Phase 2: Org Setup & Configuration

Wholesaler Order Management CRM (Salesforce Project)

Objective

Set up the Salesforce Org environment with correct company settings, security model, user access, and deployment basics. This document contains step-by-step instructions and example data to configure Phase 2 of the project.

1. Salesforce Edition

Steps:

1. Decide on an edition. Recommended: Enterprise Edition for production.
2. Create a Developer Edition org for POC: https://developer.salesforce.com/signup
3. Create a Production or sandbox org based on licensing procurement.

2. Company Profile Setup

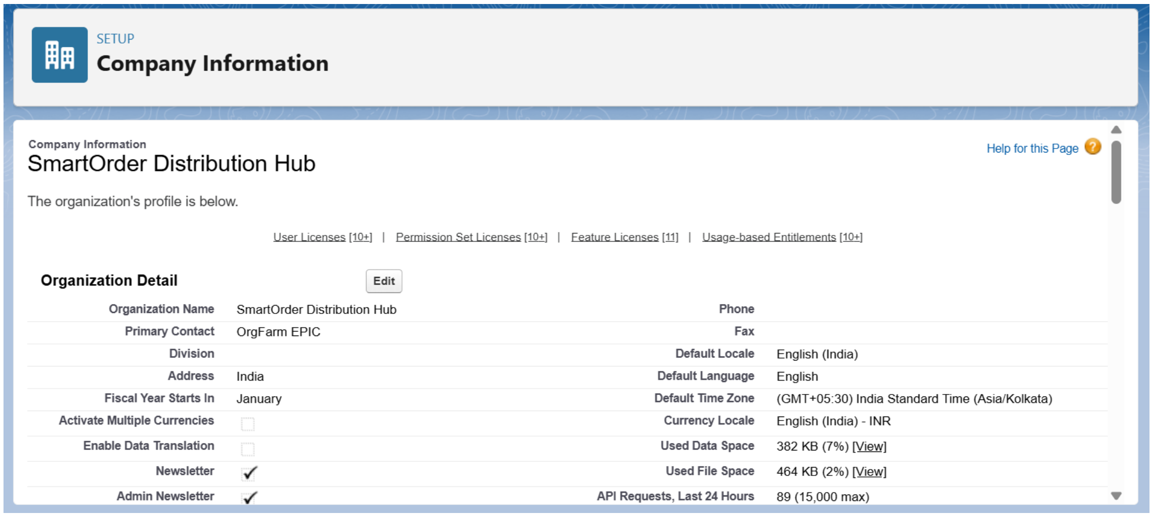
Steps:

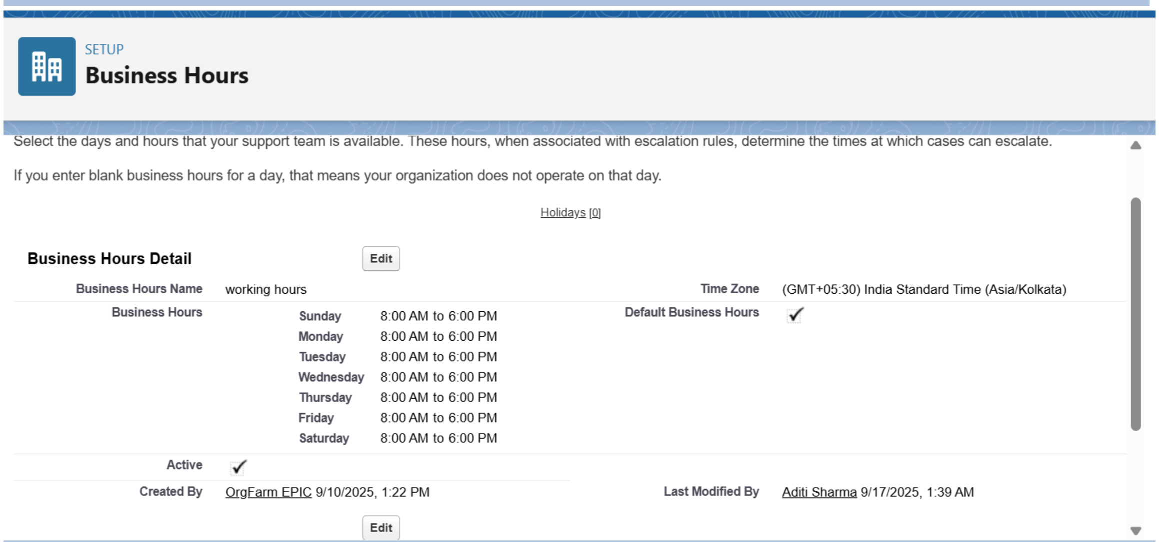
4. Setup → Company Information → Fill in Company Name, Address, Default Locale, Language, Default Currency.
5. Setup → Business Hours → New Business Hours: e.g., "Office Hours" Mon–Sat 09:00–18:00. Save.
6. Setup → Holidays → New Holiday: Add observed public holidays and company holidays.
7. Setup → Fiscal Year → Select Standard Fiscal Year or configure Custom Fiscal Year if required.

