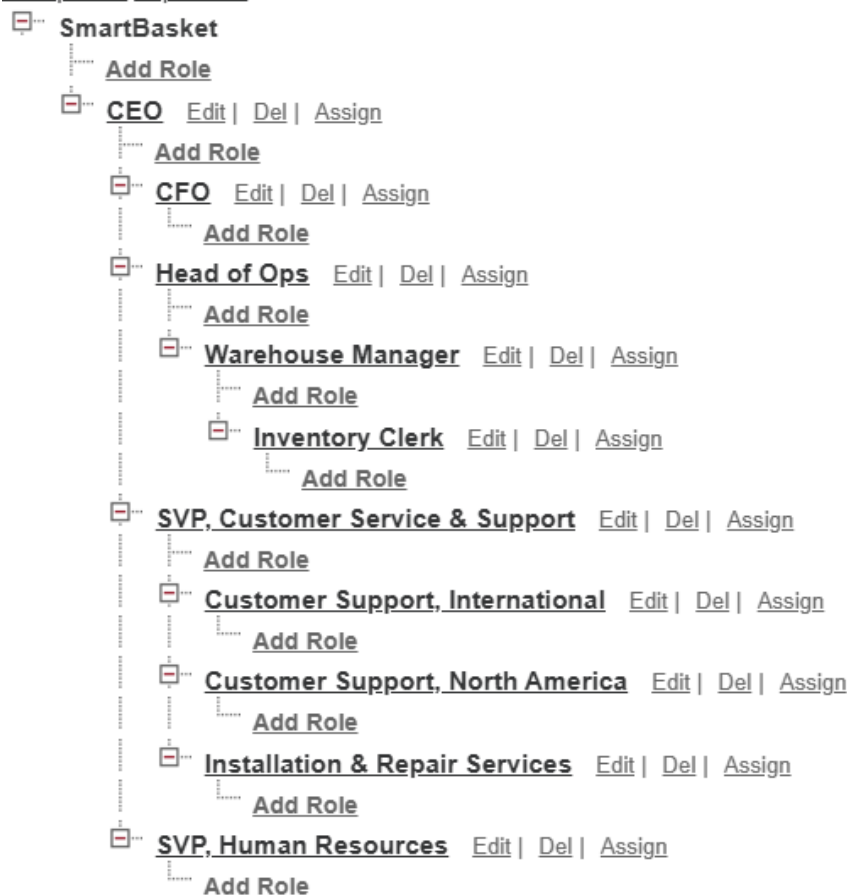
Defined **three profiles** to control baseline permissions:

- **System Administrator:** Full access to all data and configurations.
- **Warehouse User:** Manage Inventory records (create, update stock, view Products).
- **Order Processor:** Create and manage Orders, link with Products and Inventory.

## 7. Roles

### Your Organization's Role Hierarchy

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



- Built a **role hierarchy** to reflect data visibility:
  - CEO → Operations Head → Warehouse Manager → Order Processor
- Ensures managers have visibility of team-level records while restricting access horizontally.

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## 8. Permission Sets

- Configured **permission sets** for flexibility in assigning permissions beyond profiles:
  - Inventory Manager Access: Grants full CRUD on Inventory.
  - Order Processing Access: Grants CRUD on Order and Order Item.
  - Product Management Access: Grants CRUD on Products .

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## 9. Organization-Wide Defaults (OWD)

- Set **default sharing model** for data security:
  - Accounts & Contacts: Private
  - Orders: Private
  - Inventory: Private
  - Products: Read Only

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## 10. Sharing Rules

- Created sharing rules to allow cross-role collaboration:
  - Warehouse team members can share Inventory data with Order Processors.
  - Specific Orders can be shared with Sales Managers for reporting.

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## 11. Login Access Policies

- Configured policies for controlled access:
  - Enabled **Admin Login-As** feature for support.
  - Set **Session Timeout** = 60 minutes.
  - Enforced **Password Policies** (min length = 8, reset every 90 days).

