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.

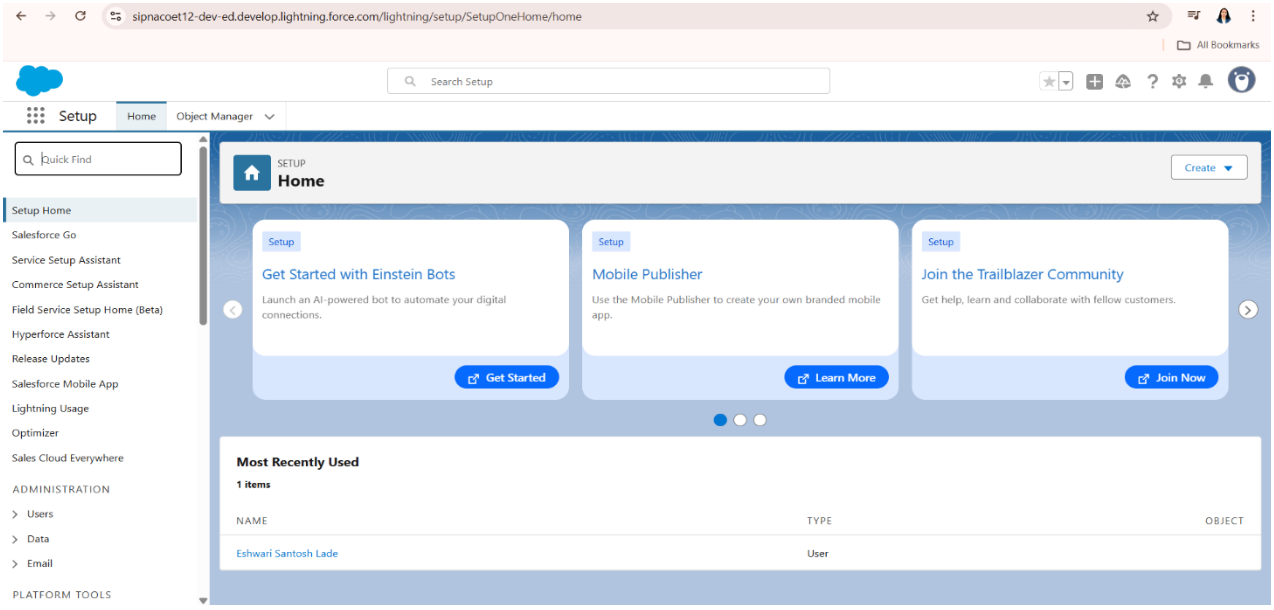

Fig 2.1. Setup Page

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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.

