

Inventory & Order Tracking System

Phase 2: Org Setup & Configuration

1. Introduction

This phase focuses on setting up a Salesforce Developer Org to simulate an inventory and order tracking environment. The setup manages product inventory, processes orders, and tracks reorders, with secure access to ensure proper control of stock and transactional data.

2. Objectives

- Configure a Salesforce Developer Org named **Inventory & Order Tracking System**.
- Create sample users with different roles: Admin, Inventory Manager, Sales Staff.
- Apply Org-Wide Defaults (OWD) and Sharing Rules for secure data access.
- Demonstrate end-to-end workflow: product inventory management, order creation, and reorder processing.

3. Configuration Steps

Step 0 — Company Info - Signed up for a Developer Edition Org and logged in.

- **Setup** → **Company Information** → updated: - Organization Name = Inventory & Order Tracking System - Locale = English (India) - Timezone = IST

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with options like 'Setup', 'Home', 'Object Manager', and 'Company Settings'. The main content area is titled 'Company Information' and displays the organization's profile for 'Inventory & Order Tracking System'. The profile includes details such as Organization Name, Primary Contact, Division, Address, Fiscal Year, and various system settings like Newsletter, Admin Newsletter, and Locale Formats. The bottom of the page shows the creation and modification dates and times.

Organization Detail	
Organization Name	Inventory & Order Tracking System
Primary Contact	OrgFam EPIC
Division	
Address	United States
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"/>
Hide Notices About System Maintenance	<input type="checkbox"/>
Hide Notices About System Downtime	<input type="checkbox"/>
Locale Formats	ICU

Created By: OrgFam EPIC, 9/16/2025, 4:25 PM
Modified By: Vedhatha Dodda, 9/24/2025, 9:59 AM

Step 1 — Business Hours & Holidays - Created

Business Hours → Mon–Sat, 9 AM–6 PM. - Added public holidays (e.g., National Holidays).
- Linked holidays to business hours for scheduling inventory and order processing.

The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is open, showing 'Company Settings' > 'Business Hours'. The main content area is titled 'Organization Business Hours'. It includes a description: '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.' Below this is the 'Business Hours Detail' section, which has an 'Edit' button. It shows a table with columns for 'Business Hours Name', 'Default', and 'Time Zone'. The table lists days of the week and their corresponding hours (e.g., Sunday 24 Hours, Monday 24 Hours, etc.). The 'Default Business Hours' are set to '(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)'. Below the table, there are fields for 'Active' (checked), 'Created By' (OrgFarm EPIC 9/16/2025, 4:25 PM), and 'Last Modified By' (OrgFarm EPIC 9/16/2025, 4:25 PM). At the bottom, there is a 'Holidays' section with an 'Add/Remove' button and a message 'No records to display'.

Step 2 — Users Created sample users:

Name	Role	Profile	Username
Admin	Top-level	System Administrator	admin@inventory.com
Inventory Manager	Mid-level	Inventory Manager	manager@inventory.com
Sales Staff	Bottom-level	Sales Staff	sales@inventory.com

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'users' and a list of navigation items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings. The 'Users' item is selected. The main content area is titled 'All Users' and includes a search bar, a 'View' dropdown set to 'All Users', and a table of users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. There are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users' above and below the table. A alphabetical navigation bar is at the bottom of the table.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d900000bszkuab.1kqsgfxc1vu@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Dodda Vethitha	229	229x1a2806659@agentforce.com		✓	System Administrator
<input type="checkbox"/> Edit	EPIC OrgFarm	OEPIG	epic.c5466511d570@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/> Edit	User Integration	integ	integration@00d900000bszkuab.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00d900000bszkuab.com		✓	Analytics Cloud Security User

Step 3 — Profiles and Permissions - Inventory Manager Profile: - Objects and Permissions: | Object | API Name | Permissions | |——|——|———| | Product Inventory | Product_Inventory__c | Create, Read, Edit | | Orders | Order__c | Create, Read, Edit | | Reorders | Reorder__c | Create, Read, Edit | - **Sales Staff Profile:** - Objects and Permissions: | Object | API Name | Permissions | |——|——|———| | Product Inventory | Product_Inventory__c | Read Only | | Orders | Order__c | Create, Read, Edit | | Reorders | Reorder__c | Read Only |

Profiles | Salesforce

orgfarm-4e7aab86e3-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00egL000004m121

Search Setup

Setup Home Object Manager

profiles

Users Profiles

Didn't find what you're looking for? Try using Global Search.

