

E-commerce CRM Project

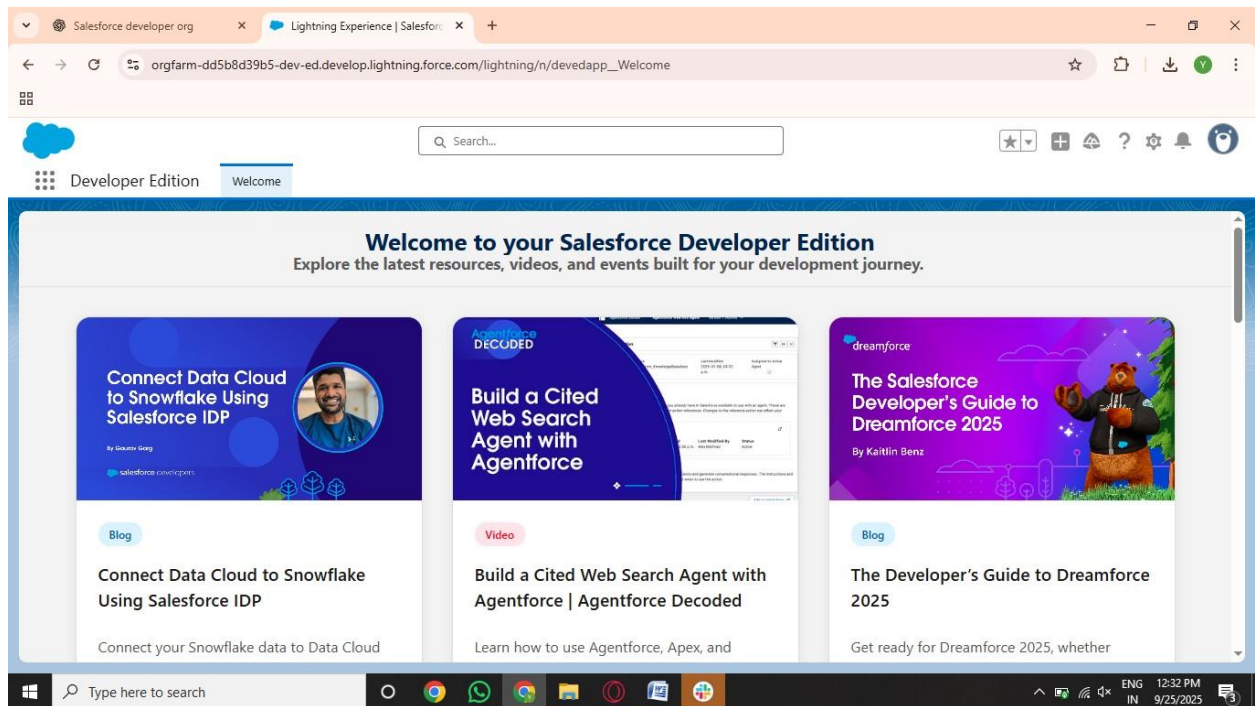
Phase 2: Org Setup & Configuration

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**.

The screenshot shows the Salesforce Setup interface for a company named "E-Shop CRM Pvt Ltd". The left sidebar contains a search bar and a list of setup categories: Company Settings, Calendar Settings, Company Information (selected), Data Protection and Privacy, Fiscal Year, Holidays, Language Settings, and My Domain. The main content area displays the "Company Information" page, which includes a search bar, a "Help for this Page" link, and a table of organization details. The table lists various settings such as Organization Name, Primary Contact, Division, Address, Fiscal Year Starts In, Activate Multiple Currencies, Enable Data Translation, Newsletter, Admin Newsletter, Hide Notices About System, Phone, Fax, Default Locale, Default Language, Default Time Zone, Currency Locale, Used Data Space, Used File Space, API Requests, Last 24 Hours, and Streaming API Events, Last 24 Hours. The table also includes links to view more details for some of these settings.

Organization Detail	
Organization Name	E-Shop CRM Pvt Ltd
Primary Contact	Yaswitha Polukonda
Division	
Address	Kakinada 533005 Andhra Pradesh India
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	<input type="checkbox"/>
Phone	09391542365
Fax	
Default Locale	English (India)
Default Language	English
Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Currency Locale	Telugu (India) - INR
Used Data Space	342 KB (7%) View
Used File Space	17 KB (0%) View
API Requests, Last 24 Hours	39 (15,000 max)
Streaming API Events, Last 24 Hours	0 (10,000 max)

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**.

