

## Phase 2: Org Setup & Configuration:

### Title Page

- Project Name → StockSense – Smart Inventory Tracking & Management
- Phase → Phase 2: Org Setup & Configuration
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### Objective (Phase 2)

The objective of Phase 2 is to **set up and configure the Salesforce environment** for the StockSense – Smart Inventory Tracking & Management project. This phase ensures that the platform is ready for:

1. **User Management:** Create users, assign appropriate roles and profiles, and define permissions so that stakeholders (Inventory Managers, Warehouse Supervisors, Finance Team) can access the system according to their responsibilities.
2. **App and Object Setup:** Create a custom StockSense Inventory App, custom objects (Inventory, Procurement Request, Alerts), and their fields to store and manage inventory and procurement data efficiently.
3. **Access Control:** Configure organization-wide defaults (OWD), sharing rules, and permission sets to ensure secure and role-based access to data.
4. **Business Operations Configuration:** Set company profile, business hours, holidays, and fiscal year to reflect the real-world operational structure of the organization.
5. **Deployment Preparation:** Establish sandbox for testing and prepare change sets for smooth migration to production, ensuring a stable and reliable environment for Phase 3 (Data Modeling and Automation).

### Salesforce Edition

For the StockSense – Smart Inventory Tracking & Management project, the Salesforce Developer Edition was used.

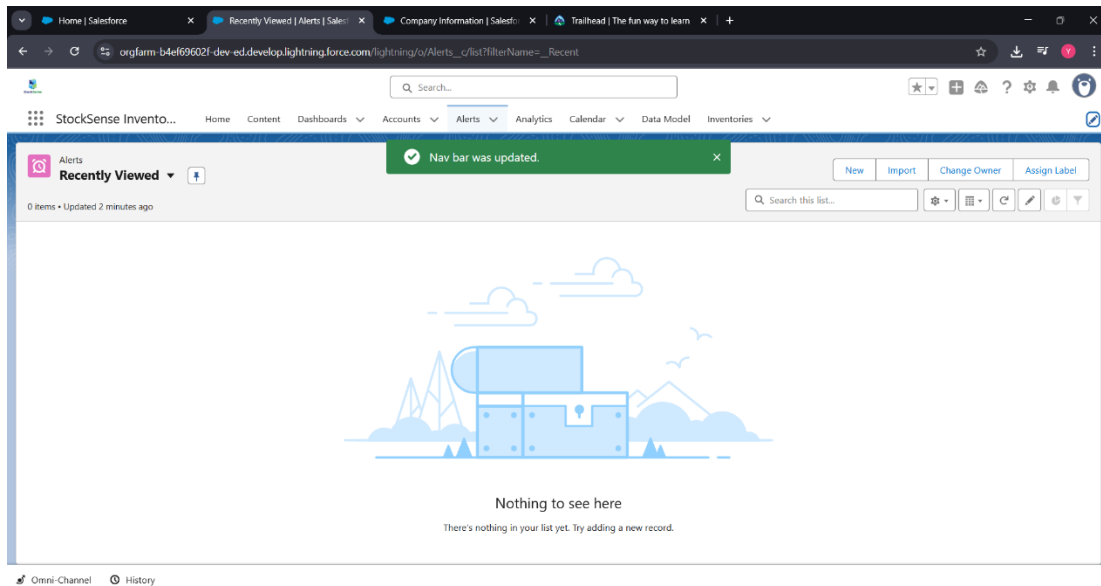
Company Profile Setup:- tcs salesforce profile use