Example values to fill:

- - Company Name: SmartOrder Pvt Ltd
- - Default Locale: English (India)
- - Default Currency: INR

- - Business Hours Name: Office Hours (Mon–Sat 09:00–18:00)

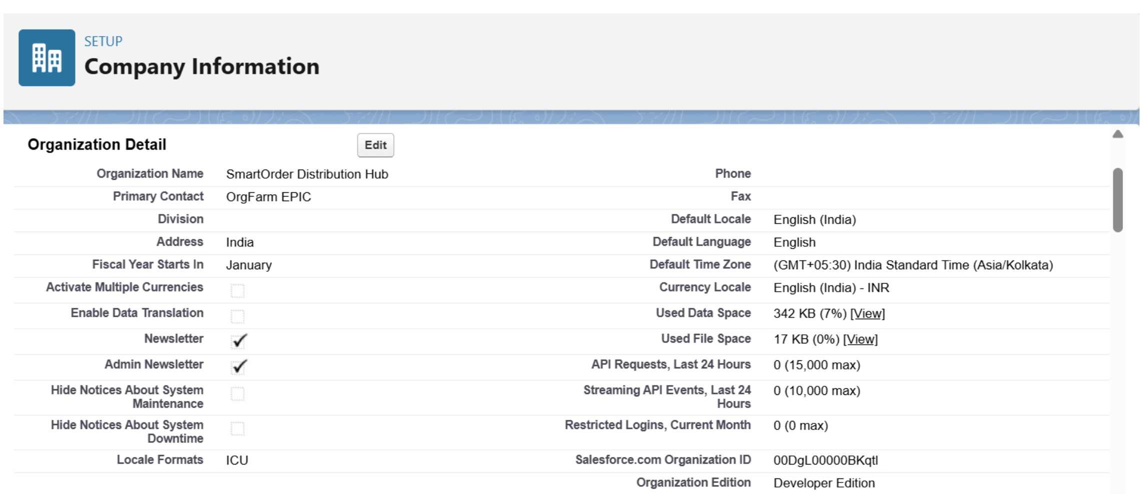




3. User Setup & Licenses

Steps to create users:

8. Setup → Users → Users → New User (or clone existing user).



9. Fill required fields: First Name, Last Name, Alias, Email, Username (must be unique), Nickname, Role, Profile, User License, Locale, Time Zone.
10. When creating community users (Retailers), create the Contact inside the Retailer Account first and then click "Enable Customer User" (or Partner User) to create a Community user.
11. Assign appropriate License: Salesforce, Platform, or Customer/Partner Community licenses.
12. Assign Permission Sets after user creation if additional permissions are required.

