

Unified Commerce Loop

Phase 2: Org Setup & Configuration

This phase is laying the foundation, erecting the steel frame, and installing the security systems for a new skyscraper before any of the actual rooms are built. Getting this right is critical for the long-term health, security, and maintainability of your entire Salesforce implementation. We'll move from a blank slate to a fully configured platform, establishing *how* the business operates, *who* can access what data, and *how* we will manage changes.

Company Profile Setup

The company information has been configured to reflect Paradise Market business identity and operating details.

SETUP

Company Information

Company Information

Paradise Market

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	Paradise Market	Phone	
Primary Contact	Ganesh Siddhartha	Fax	
Division		Default Locale	English (India)
Address	evel 5, Capital Tower, Amaravati, Andhra Pradesh 522503, India Amaravti 522237 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	Indian Rupee
Enable Data Translation	<input 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	44 (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	00DgK00000BYk0e
		Organization Edition	Developer Edition
		Instance	CAN96
Created By	OrgFarm.EPIC, 9/13/2025, 4:07 PM	Modified By	Ganesh Siddhartha, 9/17/2025, 12:35 AM

Edit | Currency Setup

- **Organization Name:** Paradise Market
- **Primary Contact:** Ganesh Siddhartha
- **Address:** evel5,CapitalTower,Amaravati,AndhraPradesh522503,India,Amaravti522237
Andhra Pradesh
India
- **Default Locale:** English (India)

- **Default Language:** English
- **Time Zone:** India Standard Time (GMT+05:30, Asia/Kolkata)
- **Currency Locale:** INR (English - India)
- **Multiple Currencies:** Enabled

This setup ensures that all users in the organization experience Salesforce in their local context, with Indian time, currency, and language preferences.

Business Hours & Holidays

Defines the working hours for support, retail, and operations teams. This directly impacts case management features like escalations and milestones.

The screenshot shows the 'Business Hours' setup page in Salesforce. At the top, there's a 'SETUP Business Hours' header. Below it, the 'Organization Business Hours' section is active. It includes a description: '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 does not operate on that day.' There's a link to 'Holidays (2)'. The 'Business Hours Detail' section shows a table for 'Paradise Market Working Hours' with columns for 'Business Hours Name', 'Schedule', and 'Time Zone'. The schedule is set for Monday to Saturday, 9:00 AM to 7:00 PM, with Sunday marked as 'No Hours'. The 'Time Zone' is set to '(GMT+05:30) India Standard Time (Asia/Kolkata)'. Below the table, there's an 'Active' checkbox which is checked, and a 'Created By' field showing 'OrgFarm EPIC 9/13/2025, 4:07 PM'. The 'Last Modified By' field shows 'Ganesh Siddhartha 9/17/2025, 3:59 AM'. At the bottom, the 'Holidays' section shows a table with two entries: 'Independence Day' on 8/15/2026 and 'Republic day' on 1/26/2026, both marked as 'All Day'.

Business Hours Name	Schedule	Time Zone
Paradise Market Working Hours	Monday to Saturday, 9:00 AM to 7:00 PM	(GMT+05:30) India Standard Time (Asia/Kolkata)
Sunday	No Hours	

Holiday Name	Description	Date and Time
Independence Day		8/15/2026 All Day
Republic day		1/26/2026 All Day

- **Business Hours Name:** Paradise Market Working Hours
- **Schedule:** Monday to Saturday – 10 Hours
- **Default Business Hours:** Enabled
- **Active:** Yes
- **Holidays Configured:** Two Holidays – All Day

This is critical for the "repair services" component of the project. We need to define when customer support teams are available to handle repair cases and when retail stores are open to process in-person trade-ins.

Fiscal Year Settings

All ROI calculations and financial reports for the Paradise Market will be based on this setting. It is critical to get this right from the beginning as it is difficult to change later. Use a Standard Fiscal Year unless your finance department explicitly uses a custom structure

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.

Change Fiscal Year Period Save Cancel

Name

Paradise Market

Fiscal Year Start Month

April

Fiscal Year is Based On

☐ The ending month

☒ The starting month

Save Cancel

Profiles

Adopted a Minimum Access security model. Never assign the standard System Administrator profile to anyone but dedicated admins. Clone the Standard User profile to create custom profiles for your key personas: Admin, Customer support, Manager, Marketing manager, Partner. Resale operation specialist.

