

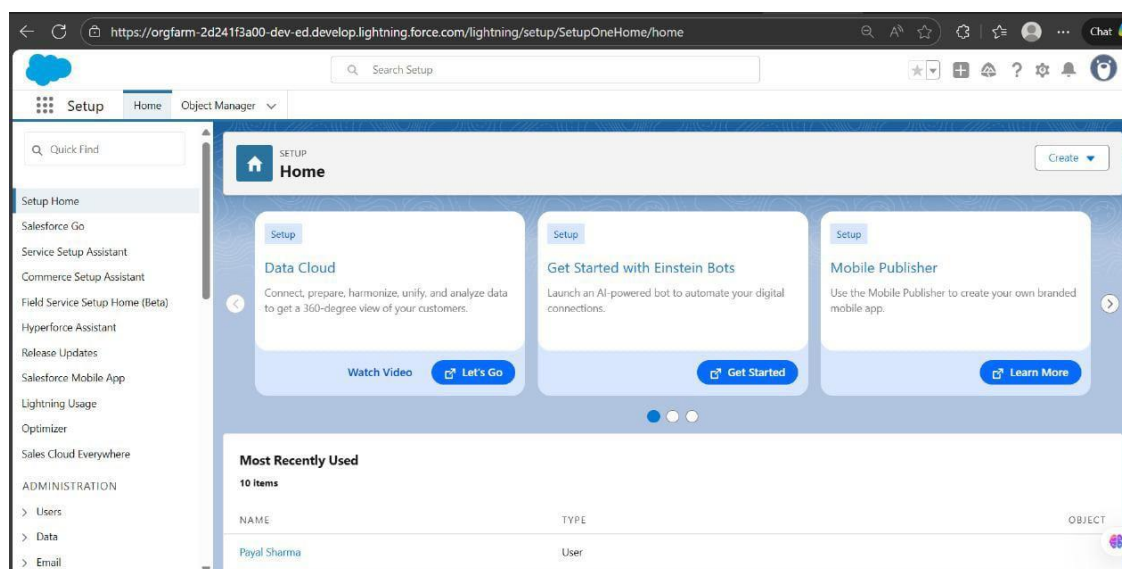
From Clicks to Conversions: Salesforce Solutions for E-Commerce

Phase 2: Org Setup & Configuration

Objective:

To establish a secure, scalable, and well-structured Salesforce environment tailored for e-commerce operations by configuring organizational settings, user roles, profiles, permissions, and access controls. This phase ensures proper governance, smooth collaboration across departments, and a reliable foundation for integrating e-commerce processes, enabling efficient testing, deployment, and future scalability.

1. Salesforce Editions

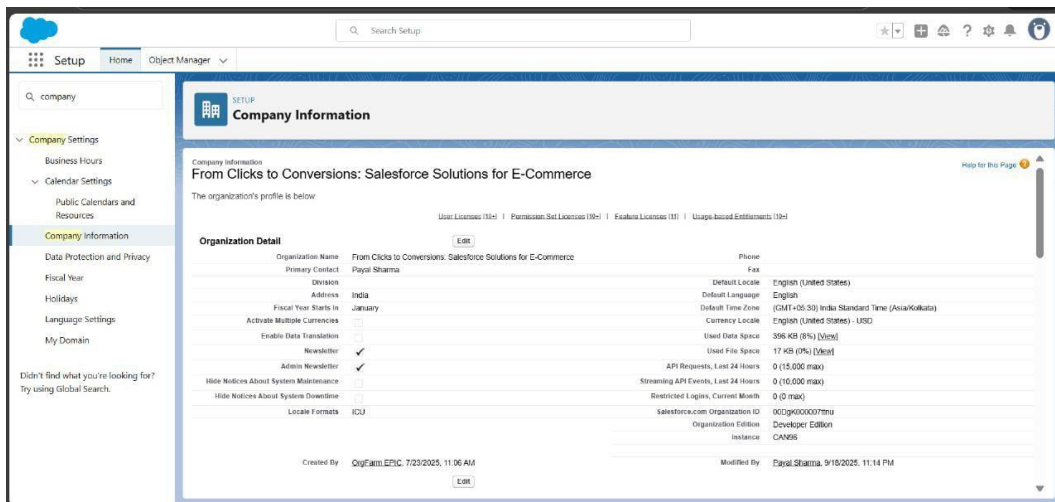


A **free Salesforce Developer Edition** was used as the primary build environment, providing access to essential tools for development and testing.

