MACK Stores Salesforce CRM Project

Phase 2: Org Setup & Configuration

⚙️ Salesforce Editions

A **Salesforce Developer Edition org** was established for building and testing MACK Stores CRM. This full-featured environment supports customization, development, and integration at no cost.

🏢 Company Profile Setup
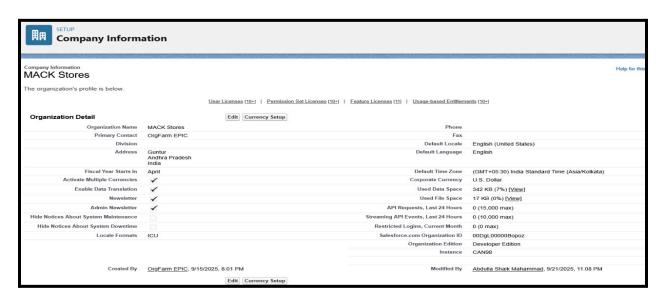
- **Path:** Setup → Company Information → Edit

- **Name:** MACK Stores CRM – Dev

- **Default Locale:** English (India)

- **Default Language:** English

- **Default Time Zone:** GMT+05:30 Asia/Kolkata

- **Corporate Currency:** INR (₹)

⏰ Business Hours & Holidays

- **Name:** MACK Stores Business Hours

- **Time Zone:** GMT+05:30 Asia/Kolkata

- **Working Hours:** Monday to Sunday, (24/7).

- **Holidays:** Configurable (regional public holidays).

📅 Fiscal Year Settings

- **Type:** Standard Fiscal Year

- **Start Month:** April (April–March cycle to align with Indian financial year).

👥 User Setup (Profiles, Roles, Permission Sets)

Roles (Hierarchy)

A simple **role hierarchy** was defined to mirror corporate structure:

- **CEO** (Top-Level Role)

  - **CFO** (reports to CEO)

  - **Retail Manager** (reports to CEO)

  - **Marketing** (reports to Retail Manager)

  - **Chatter User** (reports to Retail Manager; for collaboration-only access)

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

Show in tree view ▼

Collapse All Expand All

- MACK Stores
  - Add Role
  - CEO   Edit | Del | Assign
    - Add Role
    - CFO   Edit | Del | Assign
      - Add Role
    - COO   Edit | Del | Assign
      - Add Role
    - Retail Manager   Edit | Del | Assign
      - Add Role
    - SVP   Edit | Del | Assign
      - Add Role
    - SVP, Customer Service & Support   Edit | Del | Assign
      - Add Role
    - SVP, Human Resources   Edit | Del | Assign
      - Add Role
    - SVP, Sales & Marketing   Edit | Del | Assign
      - Add Role

Users

- **Abdulla** → Role: CEO → Profile: **System Administrator**

- **Vihari** → Role: CFO → Profile: **System Administrator**

- **Sharif** → Role: Marketing → Profile: **Marketing User**

- **Retail Manager** → Role: Retail Manager → Profile: **Sales & Marketing** (with **AnyPoint Integration User** permission set for integrations)

- **Chatter User** → Role: Chatter User → Profile: **Chatter Free User**

User
Abdulla Shaik Mahammad

User Profile Help for this Page ?

Permission Set Assignments [5] | Permission Set Assignments: Activation Required [0] | Permission Set Group Assignments [0] | Permission Set License Assignments [5+] | Personal Groups [0] | Public Group Membership [0] | Queue Membership [0] |
Team [0] | Managers in the Role Hierarchy [0] | OAuth Apps [0] | Third-Party Account Links [0] | Built-in Authenticators [0] | Installed Mobile Apps [0] | Authentication Settings for External Systems [0] | Login History [7+] |
User Provisioning Accounts [0]

User Detail

[Edit] [Sharing] [Change Password] [View Summary]

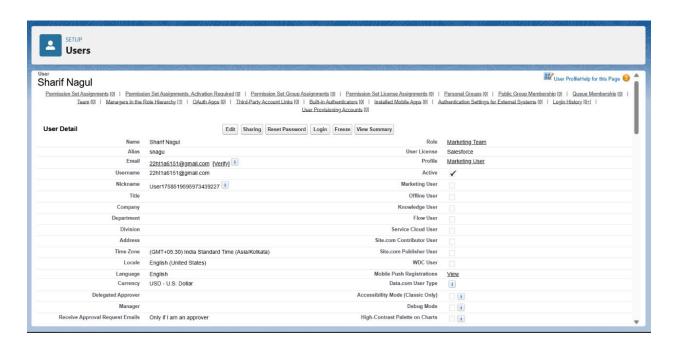|			
Name	Abdulla Shaik Mahammad	Role	Director
Alias	Abu	User License	Salesforce
Email	22ht1a6150@gmail.com [Verified]	Profile	System Administrator
Username	22ht1a6150357@agentforce.com	Active	✓
Nickname	User17582599254814837259 ⓘ	Marketing User	☐
Title		Offline User	☐
Company	MACK Stores	Knowledge User	✓
Department		Flow User	☐
Division		Service Cloud User	☐
Address		Site.com Contributor User	☐
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Site.com Publisher User	☐
Locale	English (United States)	WDC User	☐
Language	English	Mobile Push Registrations	View
Currency	USD - U.S. Dollar	Data.com User Type	ⓘ
Delegated Approver		Accessibility Mode (Classic Only)	☐ ⓘ
Manager		Debug Mode	☐ ⓘ
Receive Approval Request Emails	Only if I am an approver	High-Contrast Palette on Charts	☐ ⓘ

User
Vihari Nerella

User Profile Help for this Page ?

