# E-commerce CRM Project

Phase 2: Org Setup & Configuration

Salesforce Editions

For the E-commerce CRM project, the **Developer Edition** is used for experimentation, testing, and learning.
In a real production scenario, **Enterprise Edition** would be ideal as it supports advanced customization, API integrations, and scalability.
This ensures our CRM can handle customer orders, loyalty programs, and marketing automation efficiently.
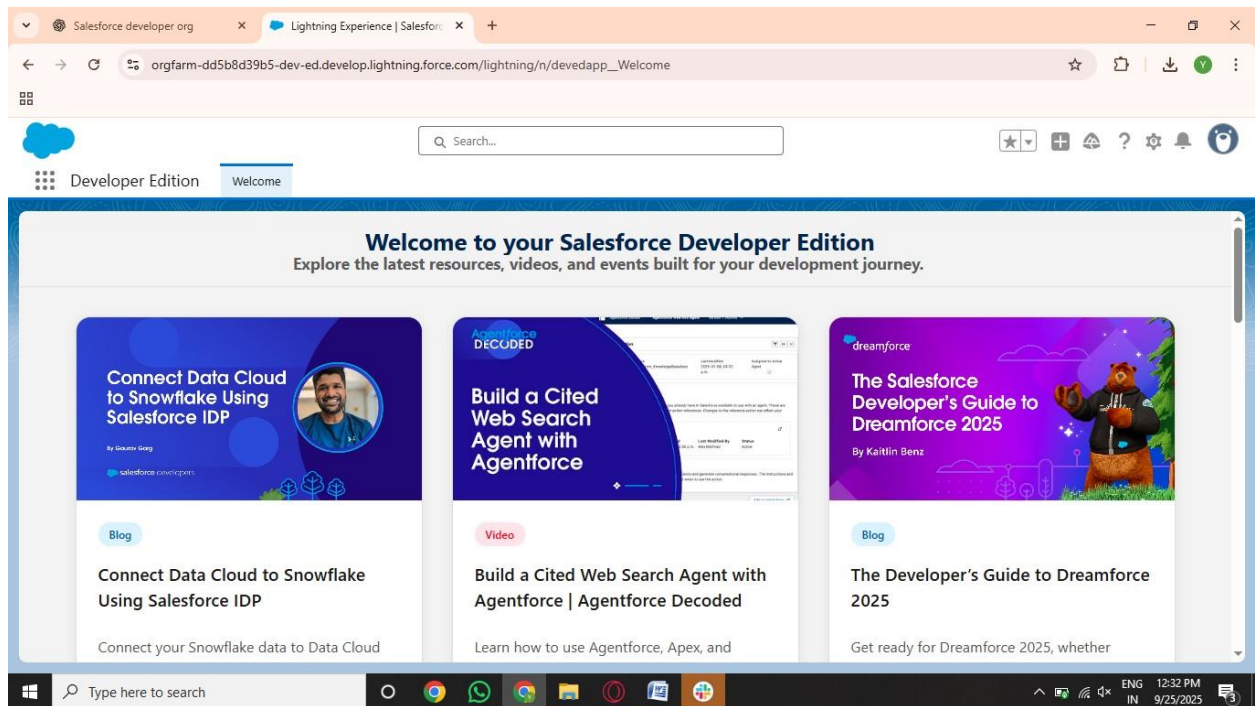
Company Profile Setup

Company settings include entering the E-commerce company's **legal name, address, default time zone, currency, and locale**.
This ensures accurate reporting, multi-currency transactions, and a unified identity across the

platform.

For example, setting **default currency as INR/USD** for international transactions and **English as the default language**.

Business Hours & Holidays

Customer support in e-commerce requires defined business hours (e.g., **9 AM – 9 PM IST**).
Defining holidays like national holidays or festive breaks ensures **SLA tracking** for customer cases.
Escalations respect these working hours, preventing **false SLA breaches**.

Fiscal Year Settings

E-commerce companies may follow either a **standard fiscal year (Jan–Dec)** or a **custom fiscal year (Apr–Mar)**.
Aligning fiscal year is critical for **sales forecasting, revenue reporting, and performance dashboards**.

