Salesforce Setup Guide: Phase 2 – Org & User Configuration

This document outlines the foundational steps to configure your Salesforce org for the **Return Flow – Efficient Reverse Logistics and Return Management System**.

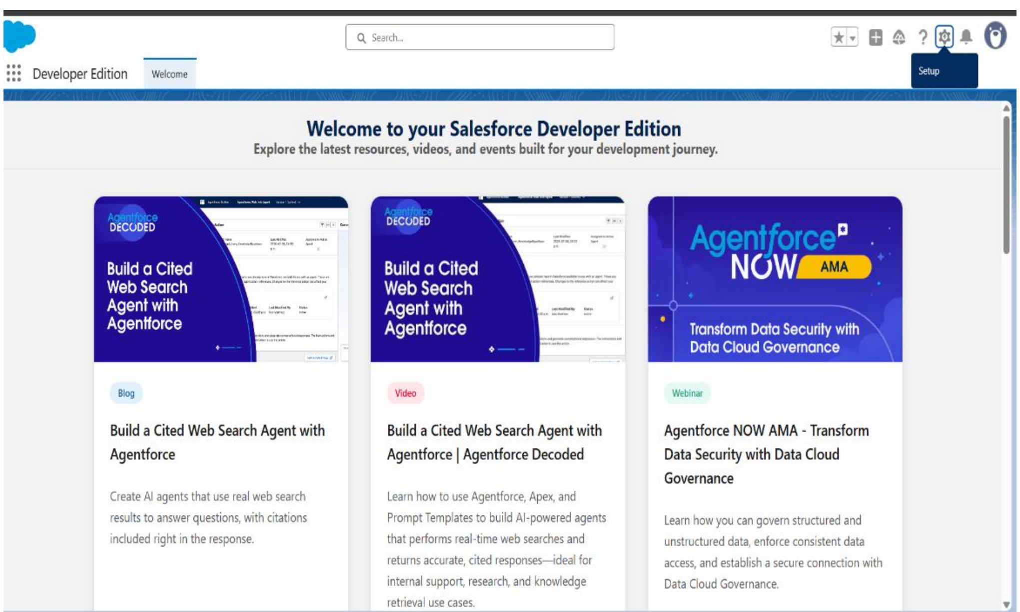
Step 1: Set Up Your Developer Org

Purpose: To get a free, safe environment for building and testing.

Action: 1. Go to developer.salesforce.com/signup.

2. Fill out the form. Your Username must be unique and in an email format (e.g., myproject@dev.com). Your Email must be a real address for verification.

3. Verify your account via the email link and log in.



Step 2: Configure Company Information

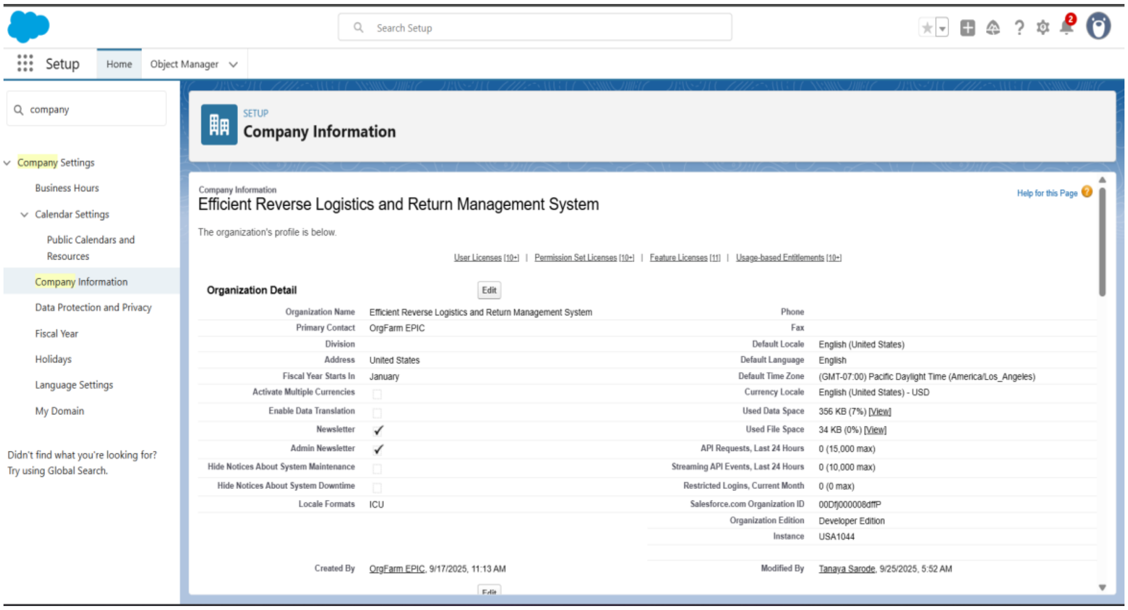
Purpose: To set the correct time zone and currency for your records.