Business Hours | Salesforce

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Setup Home Object Manager

Search Setup

compan

Company Settings

Business Hours

Calendar Settings

Public Calendars and Resources

Company Information

Data Protection and Privacy

Fiscal Year

Holidays

Language Settings

My Domain

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

Organization Business Hours

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.

[Help for this Page](#)

Business Hours Detail

[Edit](#)

Business Hours Name: E-Shop Support Hours

Time Zone: (GMT-07:00) Pacific Daylight Time (America/Los_Angeles)

Default Business Hours: ☐

Day	Start Time	End Time
Sunday	9:00 AM	9:00 PM
Monday	9:00 AM	9:00 PM
Tuesday	9:00 AM	9:00 PM
Wednesday	9:00 AM	9:00 PM
Thursday	9:00 AM	9:00 PM
Friday	9:00 AM	9:00 PM
Saturday	9:00 AM	9:00 PM

Active: ☐

Created By: Yawetha Polukonda 9/25/2025, 12:13 AM

Last Modified By: Yawetha Polukonda 9/25/2025, 12:13 AM

[Edit](#)

Holidays

[Add/Remove](#)

Holiday Name	Description	Date and Time
Christmas		12/25/2025 All Day
Diwali		11/12/2025 All Day
New Year		1/1/2025 All Day

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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**.

Users | Salesforce x Profiles | Salesforce x +

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Search Setup

Setup Home Object Manager

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Didn't find what you're looking for?

Type here to search

SETUP Users

User Profile Help for this Page

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) | Q Auth Area (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	<input checked="" type="checkbox"/>
Nickname	User17587854617248250837	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input 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+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>

Users | Salesforce x Profiles | Salesforce x +

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Search Setup

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Didn't find what you're looking for?

Type here to search

SETUP Users

User Profile Help for this Page

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 (0) | Q Auth Area (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	<input checked="" type="checkbox"/>
Nickname	User17587855792042962075	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input 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+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>

The screenshot shows the Salesforce Setup interface for a user named 'Support Agent'. The left sidebar contains navigation links for Users, Profiles, Permission Set Groups, Permission Sets, Public Groups, Queues, Roles, and User Management Settings. The main content area displays the 'User Detail' for 'Support Agent', including fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, and Time Zone. The 'User License' is 'Salesforce Platform' and the 'Profile' is 'Standard Platform User'. The 'Active' checkbox is checked. The 'Marketing User' checkbox is unchecked. The 'Offline User' checkbox is unchecked. The 'Knowledge User' checkbox is unchecked. The 'Flow User' checkbox is unchecked. The 'Service Cloud User' checkbox is unchecked. The 'Site.com Contributor User' checkbox is unchecked. The 'Site.com Publisher User' checkbox is unchecked.

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.

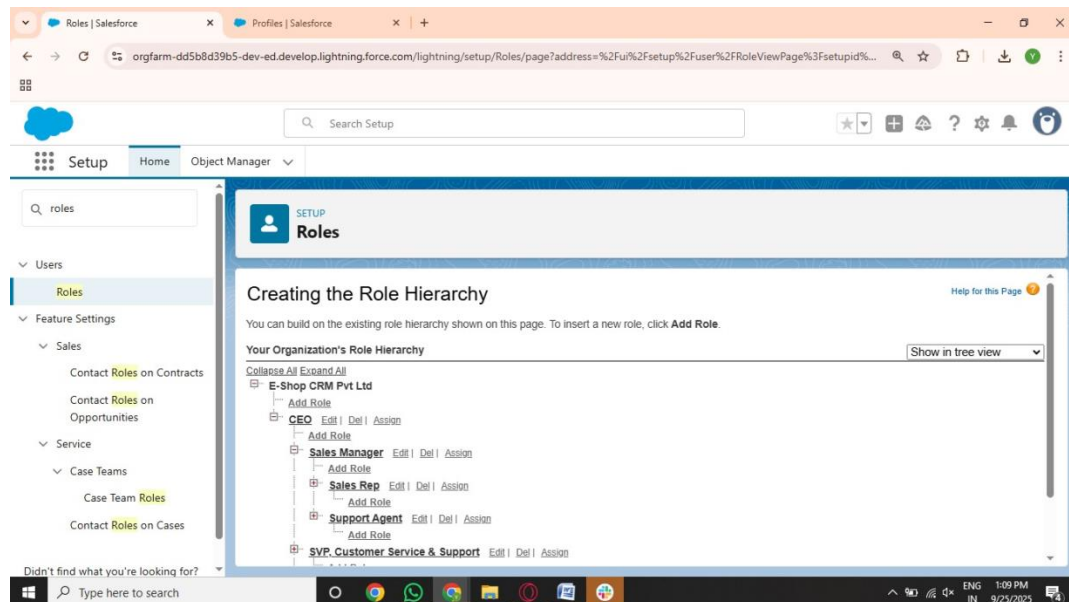
The screenshot shows the Salesforce Setup interface for a profile named 'E-Shop Sales Profile'. The left sidebar contains navigation links for Users, Profiles, and Permission Set Groups. The main content area displays the 'Profile Detail' for 'E-Shop Sales Profile', including fields for Name, User License, Description, Created By, and Modified By. The 'User License' is 'Salesforce' and the 'Custom Profile' checkbox is checked. The 'Created By' is 'Yaswita Polukonda' and the 'Modified By' is 'Yaswita Polukonda'. The 'Page Layouts' section shows the 'Global' layout assigned to 'Global Layout' and the 'Email Application' layout assigned to 'Not Assigned'. The 'Location Group Assignment' is 'Location Group Assignment Layout'. The 'Object Milestone' is 'Object Milestone Layout'. The 'Operating Hours' is 'Operating Hours Layout'. The 'Alternative Payment Method' is 'Alternative Payment Method Layout'. The 'Opportunity' is 'Opportunity Layout'.

