

Phase 2: Org Setup & Configuration – GreenFuture CRM

1. Salesforce Edition

Recommended Edition: Developer Edition (free) or Enterprise Edition

Reason: Supports custom objects, Apex, Flows, Sharing Rules, and advanced CRM features needed for GreenFuture CRM.

Implementation Steps:

1. Log in to Salesforce.
2. Go to **Setup**
3. Check the Salesforce Edition. Developer Edition is sufficient for testing and learning.

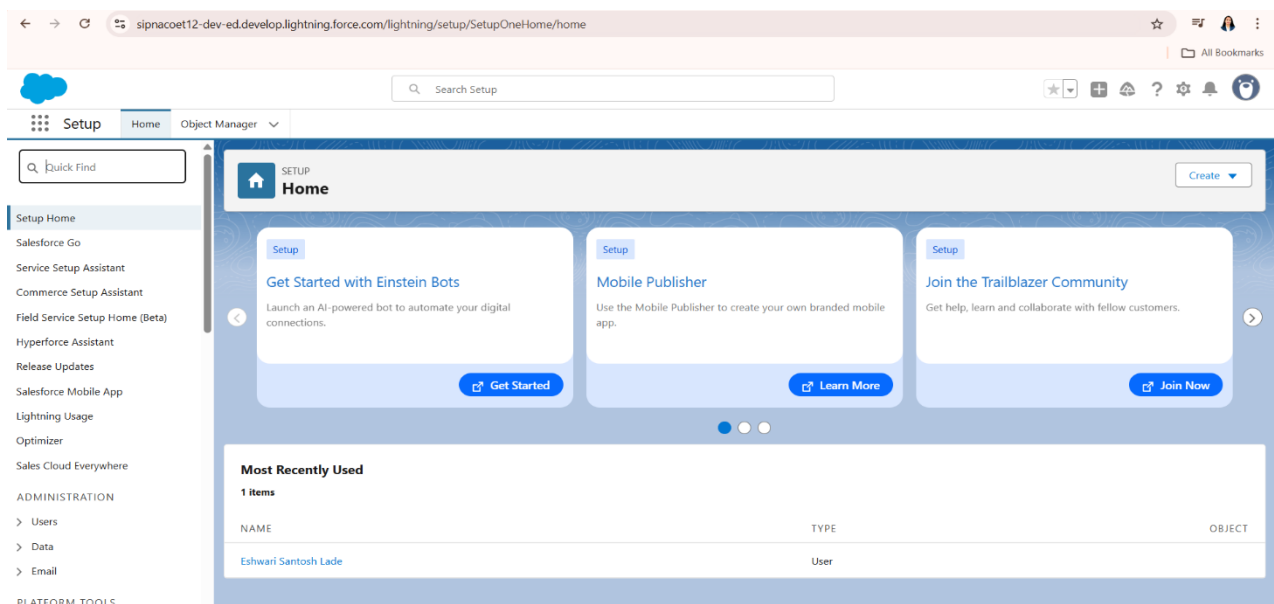


Fig 2.1. Setup Page

2. Company Profile Setup

Purpose: Configure basic org settings like name, locale, currency, and record type to match organizational requirements.

Implementation Steps:

1. Setup → **Company Settings** → **Company Information**.
2. Configure:
 - **Default Time Zone:** GMT+05:30 (India Standard Time)
 - **Default Currency:** INR (₹)

- **Enable Multi-Currency:** Optional if dealing with international carbon credit partners
3. Save settings.

The screenshot shows the Salesforce Setup interface for 'Company Information'. The left sidebar contains a search bar and a list of settings categories: Company Settings, Calendar Settings, Company Information (selected), Data Protection and Privacy, Fiscal Year, Holidays, Language Settings, Manage Currencies, and My Domain. The main content area is titled 'Company Information' and displays the profile of 'GreenFuture CRM Pvt Ltd'. It includes a search bar, a 'Help for this Page' link, and a table of organization details. The table is organized into two columns: Organization Detail and System Information. The Organization Detail column includes fields like Organization Name, Primary Contact, Division, Address, Fiscal Year, Activate Multiple Currencies, Enable Data Translation, Newsletter, Admin Newsletter, Hide Notices About System Maintenance, Hide Notices About System Downtime, and Locale Formats. The System Information column includes fields like Phone, Fax, Default Locale, Default Language, Default Time Zone, Corporate Currency, Used Data Space, Used File Space, API Requests, Streaming API Events, Restricted Logins, Salesforce.com Organization ID, Organization Edition, and Instance.

Organization Detail		System Information	
Organization Name	GreenFuture CRM Pvt Ltd	Phone	
Primary Contact	Eshwan Santosh Lade	Fax	
Division	IN	Default Locale	English (India)
Address		Default Language	English
Fiscal Year	January	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	340 KB (7%) View
Newsletter	<input checked="" type="checkbox"/>	Used File Space	13 KB (0%) View
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	0 (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	00DdM00000dpGvF
		Organization Edition	Developer Edition
		Instance	IND136

Fig.2.2. Company Information page

3. Business Hours & Holidays

Purpose: Ensure automated rules (workflow, SLA) consider working hours and holidays.

Implementation Steps:

1. Setup → **Business Hours** → **New** → Define working hours (e.g., 9 AM – 6 PM).
2. Setup → **Holidays** → **New** → Add holidays (e.g., National holidays).

The screenshot shows the Salesforce Setup interface for 'Business Hours'. The left sidebar contains a search bar and a list of settings categories: Company Settings, Business Hours (selected), Calendar Settings, Public Calendars and Resources, Company Information, Data Protection and Privacy, Fiscal Year, Holidays, Language Settings, Manage Currencies, and My Domain. The main content area is titled 'Business Hours' and displays the 'Organization Business Hours' for 'GreenFuture CRM Pvt Ltd'. It includes a search bar, a 'Help for this Page' link, and a table of business hours details. The table is organized into two columns: Business Hours Detail and System Information. The Business Hours Detail column includes fields like Business Hours Name, Business Hours, and Active. The System Information column includes fields like Time Zone, Default Business Hours, Created By, and Last Modified By.

Business Hours Detail		System Information	
Business Hours Name	GreenFuture Working Hours	Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Business Hours	Sunday: No Hours Monday: 9:00 am to 6:00 pm Tuesday: 9:00 am to 6:00 pm Wednesday: 9:00 am to 6:00 pm Thursday: 9:00 am to 6:00 pm Friday: 9:00 am to 6:00 pm Saturday: No Hours	Default Business Hours	<input type="checkbox"/>
Active	<input checked="" type="checkbox"/>	Created By	Eshwan Santosh Lade 24/09/2025, 11:52 pm
		Last Modified By	Eshwan Santosh Lade 24/09/2025, 11:52 pm

