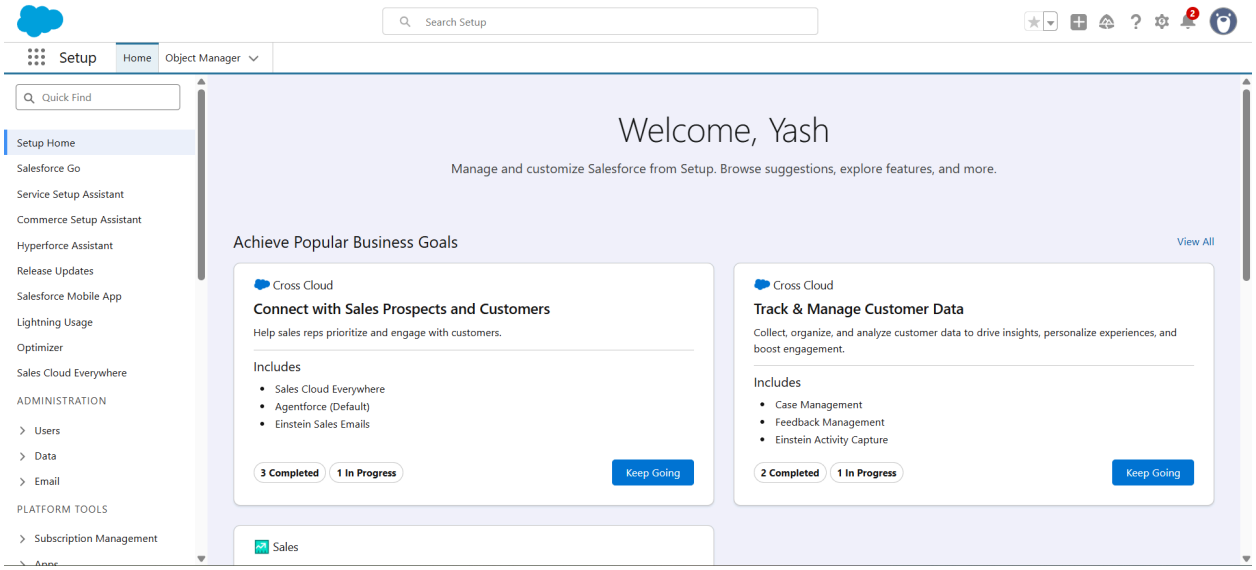
1. Salesforce Edition

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.



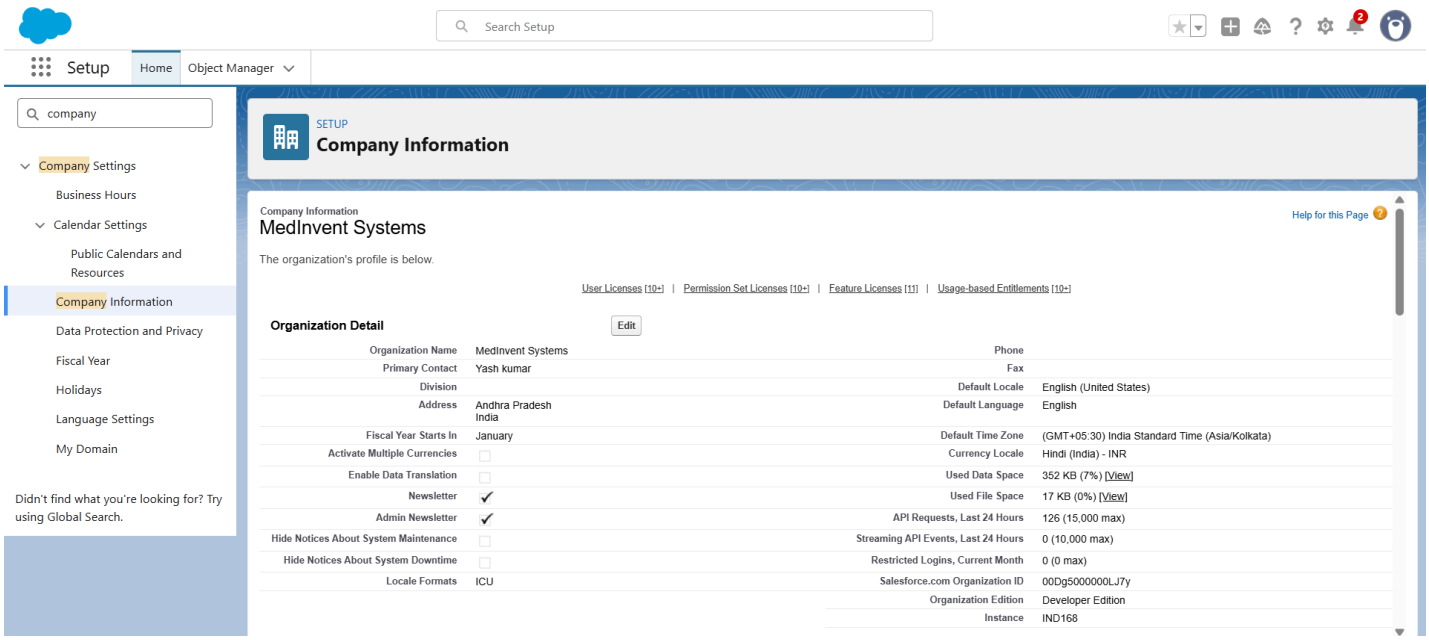
2. Company Profile Setup

Explanation:

The company profile defines organizational identity in Salesforce.