Permission Set Assignments [0] | Permission Set Assignments: Activation Required [0] | Permission Set Group Assignments [0] | Permission Set License Assignments [0] | Personal Groups [0] | Public Group Membership [0] | Queue Membership [0] |
Team [0] | Managers in the Role Hierarchy [0] | OAuth Apps [0] | Third-Party Account Links [0] | Built-in Authenticators [0] | Installed Mobile Apps [0] | Authentication Settings for External Systems [0] | Login History [0+] |
User Provisioning Accounts [0]

User Detail

[Edit] [Sharing] [Reset Password] [Login] [Freeze] [View Summary]

Name	Vihari Nerella	Role	CFO
Alias	vnere	User License	Salesforce
Email	22ht1a6139@gmail.com [Verify] ⓘ	Profile	System Administrator
Username	22ht1a6139@gmail.com	Active	✓
Nickname	User17585187845656497138 ⓘ	Marketing User	☐
Title		Offline User	☐
Company		Knowledge User	☐
Department		Flow User	☐
Division		Service Cloud User	☐
Address		Site.com Contributor User	☐
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	☐
Locale	English (United States)	WDC User	☐
Language	English	Mobile Push Registrations	View
Currency	USD - U.S. Dollar	Data.com User Type	ⓘ
Delegated Approver		Accessibility Mode (Classic Only)	☐ ⓘ
Manager		Debug Mode	☐ ⓘ
Receive Approval Request Emails	Only if I am an approver	High-Contrast Palette on Charts	☐ ⓘ

User
Sharif Nagul

User Profile Help for this Page

User Detail

Edit | Sharing | Reset Password | Login | Freeze | View Summary

Name	Sharif Nagul	Role	Marketing Team
Alias	snagu	User License	Salesforce
Email	22ht1a6151@gmail.com [Verify]	Profile	Marketing User
Username	22ht1a6151@gmail.com	Active	✓
Nickname	User1758519595973439227	Marketing User	☐
Title		Offline User	☐
Company		Knowledge User	☐
Department		Flow User	☐
Division		Service Cloud User	☐
Address		Site.com Contributor User	☐
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	☐
Locale	English (United States)	WDC User	☐
Language	English	Mobile Push Registrations	View
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Delegated Approver		Accessibility Mode (Classic Only)	☐ ℹ
Manager		Debug Mode	☐ ℹ
Receive Approval Request Emails	Only if I am an approver	High-Contrast Palette on Charts	☐ ℹ

User
Retail Manager

User Profile Help for this Page

User Detail

Edit | Sharing | Reset Password | Login | Freeze | View Summary

Name	Retail Manager	Role	SVP, Sales & Marketing
Alias	retailMan	User License	Identity
Email	retailmanager@gmail.com [Verify]	Profile	Anypoint Integration
Username	retailmanager@gail.com	Active	✓
Nickname	User17585197895154856694	Marketing User	☐
Title		Offline User	☐
Company		Knowledge User	☐
Department		Flow User	☐
Division		Service Cloud User	☐
Address		Site.com Contributor User	☐
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	☐
Locale	English (United States)	WDC User	☐
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Permission Sets

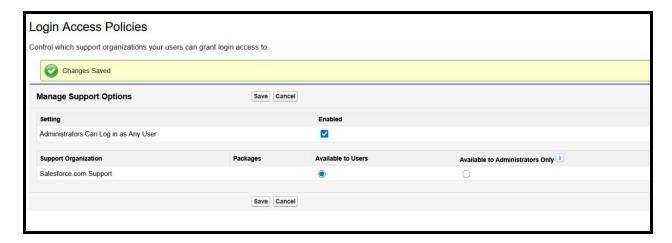Additional modular permissions were created:

- **Inventory Management PS** → extended reporting on stock and suppliers.

- **Marketing Campaign PS** → manage promotions, customer segmentation.

- **Integration PS** → Anypoint & external system integration (assigned to Retail Manager).

🔐 OWD & Sharing Rules

- **OWD Strategy:** Customer & Loyalty data = **Private**, Inventory & Sales data = **Public Read/Write**.

- **Sharing Rules:** Criteria-based (e.g., by region = `Store_Region__c`, by category = `Product_Category__c`).

🔑 Login Access Policies

- Setting: **Administrators Can Log in as Any User** → Enabled.

💻 Dev Org Setup & Tools

- **Source Org:** Developer Edition Org.

- **Version Control:** GitHub repository.

- **IDE:** VS Code + Salesforce Extension Pack.

🚀 Sandbox Usage & Deployment Basics

- **Sandboxes:**

  - Developer Sandbox → feature dev.

  - Partial Copy Sandbox → UAT.

  - Full Sandbox → performance & training.

- **Deployments:**

  - **SFDX CLI** (primary).

  - **Change Sets** (small updates).