Fig.2.3. Business Hours setup page

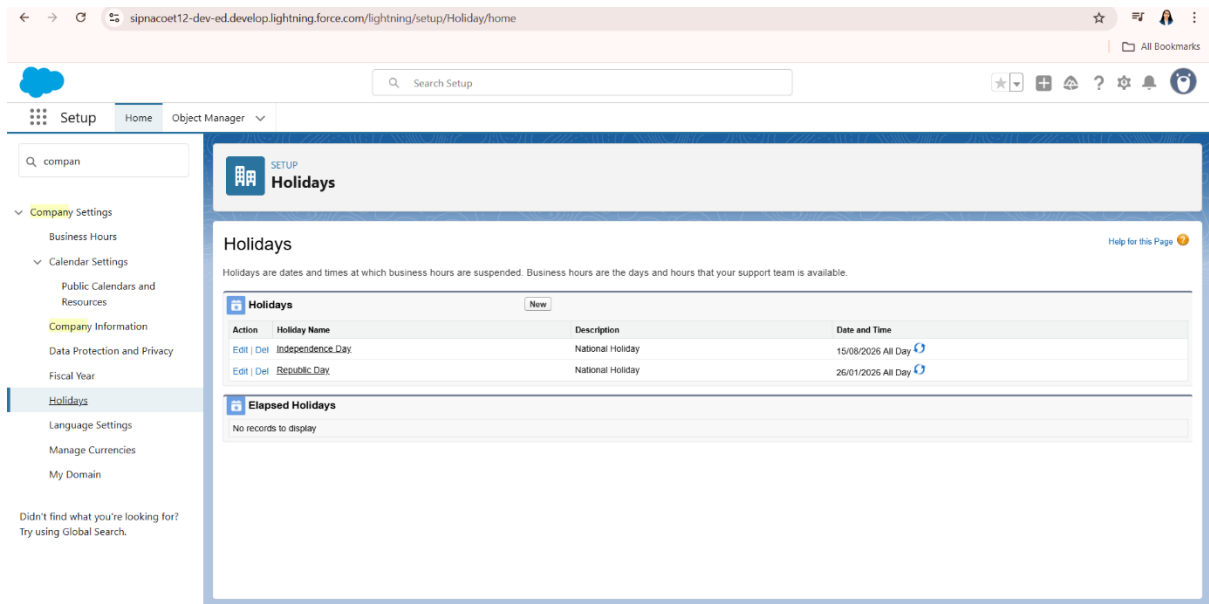


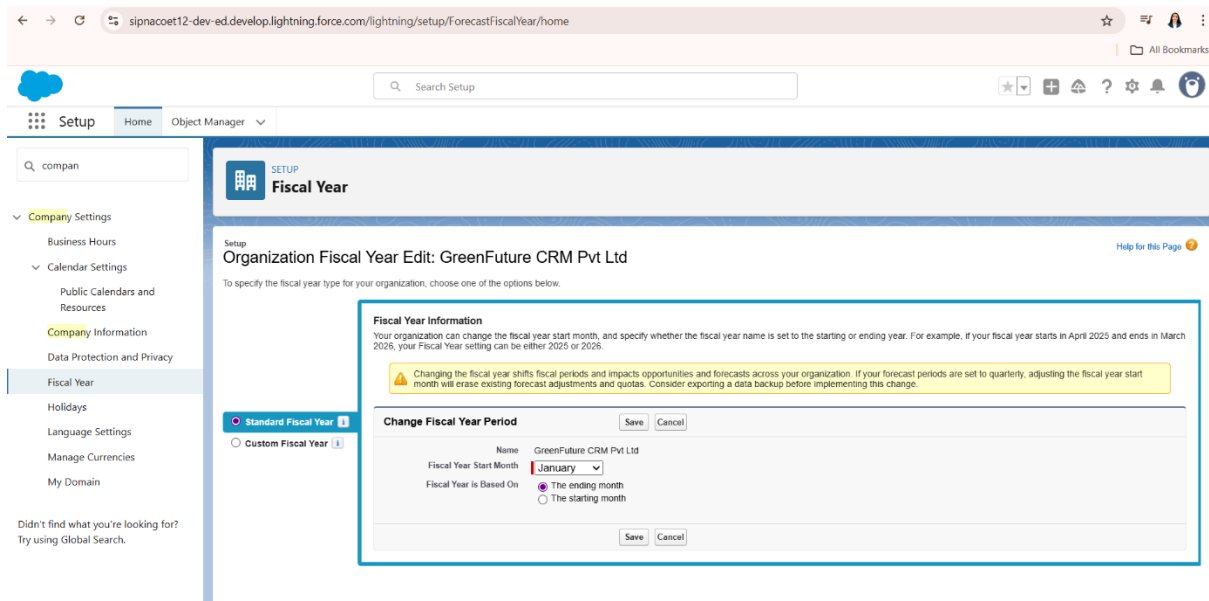
Fig.2.4. Holidays page

4. Fiscal Year Settings

Purpose: Align reporting and sustainability project cycles with organizational fiscal year.

Implementation Steps:

1. Setup → **Fiscal Year** → **Set Standard Fiscal Year**.
2. **Set Start Month:** January (or as per your reporting cycle).



Purpose: Create users for different stakeholders with proper access levels.

1. Setup → Users → New User.
2. Fill in: Name, Email, Role, Profile, License.
3. Example Users:
 - **Admin:** Salesforce License → System Administrator Profile
 - **Sustainability Manager:** Salesforce License → Custom Profile
 - **Auditor:** Salesforce Platform License → Read-Only Profile
 - **NGO Partner:** Experience Cloud License → Partner User Profile



Fig.2.6. Users list page

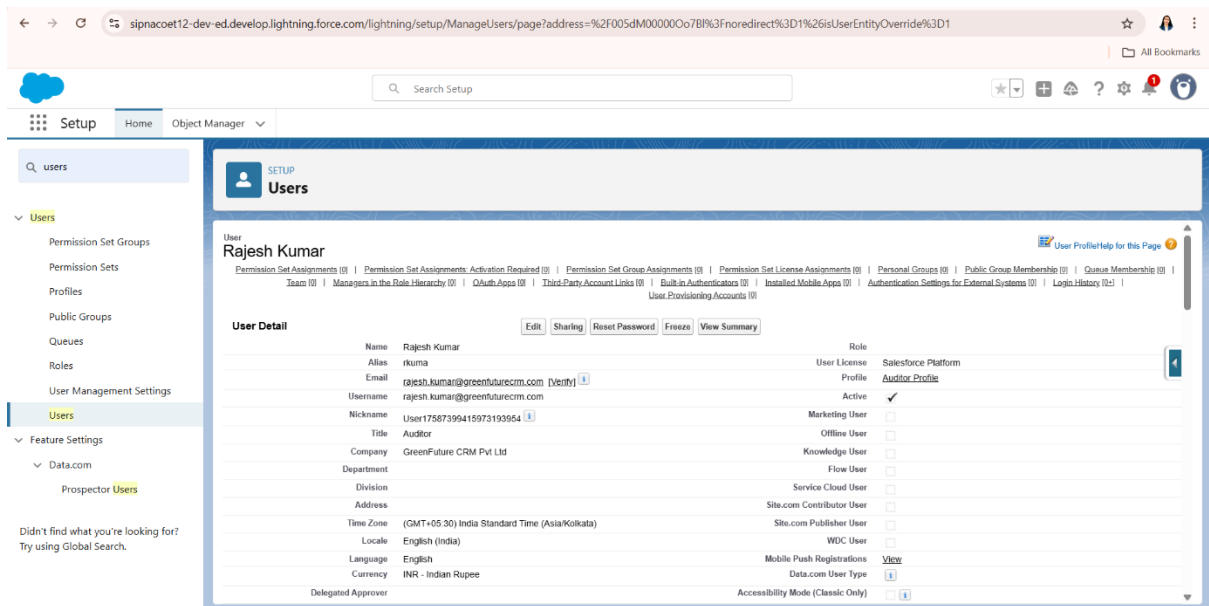


Fig.2.7. User detail page

6. Profiles

Purpose: Control object, field, and tab access for different roles.

Implementation Steps:

1. Setup → Users → Profiles
2. Example Profiles for GreenFuture CRM:
 - **Admin Profile:** Full access
 - **Sustainability Manager:** CRUD on Projects, Credits, Partners
 - **Auditor:** Read-only access on Projects and Reports
 - **Partner Profile:** Limited access to Projects and Credits