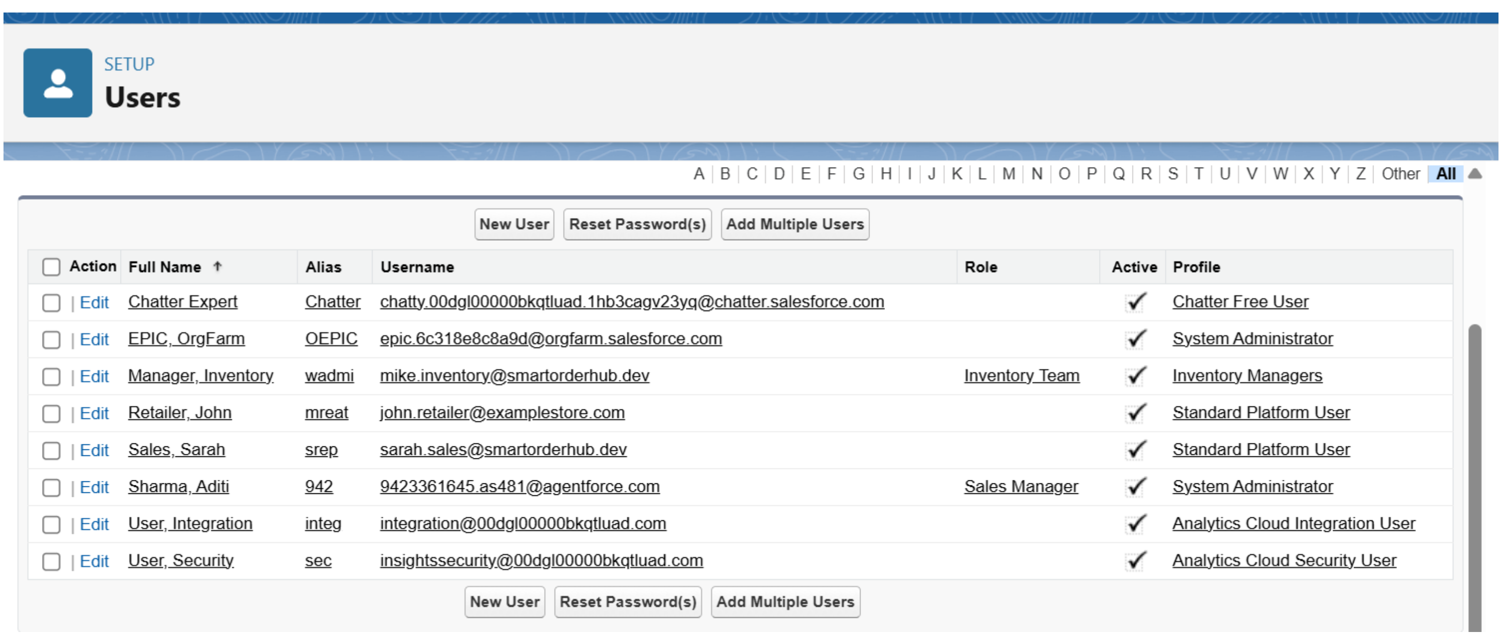
Sample users (fill with your org data):

User Name	Email	Role	Profile	License
wholesaler.ops	wholesaler.ops@acme.com	Operations Manager	Wholesaler Profile	Salesforce
retailer.john	john.retailer@store.com	Retailer Role	Retailer Profile	Customer Community Plus
sales.alice	alice.sales@acme.com	Sales Rep	Sales Team Profile	Salesforce
inv.manager	inventory@acme.com	Inventory Team	Inventory Manager Profile	Salesforce

