



Pharmacy Inventory System

This document provides a step-by-step summary of all configuration tasks completed for Phase 2 of the Pharmacy Inventory System project, following the official project roadmap.

Company Profile Setup

01

Navigate to Setup

Navigated to Setup > Company Information.

03

Time Zone Configuration

Set Default Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata).

02

Organization Name

Set Organization Name: **MediNest**.

04

Currency Settings

Set Currency Locale: English (India) - INR.



Search Setup



Setup

Home

Object Manager

company



SETUP

Company Information

Company Information

MediNest

The organization's profile is below.

Help for this Page

[User Licenses](#) (10+) | [Permission Set Licenses](#) (10+) | [Feature Licenses](#) (11) | [Usage-based Entitlements](#) (10+)

Organization Detail

Edit

Organization Name	MediNest	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (United States)
Address	Madhya 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	438 KB (9%) View
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) View
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	11 (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	00DgK000007ZYin
		Organization Edition	Developer Edition
		Instance	CAN96

Created By [OrgFarm EPIC](#), 7/17/2025, 8:50 AM

Edit

Modified By [Tarun Jhariya](#), 9/17/2025, 6:54 AM

User Licenses

[User Licenses Help](#)

Name	Status	Total Licenses	Used Licenses	Remaining Licenses	Expiration Date
Salesforce	Active	4	3	1	

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Business Hours & Holidays

Setup Navigation

Navigated to Setup > Business Hours.

Record Creation

Created a new record named **Pharma Timings**.

Operating Schedule

Set hours to **12:00 PM to 10:00 PM** for Monday through Saturday.

[Setup](#)[Home](#)[Object Manager](#) [Company Settings](#)[Business Hours](#)

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SETUP

Business Hours

Organization Business Hours

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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.

Business Hours Edit

[Save](#) [Cancel](#)

Step 1. Business Hours Name

Required Information

Business Hours Name Use these business hours as the default ☐Active ☒

Step 2. Time Zone

Time Zone

Step 3. Business Hours

Sunday	<input type="text" value="12:00 AM"/>	to	<input type="text" value="12:00 AM"/>	<input checked="" type="checkbox"/> 24 hours
Monday	<input type="text" value="12:00 AM"/>	to	<input type="text" value="10:00 PM"/>	<input type="checkbox"/> 24 hours
Tuesday	<input type="text" value="12:00 AM"/>	to	<input type="text" value="10:00 PM"/>	<input type="checkbox"/> 24 hours
Wednesday	<input type="text" value="12:00 AM"/>	to	<input type="text" value="10:00 PM"/>	<input type="checkbox"/> 24 hours
Thursday	<input type="text" value="12:00 AM"/>	to	<input type="text" value="10:00 PM"/>	<input type="checkbox"/> 24 hours
Friday	<input type="text" value="12:00 AM"/>	to	<input type="text" value="10:00 PM"/>	<input type="checkbox"/> 24 hours
Saturday	<input type="text" value="12:00 AM"/>	to	<input type="text" value="10:00 PM"/>	<input type="checkbox"/> 24 hours

[Save](#) [Cancel](#)

Fiscal Year Settings


Configuration Review

The standard Gregorian calendar (January 1st start date) was reviewed and kept as the fiscal year, as it meets the needs of the business.



User Setup & Licenses


Three representative users were created in Setup > Users, with each being assigned a Salesforce License:



Pharmacy Owner

Tarun Jhariya

Assigned the System Administrator Profile.



Pharmacist

Saksham Agrawal

Assigned the custom Pharmacist Profile.

user

- Users
- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users
- Feature Settings
- Data.com
- Prospector Users
- Service
- Embedded Service
- Messaging for In-App and Web User Verification
- User Interface
- Action Link Templates
- Actions & Recommendations
- App Menu
- Console Settings
- Console Workspace Page

SETUP

Users

User

Tarun Jhariya

User ProfileHelp for this Page

Permission Set Assignments (5) | Permission Set Assignments: Activation Required (0) | Permission Set Group Assignments (0) | Permission Set License Assignments (5+) | Personal Groups (0) | Public Group Membership (0) | Queue Membership (1) | Team (0) | Managers in the Role Hierarchy (0) | OAuth Apps (4) | Third-Party Account Links (0) | Built-in Authenticators (0) | Installed Mobile Apps (0) | Authentication Settings for External Systems (0) | Login History (10+) | User Provisioning Accounts (0)