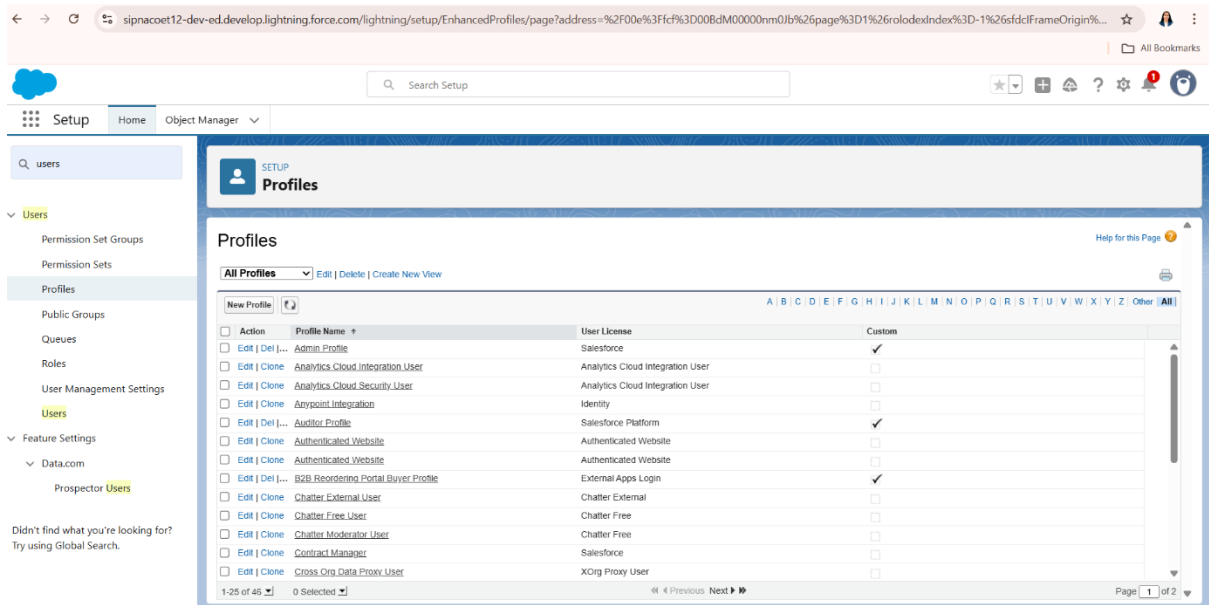


Fig.2.8. Profile List Page(a)

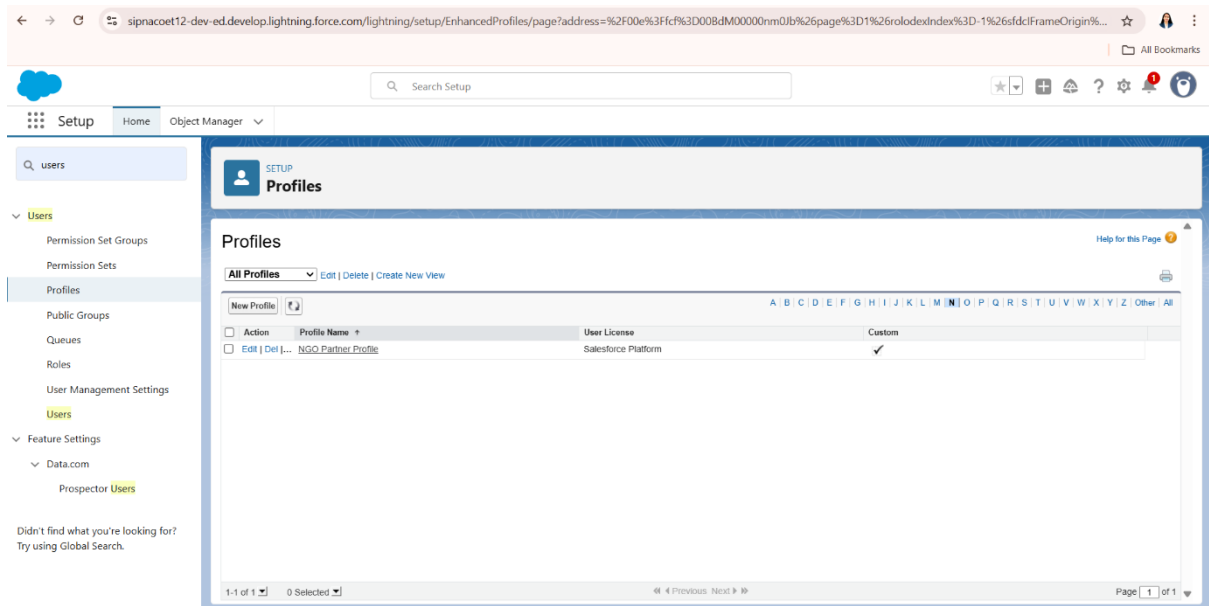


Fig.2.9. Profile List Page(b)

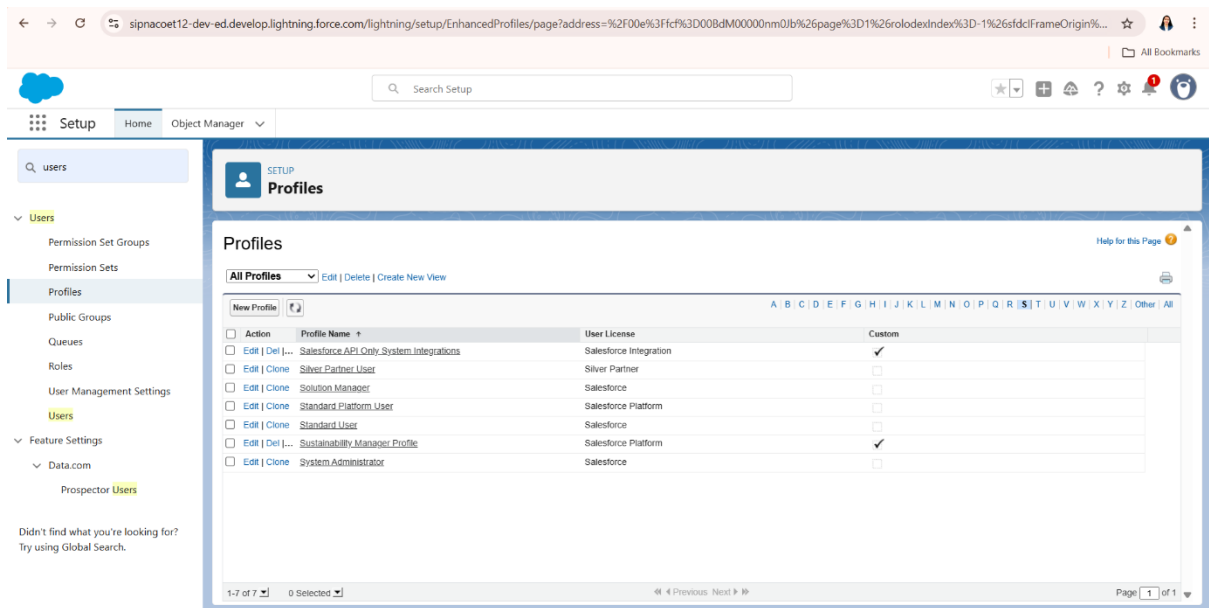


Fig.2.10. Profile List Page(c)

7. Roles

Purpose: Define record-level visibility hierarchy for projects and credits.

Implementation Steps:

1. Setup → Users → Roles
2. Example Role Hierarchy:
 - CEO → Sustainability Manager → Project Officers → NGO Coordinator → Auditor