SETUP

Profiles

Profiles

Help for this Page

All Profiles

Edit | Delete | Create New View

New Profile

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

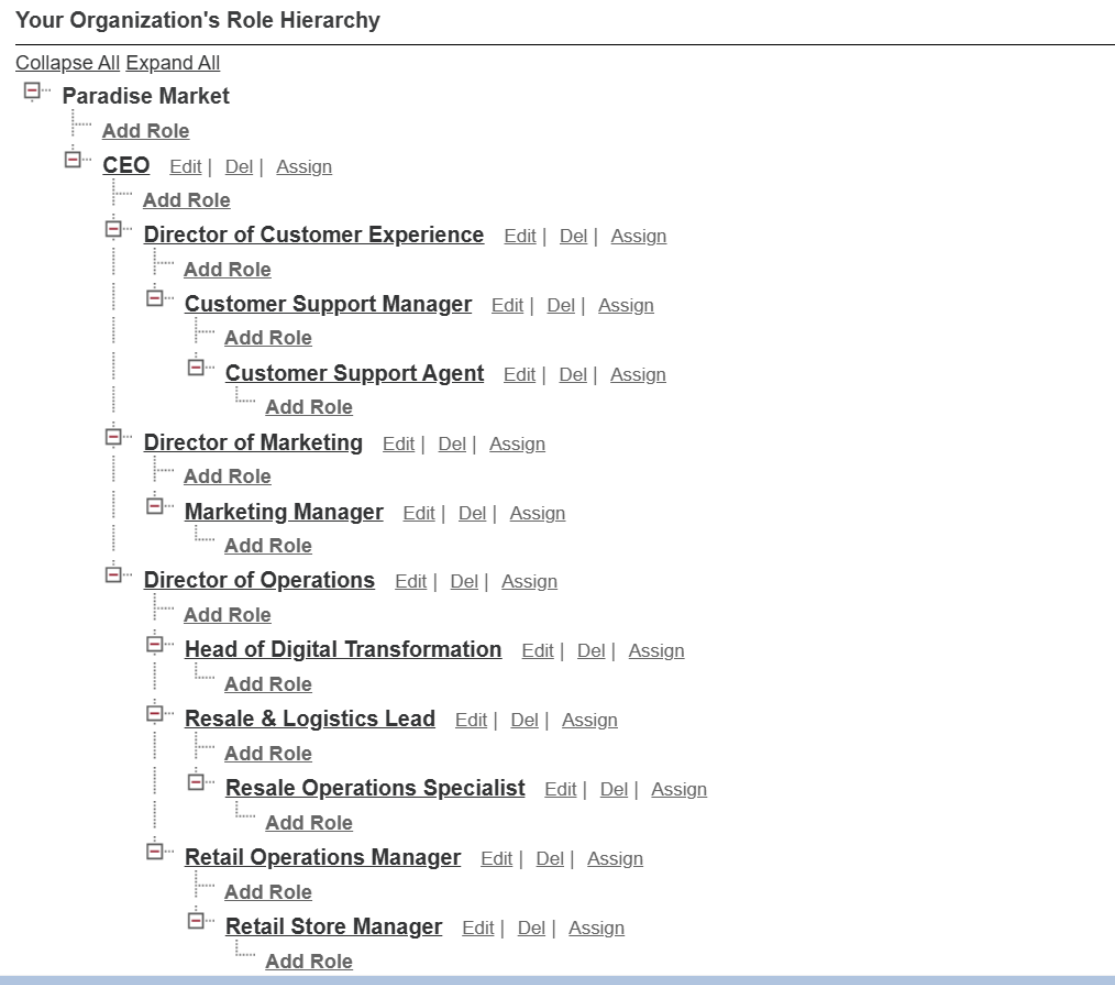
Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Del ...	Paradise Admin	Salesforce	✓
<input type="checkbox"/> Edit Del ...	Paradise Customer support	Salesforce	✓
<input type="checkbox"/> Edit Del ...	Paradise Manager	Salesforce	✓
<input type="checkbox"/> Edit Del ...	Paradise Marketing Manager	Salesforce	✓
<input type="checkbox"/> Edit Del ...	Paradise Partner	Customer Community	✓
<input type="checkbox"/> Edit Del ...	Paradise Resale Operations Specialist	Salesforce	✓

- **Paradise Admin** - Provides full access to all standard and custom features required for administration.
- **Paradise Customer Support** - Needs access to Cases, Accounts, and Service Cloud features like milestones and entitlements.
- **Paradise Manager** - Needs access to Accounts, Contacts, and potentially Opportunities for upselling during trade-ins.
- **Paradise Marketing Manager** - Needs access to Campaigns, Reports, and customer data in Accounts/Contacts.
- **Paradise Resale Operations specialist** - A cost-effective choice. They need custom objects (Digital Twin, Service History) but not standard CRM objects like Leads, Opportunities, or Cases.

- **Paradise Partner** - Specifically designed for external users, providing secure, limited access to specific data and objects.