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## 12. Developer Org Setup

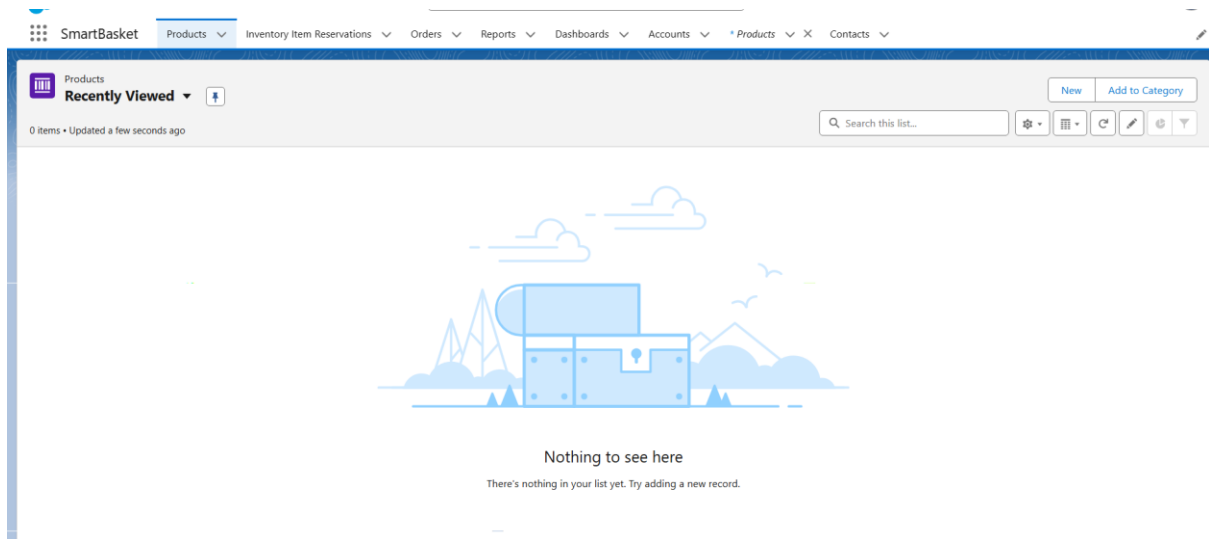
- The project was built on a **Salesforce Developer Org** with the following:
  - Custom Objects: Inventory
  - Standard Objects used: Product2, Order, Order Item.
  - Custom App: SmartBasket App with tabs for Products, Inventory, Orders, Reports.

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### 13. Sandbox Usage

- Not available in Developer Edition.
  - Sandbox functionality simulated by using a **second Developer Org** as the test environment.
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### 14. Deployment Basics



- The SmartBasket Lightning App was created using App Manager in the development org.
- In a real Enterprise Salesforce setup, the deployment would involve moving the app and related metadata from Sandbox → Production using Change Sets.
- Since Developer Edition does not support Sandboxes or Change Sets, deployment was simulated as follows:

#### Deployment Simulation Steps:

1. App Creation in Development Org
  - Created a Lightning App named SmartBasket.
  - Added key navigation items: Home, Products, Inventory, Warehouses, Orders, Reports, and Dashboards.
  - Assigned access to relevant profiles (System Administrator, Warehouse User, Order Processor).
2. Deployment Simulation
  - To demonstrate deployment, the SmartBasket App configuration was recreated manually in a second Developer Org.
  - This included:
    - Rebuilding the App (App Manager).

- Adding Custom Objects (Inventory) and required fields.
- Reconfiguring Navigation Tabs.
- Assigning access to the same set of profiles.

### 3. Real-World Equivalent (Enterprise Edition)

- In a live Salesforce Enterprise org, the process would be:
  - Create an Outbound Change Set in Sandbox containing:
    - Lightning App (SmartBasket).
    - Custom Objects (Inventory).
    - Profiles and Permission Sets.
    - Roles and Sharing Rules.
  - Upload Change Set to Production.
  - Deploy after validation.