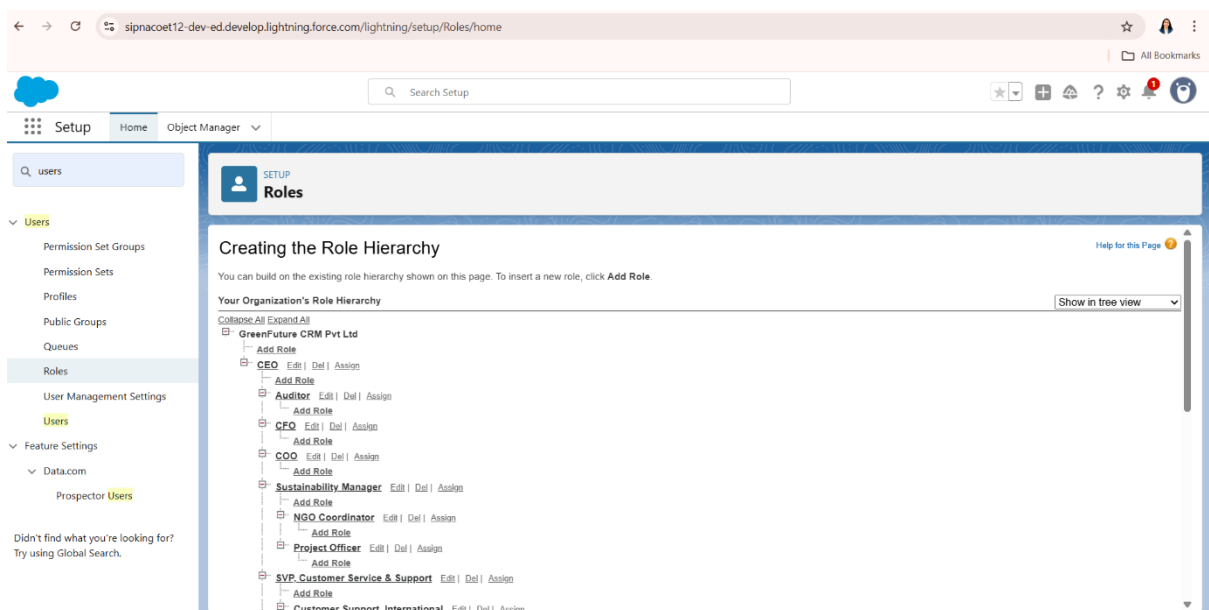


Fig.2.11. Role hierarchy tree diagram

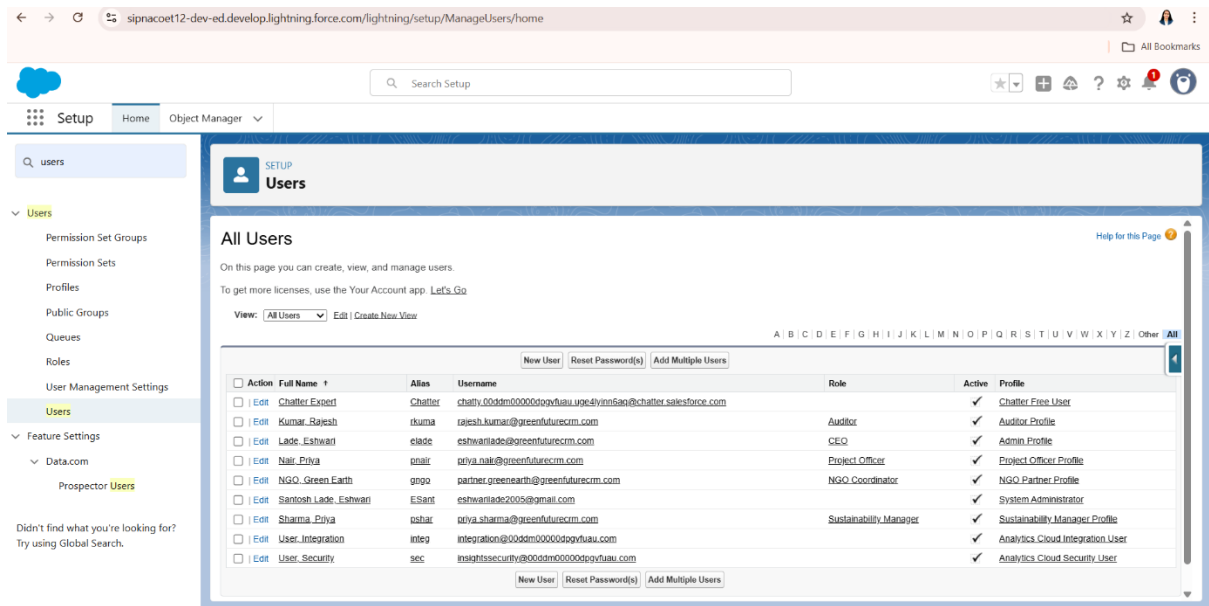


Fig.2.12. Role assignment to a user

8. Permission Sets

Purpose: Grant additional permissions without changing profiles.

Implementation Steps:

1. Setup → **Permission Sets** → **New**
2. Example:
 - **Carbon Credit Admin:** Full access to CarbonCredit__c object
3. Assign to selected users as required.

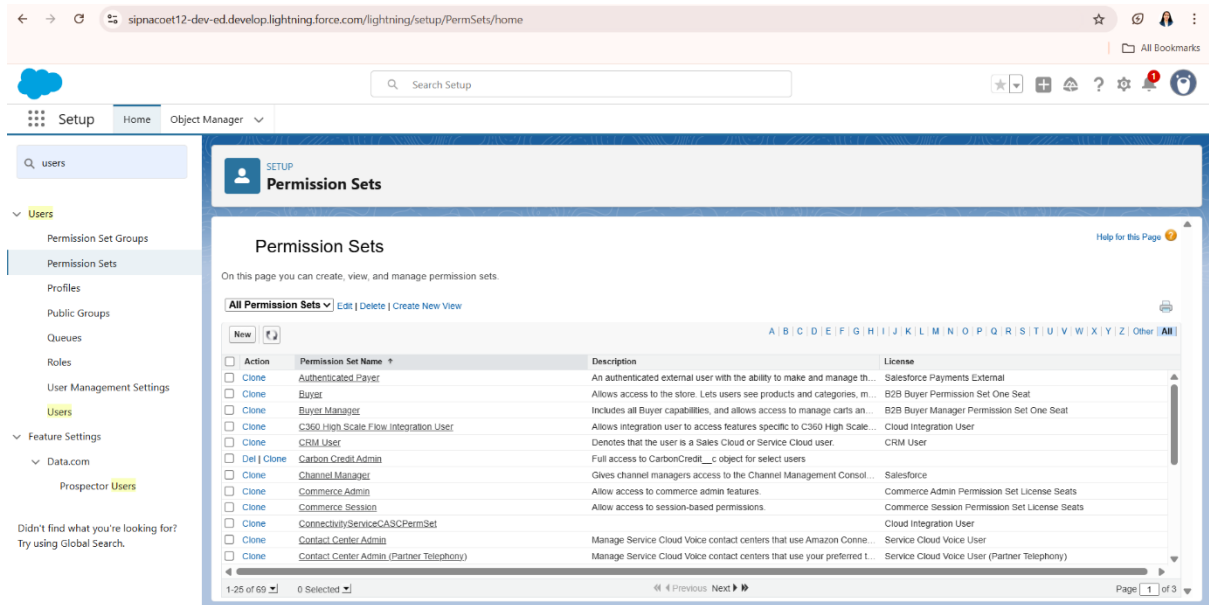


Fig.2.13. Permission Sets list page

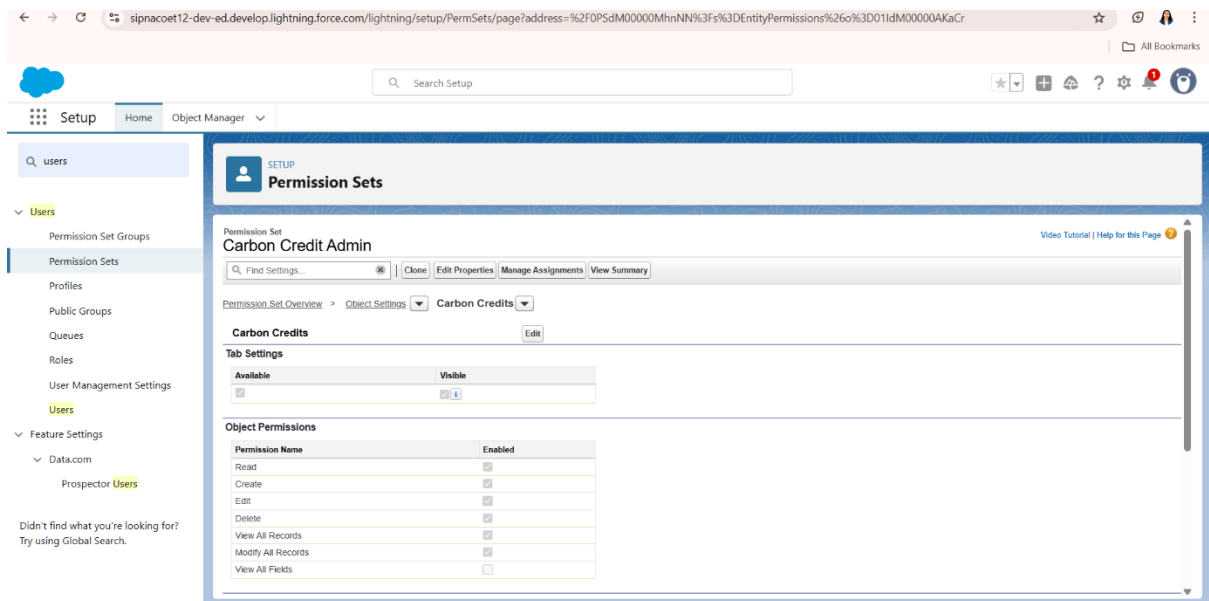


Fig.2.14. Permission Set detail page

9. Organization-Wide Defaults (OWD)

Purpose: Define baseline record-level security for objects.

