Project Title:

**E-Commerce & Inventory Tracking**

Problem statement:

An online store struggles to track customer orders and manage stock availability. They need a Salesforce solution that integrates with e-commerce platforms, manages customer orders, updates inventory automatically, and provides reports on best-selling products.

Implementation:

**Phase 1: Problem Understanding & Industry Analysis**

* **Requirement Gathering:**
* Track products, orders, customers, and inventory levels.
* Automate stock reduction & low-stock alert.
* Provide dashboards for sales & inventory insights.
* **Stakeholder Analysis:**
* Customers (place orders).
* Sales Team (manage orders).
* Inventory Manager (track stock).
* **System Administrator** -manages users, roles, configurations**.**
* **Business Owner/Management** - views reports, dashboards, KPIs.
* **Finance/Accounts Team** - tracks payments, refunds, invoices.
* **Business Process Mapping:**
* Customer selects product → Order created → Inventory auto-updates → Confirmation sent → Reports and dashboards generated.
* **Industry Use Case:**
* Similar to Amazon/Flipkart stock tracking.
* **AppExchange Exploration:**
* Look for prebuilt inventory/order management apps as references.

**Phase 2 — Org Setup & Configuration:**

* Setup salesforce Org
* Sign up for a **free Salesforce Developer Edition** (developer.salesforce.com).
* Choose **Sales Cloud** as the edition.
* Configure **Company Settings**
* **Company Info** → Go to *Setup* → **Company Settings → Company Information** → Fill in company name, address, currency, time zone.
* **Business Hours** → *Setup* → **Business Hours** → Create working hours (e.g., Mon–Fri 9 AM – 5 PM).
* **Holidays** → *Setup* → **Holidays** → Add public holidays (these can be used in escalation rules).
* Create **Users, Roles, Profiles**
* **Users** → *Setup* → **Users → New User**
  + Example: *Sales Rep, Inventory Manager, System Admin*.
* **Roles** → *Setup* → **Roles → Set up Roles**
  + Example hierarchy:
    - CEO/Admin (top)
      * Sales Manager
      * Inventory Manager
* **Profiles** → *Setup* → **Profiles**
  + Use *System Administrator* profile for admin.
  + Clone *Standard User* profile to create *Sales Rep Profile* and *Inventory Manager Profile* with appropriate permissions.
* Define **Permission Sets**
* *Setup* → **Permission Sets → New**
  + **Order Approvers** → Add “Modify All” on Orders.
  + **Inventory Editors** → Add “Edit” access on Inventory objects.
* Assign these permission sets to users who need special access without changing their profile.
* Configure Sharing Settings:
* **Organization-Wide Defaults (OWD):**
  + *Setup* → **Sharing Settings** → Set *Orders = Private* (only owner sees records).
* **Sharing Rules:**
  + Example: Create a rule to share *Orders* with *Sales Managers* so they see all team orders.
* Enable **Security Settings**
* **Login Access Policies** → Allow admins to log in as users for troubleshooting.
* **MFA (Multi-Factor Authentication):**
* Enable from *Setup* → **Identity Verification → Multi-Factor Authentication**.
* **Audit Trail:**

*Setup* → **View Setup Audit Trail** → Monitor configuration changes

