

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)

Company Information

Company Information

SmartOrder Distribution Hub

The organization's profile is below.

[User Licenses \[10+\]](#) |
 [Permission Set Licenses \[10+\]](#) |
 [Feature Licenses \[11\]](#) |
 [Usage-based Entitlements \[10+\]](#)

Organization Detail

Edit

Organization Name	SmartOrder Distribution Hub	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (India)
Address	India	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	382 KB (7%) [View]
Newsletter	<input checked="" type="checkbox"/>	Used File Space	464 KB (2%) [View]
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	89 (15,000 max)

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.

[Holidays \[0\]](#)

Business Hours Detail

Edit

Business Hours Name	working hours	Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Business Hours	Sunday 8:00 AM to 6:00 PM Monday 8:00 AM to 6:00 PM Tuesday 8:00 AM to 6:00 PM Wednesday 8:00 AM to 6:00 PM Thursday 8:00 AM to 6:00 PM Friday 8:00 AM to 6:00 PM Saturday 8:00 AM to 6:00 PM	Default Business Hours	<input checked="" type="checkbox"/>
Active	<input checked="" type="checkbox"/>		
Created By	OrgFarm EPIC 9/10/2025, 1:22 PM	Last Modified By	Aditi Sharma 9/17/2025, 1:39 AM

Edit

3. User Setup & Licenses

Steps to create users:

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

Company Information

Organization Detail

Edit

Organization Name	SmartOrder Distribution Hub	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (India)
Address	India	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	342 KB (7%) [View]
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) [View]
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00DgL00000BKqtl
		Organization Edition	Developer Edition

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:



SETUP

Users

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All ▲

New User

Reset Password(s)

Add Multiple Users

<input type="checkbox"/> Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00dgl00000bkqtlud.1hb3cagy23yq@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	EPIC_OrgFarm	OEPIE	epic.6c318e8c8a9d@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/> Edit	Manager_Inventory	wadmi	mike.inventory@smartorderhub.dev	Inventory Team	✓	Inventory Managers
<input type="checkbox"/> Edit	Retailer_John	mreat	john.retailer@examplestore.com		✓	Standard Platform User
<input type="checkbox"/> Edit	Sales_Sarah	srep	sarah.sales@smartorderhub.dev		✓	Standard Platform User
<input type="checkbox"/> Edit	Sharma_Aditi	942	9423361645.as481@agentforce.com	Sales Manager	✓	System Administrator
<input type="checkbox"/> Edit	User_Integration	integ	integration@00dgl00000bkqtlud.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00dgl00000bkqtlud.com		✓	Analytics Cloud Security User

New User

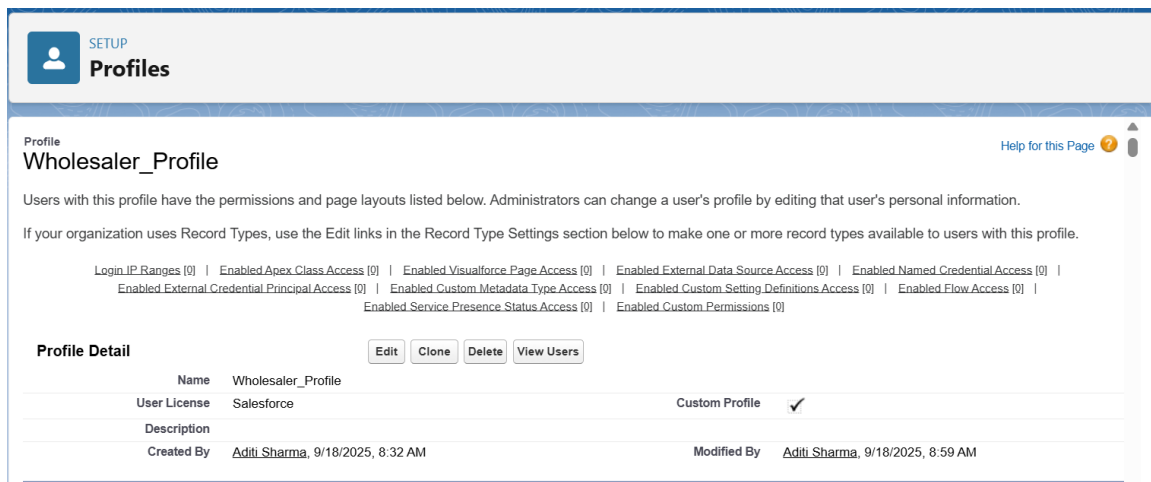
Reset Password(s)