Roles

The hierarchy should be designed based on data visibility needs. For example, a "Director of Operations" may sit high in the hierarchy to get a complete view of all repair, trade-in, and resale data, even if they don't directly manage those teams.



Permission Sets

A flexible way to grant users additional permissions and access on top of their profile. This is the modern best practice for managing permissions (Applicable when Digital product twin object created in Phase 3).

Permission Set

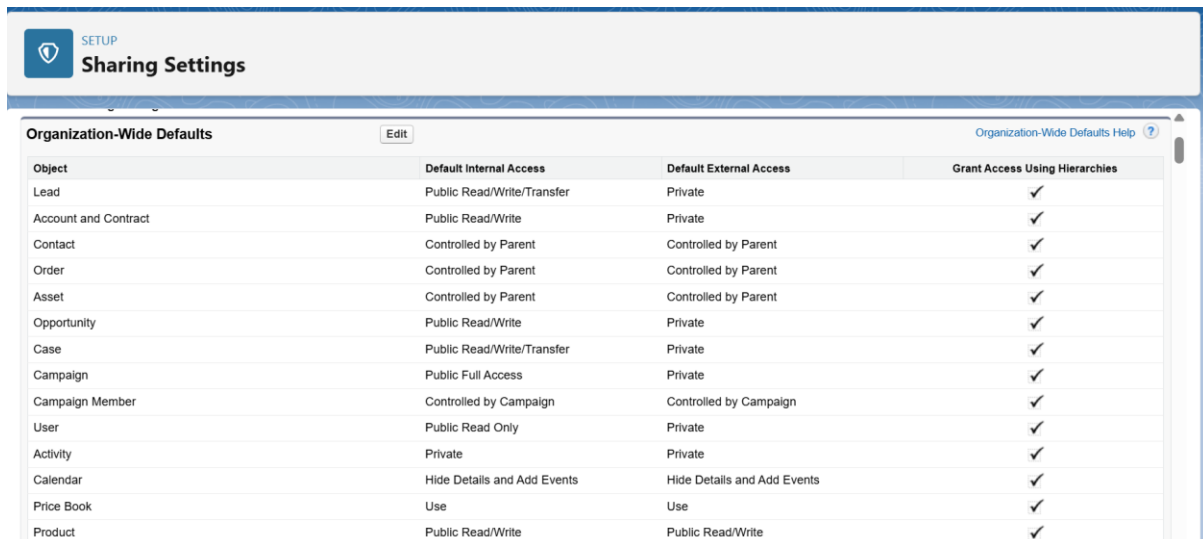
PS - High-Value Trade-In Approver [Video Tutorial](#) | [Help for this Page](#)

[Clone](#) [Edit Properties](#) [Manage Assignments](#) [View Summary](#)

Permission Set Overview	
Description	Grants the ability to edit the 'Approval Status' field on the Digital Product Twin object to approve high-value trade-ins
License	Salesforce
Session Activation Required	<input type="checkbox"/>
Permission Set Groups Added To	1
API Name	PS_High_Value_Trade_In_Approver
Namespace Prefix	
Created By	Ganesh Siddhartha, 9/17/2025, 2:41 AM
Last Modified By	Ganesh Siddhartha, 9/17/2025, 2:41 AM

OWD (Organization-Wide Defaults)

his is the most important security setting. To enforce a secure-by-default model, set all key standard and custom objects to Private. This includes Account, Contact, Case, and especially our new custom objects (Digital_Product_Twin__c, Service_History__c). This ensures users can only see records they own unless explicitly granted access elsewhere.



The screenshot shows the 'Sharing Settings' page in Salesforce Setup. The 'Organization-Wide Defaults' section is active, displaying a table of default access settings for various objects. The table has four columns: Object, Default Internal Access, Default External Access, and Grant Access Using Hierarchies. The 'Edit' button is visible next to the section title. A help link 'Organization-Wide Defaults Help' is in the top right corner.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓
Product	Public Read/Write	Public Read/Write	✓

The custom objects are created in Phase 3 and Sharing settings are set to the relevant objects.

Dev Org Setup and Deployment basics

Dev Orgs are not part of the main development path for this project. They are for individual developers to experiment with new features or test AppExchange packages in isolation *before* introducing them into the project's sandboxes.

For this project of this scale and importance, adopted modern DevOps practices from day one.

- **Version Control:** All metadata changes must be tracked in a version control system like Git. This is the source of truth.
- **Salesforce CLI (SFDX):** Use the command-line interface for scripting, retrieving, and deploying metadata in a source-tracked format.
- **CI/CD Pipeline:** Set up an automated pipeline (using tools like GitHub Actions, Jenkins, Copado, Gearset) to run tests and manage deployments, reducing manual errors.