Verified that the Developer Edition is suitable for the **E-commerce project**, as it supports Sales Cloud, Service Cloud, and Marketing integrations.

This edition provides the **full customization capabilities** required for building and testing e-commerce processes before scaling.

2. Company Profile Setup

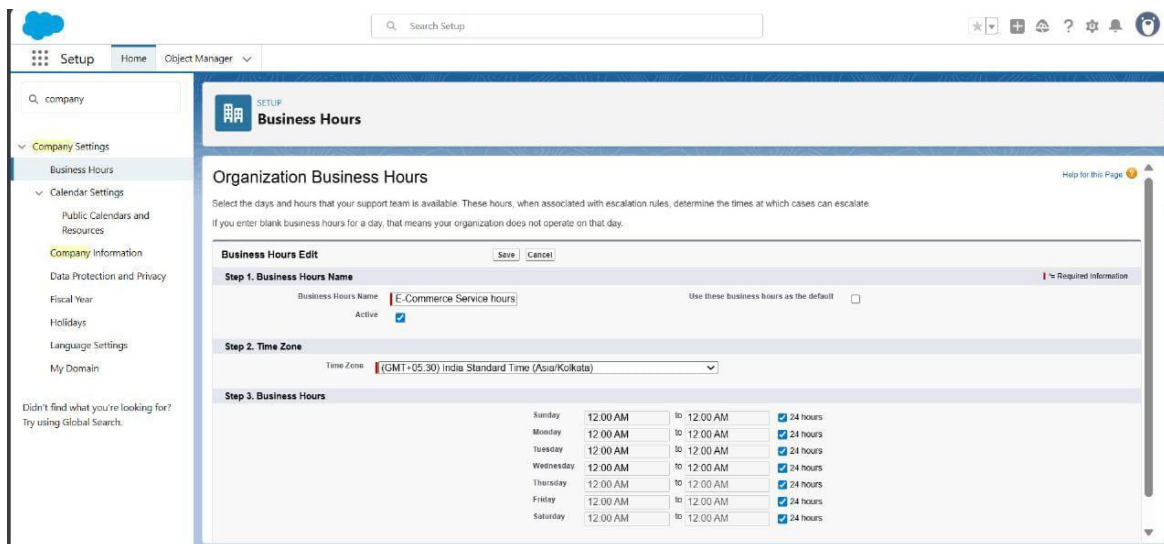


The **organization's profile** was configured with essential details to establish a professional and accurate foundation for the E-commerce project. This included reviewing and updating company-specific settings to align with business operations.

- **Verified and updated:**

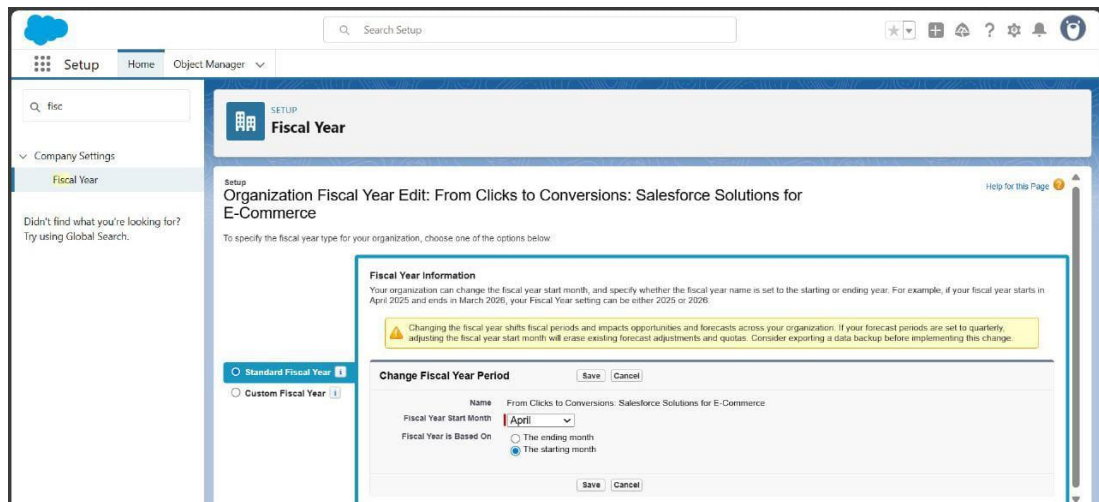
- Company name and branding
- Default locale, currency, time zone, and language
- Primary contact information (address, phone, email)

