

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 (₹)

SETUP

Company Information

Company Information

MACK Stores

The organization's profile is below.

User Licenses (10+)

Permission Set Licenses (10+)

Feature Licenses (11)

Usage-based Entitlements (10+)

Organization Detail

Edit

Currency Setup

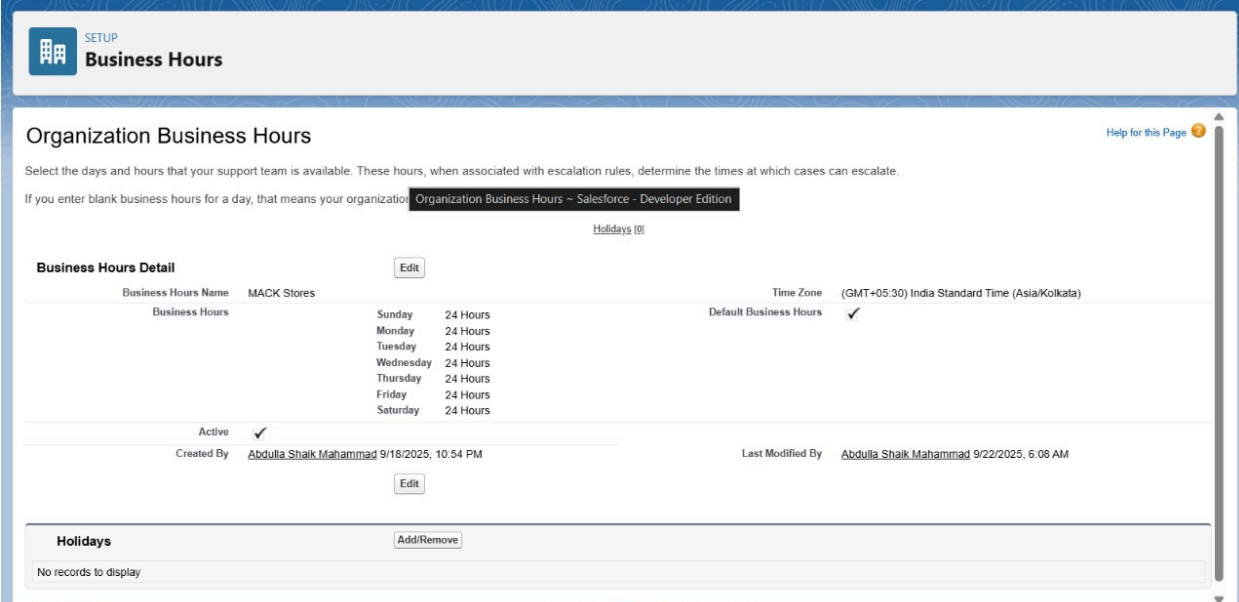
Organization Name	MACK Stores	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (United States)
Address	Guntur Andhra Pradesh India	Default Language	English
Fiscal Year Starts In	April	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input checked="" type="checkbox"/>	Corporate Currency	U.S. Dollar
Enable Data Translation	<input checked="" type="checkbox"/>	Used Data Space	342 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	0 (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	00DgL00000Bopoz
		Organization Edition	Developer Edition
		Instance	CAN98
Created By	OrgFarm EPIC, 9/15/2025, 8:01 PM	Modified By	Abdulla Shaik Mahammad, 9/21/2025, 11:08 PM

Edit

Currency Setup

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).



SETUP
Business Hours

Organization Business Hours

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 is not available on that day. [Organization Business Hours - Salesforce - Developer Edition](#)

[Holidays \(0\)](#)

Business Hours Detail

[Edit](#)

Business Hours Name	MACK Stores	Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Business Hours		Default Business Hours	<input checked="" type="checkbox"/>
	Sunday	24 Hours	
	Monday	24 Hours	
	Tuesday	24 Hours	
	Wednesday	24 Hours	
	Thursday	24 Hours	
	Friday	24 Hours	
	Saturday	24 Hours	

Active ☒

Created By [Abdulla Shaik Mahammad](#) 9/18/2025, 10:54 PM

Last Modified By [Abdulla Shaik Mahammad](#) 9/22/2025, 6:08 AM

[Edit](#)

Holidays

[Add/Remove](#)

No records to display

[Back To Top](#)

Fiscal Year Settings

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

SETUP
Fiscal Year

Setup
Organization Fiscal Year Edit: MACK Stores [Help for this Page](#)

To specify the fiscal year type for your organization, choose one of the options below.

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.