Action: 1. Go to Setup > Company Information.

2. Click Edit.

3. Set your Default Time Zone and Default Currency.

4. Click Save.

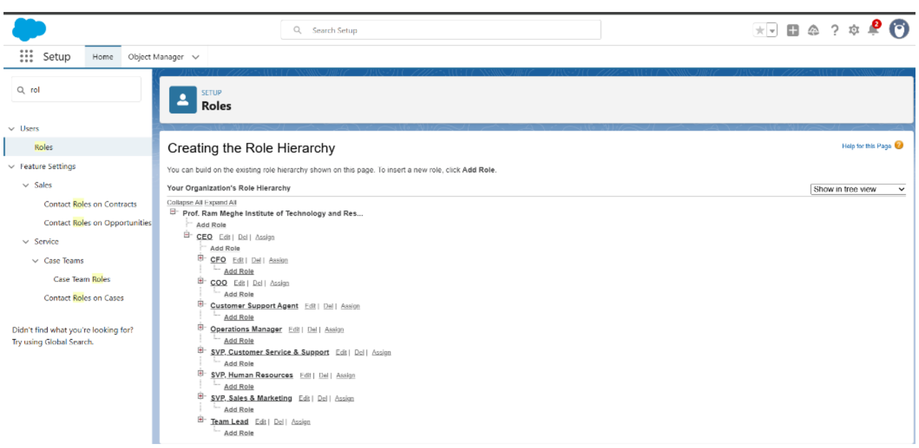


Step 3: Configure Roles Hierarchy

Purpose: To allow managers to view and manage records of their direct reports.

Action:

1. Go to **Setup → Roles → Set Up Roles**.
2. Under your company name, click **Add Role** and name it **Operations Manager**.
3. Under **Operations Manager**, click **Add Role** and name it **Support Agent**.
4. Assign users to their respective roles from the role tree.

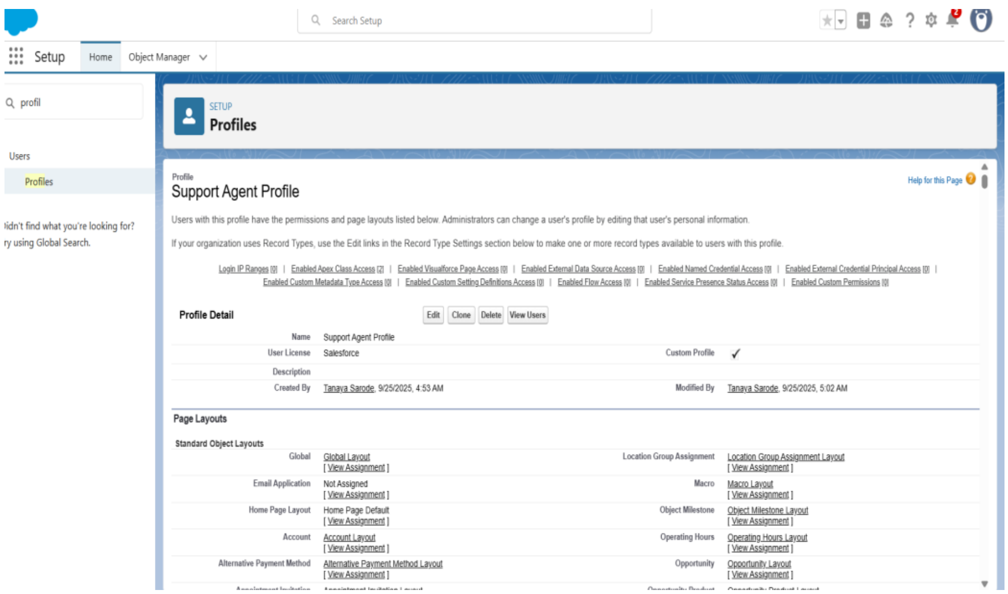


Step 4: Configure Profiles

Purpose: To define the object-level permissions for different job roles.

Action:

1. Go to **Setup → Profiles**.
2. Clone the **Standard User** profile and name the new one **Support Agent Profile**.
3. Clone the **System Administrator** profile and name the new one **Operations Manager Profile**.
4. Edit users and assign the proper profiles:
    - **Support Agent user → Support Agent Profile**
    - **Operations Manager → Operations Manager Profile**