3. Business Hours & Holidays



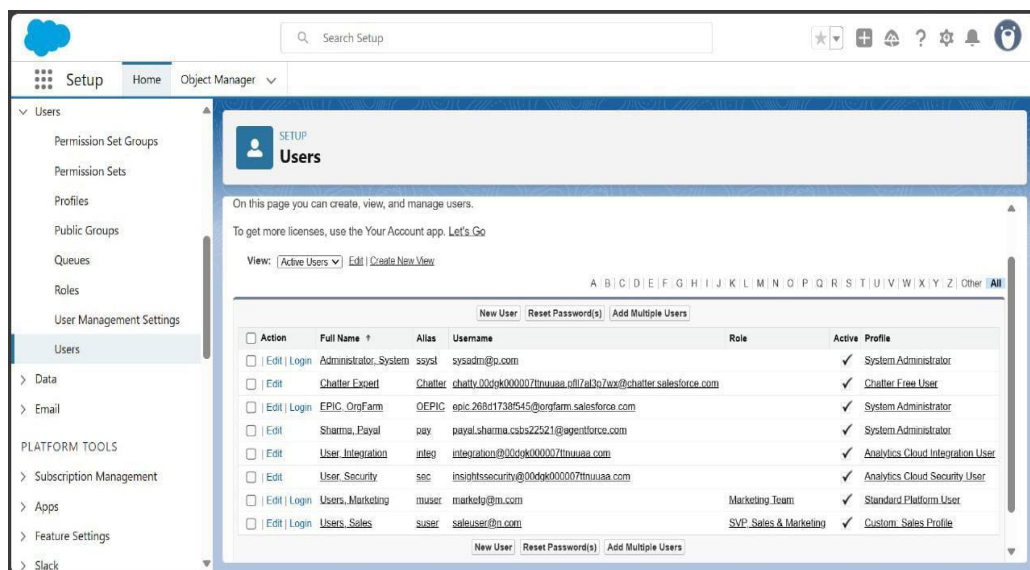
Business hours were set to **24/7** to ensure continuous e-commerce availability and customer support. Key holidays (e.g., **Christmas Day and Diwali**) were defined to support SLA tracking, case escalations, and automated scheduling.

4. Fiscal Year Settings



- Kept the standard fiscal year (April–March) as per project requirements.
- No customization was required at this stage.

5. User Setup & Licenses



System Administrator → Full org access for configuration and deployments.

Marketing Users → Manage campaigns, leads, and engagement.

Sales Users → Handle accounts, opportunities, and sales operations.