User Detail

EditSharingChange PasswordView Summary

Name	Tarun Jhariya	Role	Pharmacy Owner
Alias	tar	User License	Salesforce
Email	tarun.jhariya.csds22@ggits.net [Verified]	Profile	System Administrator
Username	tarun.jhariya.csds22564@agentforce.com	Active	<input checked="" type="checkbox"/>
Nickname	User17536240902496960082 ⓘ	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company	Gyan Ganga Institute of Technology & Sciences	Knowledge User	<input checked="" type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	ⓘ
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> ⓘ
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> ⓘ
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> ⓘ
App Registration: One-Time Password Authenticator	[Connect] ⓘ	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> ⓘ
App Registration: Salesforce Authenticator	[Connect] ⓘ	Send Apex Warning Emails	<input type="checkbox"/>
Security Key (U2F or WebAuthn)	[Register] ⓘ	Salesforce CRM Content User	<input checked="" type="checkbox"/>
Lightning Login	[Enroll] ⓘ	Receive Salesforce CRM Content Email Alerts	<input checked="" type="checkbox"/>
Temporary Verification Code (Expires in 1 to 24 Hours)	[Generate] ⓘ	Receive Salesforce CRM Content Alerts as Daily Digest	<input checked="" type="checkbox"/>
		Make Setup My Default Landing Page	<input type="checkbox"/>

Profiles Configuration

Two custom profiles were created in Setup > Profiles to manage user permissions:

1

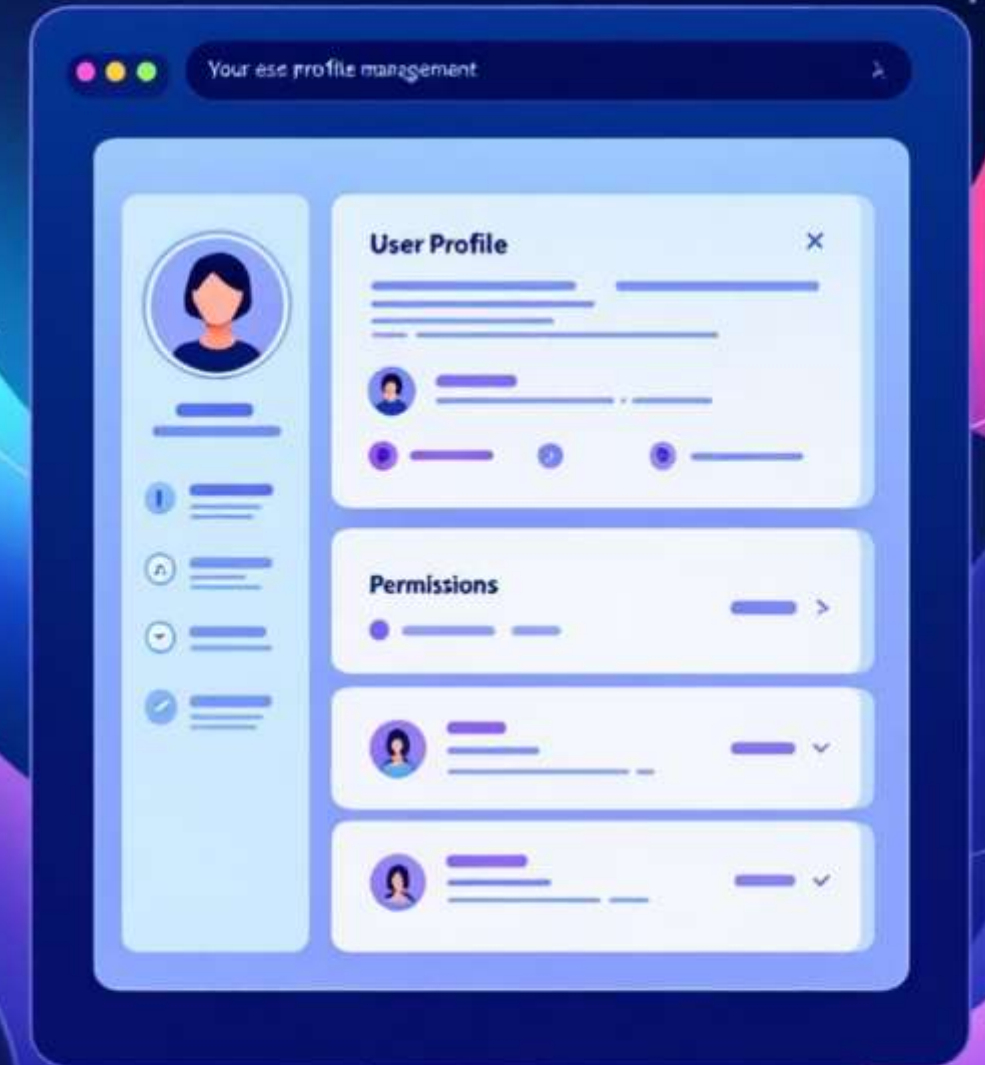
Owner Profile Creation

The Standard User profile was cloned to create the **Owner Profile**.

2



Pharmacist Profile Creation

The Standard User profile was cloned again to create the **Pharmacist Profile**.



Roles Hierarchy

A role hierarchy was created in Setup > Roles to define the data access structure:

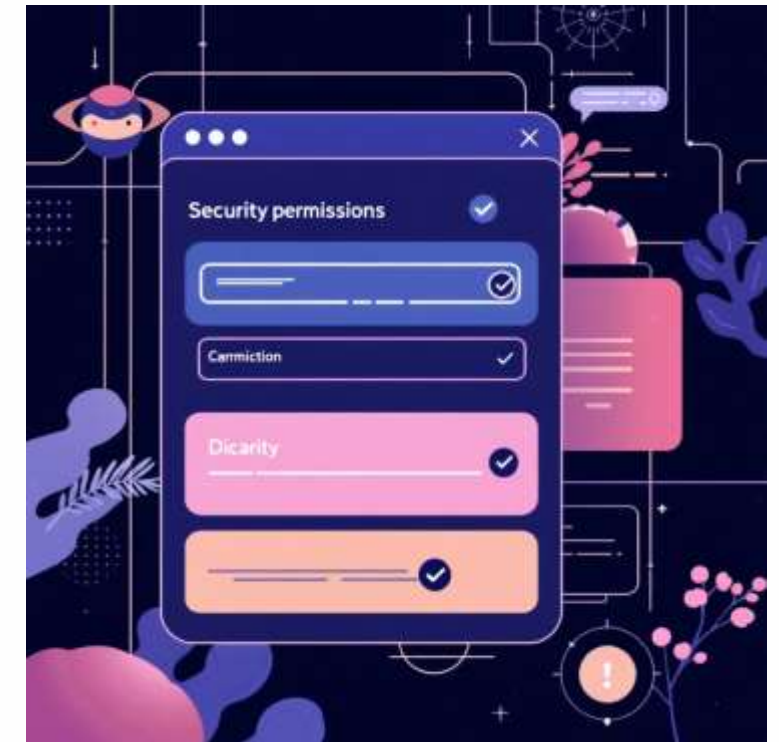
	<p>Pharmacy Owner</p> <p>Top-level administrative access with full system control and oversight capabilities.</p>
	<p>Pharmacist</p> <p>Operational-level access for daily pharmacy management and customer service functions.</p>

Permission Sets Strategy

Current Phase Approach

No permission sets were created in this phase. This tool will be reserved for granting special, one-off permissions in later phases if needed.

Permission sets provide flexibility for future customization without modifying core profiles.



Setup

Home

Object Manager

per

Hyperforce Assistant

Users

Permission Set Groups

Permission Sets

Apps

Mobile Apps

Salesforce

Mobile Builder for the Seller-Focused Experience

Feature Settings

Digital Experiences

Salesforce CMS

Settings

Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler Settings

Scheduling Policies

Search Setup

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SETUP

Permission Sets

Permission Sets

On this page you can create, view, and manage permission sets.