Roles

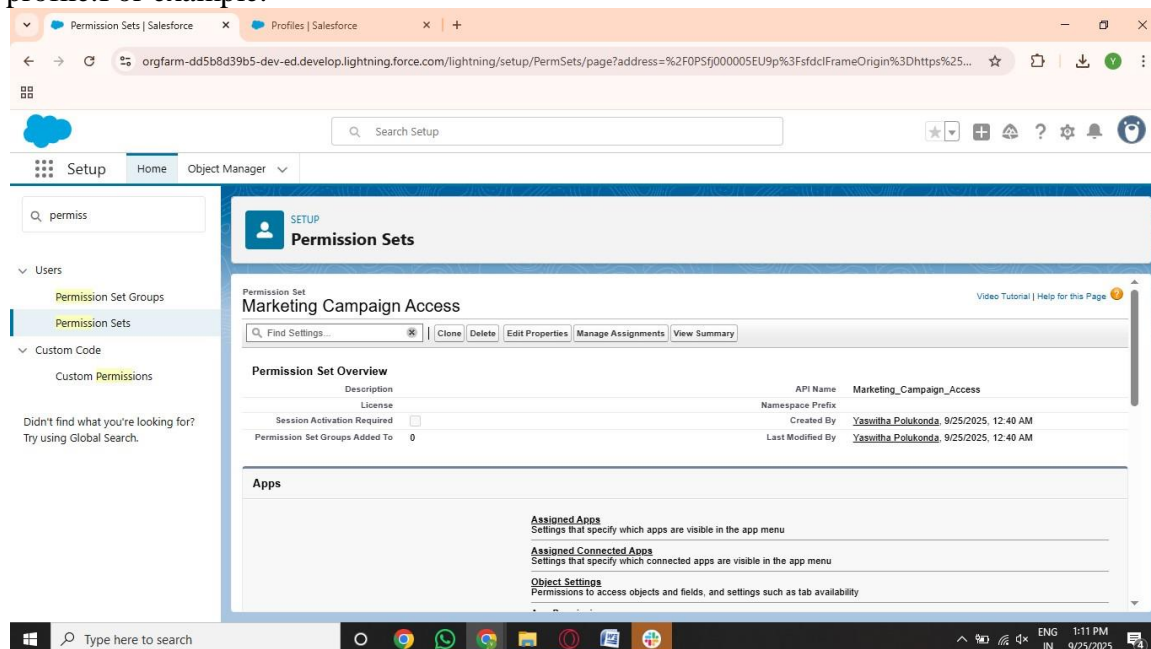
A role hierarchy ensures **data visibility matches organizational structure**.