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Quarter 1

Period 1

Week	Month	Tue	Wed	Thu	Fri	Sat	Sun	Mon
1	Apr	1	2	3	4	5	6	7
2	Apr	8	9	10	11	12	13	14
3	Apr	15	16	17	18	19	20	21
4	Apr	22	23	24	25	26	27	28

Period 2

Week	Month	Tue	Wed	Thu	Fri	Sat	Sun	Mon
5	Apr/May	29	30	1	2	3	4	5
6	May	6	7	8	9	10	11	12
7	May	13	14	15	16	17	18	19
8	May	20	21	22	23	24	25	26

Period 3

Week	Month	Tue	Wed	Thu	Fri	Sat	Sun	Mon
9	May/Jun	27	28	29	30	31	1	2
10	Jun	3	4	5	6	7	8	9
11	Jun	10	11	12	13	14	15	16
12	Jun	17	18	19	20	21	22	23
13	Jun	24	25	26	27	28	29	30

Quarter 2

Period 4

Week	Month	Tue	Wed	Thu	Fri	Sat	Sun	Mon
14	Jul	1	2	3	4	5	6	7
15	Jul	8	9	10	11	12	13	14
16	Jul	15	16	17	18	19	20	21
17	Jul	22	23	24	25	26	27	28

Period 5

Week	Month	Tue	Wed	Thu	Fri	Sat	Sun	Mon
18	Jul/Aug	29	30	31	1	2	3	4
19	Aug	5	6	7	8	9	10	11
20	Aug	12	13	14	15	16	17	18
21	Aug	19	20	21	22	23	24	25

Period 6

Week	Month	Tue	Wed	Thu	Fri	Sat	Sun	Mon
22	Aug/Sep	26	27	28	29	30	31	1
23	Sep	2	3	4	5	6	7	8
24	Sep	9	10	11	12	13	14	15
25	Sep	16	17	18	19	20	21	22
26	Sep	23	24	25	26	27	28	29

Quarter 3

Period 7

Week	Month	Tue	Wed	Thu	Fri	Sat	Sun	Mon
27	Sep/Oct	30	1	2	3	4	5	6
28	Oct	7	8	9	10	11	12	13
29	Oct	14	15	16	17	18	19	20
30	Oct	21	22	23	24	25	26	27

Period 8

Week	Month	Tue	Wed	Thu	Fri	Sat	Sun	Mon
31	Oct/Nov	28	29	30	31	1	2	3
32	Nov	4	5	6	7	8	9	10
33	Nov	11	12	13	14	15	16	17
34	Nov	18	19	20	21	22	23	24

Period 9

Week	Month	Tue	Wed	Thu	Fri	Sat	Sun	Mon
35	Nov/Dec	25	26	27	28	29	30	1
36	Dec	2	3	4	5	6	7	8
37	Dec	9	10	11	12	13	14	15
38	Dec	16	17	18	19	20	21	22
39	Dec	23	24	25	26	27	28	29

Quarter 4

Period 10

Week	Month	Tue	Wed	Thu	Fri	Sat	Sun	Mon
40	Dec/Jan	30	31	1	2	3	4	5
41	Jan	6	7	8	9	10	11	12
42	Jan	13	14	15	16	17	18	19
43	Jan	20	21	22	23	24	25	26

Period 11

Week	Month	Tue	Wed	Thu	Fri	Sat	Sun	Mon
44	Jan/Feb	27	28	29	30	31	1	2
45	Feb	3	4	5	6	7	8	9
46	Feb	10	11	12	13	14	15	16
47	Feb	17	18	19	20	21	22	23

Period 12

Week	Month	Tue	Wed	Thu	Fri	Sat	Sun	Mon
48	Feb/Mar	24	25	26	27	28	1	2
49	Mar	3	4	5	6	7	8	9
50	Mar	10	11	12	13	14	15	16
51	Mar	17	18	19	20	21	22	23
52	Mar	24	25	26	27	28	29	30

User Setup & Licenses

Users such as **Sales Managers, Marketing Specialists, and Customer Support Agents** are created with unique logins.

Appropriate Salesforce licenses (**Salesforce, Platform, or Chatter**) are assigned based on their responsibilities.

For example, a **support agent** might only need Service Cloud functionality while a **marketer** requires campaign features.