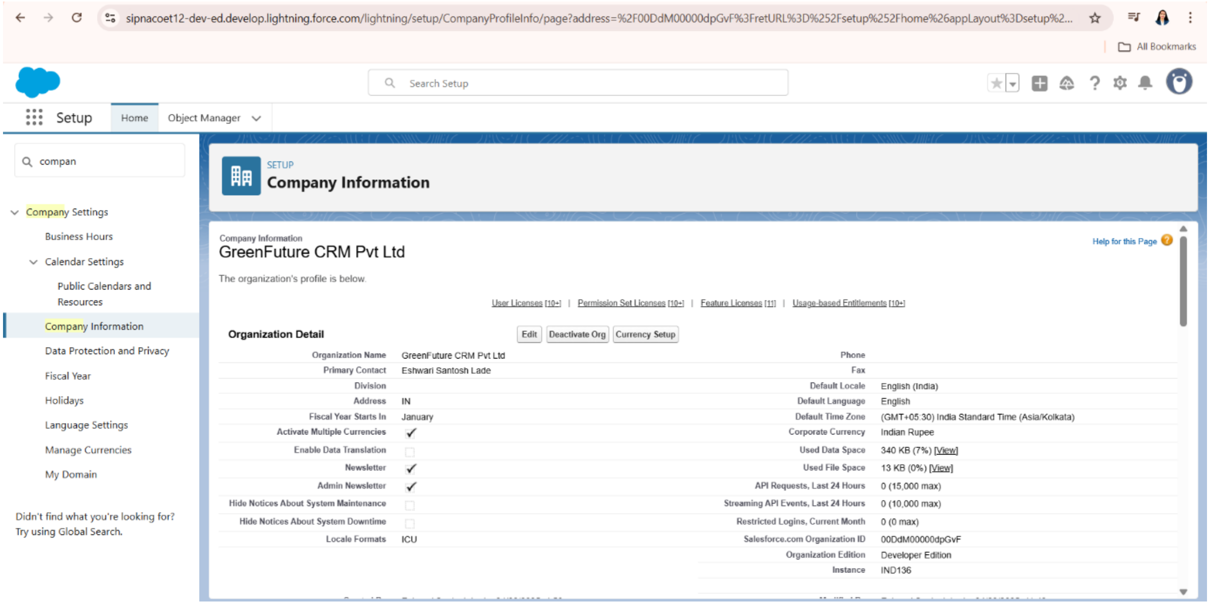

Fig.2.2. Company Information page

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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).

