Project Title: "Inventory & Order Tracking Dashboard"

PHASE 2: Org Setup & Configurtion

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.

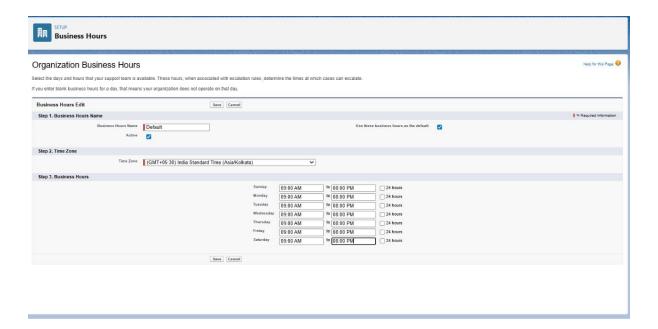
2. Company Profile Setup

- 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.



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)

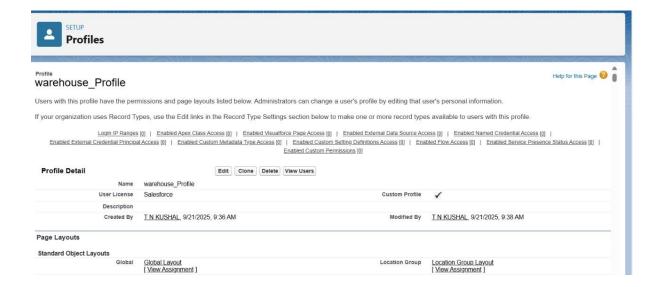


4. Fiscal Year Setup

- 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.



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.