Profile: System Administrator

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 | Enabled Apex Class Access | Enabled Visualforce Page Access | Enabled External Data Source Access | Enabled Named Credential Access | Enabled External Credential Principal Access | Enabled Custom Metadata Type Access | Enabled Custom Setting Definitions Access | Enabled Flow Access | Enabled Service Presence Status Access | Enabled Custom Permissions

Profile Detail

Edit Clone View Users

Name	System Administrator	Custom Profile	<input type="checkbox"/>
User License	Salesforce		
Created By	salesforce.com, inc., 9/16/2025, 4:25 PM	Modified By	Vedhitha Dooda 9/24/2025, 8:48 AM

Page Layouts

Standard Object Layouts	Global	Global Layout [View Assignment]	Location Group Assignment	Location Group Assignment Layout [View Assignment]
	Email Application	Not Assigned [View Assignment]	Macro	Macro Layout [View Assignment]
	Home Page Layout	Home Page Default [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
	Account	Account Layout [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
	Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Opportunity	Opportunity Layout [View Assignment]
	Appointment Invitation	Appointment Invitation Layout [View Assignment]	Opportunity Product	Opportunity Product Layout [View Assignment]

Profiles | Salesforce

orgfarm-4e7aab86e3-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00egL000004m121

Search Setup

Setup Home Object Manager

profiles

Users Profiles

Didn't find what you're looking for? Try using Global Search.

Profile: Standard User

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 | Enabled Apex Class Access | Enabled Visualforce Page Access | Enabled External Data Source Access | Enabled Named Credential Access | Enabled External Credential Principal Access | Enabled Custom Metadata Type Access | Enabled Custom Setting Definitions Access | Enabled Flow Access | Enabled Service Presence Status Access | Enabled Custom Permissions

Profile Detail

Edit Clone View Users

Name	Standard User	Custom Profile	<input type="checkbox"/>
User License	Salesforce		
Created By	salesforce.com, inc., 9/16/2025, 4:25 PM	Modified By	Vedhitha Dooda 9/24/2025, 6:56 AM

Page Layouts

Standard Object Layouts	Global	Global Layout [View Assignment]	Location Group Assignment	Location Group Assignment Layout [View Assignment]
	Email Application	Not Assigned [View Assignment]	Macro	Macro Layout [View Assignment]
	Home Page Layout	Home Page Default [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
	Account	Account Layout [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
	Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Opportunity	Opportunity Layout [View Assignment]
	Appointment Invitation	Appointment Invitation Layout [View Assignment]	Opportunity Product	Opportunity Product Layout [View Assignment]

javascript:srcUp(%27%2F00egL000004m121%3Fidtp%3Dp1%27%27);

Step 4 — Role Hierarchy

Admin (Top)

└ Inventory Manager

└ Sales Staff

The screenshot displays the Salesforce Setup interface for the 'Roles' section. The left sidebar shows the navigation menu with 'Users' selected. The main content area is titled 'Creating the Role Hierarchy' and provides instructions on building the hierarchy. Below the instructions, the 'Your Organization's Role Hierarchy' is shown in a tree view. The hierarchy starts with 'Inventory & Order Tracking System' at the top, which has an 'Add Role' button. Below it are 'Admin', 'CEO', 'Inventory Manager', and 'Sales Staff', each with 'Add Role', 'Edit', 'Del', and 'Assign' options. The 'Show in tree view' button is visible in the top right corner of the hierarchy section.

