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.

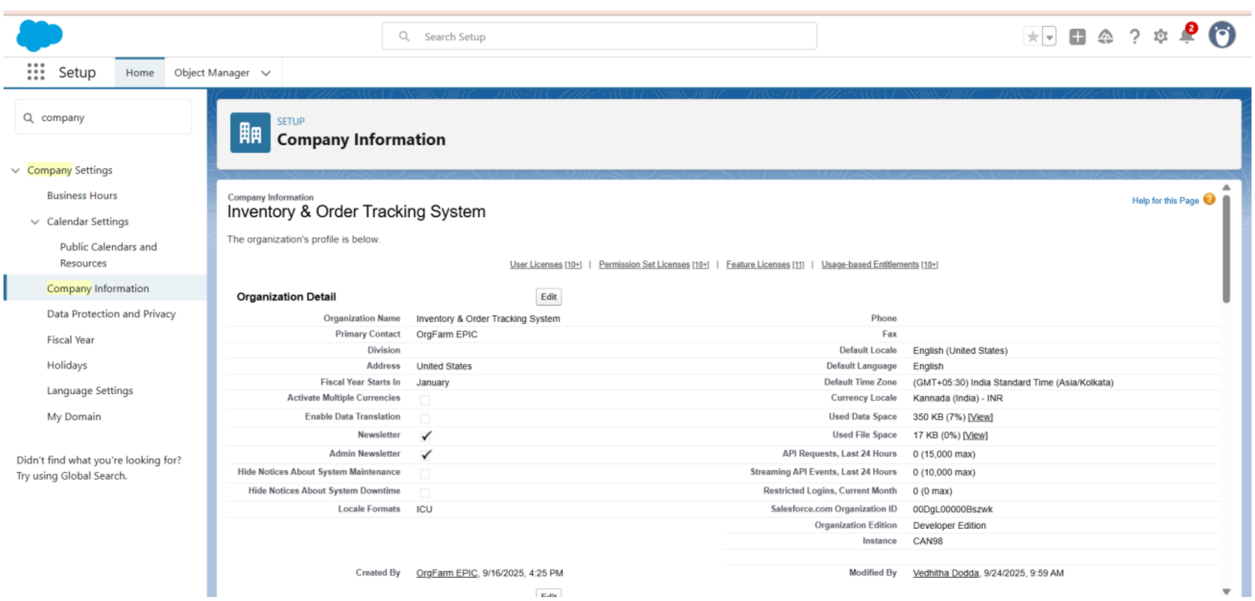
2. Objectives

- 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

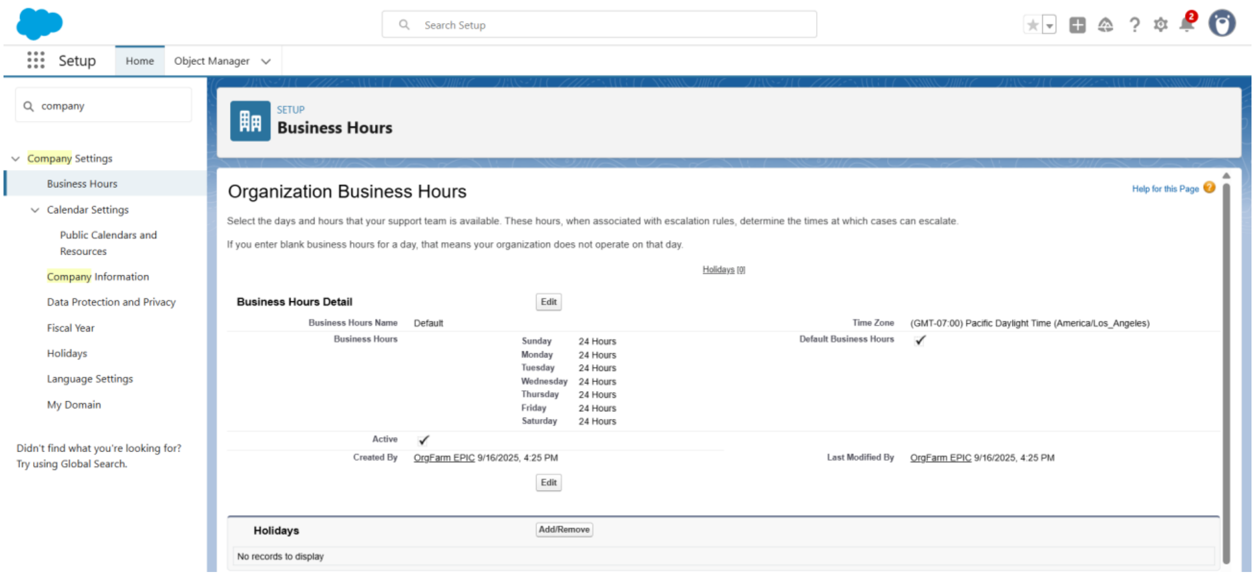
Step 0 — Company Info - Signed up for a Developer Edition Org and logged in.