I configured it to represent the healthcare company implementing this system:

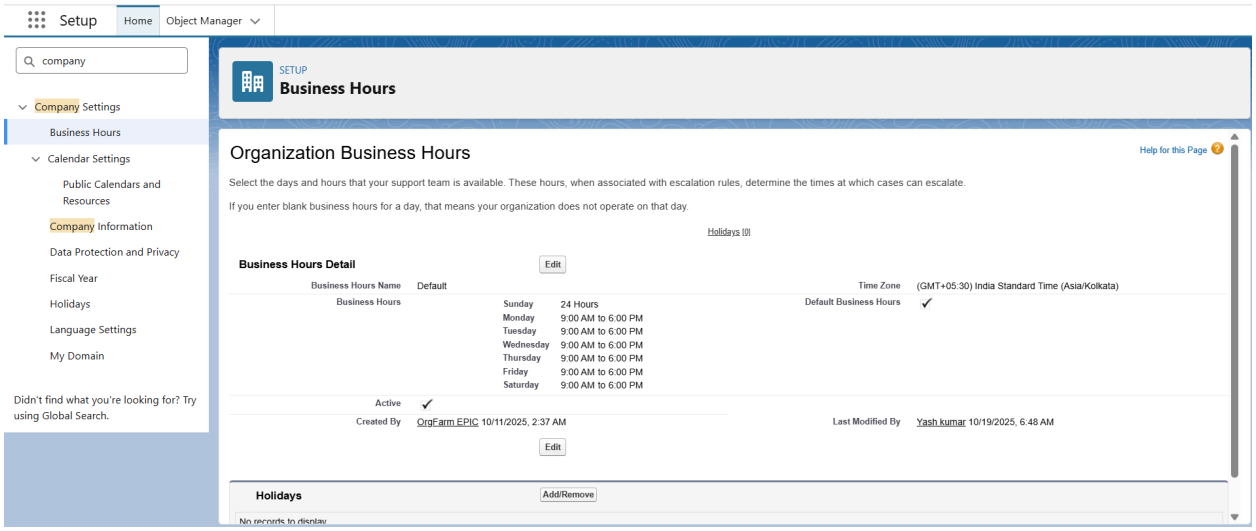
Field	Example Value
Company Name	MedInvent Systems
Primary Contact	Inventory Head
Locale	English (India)
Currency	INR – Indian Rupees
Time Zone	(GMT+5:30) India Standard Time



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

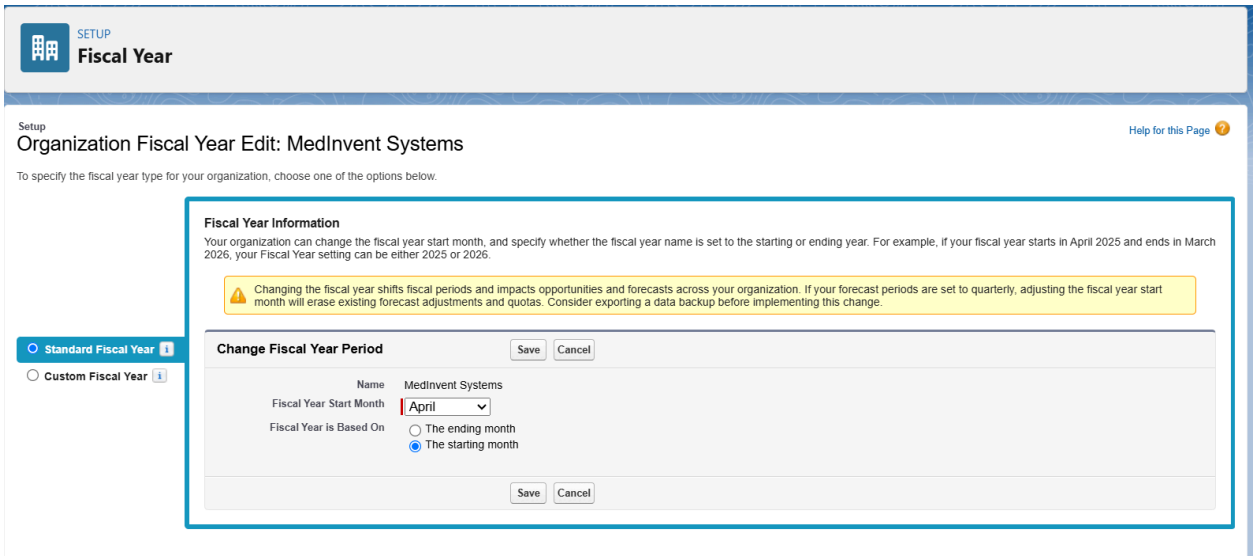


4. Fiscal Year Settings

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.