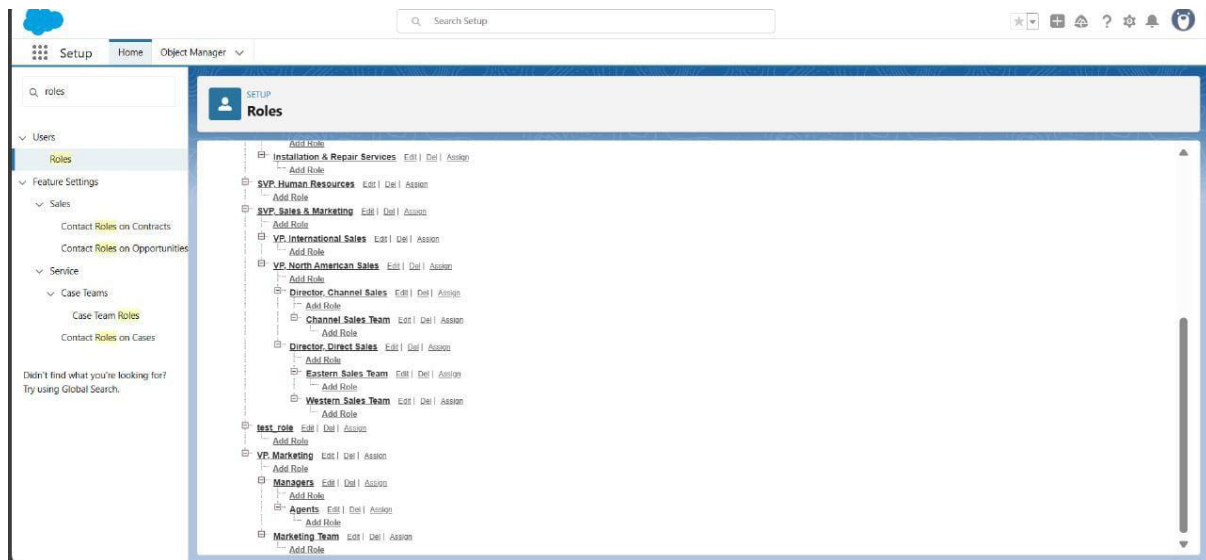
Licenses → Assigned only to essential roles to optimize limited availability.

6. Profiles

- **System Administrator** – full access.

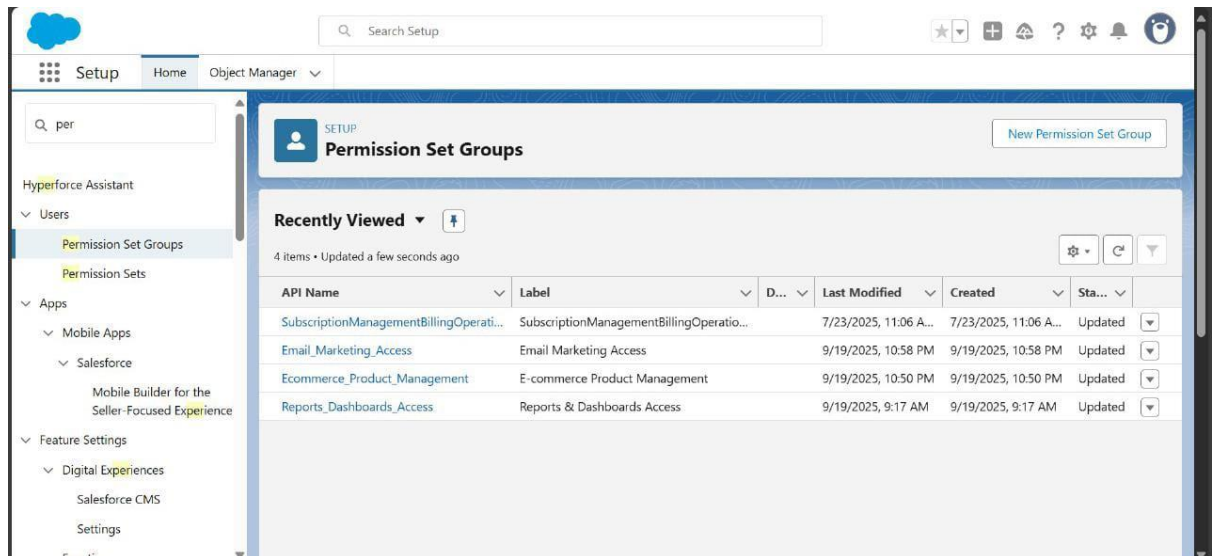
- **Marketing Profile** – campaigns, leads, analytics.
- **Support Profile** – cases, knowledge base, chatbots.
- **Sales Profile** – opportunities, B2B accounts.