4. Security Model Configuration

4.1 Profiles (Base Permissions)

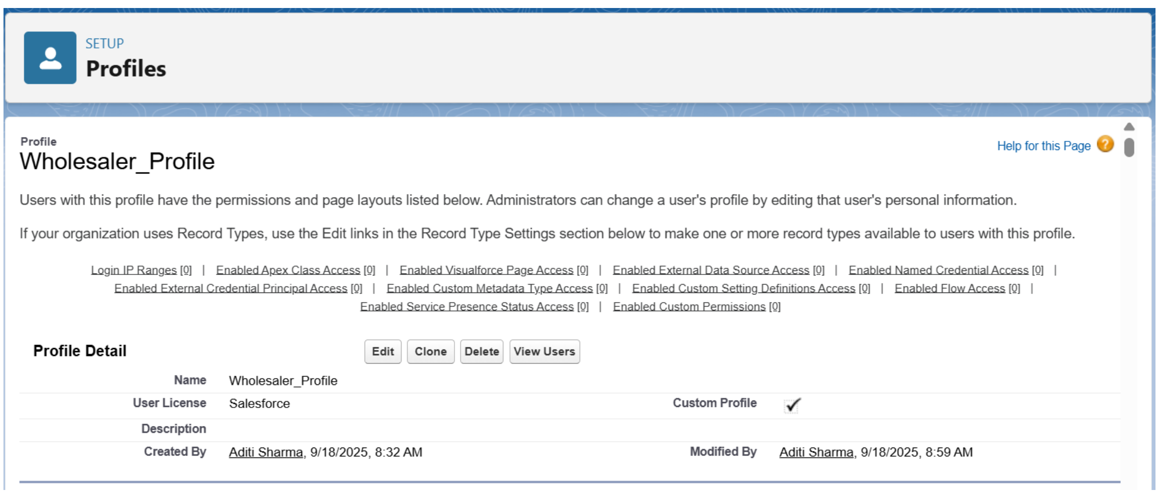
Steps to create/clone profiles:



13. Setup → Profiles → Click "New Profile" (or clone an existing Standard Profile).
14. Name the profile (e.g., "Wholesaler Profile") and set the appropriate User License if needed.
15. Edit Object Settings: Configure Create, Read, Edit, Delete, View All, Modify All for each object.
16. Set Tab Settings: Default On, Hidden, or Default Off for tabs.
17. Assign system permissions where necessary (e.g., "API Enabled", "View Setup and Configuration" only for admins).

Recommended Profile Permissions (example):

- **Wholesaler Profile:** Orders: CRUD, Products: CRUD, Inventory: CRUD, System Permissions: Run Reports, Export Reports
- **Retailer Profile:** Orders: Create/Edit/Read (No Delete), Products: Read Only, Minimal system permissions
- **Sales Team Profile:** Orders: Create/Edit/Read, Products: Read, View Dashboards & Reports
- **Inventory Manager Profile:** Inventory: CRUD, Products: CRUD, Orders: Read Only



4.2 Roles (Hierarchy for Data Visibility)

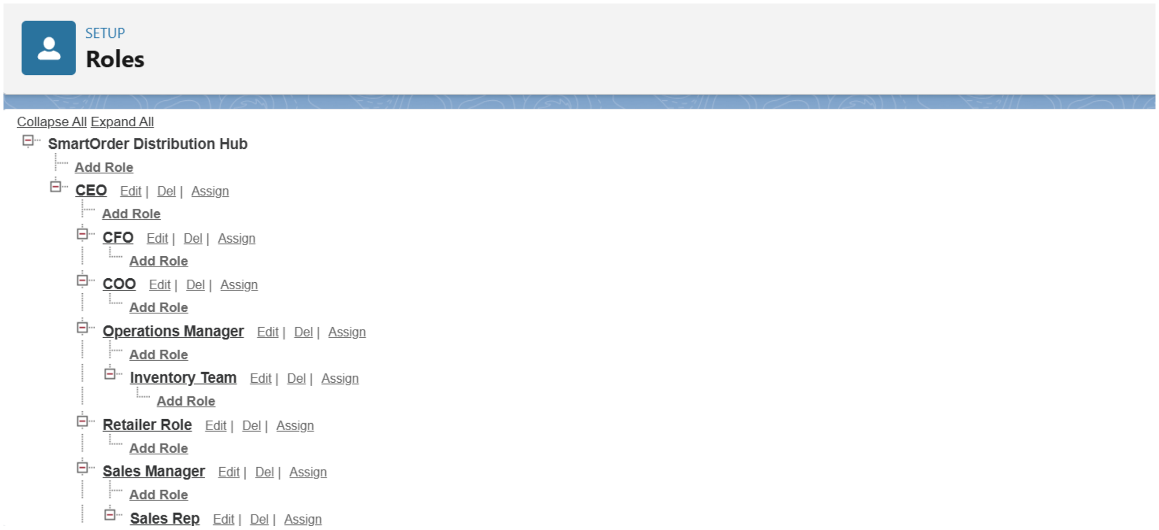
Steps to create roles:

18. Setup → Roles → Set Up Roles → Click "Add Role".
19. Create roles according to company structure and place them in a hierarchy that reflects reporting lines.
20. Ensure roles match data visibility requirements (higher role inherits visibility of lower roles).

Example Role Hierarchy:

- CEO
- ├── Sales Manager

- │ └── Sales Rep
- └── Operations Manager
- └── Inventory Team
- └── Retailer Role (external users)



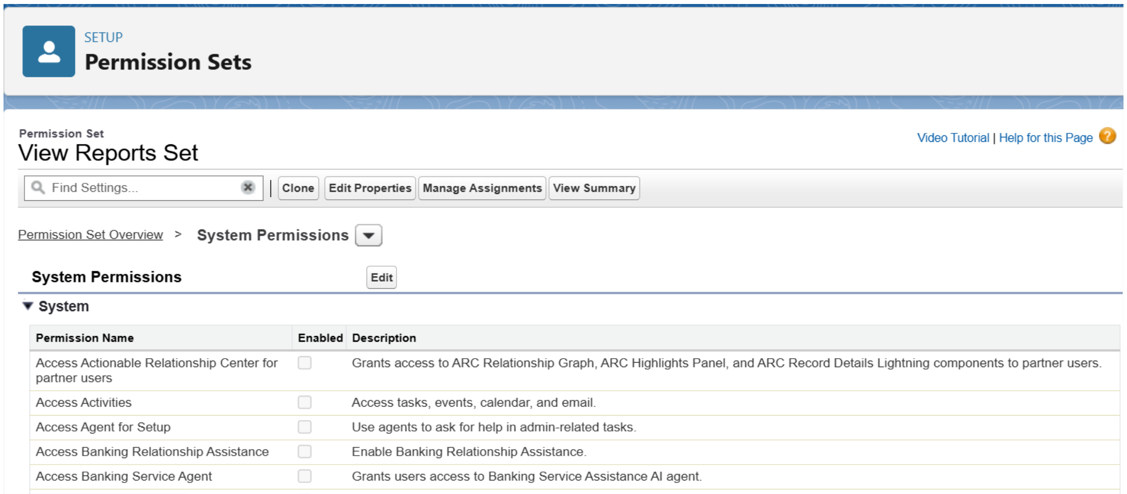
4.3 Permission Sets (Extra Permissions)

Steps to create Permission Sets:

21. Setup → Permission Sets → New.
22. Label: (e.g., "View Reports Set"), API Name auto-generated, License: None (recommended). Save.
23. Click "System Permissions" → Edit → Enable required permissions (e.g., Run Reports, View Dashboards). Save.
24. Assign the Permission Set: Manage Assignments → Add Assignments → Select users → Assign.

Detailed Permission Set examples:

Permission Set	Key Permissions	Suggested Assignees
View Reports Set	Run Reports, View Dashboards	Retailers (selected), Sales Team
Export Data Set	Export Reports, (optional) Manage Public Reports	Trusted Wholesaler users, Analysts
API Access Set	API Enabled, (optional) Modify All Data if integration needs it	Inventory Integration User, System Admins