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



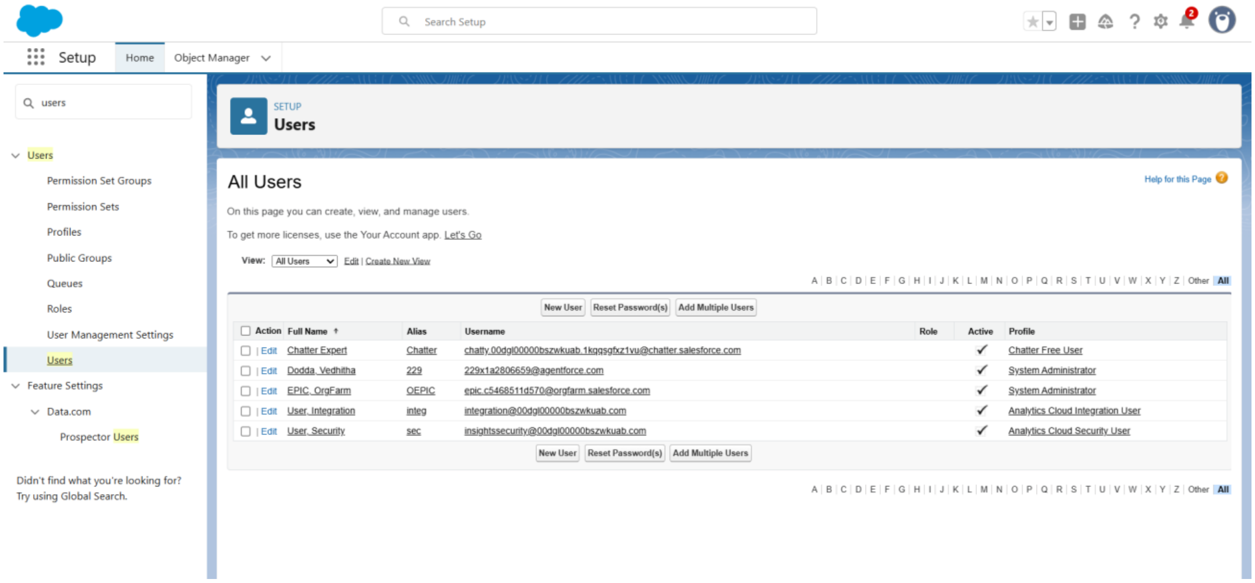
Step 1 — Business Hours & Holidays - Created

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.