Setup 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

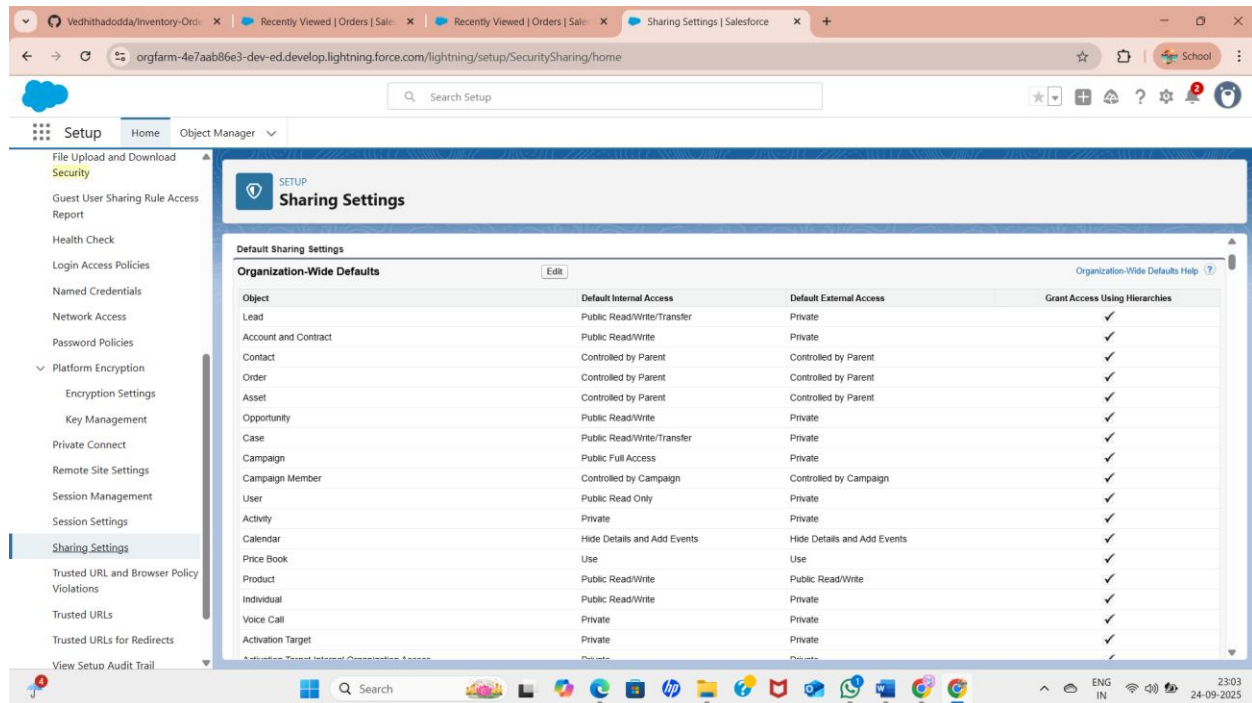
Inventory & Order Tracking System

- Add Role**
- Admin** | Edit | Del | Assign
- Add Role**
- CEO** | Edit | Del | Assign
- Add Role**
- Inventory Manager** | Edit | Del | Assign
- Add Role**
- Sales Staff** | Edit | Del | Assign
- Add Role**

Didn't find what you're looking for?
Try using Global Search.

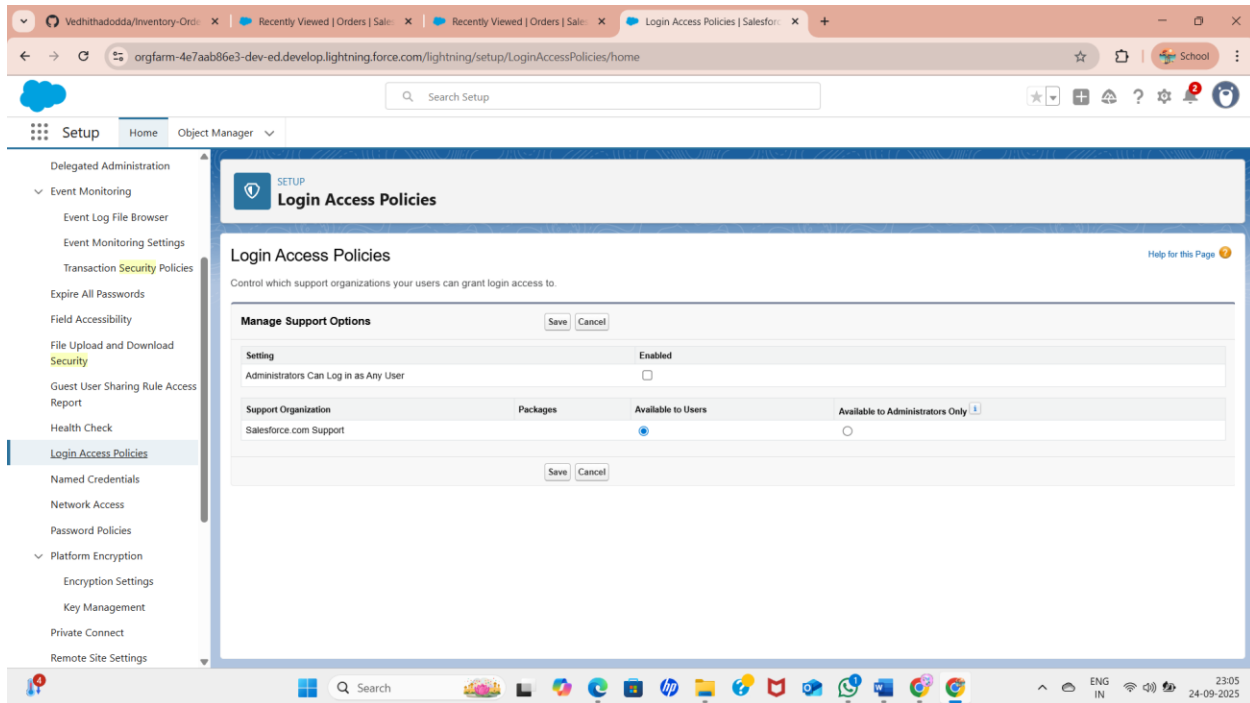
Step 5 — Org-Wide Defaults (OWD) - Product_Inventory__c = Private - Order__c = Private - Reorder__c = Private