7. Roles



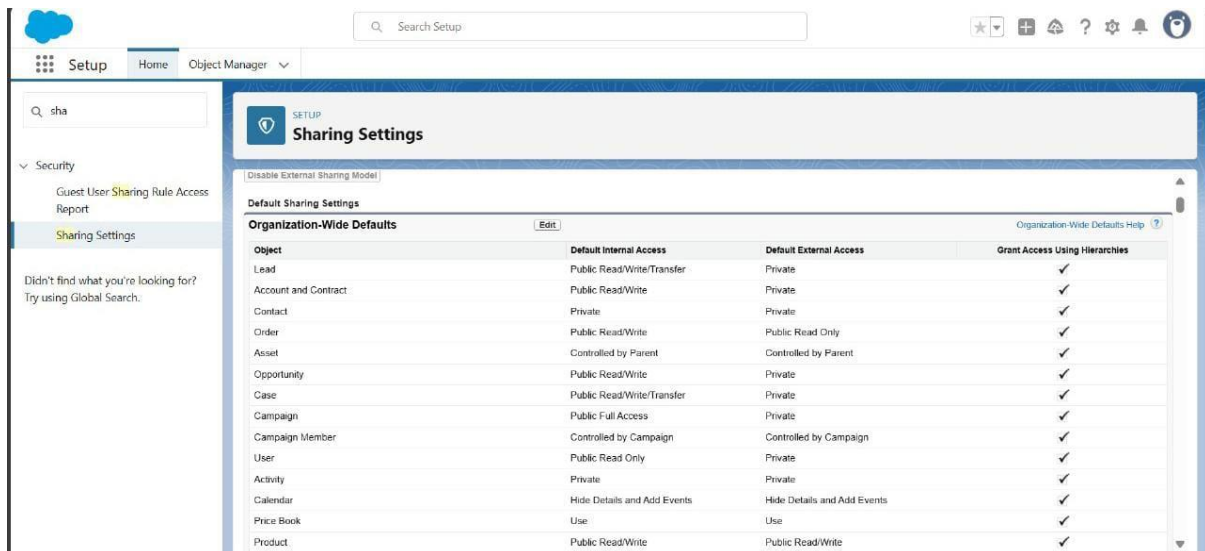
- Role hierarchy aligned with e-commerce structure:
 - **CEO → VP Sales/Marketing → Managers → Agents.**
- Ensures **data visibility** (e.g., regional sales managers only see their region).

8. Permission Sets



- **Email Marketing Access** → Granted to Marketing Users for advanced campaign management and email template customization.
- **Reports & Dashboards Access** → Assigned to Sales Users for creating custom reports, dashboards, and tracking sales KPIs.
- **E-commerce Product Management** → Provided to selected Sales Users for managing product catalog, price books, and inventory.

9. Organization-Wide Defaults (OWD)



- **Accounts & Contacts** → *Accounts* are **Public Read/Write** (internally) to enable collaboration within the sales team, while *Contacts* remain **Private** to secure sensitive customer details.
- **Cases** → Configured as **Public Read/Write/Transfer**, ensuring managers and support teams can track, update, and resolve issues collaboratively while still