Implementation Steps:

1. Setup → Security → Sharing Settings
2. Example settings:
 - o CarbonCredit__c → Private

- SustainabilityProject__c → Private
- Partner__c → Public Read Only

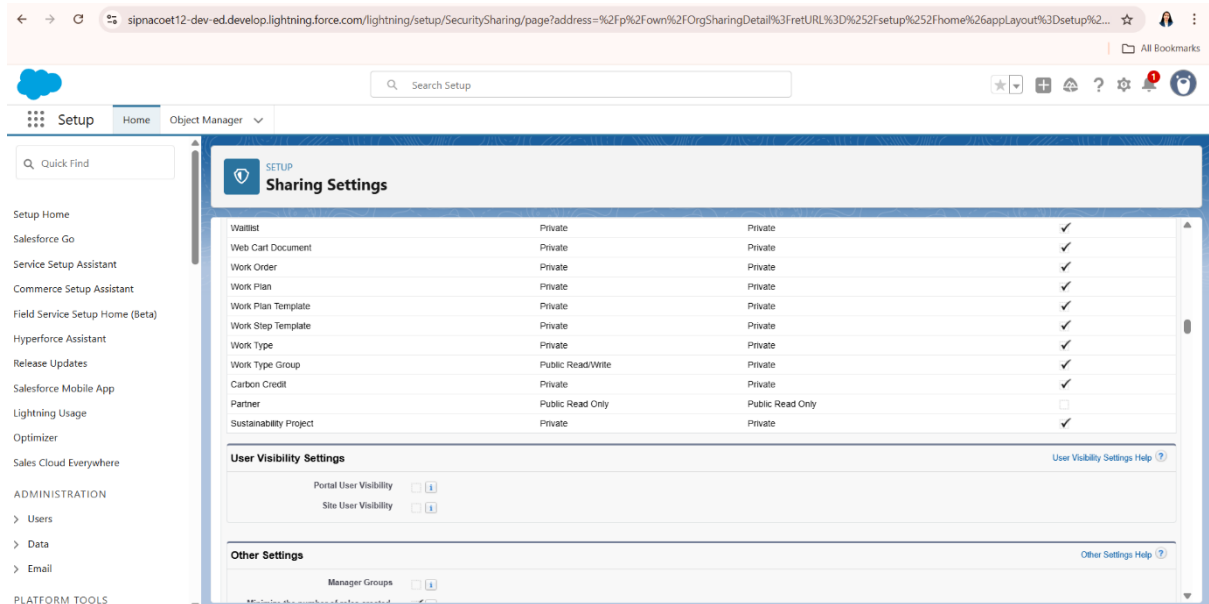


Fig.2.15. Sharing Settings page

10. Sharing Rules

Purpose: Automate record sharing with roles or groups.

Implementation Steps:

1. Setup → Security → Sharing Settings → New
2. Example: Share CarbonCredit__c with Sustainability Manager role if created by Project Officer.

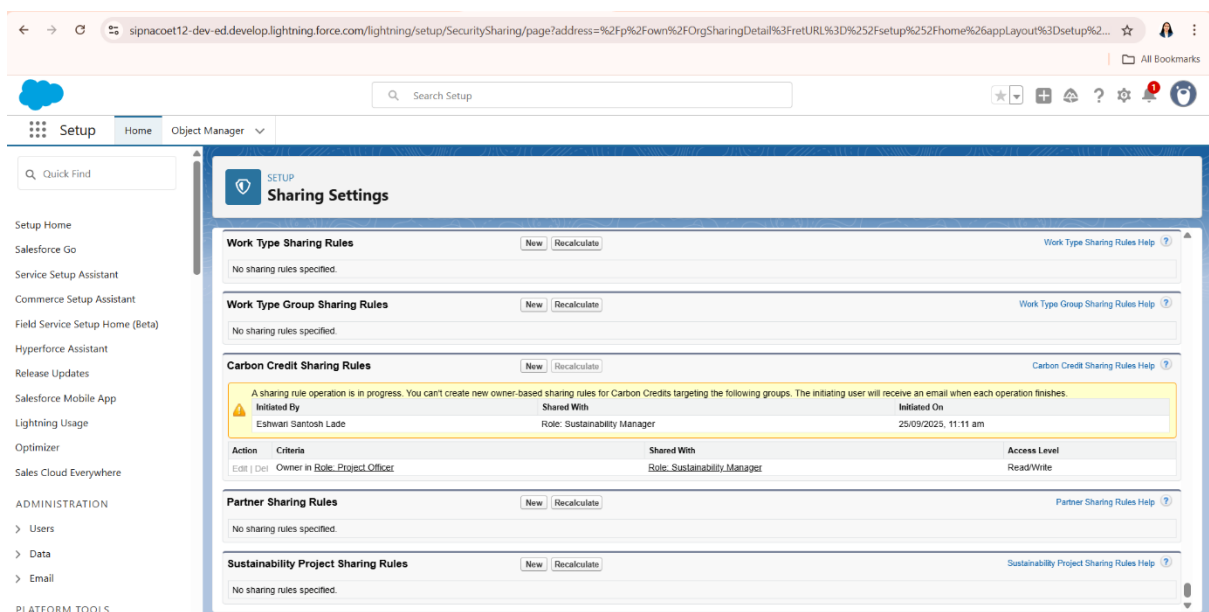


Fig.2.16. Sharing Rules list page

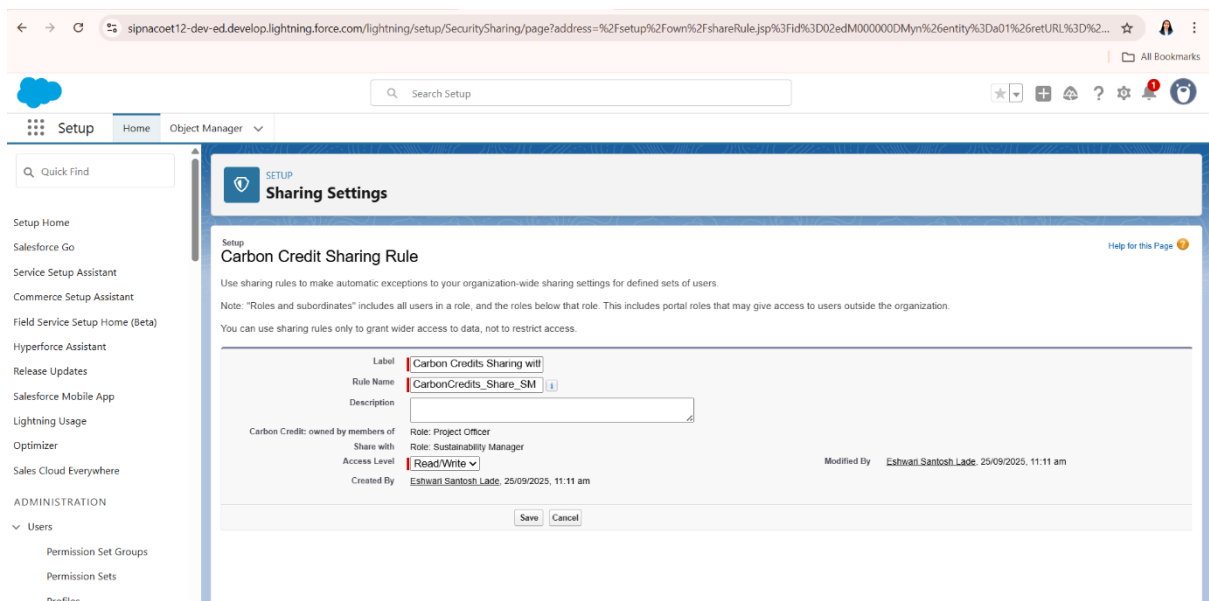


Fig.2.17. Sharing Rule detail

11. Login Access Policies

Purpose: Ensure security with password policies, login IP ranges, and session limits.