Ensures that records are only visible to owners unless shared explicitly.

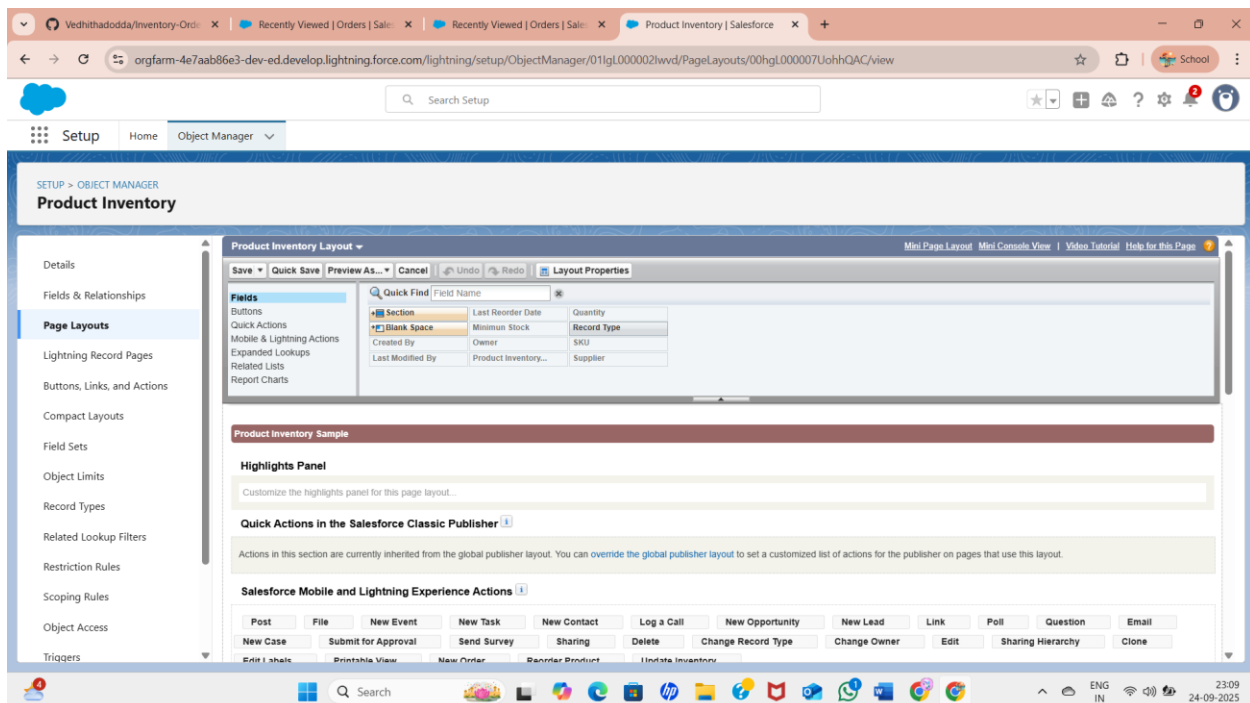


Step 6 — Sharing Rules - Created Public Group **Inventory Team** (Inventory Managers). - Sharing Rule: - Records owned by Sales Staff → shared with Inventory Managers - Access Level = Read/Write

Step 7 — Login Access Policies - Enabled **Administrators Can Log in as Any User** for testing purposes.