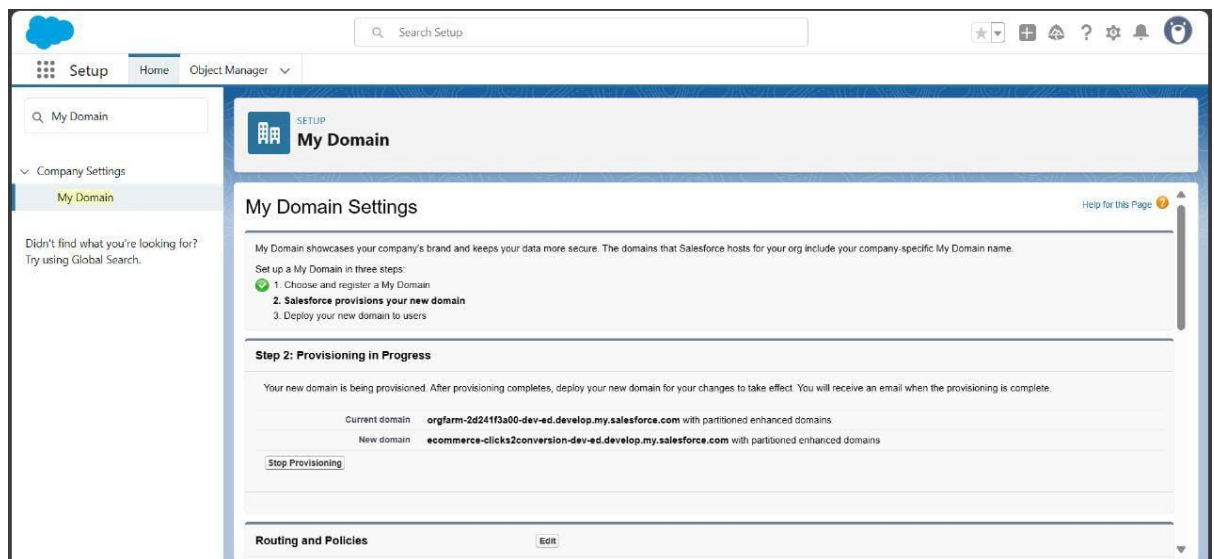
respecting hierarchy.

- **Orders & Products** → *Orders* are **Public Read/Write internally** and **Public Read**
- **Only externally**, while *Products* are **Public Read/Write**, allowing Sales and Marketing teams full visibility for smooth order management and product updates.

10. Sharing Rules

- **Lead Sharing** → Marketing users can share qualified leads with Sales users to enable smooth handoff and faster conversion.
- **Customer Support History Sharing** → Support-related case information is shared with Sales users to provide a complete 360° view of the customer.
- **Cross-Team Collaboration** → Enabled selective sharing between Marketing and Sales to avoid duplication and ensure transparency.

