**Phase 2: Org Setup & Configuration**

In this phase, we completed the detailed Salesforce org setup specifically for our Full-Stack E-commerce Project. The goal was to configure the Salesforce Developer Org with correct settings, users, security, and permissions so later phases (data modeling, automation, Apex, and LWC) could be built successfully.

**1. Company Information Setup**

\* Logged into Salesforce Developer Edition org.

\* Navigated to Setup → Company Information.

\* Verified **Org Name** and updated Locale Settings:

\* Default Locale: English (United States)

\* Language: English

\* Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)

\* Currency Locale: INR (₹)

\* Confirmed Storage Limits and active licenses.

**2. Business Hours & Holidays**

\* Setup → Company Settings → Business Hours.

\* Defined Business Hours: 9:00 AM to 6:00 PM IST, Monday–Friday.

\* Added Holidays (New Year’s Day, Republic Day, Independence Day).

\* Ensured business hours align with case escalations and workflows.



**3. User Management**

\* Created multiple Users:

\* Admin User (System Administrator profile).

\* Sales User (Standard User profile).

\* Support User (Customer Service profile).

\* Assigned appropriate licenses (Salesforce).

\* Configured user details (username, email, role).

\* Verified login access by logging in as different users.

**4. Profiles & Roles**

\* Configured Profiles:

\* System Administrator → full access.

\* Sales Profile → CRUD on Accounts, Contacts, Orders, and Order Items.

\* Support Profile → Read-only access to Orders and Products.

\* Implemented Role Hierarchy:

\* CEO → Sales Manager → Sales Rep.

\* Verified managers can view subordinate records.



**5. Permission Sets**

\* Created a Permission Set: Product Management Access.

\* Added Create/Read/Edit/Delete permissions on Product2 object.

\* Assigned to specific sales and support users.

\* Ensured permission flexibility without cloning profiles.



**6. Organization-Wide Defaults (OWD)**

\* Setup → Sharing Settings.

\* Configured:

\* Accounts = Public Read/Write.

\* Orders = Private.

\* Order Items = Controlled by Parent.

\* Products= Read-Only.

\* This ensures customer orders are private but products are visible.

**7. Sharing Settings & Rules**

\* Enabled Grant Access Using Hierarchies.

\* Configured Sharing Rule: Share Orders with role = Sales Manager.

**8. Login Access Policies**

\* Setup → Security → Login Access Policies.

\* Enabled Administrators Can Log in as Any User.

\* Verified by impersonating Sales User.



**9. Sandbox & Deployment Prep**

\* Reviewed Sandbox options (not available in Dev Edition, noted for production).

\* Prepared deployment plan:

\* Use Change Sets for simple org-to-org moves.

\* Use VS Code with Salesforce CLI (sf) for advanced metadata deployment.

\* Tested Salesforce CLI installation locally.