Step 8 — Lightning App Setup - Setup → App Manager → Lightning App ‘Inventory & Order Tracking’ - Added Tabs: - Product Inventory (Product_Inventory__c) - Orders (Order__c) - Reorders (Reorder__c) - Reports – Dashboards

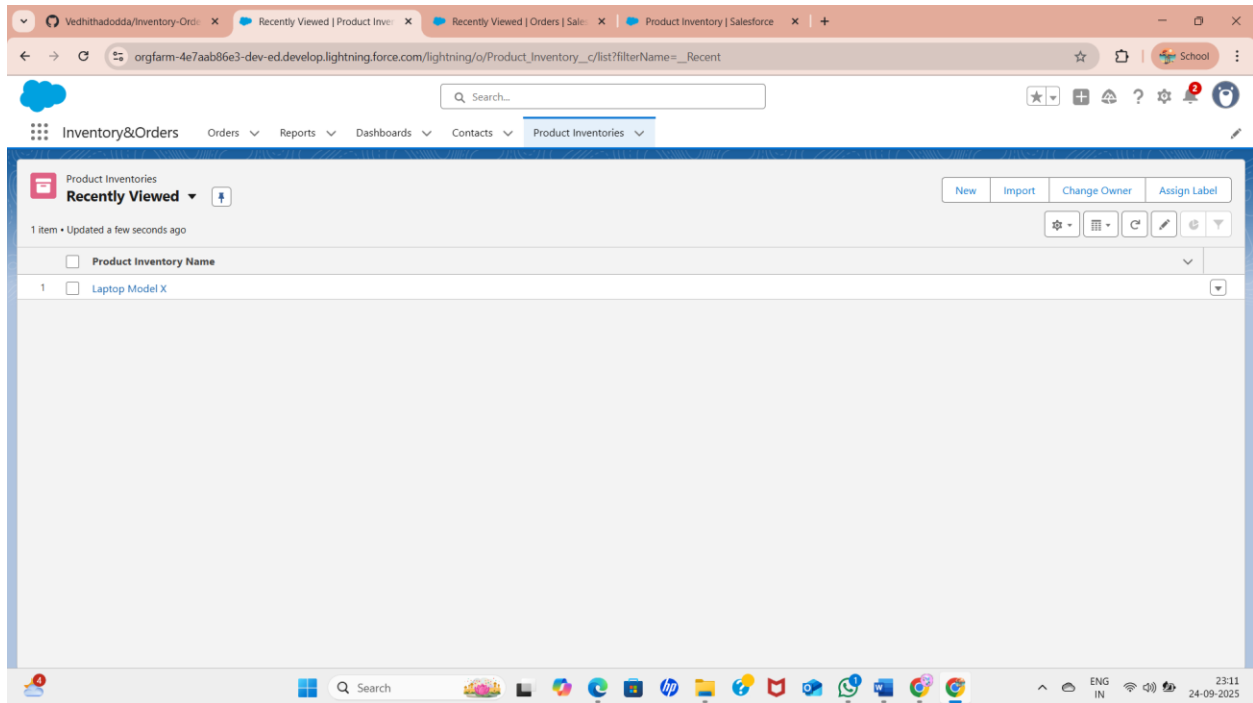


Step 9 — Testing - Logged in as **Sales Staff** → created an order. - Logged in as **Inventory Manager** → verified access to Product Inventory, edited stock, and processed reorder. - Observed: - Sales Staff can create orders but cannot edit Product Inventory. - Inventory Manager can manage Product Inventory, Orders, and Reorders. - Admin has full access.

The screenshot displays a web browser window with multiple tabs open, including 'Vedhithadodda/Inventory-Ord...', 'Recently Viewed | Orders | Sale...', 'Recently Viewed | Orders | Sale...', and 'Product Inventory | Salesforce'. The active tab shows a Salesforce Lightning interface for the 'Inventory&Orders' app. The 'Orders' section is selected, and the 'Recently Viewed' list is displayed. The list contains one item with the following details:

Order Number	Account Name	Order Amount	Order Start Date	Status	Contract Number
00000100	Tech Solutions Pvt Ltd	\$0.00	9/20/2025	Draft	00000100

The interface includes a search bar at the top, a 'New Order' button, and a table with columns for Order Number, Account Name, Order Amount, Order Start Date, Status, and Contract Number. The status of the order is 'Draft'.



4. Results / Observations

- Sales Staff successfully creates and manages orders.
- Inventory Manager can track inventory and reorders via sharing rules.
- Admin sees all records.
- OWD = Private ensures a secure baseline for inventory and order data.

5. Next Steps (Optional Enhancements)

- Automate low-stock alerts using Flow (Email/SMS).
- Create dashboards for inventory levels, order tracking, and reorder reports.
- Implement barcode scanning for product updates and order processing.