Add Multiple Users

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



The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The header includes a 'SETUP' button and a 'Profiles' title. The main content area is titled 'Profile: Wholesaler_Profile' and includes a 'Help for this Page' link. Below the title, there is a description: 'Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information. If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.' A list of enabled system permissions is shown, including Login IP Ranges, Apex Class Access, Visualforce Page Access, External Data Source Access, Named Credential Access, External Credential Principal Access, Custom Metadata Type Access, Custom Setting Definitions Access, Flow Access, Service Presence Status Access, and Custom Permissions. Below this, the 'Profile Detail' section contains buttons for 'Edit', 'Clone', 'Delete', and 'View Users'. A table displays the profile details:

Name	Wholesaler_Profile
User License	Salesforce Custom Profile <input checked="" type="checkbox"/>
Description	
Created By	Aditi Sharma, 9/18/2025, 8:32 AM
Modified By	Aditi Sharma, 9/18/2025, 8:59 AM

4.2 Roles (Hierarchy for Data Visibility)

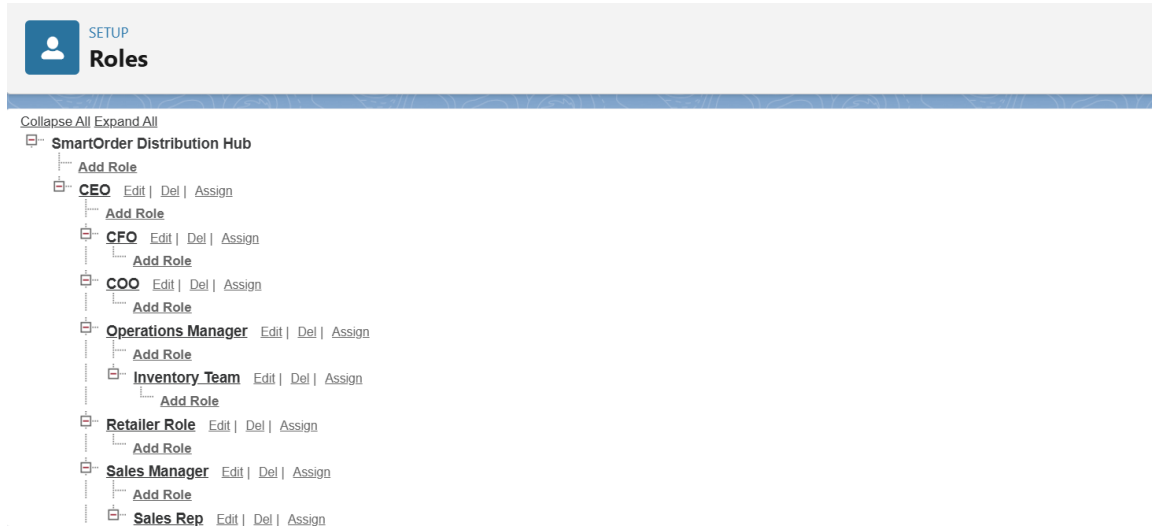
Steps to create roles:

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

Permission Sets

Permission Set
View Reports Set

[Find Settings...](#)
[Clone](#)
[Edit Properties](#)
[Manage Assignments](#)
[View Summary](#)

[Permission Set Overview](#) > **System Permissions**

System Permissions
[Edit](#)

System

Permission Name	Enabled	Description
Access Actionable Relationship Center for partner users	<input type="checkbox"/>	Grants access to ARC Relationship Graph, ARC Highlights Panel, and ARC Record Details Lightning components to partner users.
Access Activities	<input type="checkbox"/>	Access tasks, events, calendar, and email.
Access Agent for Setup	<input type="checkbox"/>	Use agents to ask for help in admin-related tasks.
Access Banking Relationship Assistance	<input type="checkbox"/>	Enable Banking Relationship Assistance.
Access Banking Service Agent	<input type="checkbox"/>	Grants users access to Banking Service Assistance AI agent.

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:

Sharing Settings

Sharing Settings

[Help for this Page](#)

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for:

[Disable External Sharing Model](#)

Default Sharing Settings

Organization-Wide Defaults
[Edit](#)

[Organization-Wide Defaults Help](#)

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓

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

SETUP Sharing Settings

No sharing rules specified.

Order Sharing Rules [New](#) [Recalculate](#) [Order Sharing Rules Help](#)

No sharing rules specified.

Opportunity Sharing Rules [New](#) [Recalculate](#) [Opportunity Sharing Rules Help](#)

No sharing rules specified.

Case Sharing Rules [New](#) [Recalculate](#) [Case Sharing Rules Help](#)

No sharing rules specified.

Campaign Sharing Rules [New](#) [Recalculate](#) [Campaign Sharing Rules Help](#)

No sharing rules specified.

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



SETUP

Login Access Policies

Login Access Policies

[Help for this Page ?](#)

Control which support organizations your users can grant login access to.

Manage Support Options

Setting	Enabled
Administrators Can Log in as Any User	<input type="checkbox"/>

Support Organization	Packages	Available to Users	Available to Administrators Only i
Salesforce.com Support		<input checked="" type="radio"/>	<input type="radio"/>

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.