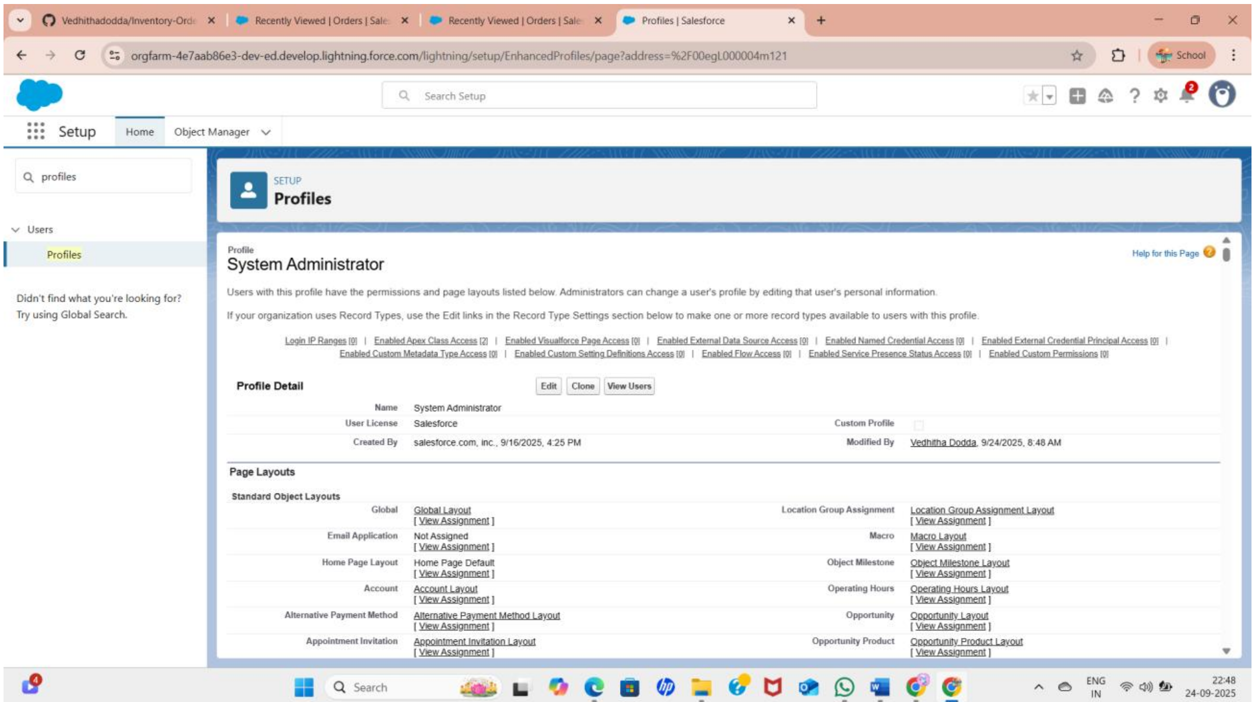


Step 2 — Users Created sample users:

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



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 |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Setup
Home
Object Manager
profiles
Users
Profiles
Didn't find what you're looking for? Try using Global Search.
SETUP
Profiles
Profile
System Administrator
Help for this Page
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.
Profile Detail
Edit
Clone
View Users
Name
System Administrator
User License
Salesforce
Custom Profile
Created By
salesforce.com, inc., 9/16/2025, 4:25 PM
Modified By
Vedhitha Dodda, 9/24/2025, 8:48 AM
Page Layouts
Standard Object Layouts
Global
Global Layout
Email Application
Not Assigned
Home Page Layout
Home Page Default
Account
Account Layout
Alternative Payment Method
Alternative Payment Method Layout
Appointment Invitation
Appointment Invitation Layout
Location Group Assignment
Location Group Assignment Layout
Macro
Macro Layout
Object Milestone
Object Milestone Layout
Operating Hours
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Opportunity
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Opportunity Product
Opportunity Product Layout
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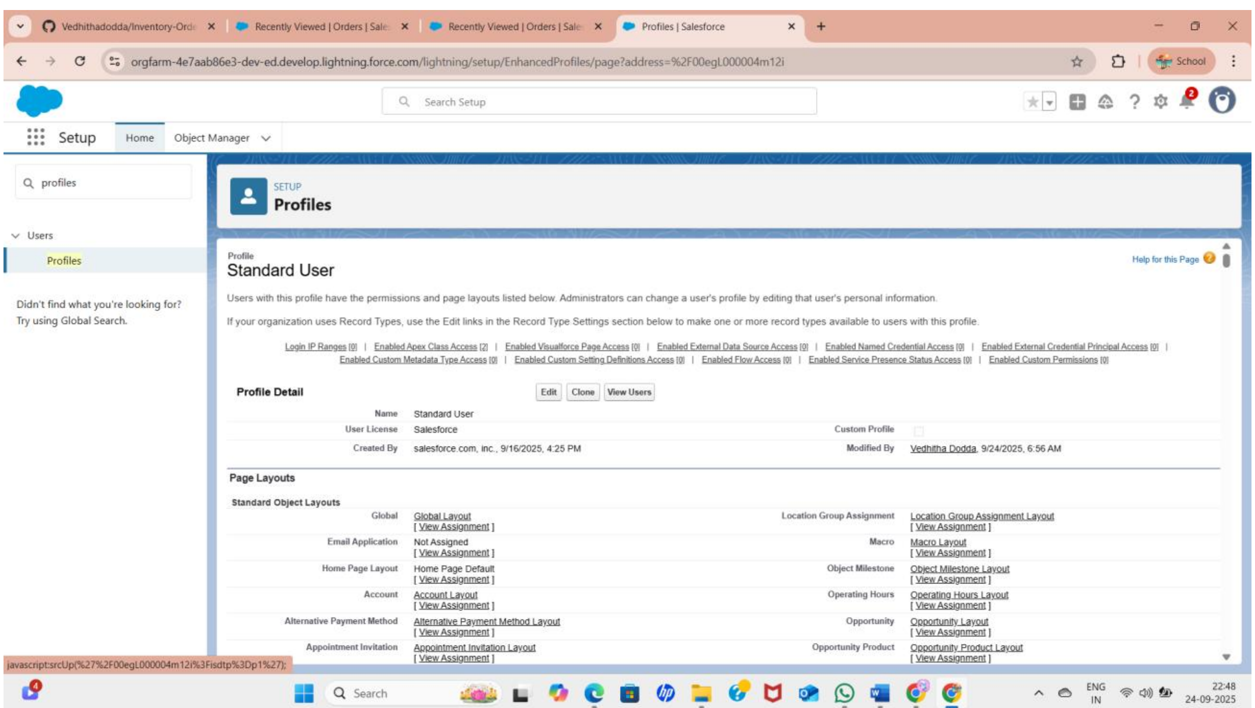
24-09-2025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Page Layouts
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Appointment Invitation
Appointment Invitation Layout
Location Group Assignment
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Macro
Macro Layout
Object Milestone
Object Milestone Layout
Operating Hours
Operating Hours Layout
Opportunity
Opportunity Layout
Opportunity Product
Opportunity Product Layout
[View Assignment]
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Step 4 — Role Hierarchy

