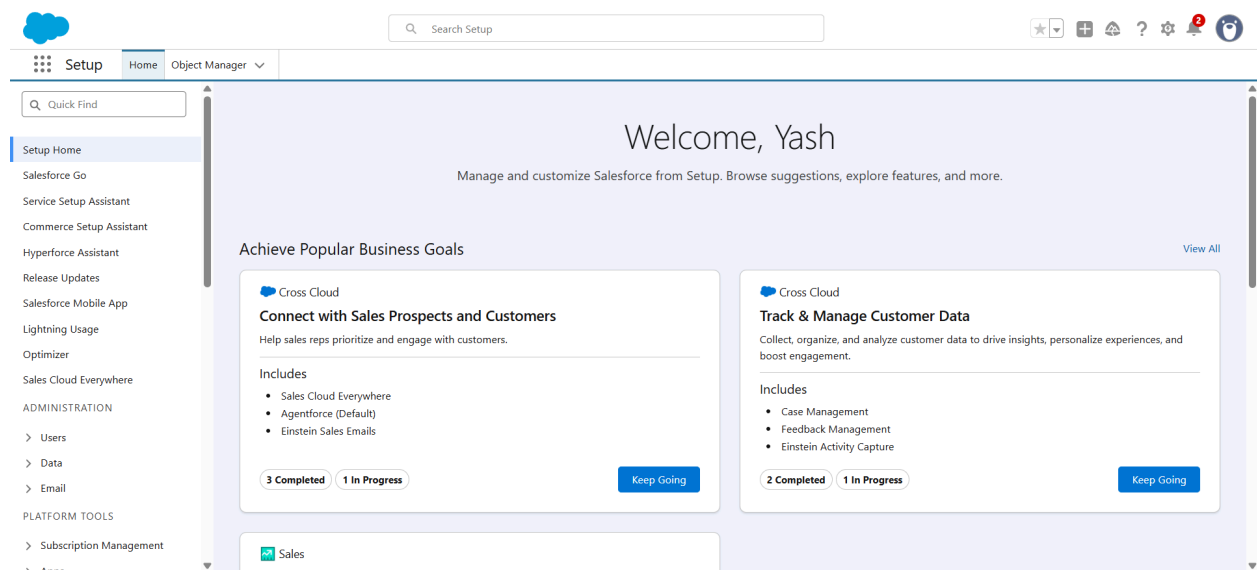


1. Salesforce Edition

Explanation:

For this project, a Salesforce Developer Edition org was used. It provides all the core functionalities of Salesforce Enterprise Edition for free, including access to Setup, Object Manager, Flows, Apex Classes, and Dashboards — which are essential for building and testing a full-fledged CRM like Medical Inventory Management.



2. Company Profile Setup

Explanation:

The company profile defines organizational identity in Salesforce. I configured it to represent the healthcare company implementing this system:

Field	Example Value
Company Name	MedInvent Systems
Primary Contact	Inventory Head
Locale	English (India)
Currency	INR – Indian Rupees
Time Zone	(GMT+5:30) India Standard Time

The screenshot shows the Salesforce Setup interface. 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 is titled 'Company Information' and displays the profile for 'MedInvent Systems'. It includes an 'Edit' button and a table of organization details. The table is organized into two columns: Organization Detail and System Settings. The Organization Detail column includes fields for Organization Name, Primary Contact, Division, Address, Fiscal Year Starts In, Activate Multiple Currencies, Enable Data Translation, Newsletter, Admin Newsletter, Hide Notices About System Maintenance, Hide Notices About System Downtime, and Locale Formats. The System Settings column includes fields for Phone, Fax, Default Locale, Default Language, Default Time Zone, Currency Locale, Used Data Space, Used File Space, API Requests, Streaming API Events, Restricted Logins, Salesforce.com Organization ID, Organization Edition, and Instance.

Organization Detail		System Settings	
Organization Name	MedInvent Systems	Phone	
Primary Contact	Yash kumar	Fax	
Division		Default Locale	English (United States)
Address	Andhra Pradesh 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	Hindi (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	352 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	126 (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	00Dg5000000LJ7y
		Organization Edition	Developer Edition
		Instance	IND168

3. Business Hours & Holidays

Explanation:

Configured standard business hours and hospital holidays to support time-dependent workflows (e.g., supplier follow-up reminders or delivery deadlines).

Setting	Value
Business Hours Name	MedInvent Working Hours
Time	Monday–Saturday, 9:00 AM – 6:00 PM

Setup

Home

Object Manager

Q company

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.

