

Phase 2: Salesforce Environment Setup & Security Configuration

1. Introduction

Phase 2 of the WhatNext Vision Motors Salesforce CRM implementation focused on configuring the Salesforce environment to ensure a secure, scalable, and business-ready platform. This phase involved selecting the right Salesforce edition, setting up the company profile, defining business hours, fiscal year, and configuring the core security model (users, profiles, roles, permission sets, OWD, and sharing rules). Additionally, it addressed Developer Org setup, sandbox usage, and deployment fundamentals, laying the groundwork for smooth development and controlled rollouts.

2. Salesforce Editions

Enterprise Edition was selected for advanced customization, automation, and robust security features. It supports Apex, Flows, APIs, multiple sandboxes, and comprehensive reporting, balancing cost with enterprise-grade needs.

3. Company Profile Setup

Configured with company name, default locale, INR currency, IST timezone, and uploaded company logo. This ensured consistency in records and reports.

4. Business Hours & Holidays

Defined working hours as Mon-Sat (9 AM–7 PM IST) and added holidays like Independence Day, Republic Day, Diwali, Christmas. Linked to entitlement management for SLA accuracy.

5. Fiscal Year Settings

Configured fiscal year (April–March) to match Indian standards. Allowed accurate forecasting and financial reporting.

6. User Setup & Licenses

Users created for admins, sales managers, dealer executives, service agents, and guest users. Appropriate Salesforce licenses assigned to each.

7. Profiles

Profiles created for System Admin, Sales, Service, and Dealer, defining baseline access to objects and fields.

8. Roles

Role hierarchy mirrored company structure: CEO → Sales Director → Regional Managers → Dealers; Service Head → Service Agents.

9. Permission Sets

Extended permissions without altering profiles, e.g., dashboard creation, email template access, Apex class execution.

10. Organization-Wide Defaults (OWD)

OWD enforced baseline security: Accounts/Contacts private, Vehicles public read-only, Orders controlled by parent, Service Requests private.

11. Sharing Rules

Sharing rules enabled collaboration: managers could access subordinate records; service cases were shared for balancing workloads.

12. Login Access Policies

Implemented IP restrictions, session timeouts (2 hrs), 2FA, and login-as-user for troubleshooting.

13. Developer Org Setup

Developer org used for schema design, automation building, and Apex testing before sandbox rollout.

14. Sandbox Usage

Developer, Partial Copy, and Full Sandboxes ensured rigorous testing and smooth deployment cycles.

15. Deployment Basics

Used Change Sets and version control for deployments. Changes tested in UAT before production; rollback strategies documented.

16. Conclusion of Phase 2

Phase 2 created a secure, scalable Salesforce foundation for future automation and customization, ensuring compliance and efficiency.