5. User Setup & Licenses

Explanation:

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

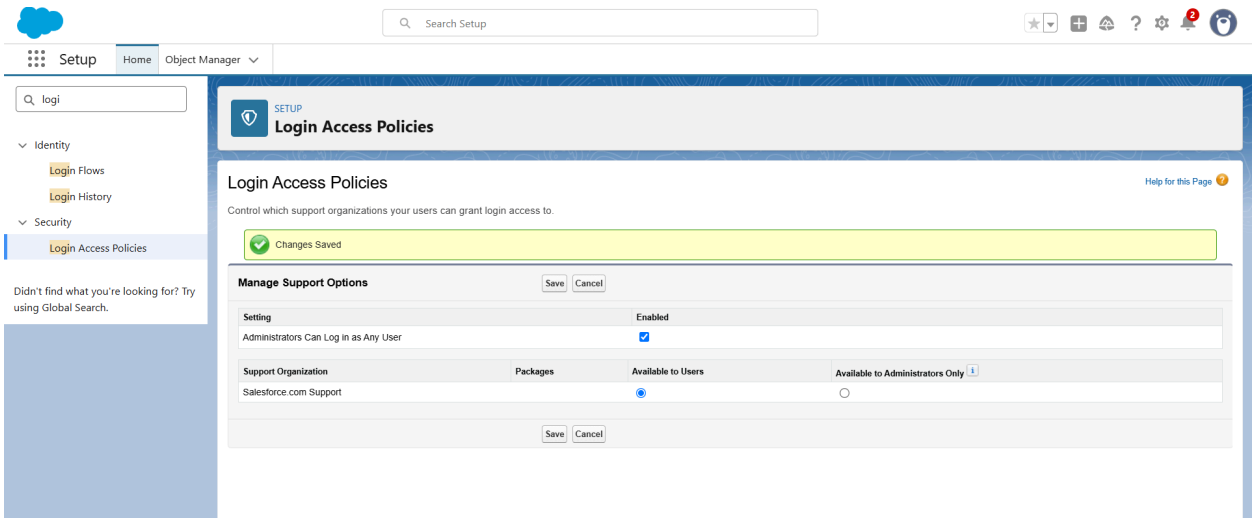
Each user was assigned a role and profile created later in Phase 5.

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

Ravi Sharma	Inventory Manager	Custom Profile	Salesforce

6. Login Access Policies

Explanation:
Enabled “Administrators Can Log in as Any User” for troubleshooting and testing user visibility restrictions (useful during role hierarchy testing).

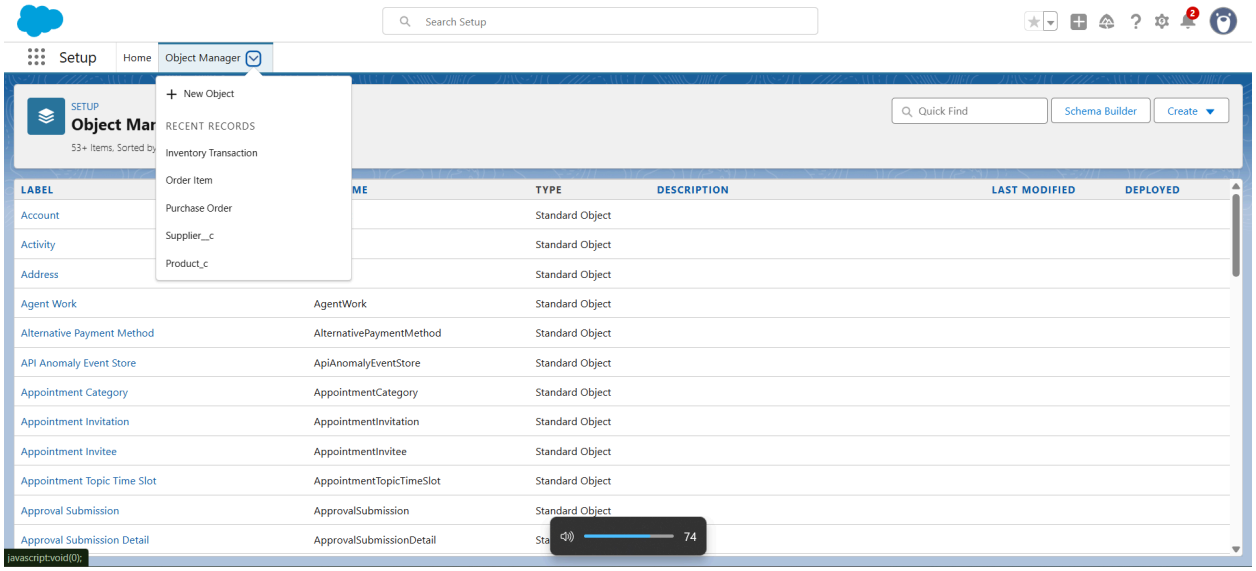


7. Developer Org Setup

Explanation:
Created and configured the Salesforce Developer Org exclusively for this project.
This included:

- 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.