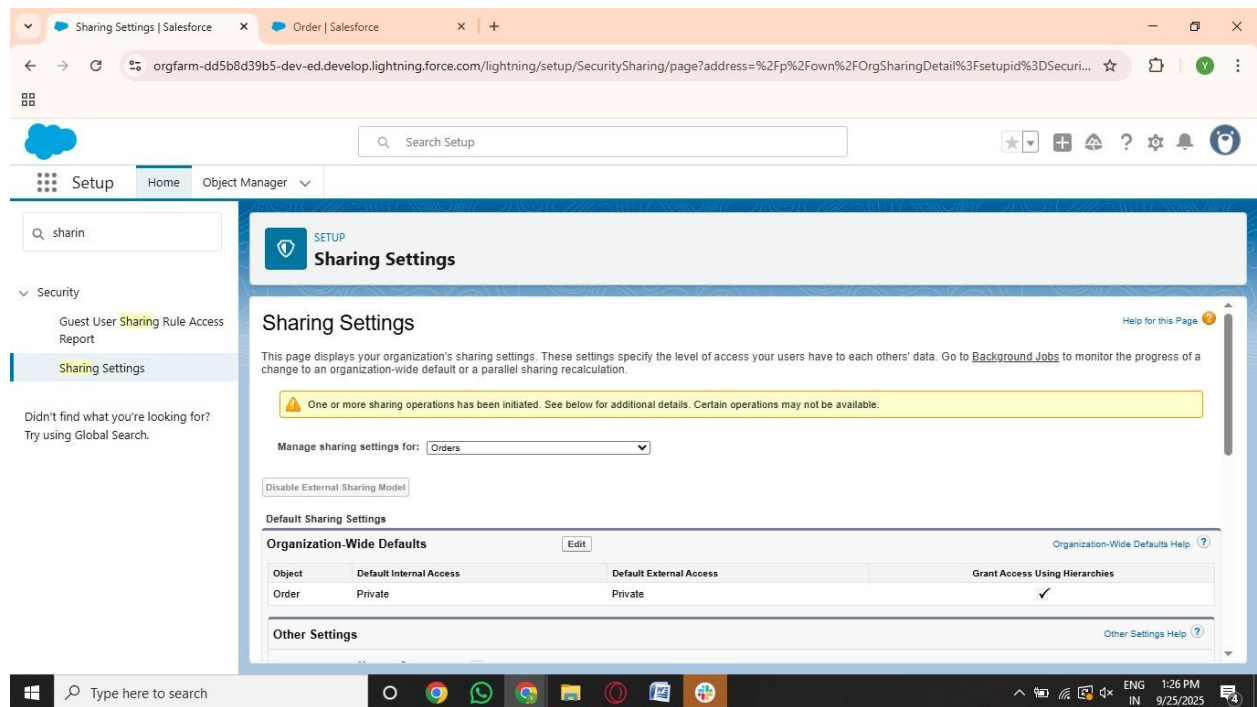
For e-commerce: **CEO/Admin** → **Sales Manager** → **Sales Reps** → **Customer Support Agents**.

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:

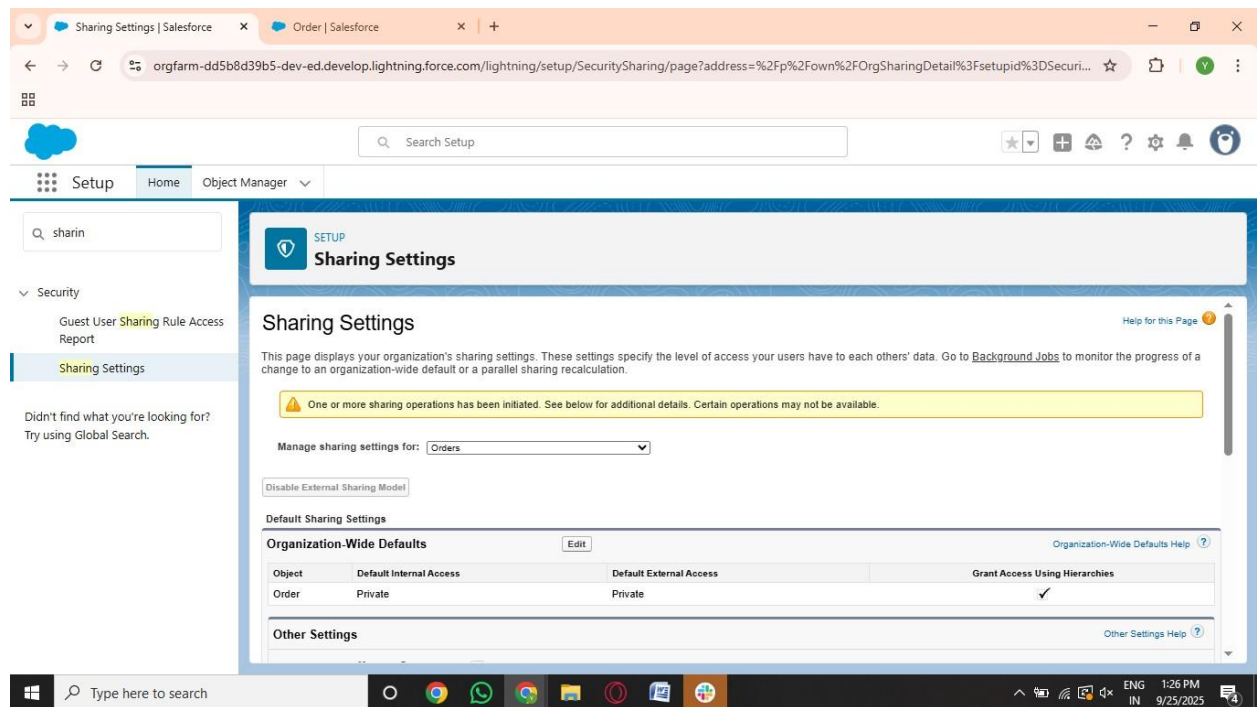
- **Customer Data = Private**
- **Orders = Private**
- **Product Catalog = Public Read Only**