11. My Domain

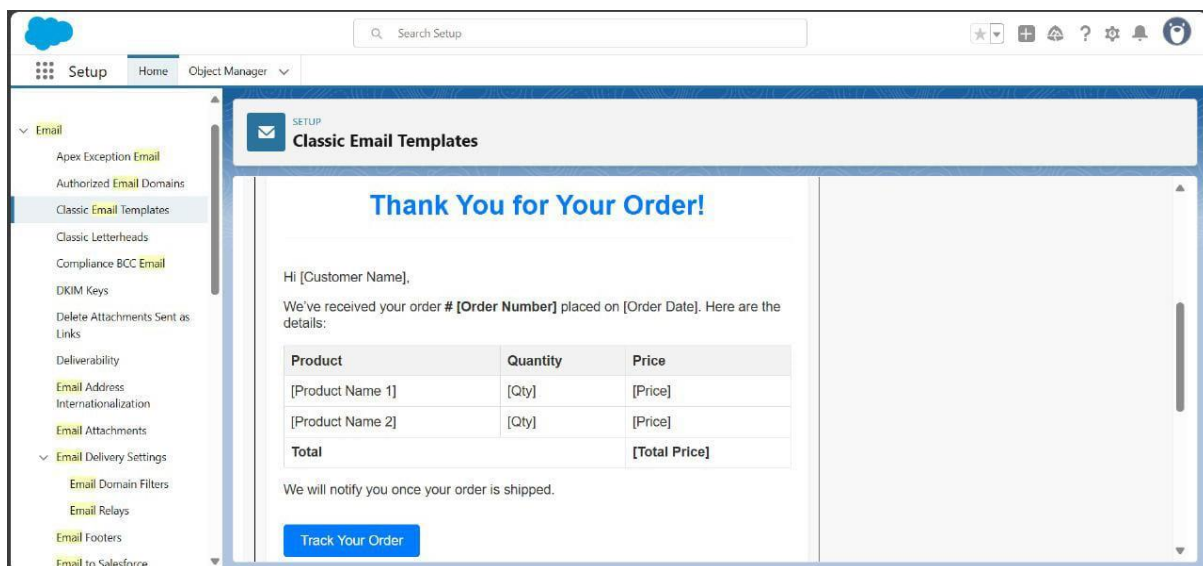
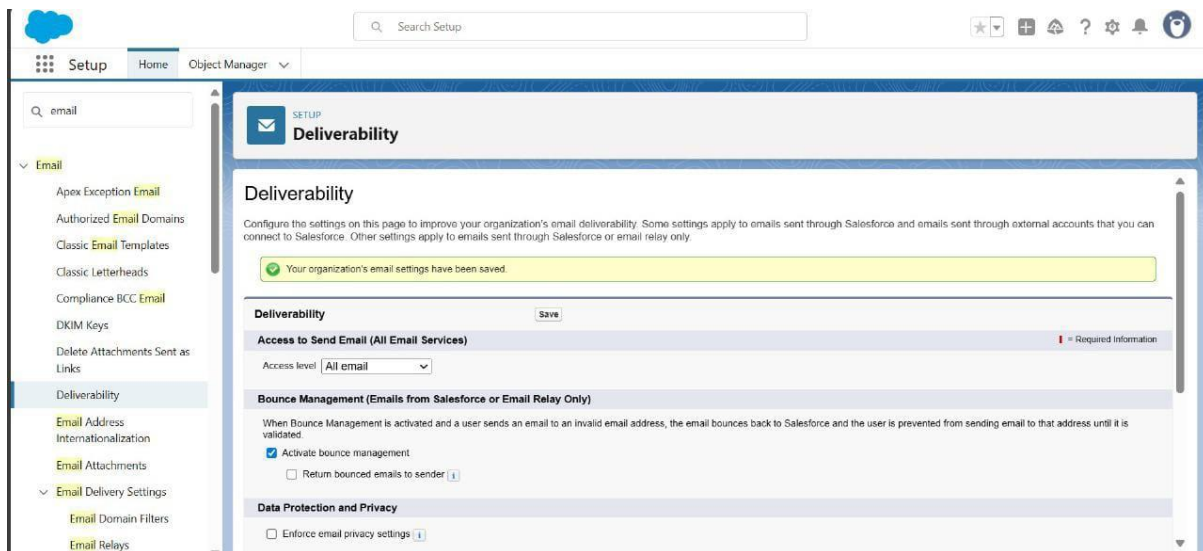


- Custom Salesforce domain: **ecommerce-clicks2conversion**.
- Enhances **branding, security, and user access**.
- Supports **Lightning components, custom apps, and SSO**

12. Login Access Policies

This was not implemented. Login and password policies were reviewed, but left at their defaults, as they are not necessary for a single-user development environment.

13. Email Configuration



- Deliverability set to “All Email” and an organization-wide email address verified.
- Templates created for order confirmations, shipping updates, and support.
- Marketing and Sales users assigned proper email permissions.
- Ensures all customer communications are professional, reliable, and branded.

14. Experience Cloud

- Experience Cloud is used to create portals for customers, partners, or vendors, enabling self-service support, order tracking, and product information access.
- Configured in Phase 2 to provide a secure and branded interface for e-commerce stakeholders, ensuring seamless interaction with the platform.

15. Sandbox Usage

- Sandboxes are set up in Phase 2 to safely develop, test, and validate e-commerce workflows, automations, and configurations without affecting live data.

16. Dev Org Setup & Deployment Basics

- All development work for the e-commerce project will be conducted in a Salesforce Developer Org environment to ensure a safe and isolated workspace for customization and testing.
- Deployment to a production environment was not implemented during this phase. The deployment strategy, including moving configurations, automations, and customizations to a live environment, will be planned and executed in **Phase 8**, preparing the system for real-world use in managing e-commerce operations.