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 Salesforce Developer Edition Org and updated company information such as organization name, locale (English – India), and timezone (IST).

Step 1 — Business Hours & Holidays

Configured business hours from Monday to Saturday (9 AM – 6 PM) and added public holidays. Holidays were linked to business hours for accurate order and inventory scheduling.

Step 2 — Users

Created sample users with the following roles:

• Admin – System Administrator

• Inventory Manager – Inventory Manager profile

• Sales Staff – Sales Staff profile

Step 3 — Profiles and Permissions

Inventory Manager profile was granted create, read, and edit permissions on Product Inventory, Orders, and Reorders. Sales Staff profile was given read-only access to Product Inventory and create/edit access to Orders, with read-only access to Reorders.

Step 4 — Role Hierarchy

Defined a role hierarchy where Admin is at the top, followed by Inventory Manager, and then Sales Staff.

Step 5 — Org-Wide Defaults (OWD)

Set Product Inventory, Orders, and Reorders to Private to ensure records are only visible to record owners unless shared explicitly.

Step 6 — Sharing Rules

Created a public group for Inventory Managers and defined sharing rules to share Sales Staff-owned records with Inventory Managers with read/write access.

Step 7 — Login Access Policies

Enabled administrators to log in as any user for testing and troubleshooting purposes.

Step 8 — Lightning App Setup

Created a Lightning App named Inventory & Order Tracking and added tabs for Product Inventory, Orders, Reorders, Reports, and Dashboards.

Step 9 — Testing

Tested the system by logging in as Sales Staff to create orders and as Inventory Manager to manage inventory and process reorders. Admin access was verified for full system control.

4. Results / Observations

• Sales Staff successfully created and managed orders.

• Inventory Manager effectively tracked inventory and reorders through sharing rules.

• Admin had complete visibility and access to all records.

• Private OWD ensured a secure baseline for data access.

5. Next Steps (Optional Enhancements)

• Automate low-stock alerts using Salesforce Flow (Email/SMS).

- Create dashboards for inventory levels, order tracking, and reorder reports.
- Implement barcode scanning for product updates and order processing.