SETUP

Business Hours

Organization Business Hours

Help for this Page

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

Business Hours Detail

Edit

Business Hours Name	Default	Time Zone														
Business Hours	<table><tr><td>Sunday</td><td>24 Hours</td></tr><tr><td>Monday</td><td>9:00 AM to 6:00 PM</td></tr><tr><td>Tuesday</td><td>9:00 AM to 6:00 PM</td></tr><tr><td>Wednesday</td><td>9:00 AM to 6:00 PM</td></tr><tr><td>Thursday</td><td>9:00 AM to 6:00 PM</td></tr><tr><td>Friday</td><td>9:00 AM to 6:00 PM</td></tr><tr><td>Saturday</td><td>9:00 AM to 6:00 PM</td></tr></table>	Sunday	24 Hours	Monday	9:00 AM to 6:00 PM	Tuesday	9:00 AM to 6:00 PM	Wednesday	9:00 AM to 6:00 PM	Thursday	9:00 AM to 6:00 PM	Friday	9:00 AM to 6:00 PM	Saturday	9:00 AM to 6:00 PM	(GMT+05:30) India Standard Time (Asia/Kolkata)
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Thursday	9:00 AM to 6:00 PM															
Friday	9:00 AM to 6:00 PM															
Saturday	9:00 AM to 6:00 PM															

Default Business Hours

✓

Active

✓

Created By

OrgFarm.EPIC

10/11/2025, 2:37 AM

Last Modified By

Yash kumar

10/19/2025, 6:48 AM

Edit

Holidays

Add/Remove

No records to display

4. Fiscal Year Settings

Explanation:

Set the fiscal year to match the healthcare organization's accounting cycle. Configured the system to use a Standard Fiscal Year (April–March) as per Indian business norms.

The screenshot displays the 'Setup Fiscal Year' interface for 'MedInvent Systems'. It includes a 'Fiscal Year Information' section with a warning about changing fiscal periods and a 'Change Fiscal Year Period' modal. The modal is set to 'Standard Fiscal Year' with 'April' as the start month and 'The starting month' as the basis.

Fiscal Year Information
Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example, if your fiscal year starts in April 2025 and ends in March 2026, your Fiscal Year setting can be either 2025 or 2026.

Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing this change.

Change Fiscal Year Period

Name: MedInvent Systems

Fiscal Year Start Month: April

Fiscal Year is Based On:
☐ The ending month
☒ The starting month

5. User Setup & Licenses

Explanation:

Created users for each role to simulate real-world access and collaboration between departments.

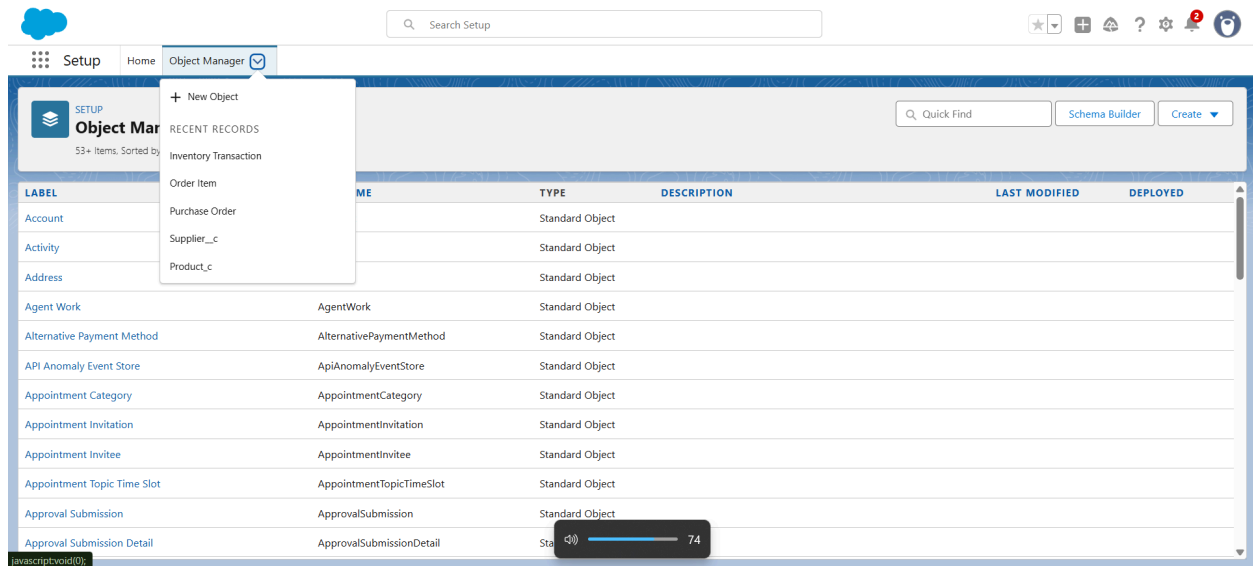
Each user was assigned a role and profile created later in Phase 5.

User Name	Role	Profile	License
Ankit Singh	Inventory Head	System Administrator	Salesforce
Priya Nair	Purchase Manager	Custom Profile	Salesforce

Salesfor
ce

- Enabling Lightning Experience
- Activating Developer Console for Apex
- Setting up Object Manager for Custom Objects

This environment served as a safe sandbox for experimentation, debugging, and testing automations before deployment.



8. Sandbox Usage

Explanation:

Although Developer Edition provides a single environment, sandbox principles were simulated by creating backup copies of metadata before implementing major automations.

This ensured data safety and rollback flexibility during trigger testing.

9. Deployment Basics

Explanation:

All configurations and customizations were built in the Developer Org first and then deployed using Change Sets (for backup/testing).

This ensured smooth migration of Apex triggers, validation rules, and flows without disrupting live data.