### Profiles & Permission Sets

- Profiles created / modified

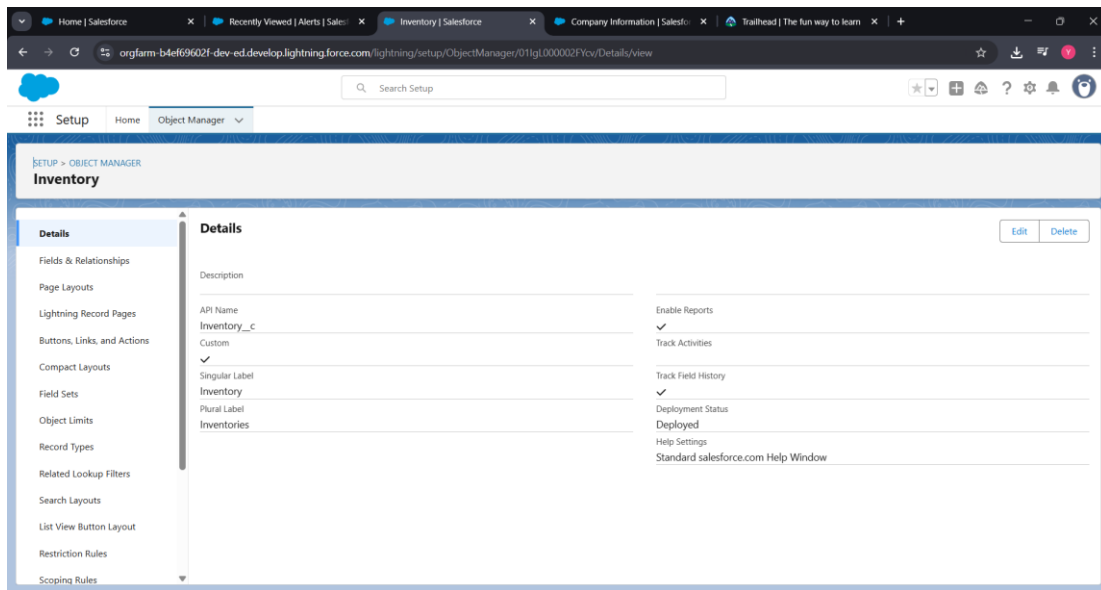
## Create a New App

- In Setup, type App Manager in the left-hand search bar → Click App Manager
- Click New Lightning App
- Fill in the details:
  - App Name: StockSense Inventory App
  - Developer Name: StockSense\_Inventory\_App (auto-filled)
  - Description: Inventory tracking and alerts for StockSense
  - Added Logo
- Click Next



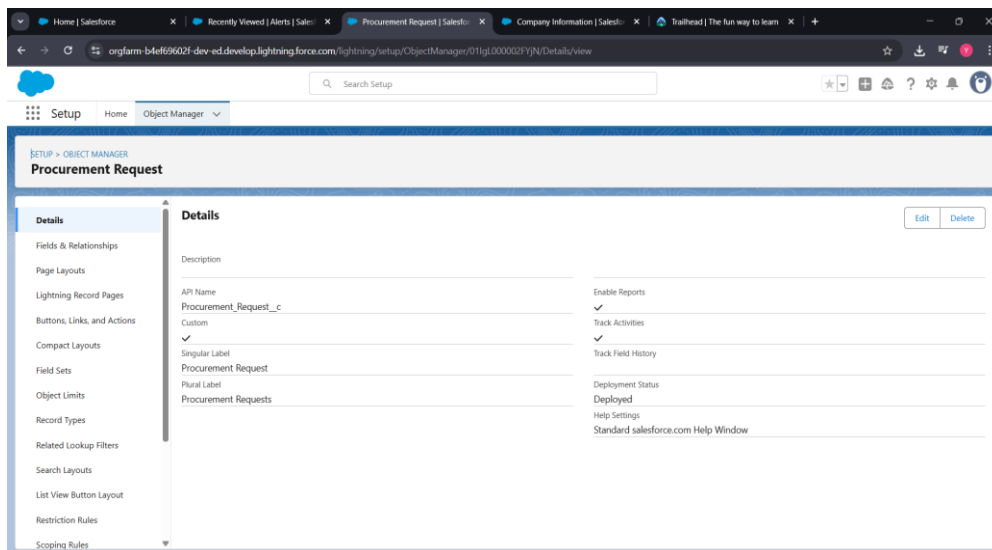
## Custom Objects & Fields

- Inventory → Stock Inventory Management
  - Fields: Product Name, Stock Quantity, Reorder Level, Last Updated Date