Implementation Steps:

1. Setup → Security → Session Settings
2. Configure:
 - Maximum login attempts: 5
 - Session timeout: 30 minutes
 - Login IP ranges for sensitive roles

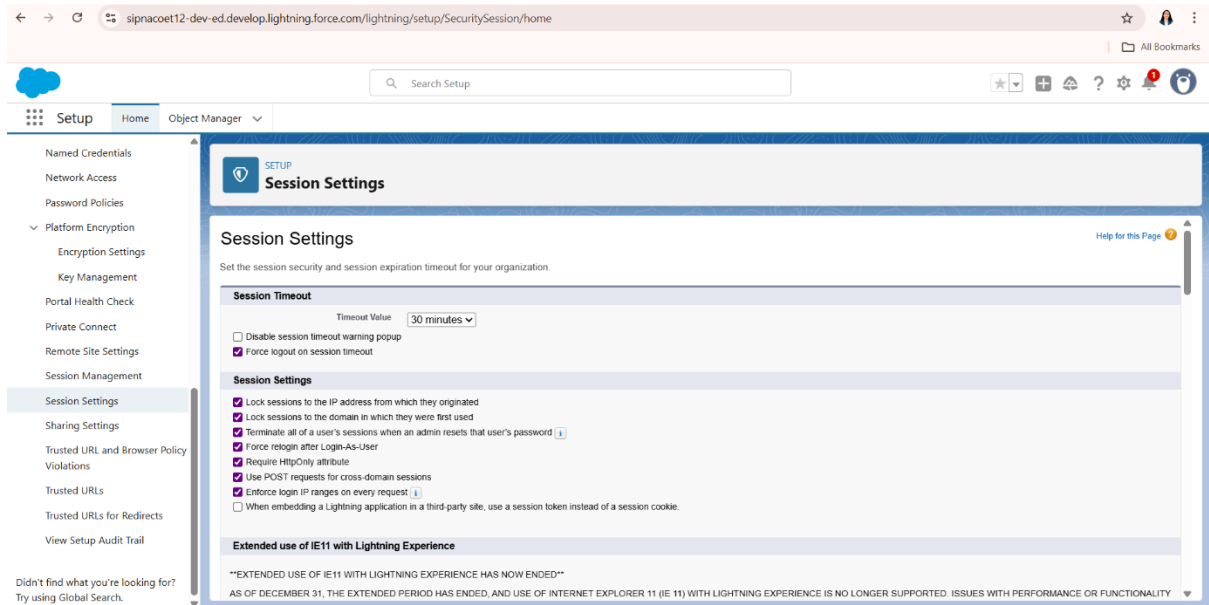


Fig.2.18. Session Settings page

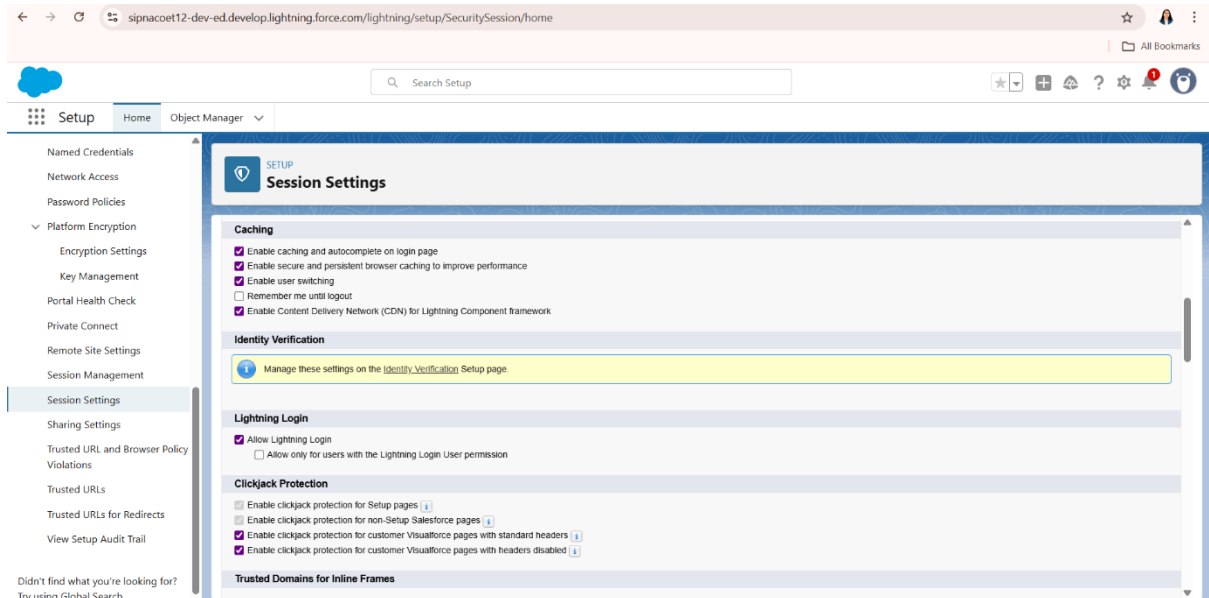


Fig.2.19. Clickjack Protection Section

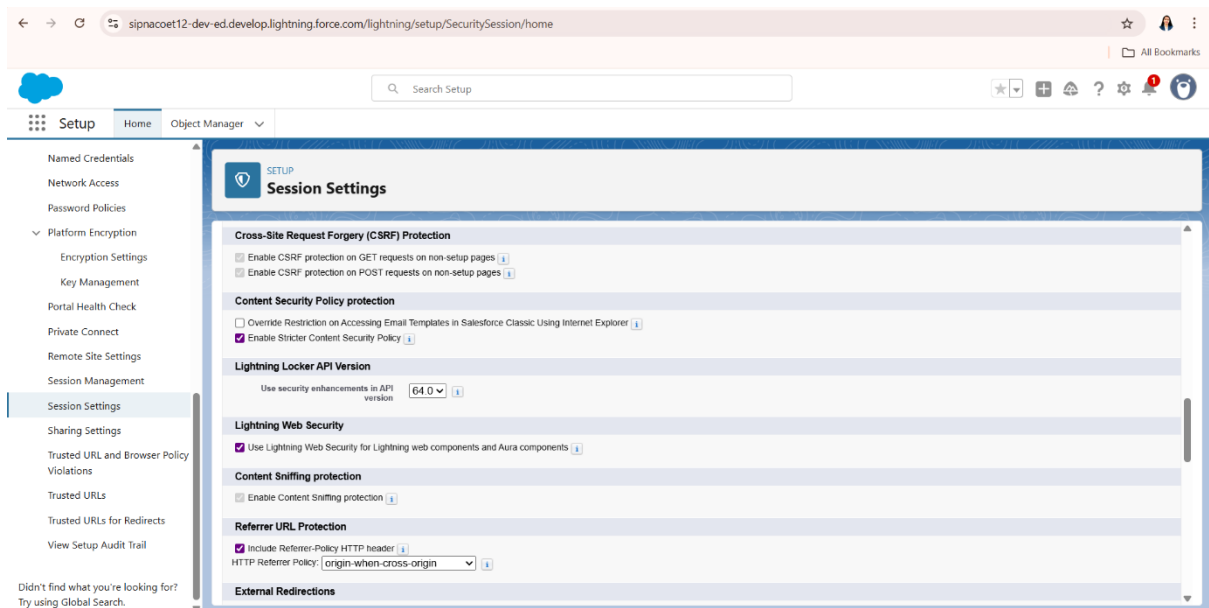


Fig.2.20. CSRF & CSP Section

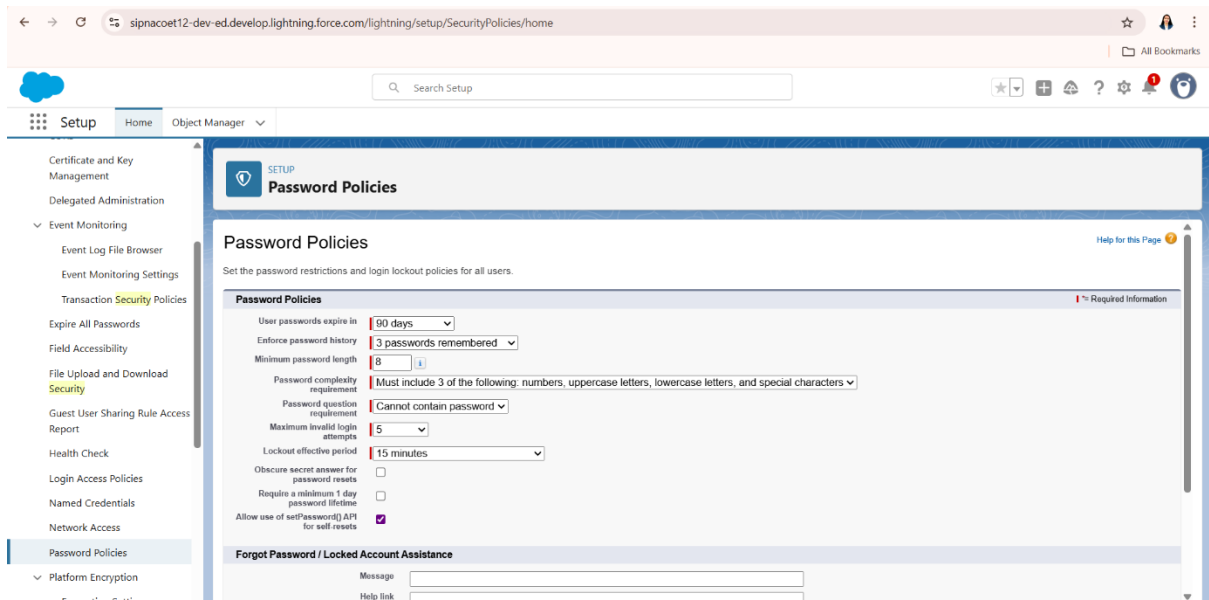