☒ **Standard Fiscal Year**

☐ **Custom Fiscal Year**

Change Fiscal Year Period Save Cancel

Name	MACK Stores
Fiscal Year Start Month	April
Fiscal Year is Based On	<input type="radio"/> The ending month <input checked="" type="radio"/> The starting month

Save Cancel

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)

SETUP

Users

User

Abdulla Shaik Mahammad

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	2Zht1a6150@gmail.com [Verified]	Profile	System Administrator
Username	2Zht1a6150357@agentforce.com	Active	<input checked="" type="checkbox"/>
Nickname	User17582599254814837259 ⓘ	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company	MACK Stores	Knowledge User	<input checked="" type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Currency	USD - U.S. Dollar	Data.com User Type	i
Delegated Approver		Accessibility Mode (Classic Only)	<input type="checkbox"/> ⓘ
Manager		Debug Mode	<input type="checkbox"/> ⓘ
Receive Approval Request Emails	Only if I am an approver	High-Contrast Palette on Charts	<input type="checkbox"/> ⓘ

SETUP

Users

User

Vihari Nerella

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	CFQ
Alias	vnere	User License	Salesforce
Email	22htia6139@gmail.com [Verify] ⓘ	Profile	System Administrator
Username	22htia6139@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User17585187845656497138 ⓘ	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Currency	USD - U.S. Dollar	Data.com User Type	i
Delegated Approver		Accessibility Mode (Classic Only)	<input type="checkbox"/> ⓘ
Manager		Debug Mode	<input type="checkbox"/> ⓘ
Receive Approval Request Emails	Only if I am an approver	High-Contrast Palette on Charts	<input type="checkbox"/> ⓘ

SETUP

Users

User

Sharif Nagul

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 (1) | 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	Sharif Nagul	Role	Marketing Team
Alias	snagu	User License	Salesforce
Email	22ht1a6151@gmail.com <div>Verify</div>	Profile	Marketing User
Username	22ht1a6151@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User1758519595973439227 <div>i</div>	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<div>View</div>
Currency	USD - U.S. Dollar	Data.com User Type	<div>i</div>
Delegated Approver		Accessibility Mode (Classic Only)	<input type="checkbox"/> <div>i</div>
Manager		Debug Mode	<input type="checkbox"/> <div>i</div>
Receive Approval Request Emails	Only if I am an approver	High-Contrast Palette on Charts	<input type="checkbox"/> <div>i</div>

SETUP

Users

User

Retail Manager

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	Retail Manager	Role	SVP_Sales & Marketing
Alias	retailMan	User License	Identity
Email	retailmanager@gmail.com <div>Verify</div>	Profile	Anypoint Integration
Username	retailmanager@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User17585197895154856694 <div>i</div>	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<div>View</div>
Currency	USD - U.S. Dollar	Data.com User Type	<div>i</div>
Delegated Approver		Accessibility Mode (Classic Only)	<input type="checkbox"/> <div>i</div>
Manager		Debug Mode	<input type="checkbox"/> <div>i</div>
Receive Approval Request Emails	Only if I am an approver	High-Contrast Palette on Charts	<input type="checkbox"/> <div>i</div>


Users

User

Chatter Expert

[User Profile Help for this Page](#)

[Permission Set Assignments \(9\)](#) |
 [Permission Set Assignments: Activation Required \(9\)](#) |
 [Permission Set Group Assignments \(9\)](#) |
 [Permission Set License Assignments \(9\)](#) |
 [Personal Groups \(9\)](#) |
 [Public Group Membership \(9\)](#) |
 [Queue Membership \(9\)](#) |
 [Team \(9\)](#) |
 [Managers in the Role Hierarchy \(9\)](#) |
 [OAuth Apps \(9\)](#) |
 [Third-Party Account Links \(9\)](#) |
 [Built-In Authenticators \(9\)](#) |
 [Installed Mobile Apps \(9\)](#) |
 [Authentication Settings for External Systems \(9\)](#) |
 [Login History \(9\)](#) |
 [User Provisioning Accounts \(9\)](#)

User Detail

[Edit](#)
[Sharing](#)
[Reset Password](#)
[Freeze](#)
[View Summary](#)

Name	Chatter Expert	User License	Chatter Free
Alias	Chatter	Profile	Chatter Free User
Email	noreply@example.com [Verify]	Active	<input checked="" type="checkbox"/>
Username	chatty.00dgi0000bopozuab.b0mqncrkep@chatter.salesforce.com	Marketing User	<input type="checkbox"/>
Nickname	Chatter Expert [i]	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company	EPIC OrgFarm	Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
Address	United States	Site.com Publisher User	<input type="checkbox"/>
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	WDC User	<input type="checkbox"/>
Locale	English (United States)	Mobile Push Registrations	View
Language	English	Data.com User Type	[i]
Currency	USD - U.S. Dollar	Accessibility Mode (Classic Only)	<input type="checkbox"/> [i]
Federation ID		Debug Mode	<input type="checkbox"/> [i]
App Registration: One-Time Password Authenticator	[i]	High-Contrast Palette on Charts	<input type="checkbox"/> [i]
App Registration: Salesforce	[i]	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> [i]

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.

Login Access Policies

Control which support organizations your users can grant login access to.

Changes Saved

Manage Support Options

SaveCancel

Setting	Enabled
Administrators Can Log in as Any User	<input checked="" type="checkbox"/>

Support Organization	Packages	Available to Users	Available to Administrators Only ¹
Salesforce.com Support		<input checked="" type="radio"/>	<input type="radio"/>

SaveCancel

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).
-