Screenshot 1

Users | Salesforce   Profiles | Salesforce   +

orgfarm-dd5b8d39b5-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005fj000005v0zh%3Fnoredirect%3D1%26isUserE...

Q Search Setup

Setup | Home | Object Manager ∨

Q users

Users
- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users

∨ Feature Settings
  ∨ Data.com
    Prospector Users

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SETUP
Users

User
Sales Manager

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

User Detail   Edit | Sharing | Reset Password | Freeze | View Summary

Name	Sales Manager	Role	Sales Manager
Alias	smana	User License	Salesforce
Email	managersales@gmail.com [Verify]	Profile	E-Shop Sales Profile
Username	managersaleseshop@gmail.com	Active	✓
Nickname	User17587854617248250837	Marketing User	☐
Title		Offline User	☐
Company		Knowledge User	☐
Department		Flow User	☐
Division		Service Cloud User	☐
Address		Site.com Contributor User	☐
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	☐

User ProfileHelp for this Page

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Screenshot 2

SETUP
Users

User
Marketing Analyst

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

User Detail   Edit | Sharing | Reset Password | Freeze | View Summary

Name	Marketing Analyst	Role	Sales Rep
Alias	manal	User License	Salesforce
Email	analystmarketeshop@gmail.com [Verify]	Profile	Standard User
Username	analystmarketeshop@gmail.com	Active	✓
Nickname	User17587855792042962075	Marketing User	☐
Title		Offline User	☐
Company		Knowledge User	☐
Department		Flow User	☐
Division		Service Cloud User	☐
Address		Site.com Contributor User	☐
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	☐

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Profiles

Profiles define the **baseline permissions**.
For this project, profiles such as **System Administrator, Sales Profile, Marketing Profile, and Support Profile** are customized.
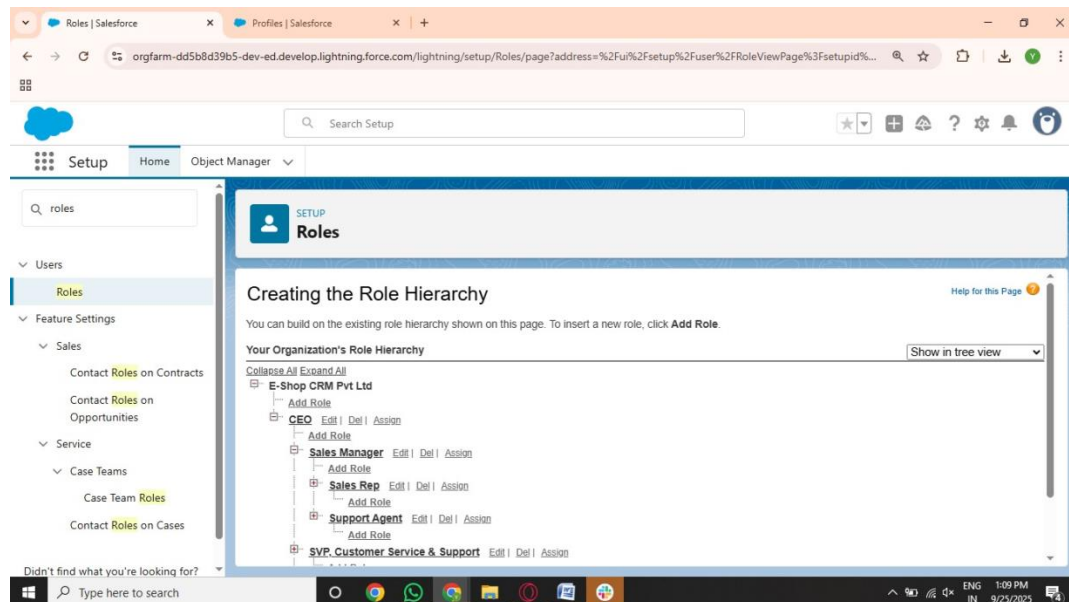Each profile ensures users only access data relevant to their job role.