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Admin (Top)
 └─ Inventory Manager
      └─ Sales Staff
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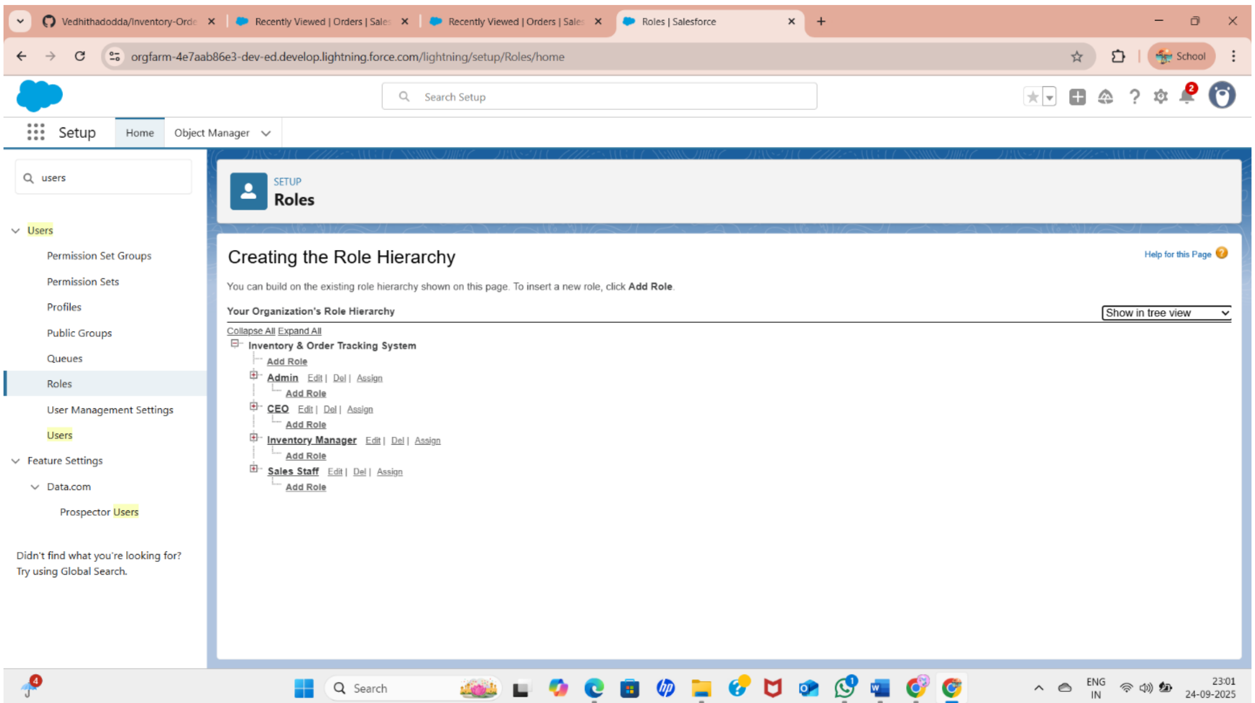
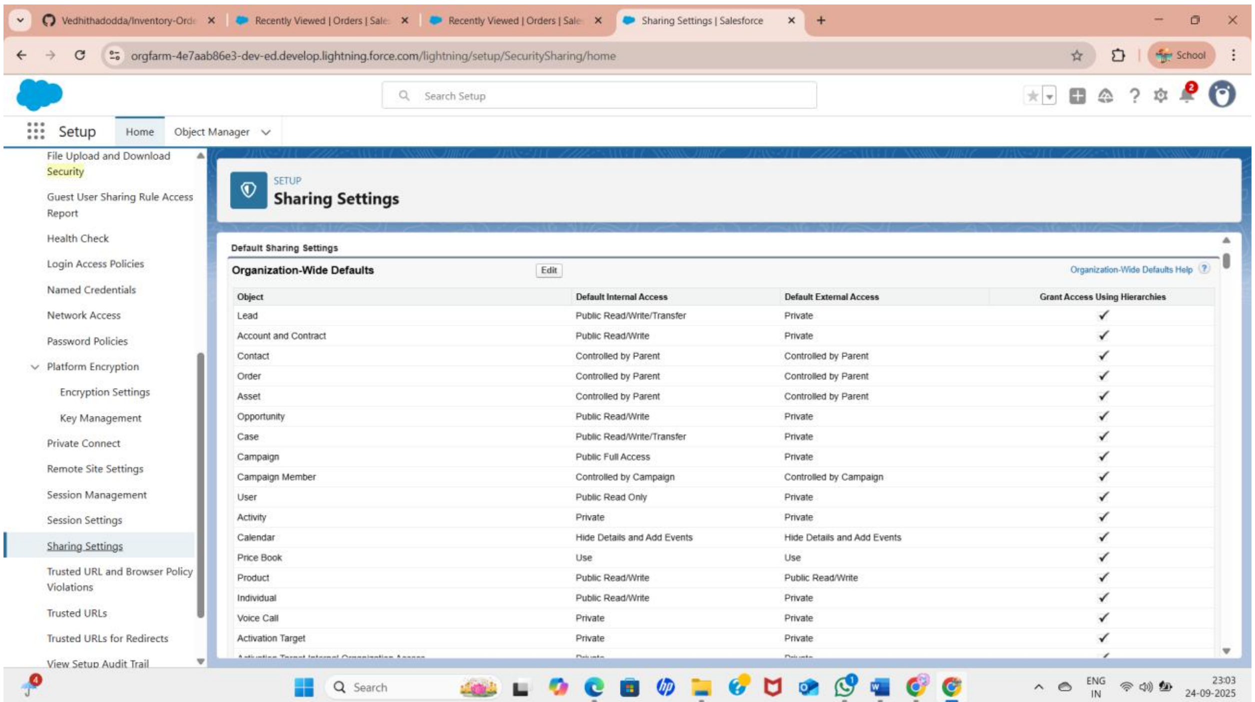