Fig.2.21. Password Policies Setup Page

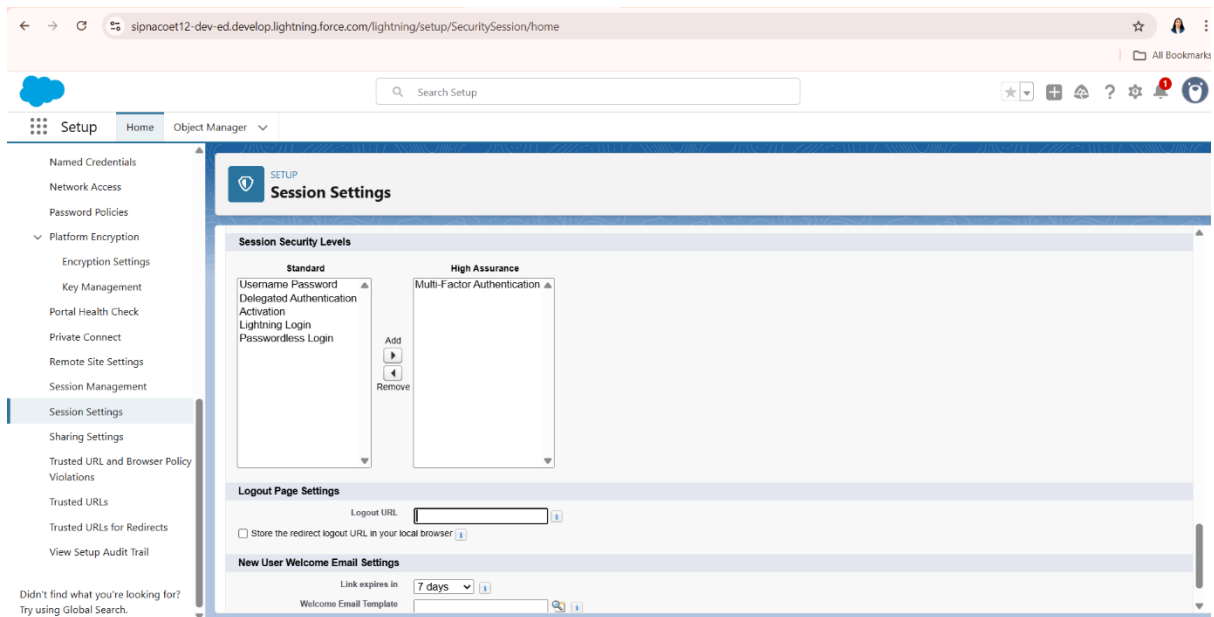


Fig.2.22. Session Security Levels Section Page

12. Developer Org & Scratch Org Setup

Purpose: Configure Dev Org for development and testing of Apex, Flows, and LWCs.

Implementation Steps:

1. Enable Dev Hub: Setup → **Dev Hub** → **Enable**
2. Create Scratch Org for testing:

```
sf project org create scratch --definition-file config/project-scratch-org-def.json --alias GreenFutureScratch
```