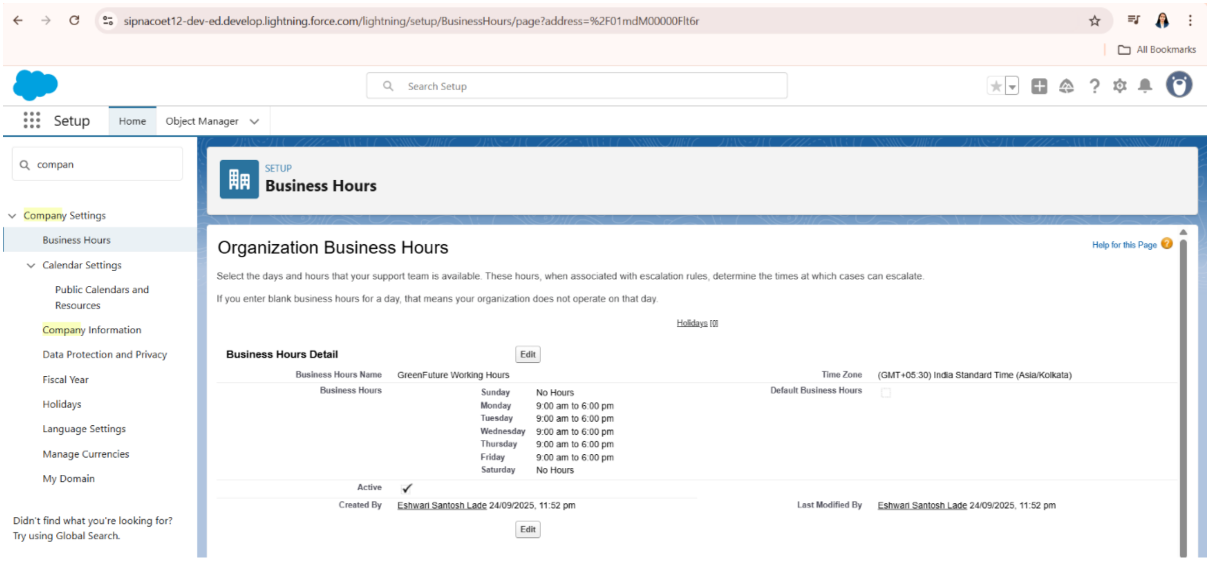

Fig.2.3. Business Hours setup page

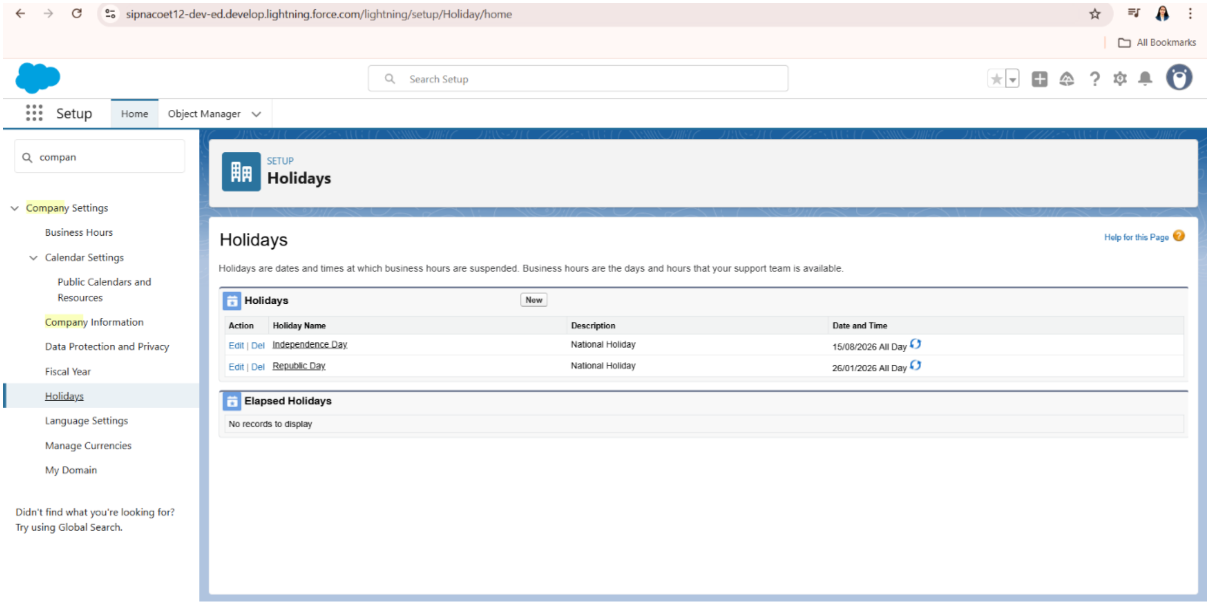

Fig.2.4. Holidays page

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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).

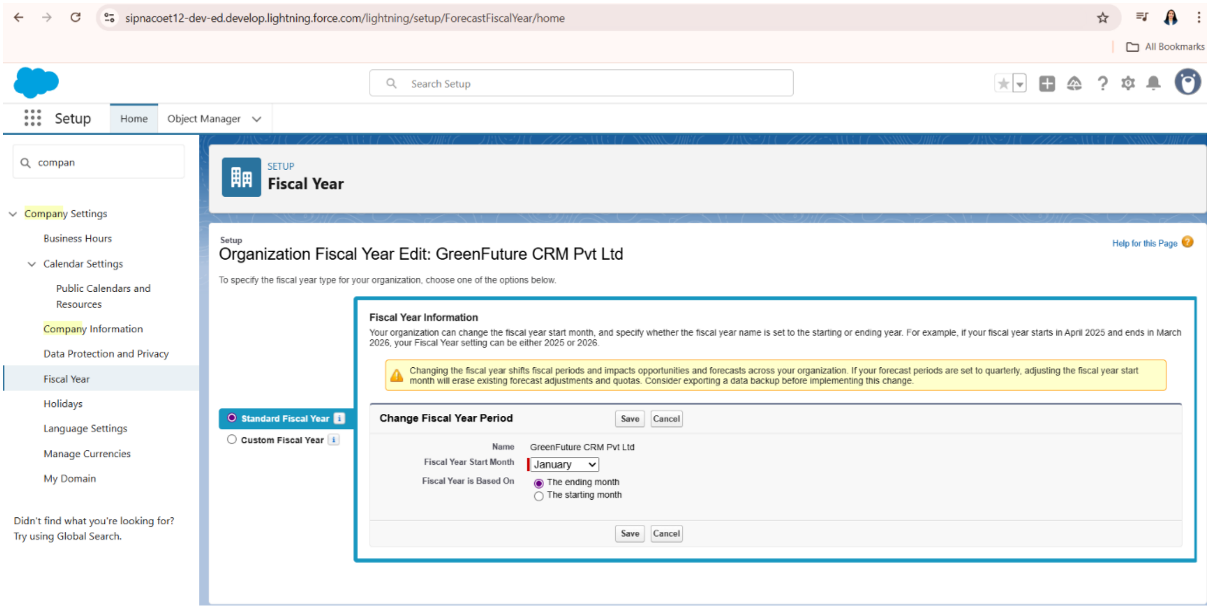

Fig.2.5. Fiscal Year setup page

5. User Setup & Licenses

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

Implementation Steps:

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

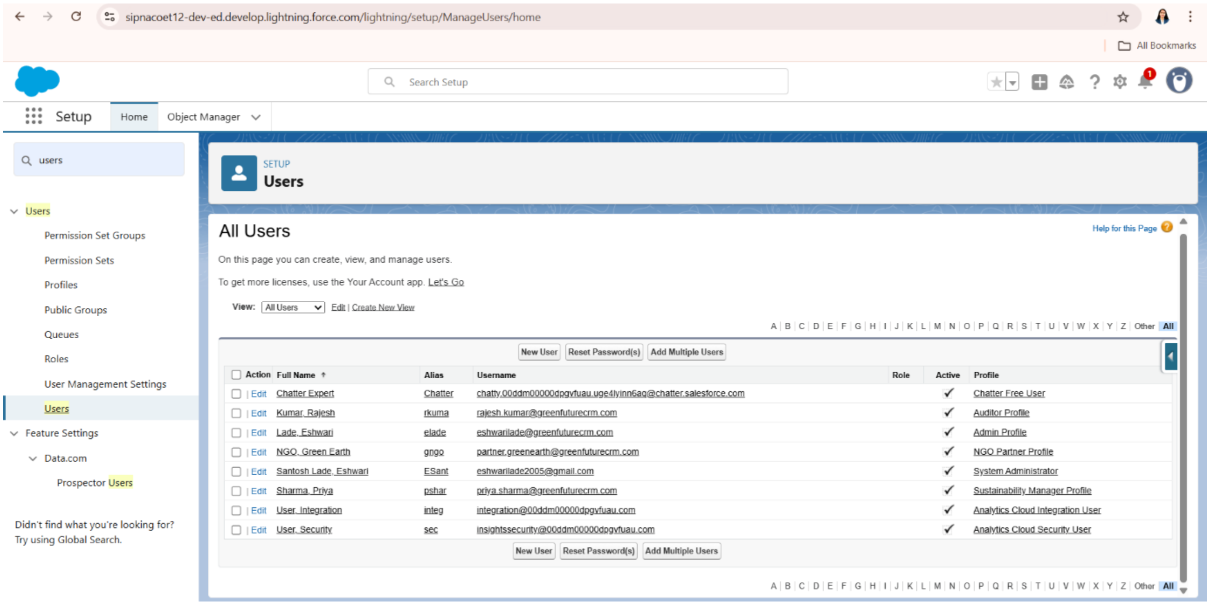

Fig.2.6. Users list page

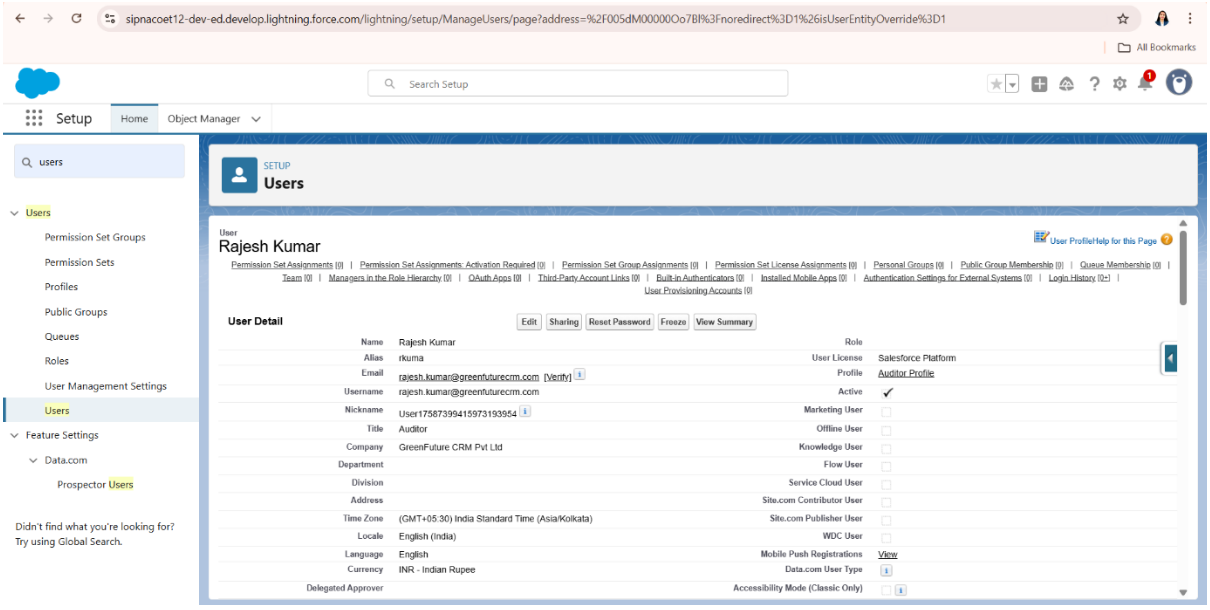

Fig.2.7. User detail page