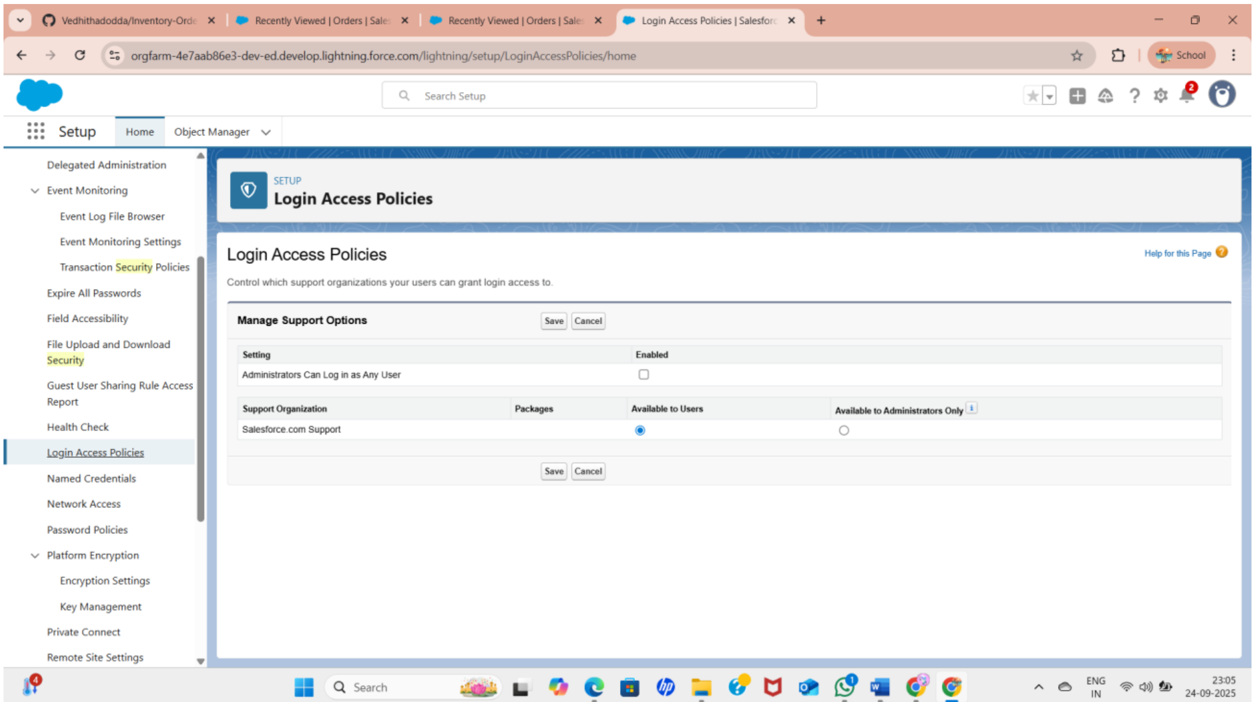
Step 5 — Org-Wide Defaults (OWD) - Product_Inventory__c = Private - Order__c = Private - Reorder__c = Private