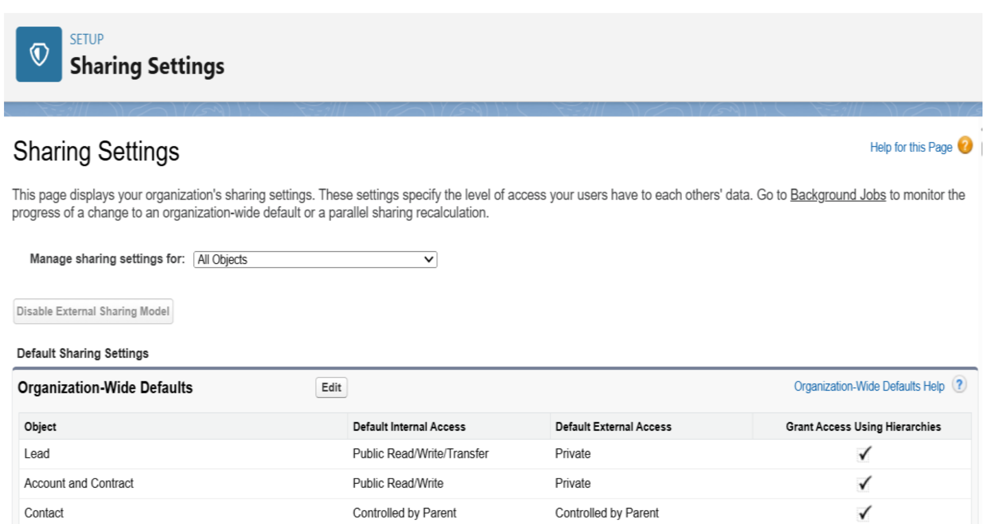
4.4 Org-Wide Defaults (OWD)

Steps to configure OWD:

25. Setup → Sharing Settings → Edit the Organization-Wide Defaults.
26. Set Orders: Private (recommended).
27. Set Products: Public Read Only (so retailers can browse product catalog).
28. Set Inventory: Private (only inventory team and managers view).
29. Save and plan sharing rules for broader access where necessary.

OWD Example:

- - Orders → Private
- - Products → Public Read Only
- - Inventory → Private



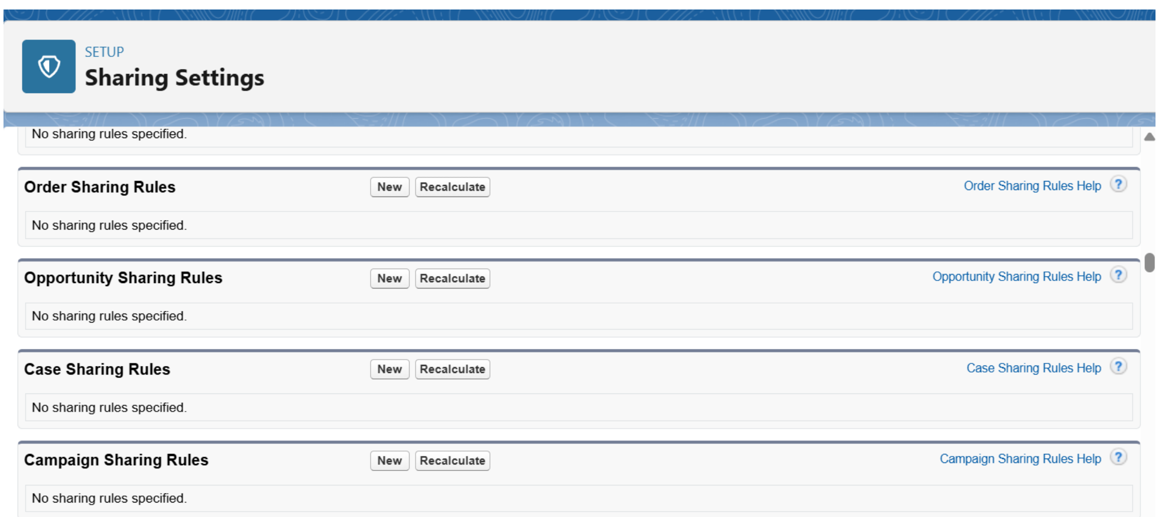
Sharing Rules

Steps to create Sharing Rules:

30. Setup → Sharing Settings → Scroll to the relevant object (Orders) → New Sharing Rule.
31. Choose rule type: Based on record owner or criteria-based.
32. If owner-based: Select "Share records owned by members of" → pick role/group → Grant Read/Read-Write.
33. If criteria-based: Define criteria (e.g., Order.Status equals "Dispatched") and share with role/group.
34. Save and run recalculation if necessary.