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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

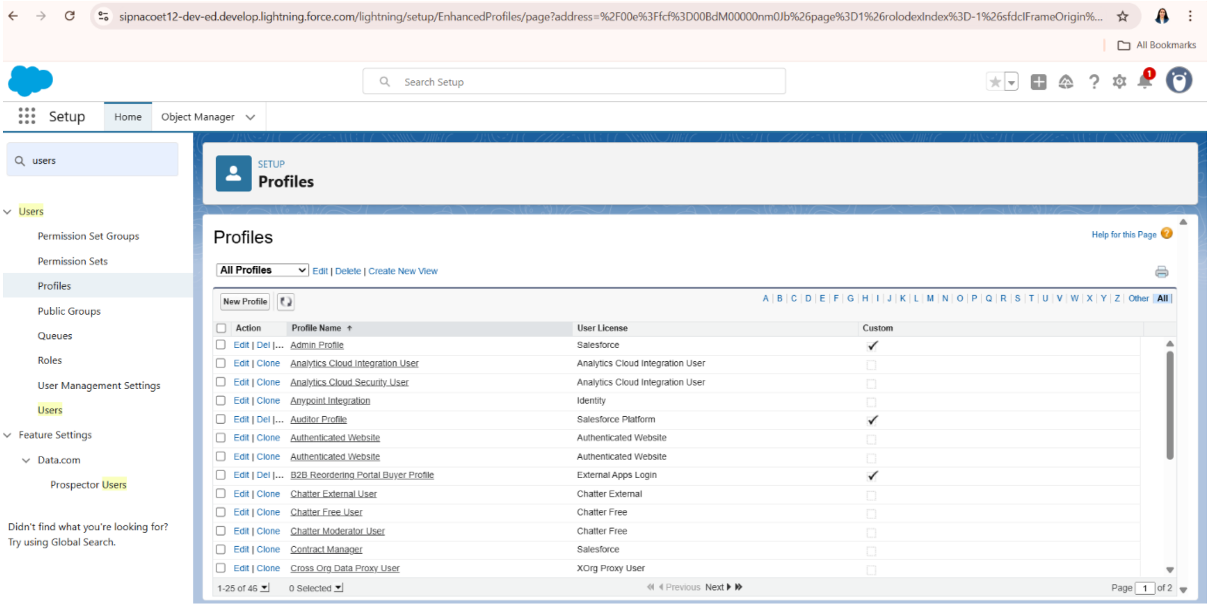

Fig.2.8. Profile List Page(a)