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

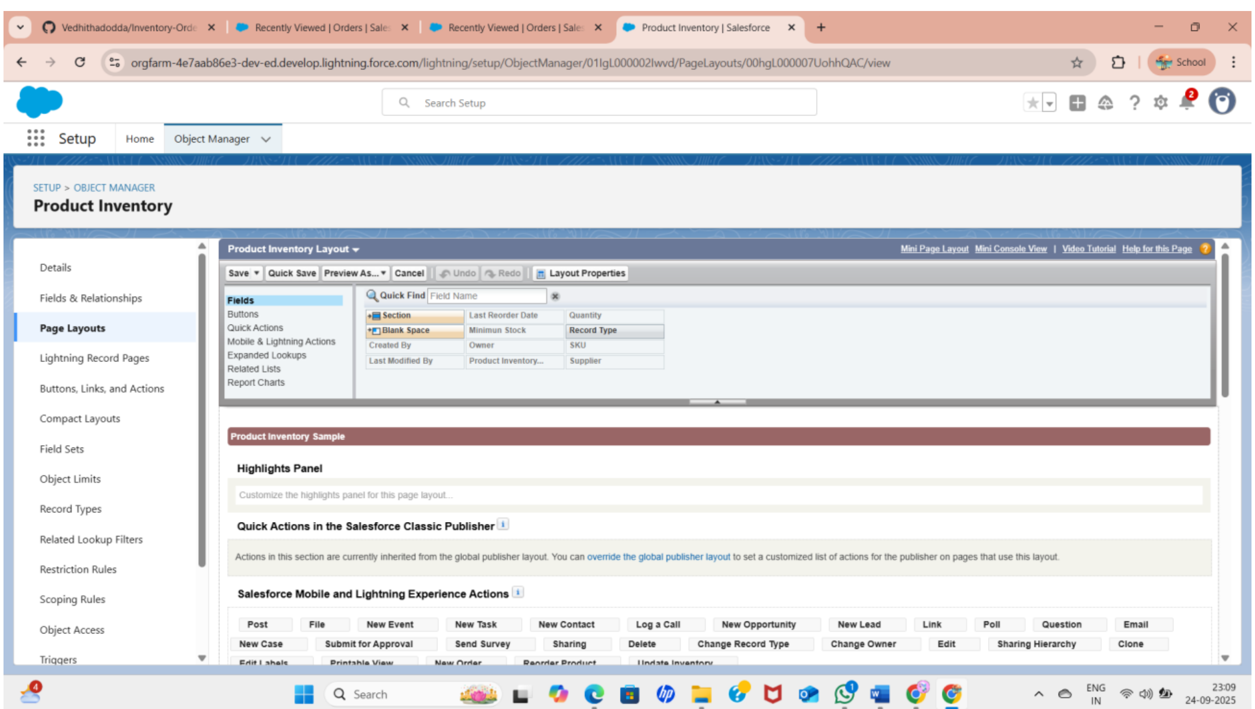


Step 6 — Sharing Rules - Created Public Group **Inventory Team** (Inventory Managers). - Sharing Rule: - Records owned by Sales Staff → shared with Inventory Managers - Access Level = Read/Write

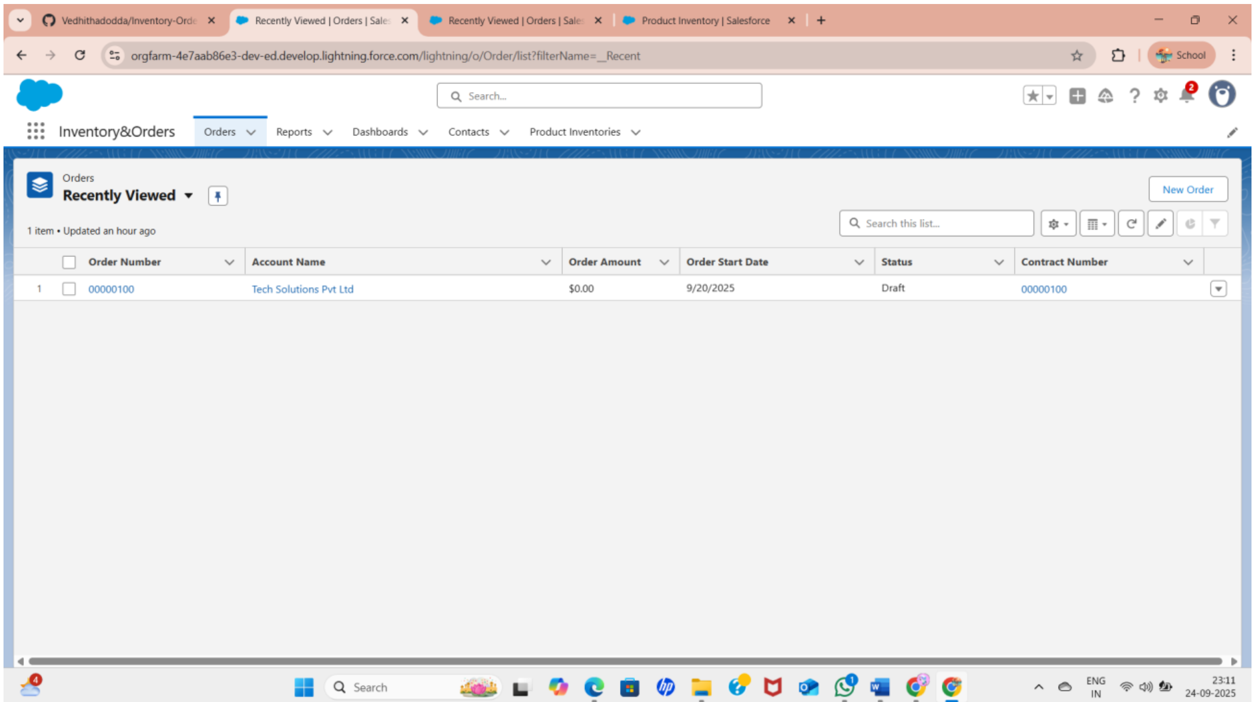
Step 7 — Login Access Policies - Enabled **Administrators Can Log in as Any User** for testing purposes.