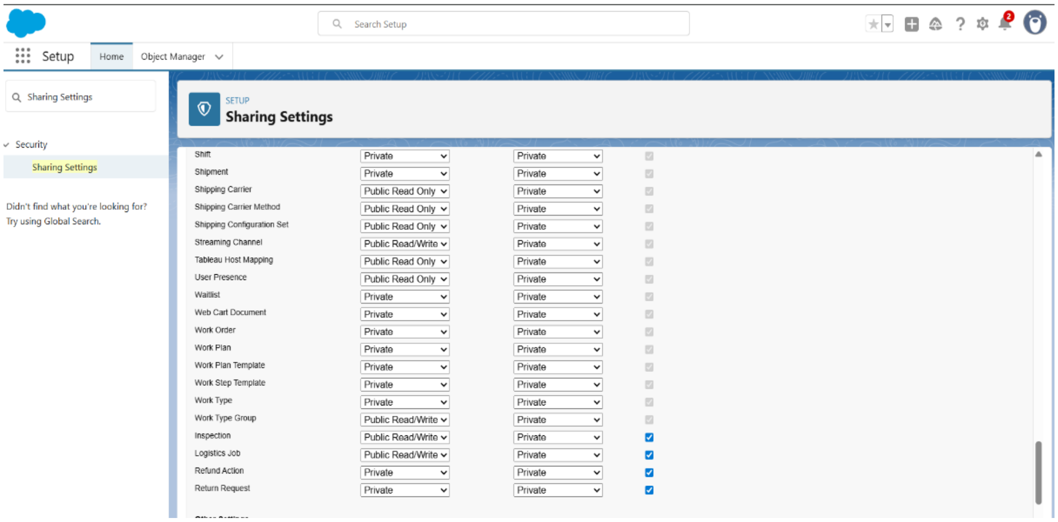


Step 5: Set Organization-Wide Defaults (OWD)

Purpose: To restrict access and enforce data security.

Action:

1. Go to **Setup → Sharing Settings**.
2. For Return_Request__c set **Default Internal Access = Private**.
3. Click **Save**.

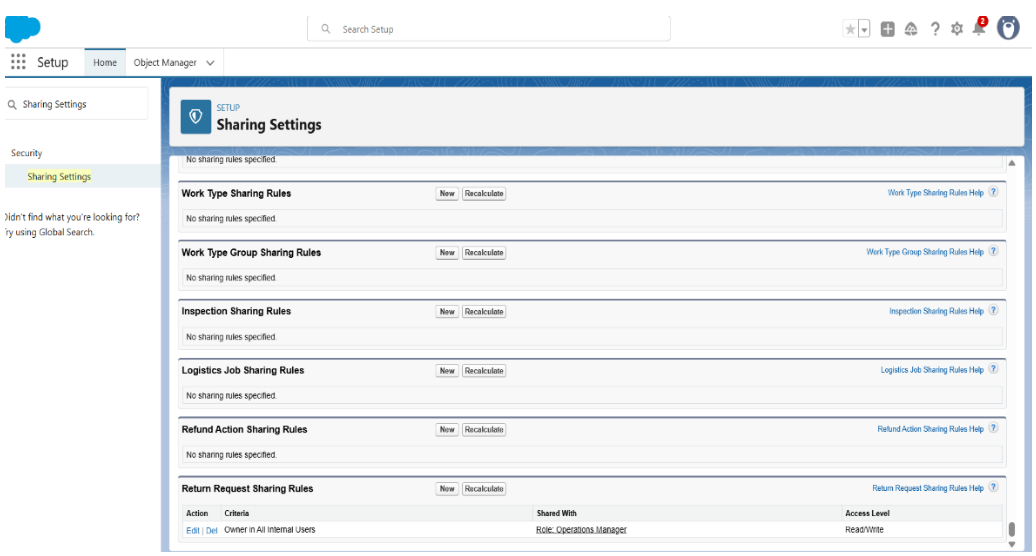


Step 6: Create Sharing Rules

Purpose: To allow specific users or roles to access certain records beyond OWD.

Action:

1. Go to **Setup → Sharing Settings → Scroll to Sharing Rules**.
2. Create a rule for **Return_Request__c**:
   - If **Owner = Support Agent → Share with Operations Manager role**
3. Create a rule for **Refund__c** if needed:
   - Share with **Finance Team role**