Roles

A role hierarchy ensures **data visibility matches organizational structure**.
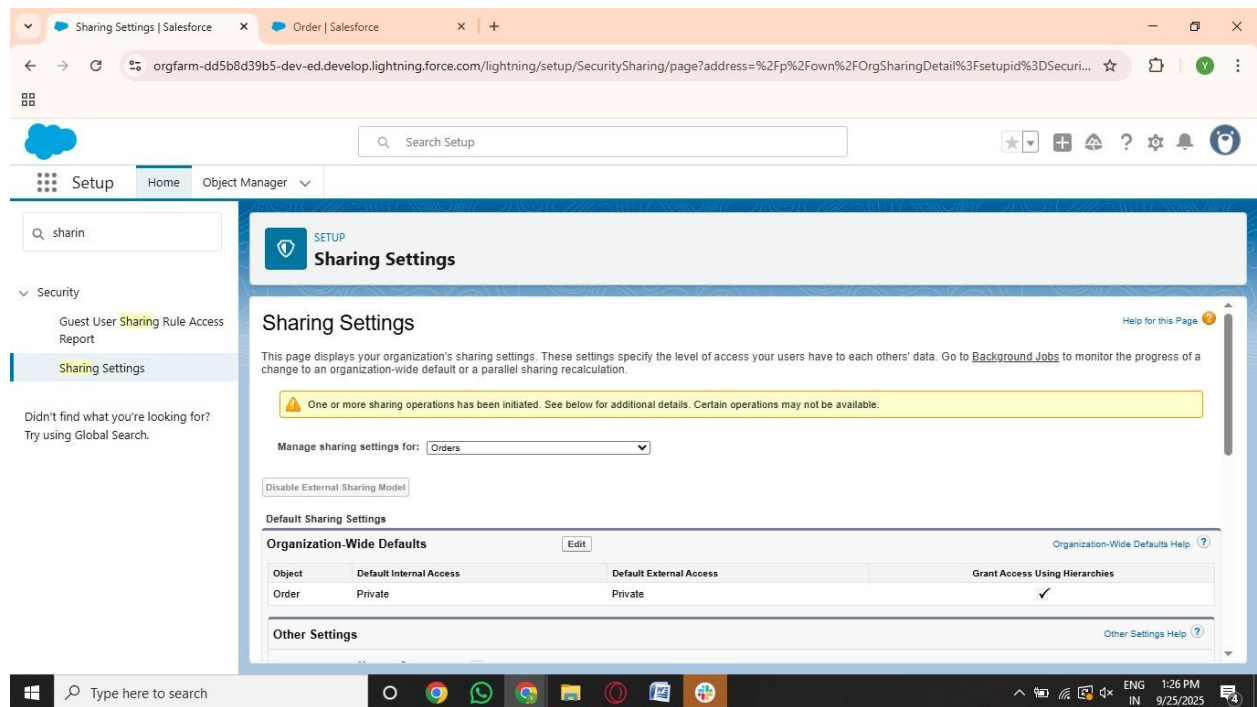For e-commerce: **CEO/Admin → Sales Manager → Sales Reps → Customer Support Agents**.
Managers can see their team's opportunities, but agents can only view their own.

Permission Sets: Permission sets grant **additional privileges** without changing the base profile.For example:
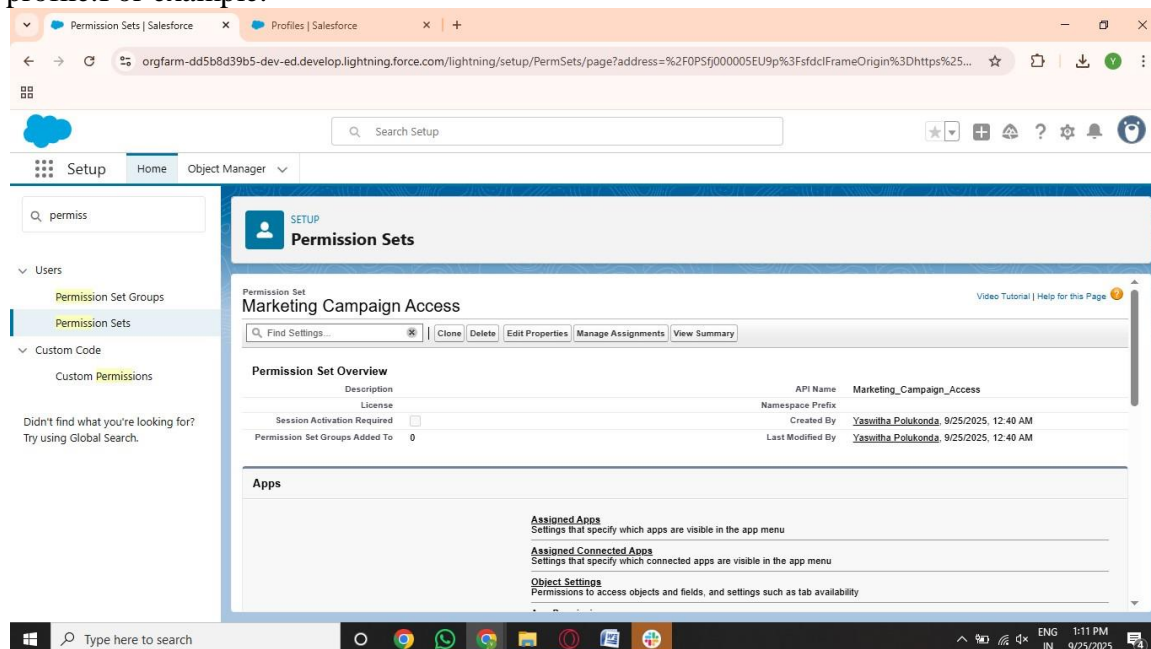
OWD (Organization-Wide Defaults)