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.

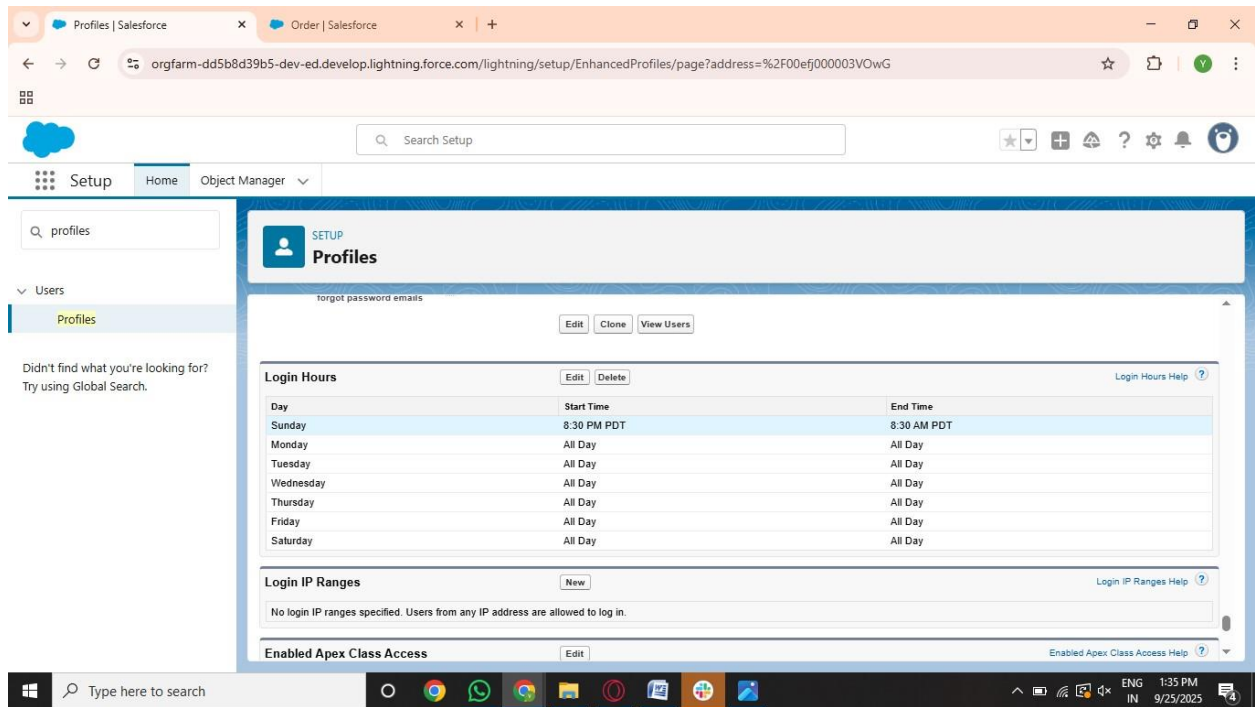


Login Access Policies

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.