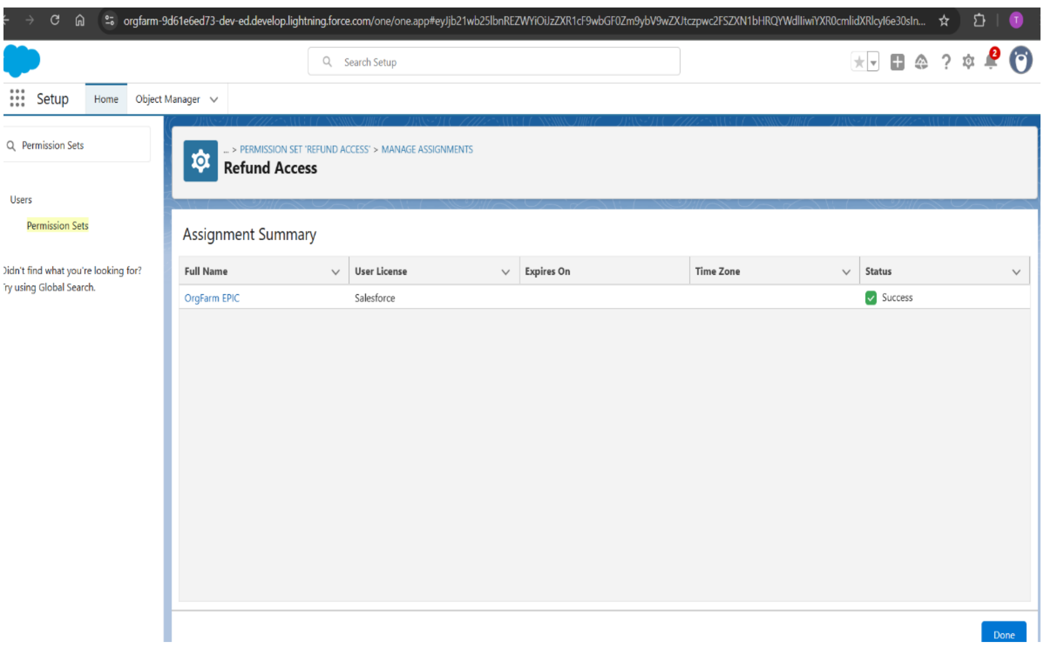


Step 7: Create Permission Sets

Purpose: To grant extra access without changing profiles.

Action:

1. Go to **Setup → Permission Sets → New**
2. Name: **Refund Access**
3. License: **--None--**
4. Assign **Object Permissions**: Read/Edit on Refund__c
5. Assign users: Finance Team or Operations Manager

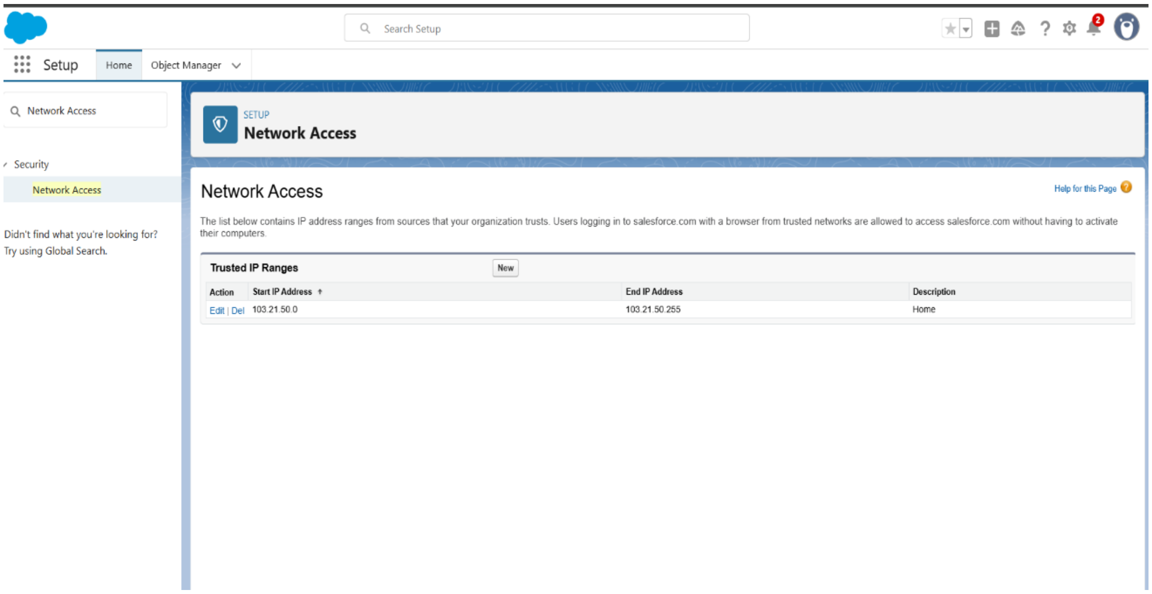


Step 8: Configure Login Policies & Security

Purpose: To secure user logins and enforce MFA.

Network Access (Trusted IPs)

1. Go to **Setup → Network Access**
2. Add your trusted IP range (your home/office network)
3. Save


Search Setup
Setup
Home
Object Manager
Network Access
Security
Network Access
Didn't find what you're looking for?
Try using Global Search.
SETUP
Network Access
Network Access
Help for this Page
The list below contains IP address ranges from sources that your organization trusts. Users logging in to salesforce.com with a browser from trusted networks are allowed to access salesforce.com without having to activate their computers.
Trusted IP Ranges
New
Action
Start IP Address
End IP Address
Description
Edit | Del
103.21.50.0
103.21.50.255
Home