Sample Sharing Rules:

Rule Name	Rule Type & Criteria	Access Granted
Sales Managers - Team Orders	Owner-based: Owned by Sales Rep role	Read/Write to Sales Manager role
Wholesalers - All Retailer Orders	Owner-based: Owned by Retailer Role	Read to Wholesaler users
Delayed Orders Alert	Criteria-based: Order.Status = "Delayed"	Read to Ops Manager & Support Group



4.6 Login Access Policies

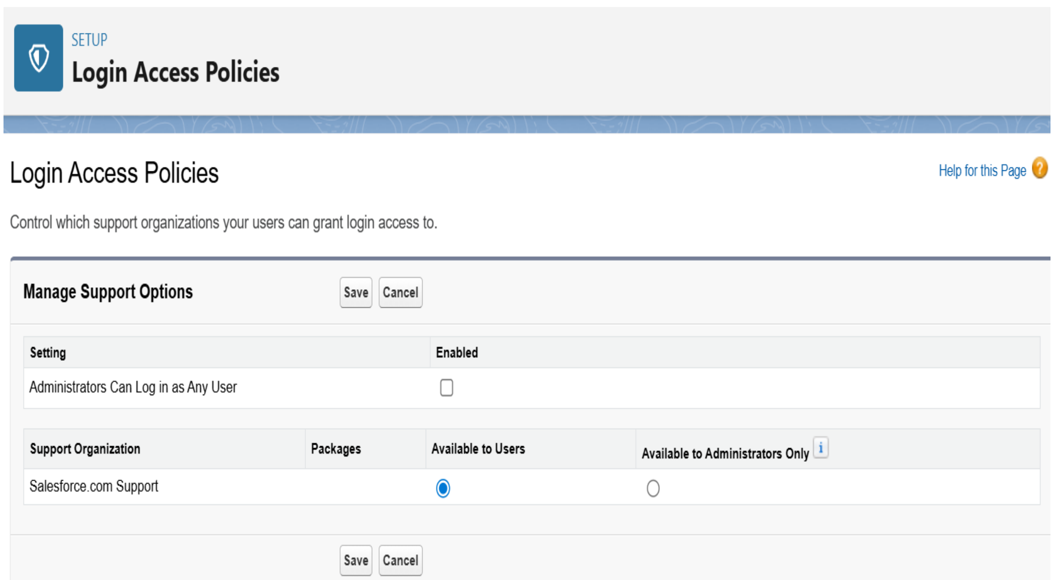
Steps and recommended settings:

35. Setup → Session Settings → Set Session Timeout (e.g., 30 minutes).
36. Setup → Network Access → Add Trusted IP Ranges (Office Range example: 203.0.113.0/24).

37. Setup → Profiles → Select Profile → Login IP Ranges to lock profile-only IPs (for highly restricted users).
38. Setup → Identity → Multi-Factor Authentication for User Interface Logins → Enforce MFA for all users (or via permission sets).
39. Enable Login Forensics and Review Login History periodically.

Sample settings:

- - Session Timeout: 30 minutes
- - Trusted IP Range (Office): 203.0.113.0 - 203.0.113.255
- - MFA: Enforced for all internal and external users



Deliverables for Phase 2

- Completed Company Profile configuration (Business Hours, Holidays, Fiscal Year).
- Users created and assigned with correct Licenses and Profiles.
- Role hierarchy implemented matching company structure.
- Profiles and Permission Sets created and assigned.
- OWD and Sharing Rules configured.
- Login Access & Security policies enforced (IP, Session Timeout, MFA).
- Sandbox strategy documented and initial sandboxes created.

- Deployment plan (Change Sets / SFDX) documented.