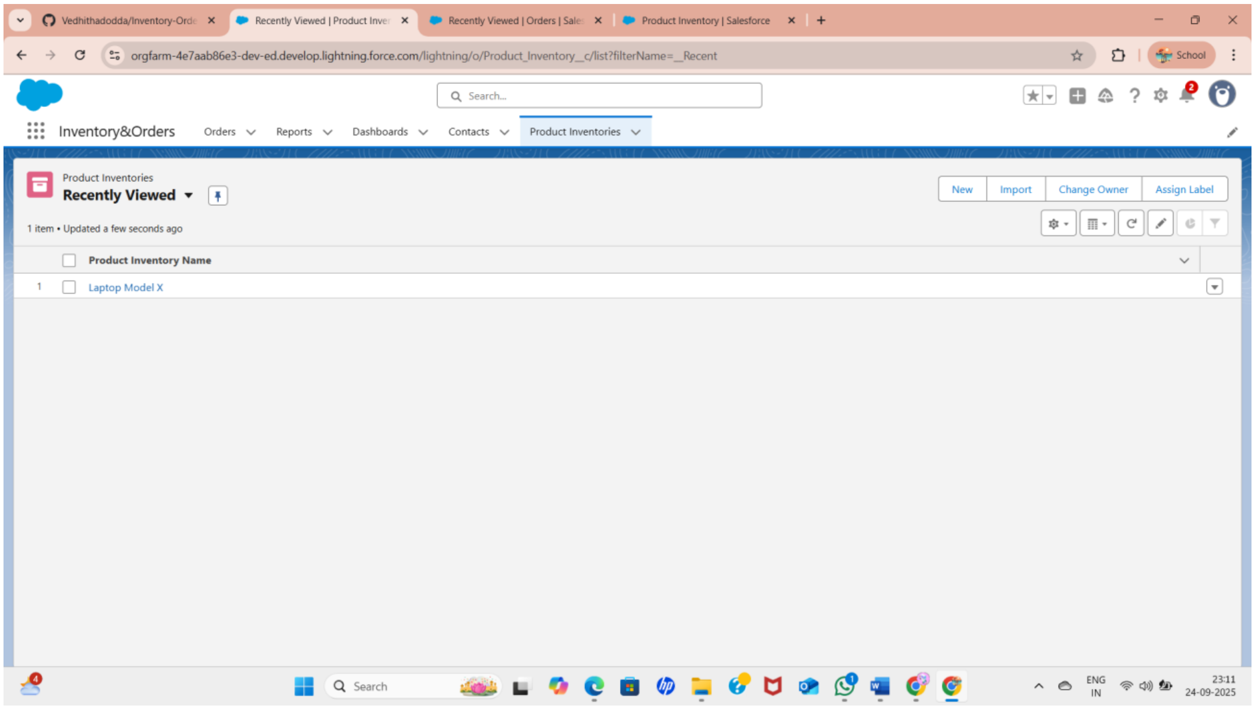


Step 8 — Lightning App Setup - Setup → App Manager → Lightning App 'Inventory & Order Tracking' - Added Tabs: - Product Inventory (Product_Inventory__c) - Orders (Order__c) - Reorders (Reorder__c) - Reports – Dashboards



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.





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.