

Project Title : “ Inventory & Order Tracking Dashboard “

PHASE 2 : Org Setup & Configuration

1. Salesforce Org Setup

- **Sign up** : Using fully-featured environment provided by Salesforce for building and testing applications. It provides access to developer tools, APIs, and the Lightning Platform.
- **VS Code & SFDX Setup** : Visual Studio Code and the Salesforce Extension Pack. This is a crucial step that will be used to manage project metadata and any custom code.

2. Company Profile Setup

- **Name** : Project/Org (Inventory & Order Tracking Dashboard).
- **Time Zone** : Default Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata).
- **Locale** : English (United States).
- **Default Language** : English.
- **Corporate Currency** : Indian Rupee.

The screenshot shows the 'Company Information' setup page in Salesforce. The page title is 'Inventory & Order Tracking Dashboard'. Below the title, it says 'The organization's profile is below.' There are links for 'User Licenses (10+)', 'Permission Set Licenses (10+)', 'Feature Licenses (11)', and 'Usage-based Entitlements (10+)'. The 'Organization Detail' section is active, showing a table of organization information. The table has columns 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', 'Locale Formats', 'Phone', 'Fax', 'Default Locale', 'Default Language', 'Default Time Zone', 'Corporate Currency', 'Used Data Space', 'Used File Space', 'API Requests, Last 24 Hours', 'Streaming API Events, Last 24 Hours', 'Restricted Logins, Current Month', 'Salesforce.com Organization ID', 'Organization Edition', and 'Instance'. The values are: Organization Name: Inventory & Order Tracking Dashboard, Primary Contact: OrgFarm EPIC, Division: India, Address: January, Fiscal Year Starts In: January, Activate Multiple Currencies: checked, Enable Data Translation: unchecked, Newsletter: checked, Admin Newsletter: checked, Hide Notices About System Maintenance: unchecked, Hide Notices About System Downtime: unchecked, Locale Formats: ICU, Phone: , Fax: , Default Locale: English (United States), Default Language: English, Default Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata), Corporate Currency: Indian Rupee, Used Data Space: 420 KB (8%) [View], Used File Space: 285 KB (1%) [View], API Requests, Last 24 Hours: 3 (15,000 max), Streaming API Events, Last 24 Hours: 0 (10,000 max), Restricted Logins, Current Month: 0 (0 max), Salesforce.com Organization ID: 00DgL000007dAwL, Organization Edition: Developer Edition, Instance: CAN98. At the bottom, it says 'Created By: OrgFarm EPIC, 7/21/2025, 4:42 AM' and 'Modified By: T.N.KUSHAL, 9/21/2025, 7:43 AM'.

Organization Detail	
Organization Name	Inventory & Order Tracking Dashboard
Primary Contact	OrgFarm EPIC
Division	India
Address	January
Fiscal Year Starts In	January
Activate Multiple Currencies	<input checked="" type="checkbox"/>
Enable Data Translation	<input type="checkbox"/>
Newsletter	<input checked="" type="checkbox"/>
Admin Newsletter	<input checked="" type="checkbox"/>
Hide Notices About System Maintenance	<input type="checkbox"/>
Hide Notices About System Downtime	<input type="checkbox"/>
Locale Formats	ICU
Phone	
Fax	
Default Locale	English (United States)
Default Language	English
Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Corporate Currency	Indian Rupee
Used Data Space	420 KB (8%) View
Used File Space	285 KB (1%) View
API Requests, Last 24 Hours	3 (15,000 max)
Streaming API Events, Last 24 Hours	0 (10,000 max)
Restricted Logins, Current Month	0 (0 max)
Salesforce.com Organization ID	00DgL000007dAwL
Organization Edition	Developer Edition
Instance	CAN98

Created By: OrgFarm EPIC, 7/21/2025, 4:42 AM
Modified By: T.N.KUSHAL, 9/21/2025, 7:43 AM

3. Business Hours Setup

- **Name**: Define (Standard Business Hours).
- **Time Zone**: Select Org or Regional timezone (GMT+05:30 Asia/Kolkata).
- **Working Hours**: set daily Schedule (9:00 AM-6:00 PM)

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.

Business Hours Edit

Save Cancel

Step 1. Business Hours Name

Business Hours Name

Default

Active

Use these business hours as the default

Required Information

Step 2. Time Zone

Time Zone

(GMT+05:30) India Standard Time (Asia/Kolkata)

Step 3. Business Hours

Sunday	09:00 AM	to	00:00 PM	<input type="checkbox"/> 24 hours
Monday	09:00 AM	to	00:00 PM	<input type="checkbox"/> 24 hours
Tuesday	09:00 AM	to	00:00 PM	<input type="checkbox"/> 24 hours
Wednesday	09:00 AM	to	00:00 PM	<input type="checkbox"/> 24 hours
Thursday	09:00 AM	to	00:00 PM	<input type="checkbox"/> 24 hours
Friday	09:00 AM	to	00:00 PM	<input type="checkbox"/> 24 hours
Saturday	09:00 AM	to	00:00 PM	<input type="checkbox"/> 24 hours


Save Cancel

4. Fiscal Year Setup

- Go to Setup -> Fiscal Year
- For simplicity, select Standard Fiscal Year (Jan – Dec).
- Advanced option: You can define a custom fiscal year if your business follows a different cycle (e.g., April – March).
- Fiscal years are important when analyzing orders, sales, and stock reports.

5. User Setup

- Profiles: Create custom profiles by cloning a standard one, like Standard User. Your project needs a “Warehouse_Profile” and a “Sales_Profile” to define the baseline access for each user group. Profiles control what a user can see and do in Salesforce. For this project, assign yourself the System Administrator Profile.
- Roles: Establish a role hierarchy under Setup > Roles. Create roles such as “Manager”, “Sales Rep”, and “Warehouse Team” to control data visibility.
- Permission Sets: Create a permission set called “Inventory_Access”. This will be used in a later phase to grant specific permissions to your custom objects without changing a user's profile.
- Users: Create sample users and assign them their corresponding profiles and roles. This allows you to test your security model.



SETUP

Profiles

Profile

warehouse_Profile

Help for this Page

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.

[Login IP Ranges \[0\]](#) |
 [Enabled Apex Class Access \[0\]](#) |
 [Enabled Visualforce Page Access \[0\]](#) |
 [Enabled External Data Source Access \[0\]](#) |
 [Enabled Named Credential Access \[0\]](#) |
 [Enabled External Credential Principal Access \[0\]](#) |
 [Enabled Custom Metadata Type Access \[0\]](#) |
 [Enabled Custom Setting Definitions Access \[0\]](#) |
 [Enabled Flow Access \[0\]](#) |
 [Enabled Service Presence Status Access \[0\]](#) |
 [Enabled Custom Permissions \[0\]](#)

Profile Detail

[Edit](#)
[Clone](#)
[Delete](#)
[View Users](#)

Name	warehouse_Profile		
User License	Salesforce	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	T.N.KUSHAL, 9/21/2025, 9:36 AM	Modified By	T.N.KUSHAL, 9/21/2025, 9:38 AM

Page Layouts

Standard Object Layouts	
Global	Global Layout [View Assignment]
Location Group	Location Group Layout [View Assignment]

6. Outcome of Phase 2

At the end of this phase:

- The Developer Org is ready.
- Company profile and fiscal year are set.
- The Admin user has System Administrator profile.

The environment is fully prepared to start Phase 3 (Data Modeling & Relationships) where we will create Product, Order, and Order Item objects.