OWD determines baseline data visibility.
For the E-commerce CRM:

- **Customer Data = Private**
- **Orders = Private**
- **Product Catalog = Public Read Only**

This ensures sensitive data is protected while product data remains accessible for all teams.

Sharing Rules

Sharing rules open up access where collaboration is needed.
For example:

- Regional sales teams may be allowed to **share opportunities across a territory**.
- Support teams may be given **read-only access to order history** to resolve customer queries.
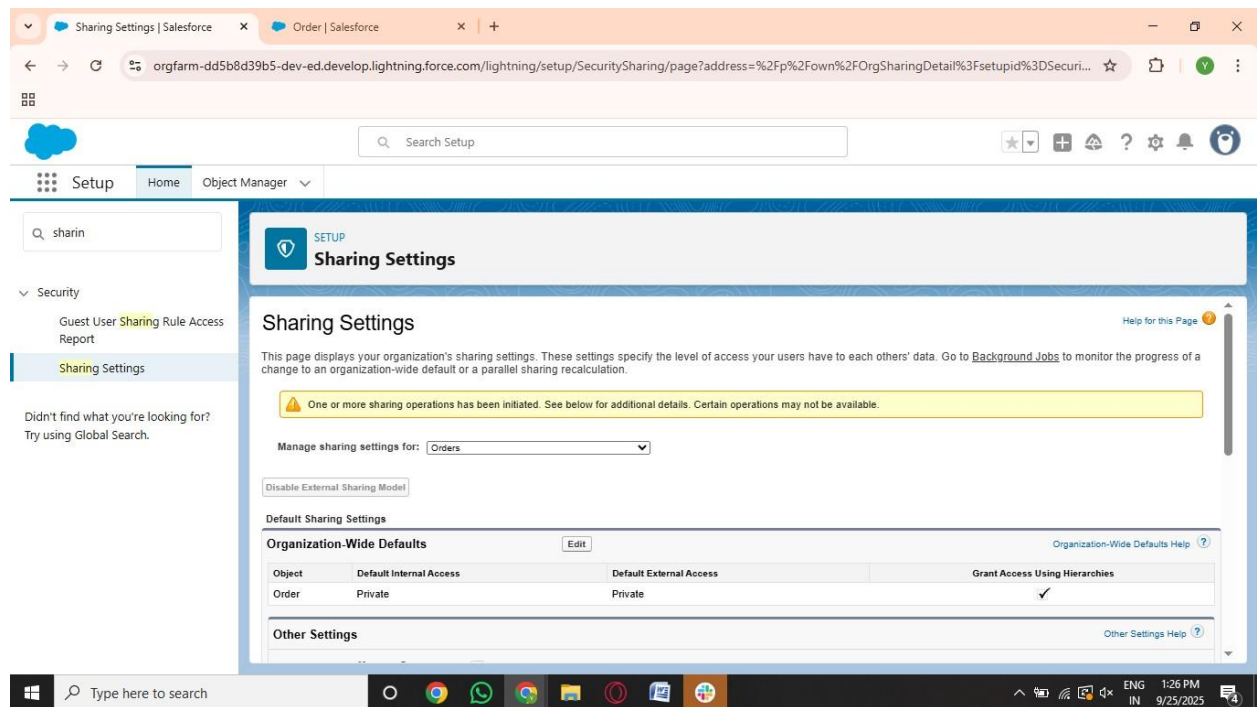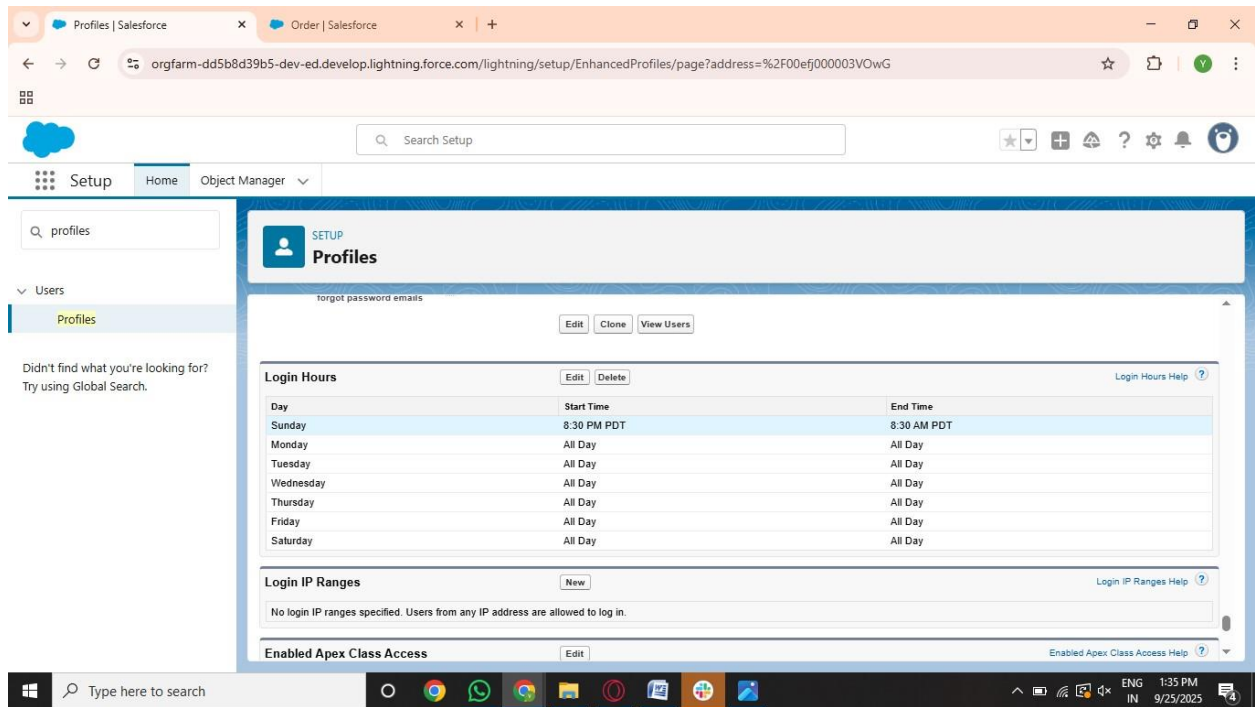
Login Access Policies

Security policies include:

- **IP restrictions** (restricting logins to office networks)
- **Login hours** (blocking access outside work shifts)
- **Two-factor authentication**

These measures protect sensitive e-commerce data from unauthorized access.

Dev Org Setup

The **Developer Org** is used for all configuration and customization first.
Objects for **Orders, Products, Customers, and Loyalty Points** are created and tested here before moving to production.

Sandbox Usage

Sandboxes (Developer, Partial, or Full) replicate the **production environment** for testing.
For example, a **Full Sandbox** is used to test seasonal sale workflows and campaign automation without affecting live customers.

Deployment Basics

Deployment in Salesforce can be done using **Change Sets, Salesforce CLI, or third-party DevOps tools**.
For the e-commerce CRM, customizations such as objects, workflows, and security settings are deployed from **Sandbox → Production** using Change Sets.