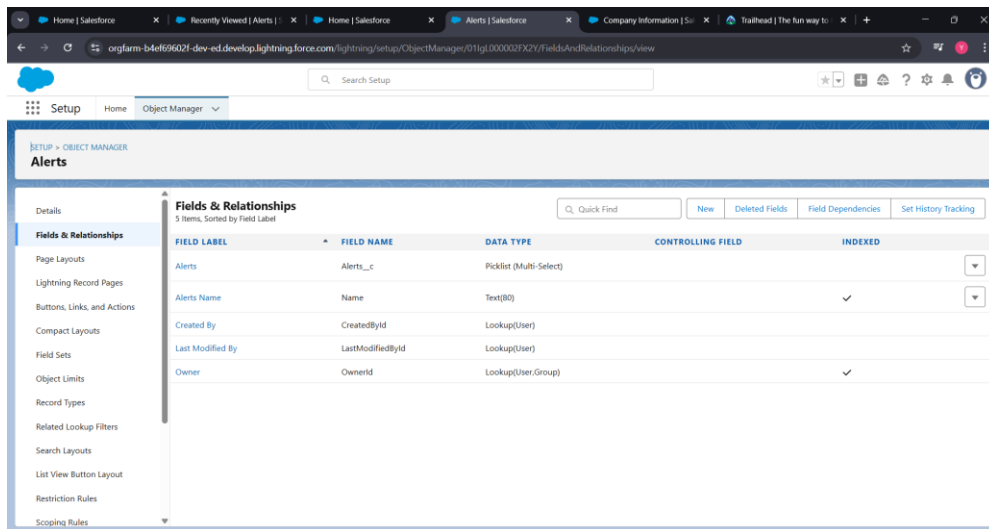
## Procurement Request → Inventory Procurement Request

- Fields: Request Date, Supplier Name, Status, Quantity Requested, Expected Delivery Date



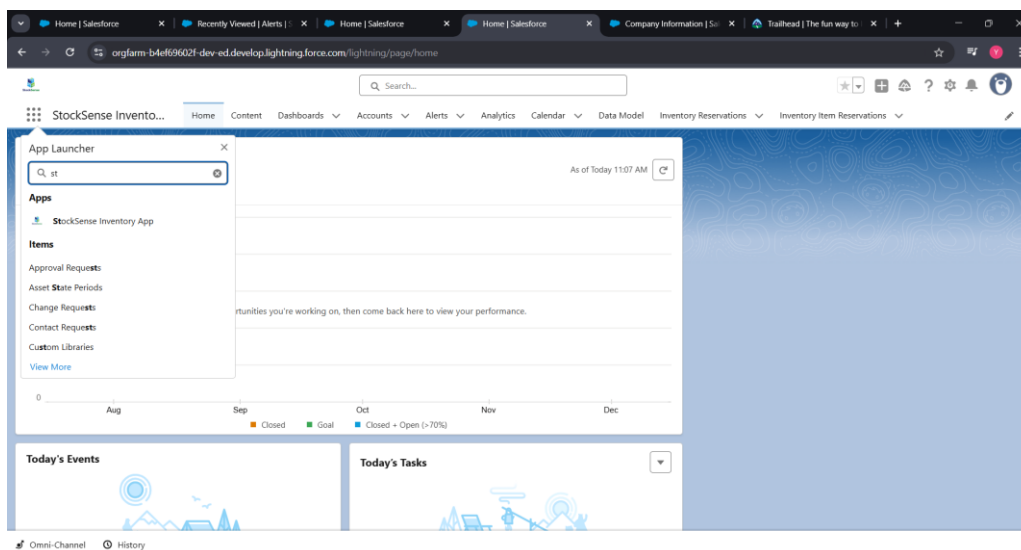
## Alerts → Inventory Alerts & Notifications

- Fields: Alert Type, Product, Stock Level, Date



## Tabs & App Creation

- App Name: StockSense Inventory App
- Tabs created for Inventory, Procurement Request, Alerts



## Login Access Policies

- Admin access allowed for troubleshooting
- ☐ Navigation Style → **Standard** → Next
  - ☐ Add Items (these are the objects the app will use):
    - Inventory
    - Procurement Request

- Alerts
- Other they are required