All Permission Sets

Edit | Delete | Create New View

New

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

	Action	Permission Set Name	Description	License
<input type="checkbox"/>	Clone	(Legacy) Data Cloud Data Aware Specialist	This Data Cloud permission set will be deprecated in Spring '24. Learn more at sfd...	Customer Data Platform
<input type="checkbox"/>	Clone	(Legacy) Data Cloud Marketing Admin	Allows access to Data Cloud Setup if the user is also a Salesforce admin, manage...	Customer Data Cloud for Marketing
<input type="checkbox"/>	Clone	(Legacy) Data Cloud Marketing Manager	This Data Cloud permission set will be deprecated in Spring '24. Learn more at sfd...	Customer Data Platform
<input type="checkbox"/>	Clone	(Legacy) Data Cloud Marketing Specialist	This Data Cloud permission set will be deprecated in Spring '24. Learn more at sfd...	Customer Data Platform
<input type="checkbox"/>	Clone	(Legacy) Data Cloud for Marketing Data Aware Specialist	This Data Cloud permission set will be deprecated in Spring '24. Learn more at sfd...	Customer Data Cloud for Marketing
<input type="checkbox"/>	Clone	(Legacy) Data Cloud for Marketing Manager	This Data Cloud permission set will be deprecated in Spring '24. Learn more at sfd...	Customer Data Cloud for Marketing
<input type="checkbox"/>	Clone	(Legacy) Data Cloud for Marketing Specialist	This Data Cloud permission set will be deprecated in Spring '24. Learn more at sfd...	Customer Data Cloud for Marketing
<input type="checkbox"/>	Clone	Access Agentforce Default Agent	Gives users access to the default Agentforce agent in Salesforce.	Agentforce (Default)
<input type="checkbox"/>	Clone	Agent Platform Builder	Allow access to agent platform.	Agent platform builder
<input type="checkbox"/>	Clone	Agentforce Default Admin	Allows users to build and manage in-org copilots.	Agentforce (Default)
<input type="checkbox"/>	Clone	Agentforce Service Agent Configuration	Build and manage autonomous AI service agents.	Agentforce Service Agent Builder
<input type="checkbox"/>	Clone	Agentforce Service Agent Object Access	Access knowledge articles and manage cases and contacts as an autonomous AI ...	Agentforce Service Agent User
<input type="checkbox"/>	Clone	Agentforce Service Agent Secure Base	Set up and use Agentforce Service Agent actions with enhanced data security.	Agentforce Service Agent User
<input type="checkbox"/>	Clone	Agentforce Service Agent User	Analyze topics and perform actions as an autonomous AI service agent.	Agentforce Service Agent User
<input type="checkbox"/>	Clone	Authenticated Payer	An authenticated external user with the ability to make and manage their payments.	Salesforce Payments External
<input type="checkbox"/>	Clone	Buyer	Allows access to the store. Lets users see products and categories, make purchas...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to manage carts and orders relat...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Clone	C360 High Scale Flow Integration User	Allows integration user to access features specific to C360 High Scale Flow.	Cloud Integration User
<input type="checkbox"/>	Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/>	Clone	Code Builder User	Enables the user to create and access Code Builder environments.	Code Builder

1-25 of 85

0 Selected

Previous Next

Page 1 of 4

Organization-Wide Defaults & Sharing



Security Configuration

Navigated to Setup > Sharing Settings.

Set the Default Internal Access for both Contact and Account to **Private** to establish a secure, restrictive baseline.



Sharing Rules Status

No sharing rules were created in this phase.

They will be implemented in later phases as specific business needs for broader data access are identified.



Login Access Policies

1

Policy Navigation

Navigated to Setup > Login Access Policies.

2

Administrator Access

Enabled the policy "**Administrators Can Log in as Any User**" to allow for effective testing and debugging.

This configuration ensures system administrators can troubleshoot user issues and validate system functionality across different user roles.



Setup

Home

Object Manager ▾

Identity

Login Flows

Login History

Security

Login Access Policies

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SETUP

Login Access Policies

Login Access Policies

[Help for this Page](#) ?

Control which support organizations your users can grant login access to.

Manage Support Options

Setting		Enabled	
Administrators Can Log in as Any User		<input checked="" type="checkbox"/>	
Support Organization	Packages	Available to Users	Available to Administrators Only i
Salesforce.com Support		<input checked="" type="radio"/>	<input type="radio"/>