3. Scratch Org is used to test all metadata before deploying to production.

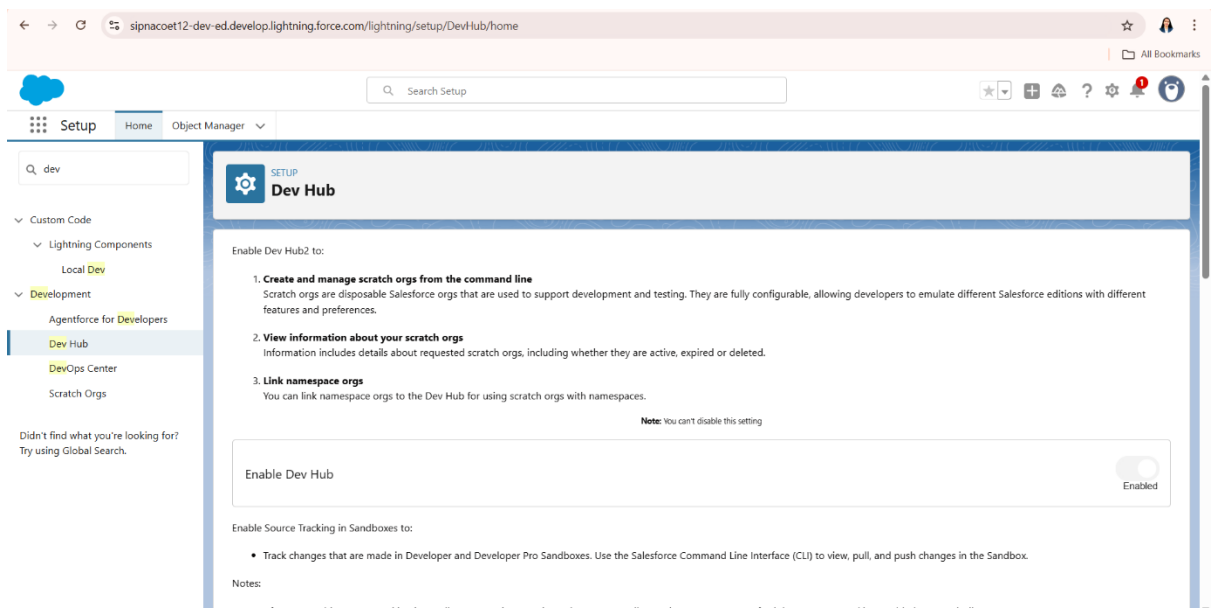


Fig.2.23. Dev Hub Enabled

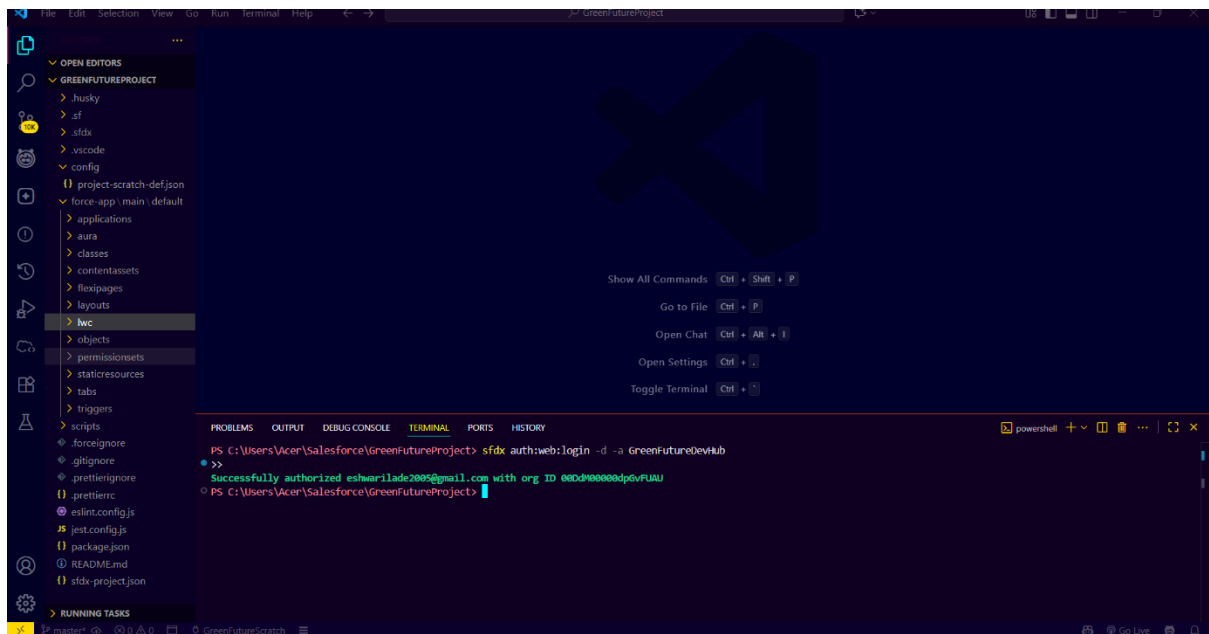


Fig.2.24. Authenticate Dev Hub

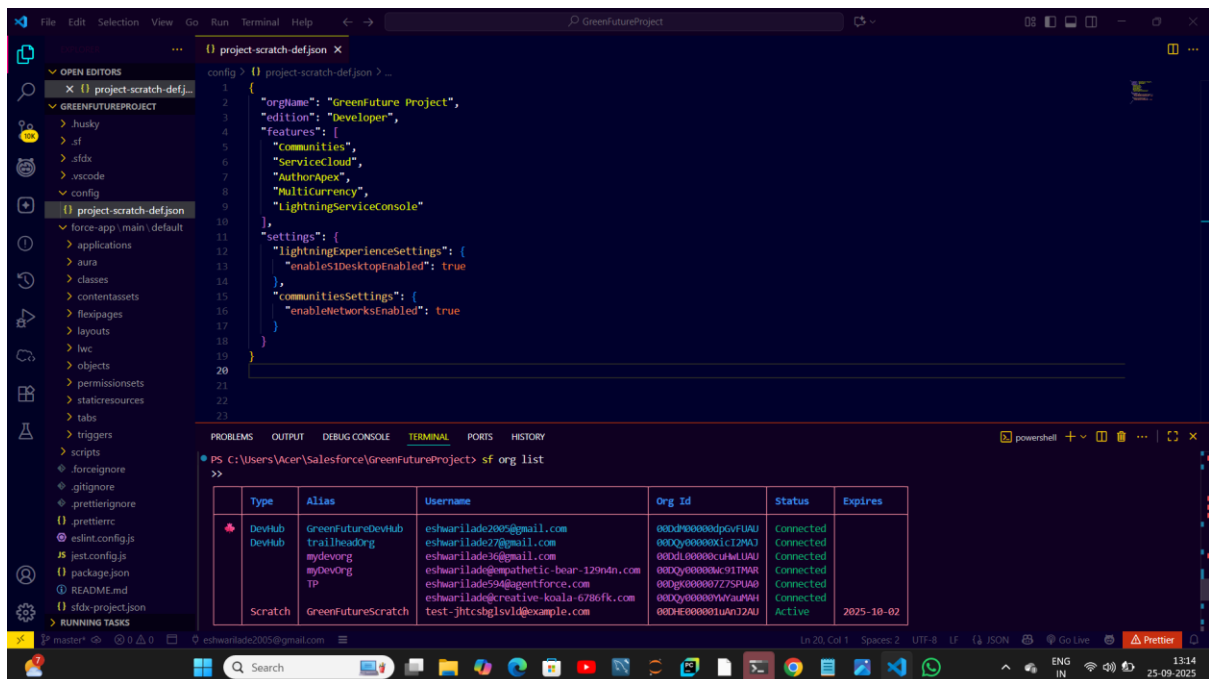


Fig.2.25. Phase2_OrgList_DefaultOrg

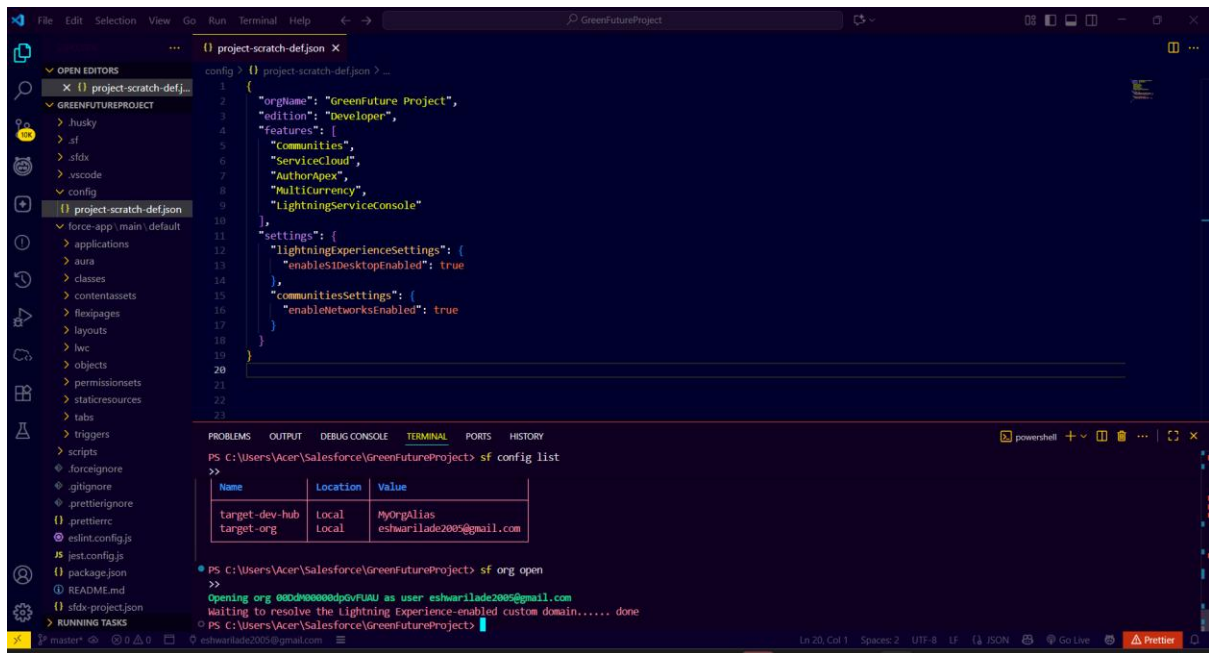


Fig.2.26. Phase2_DefaultOrg_ConfigAndOpen

Phase 2 establishes a secure and well-structured Salesforce environment for GreenFuture CRM, ensuring proper user access, data security, and workflow automation. With Developer and Scratch Orgs for testing and reliable deployment methods, the foundation is set for efficient project management, carbon credit tracking, and transparent sustainability reporting.