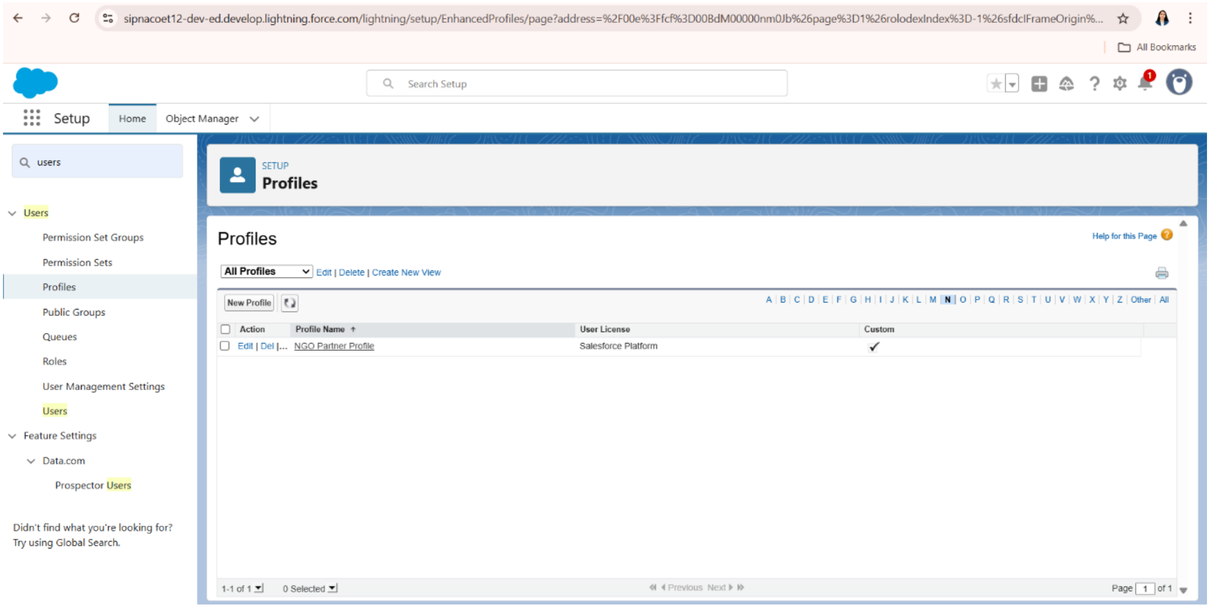

Fig.2.9. Profile List Page(b)

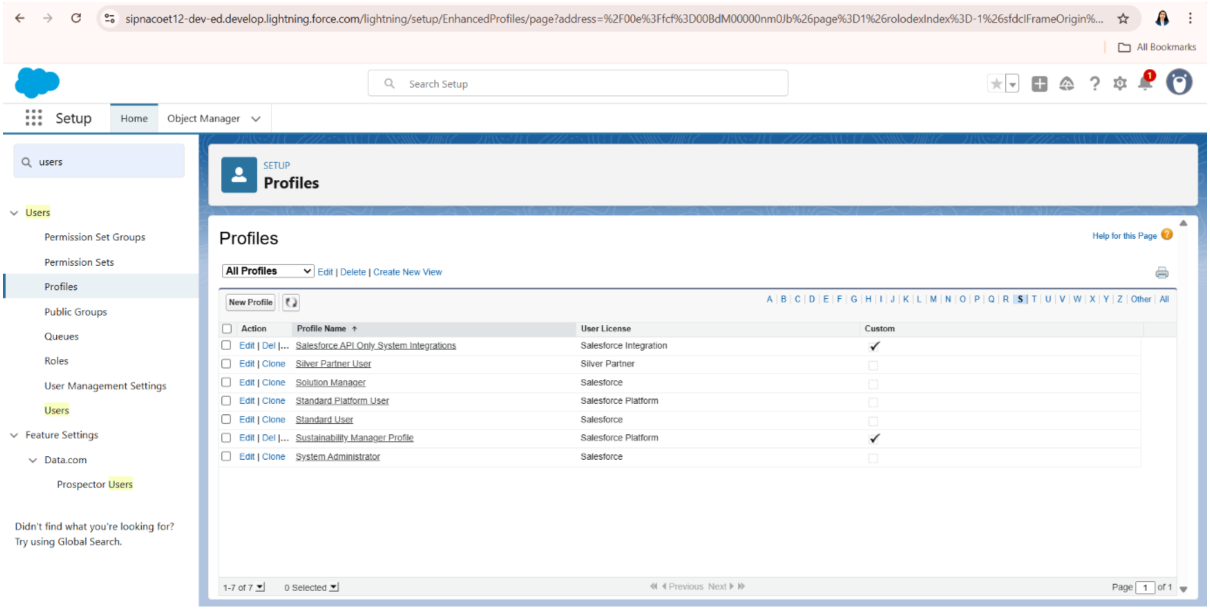

Fig.2.10. Profile List Page(c)

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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

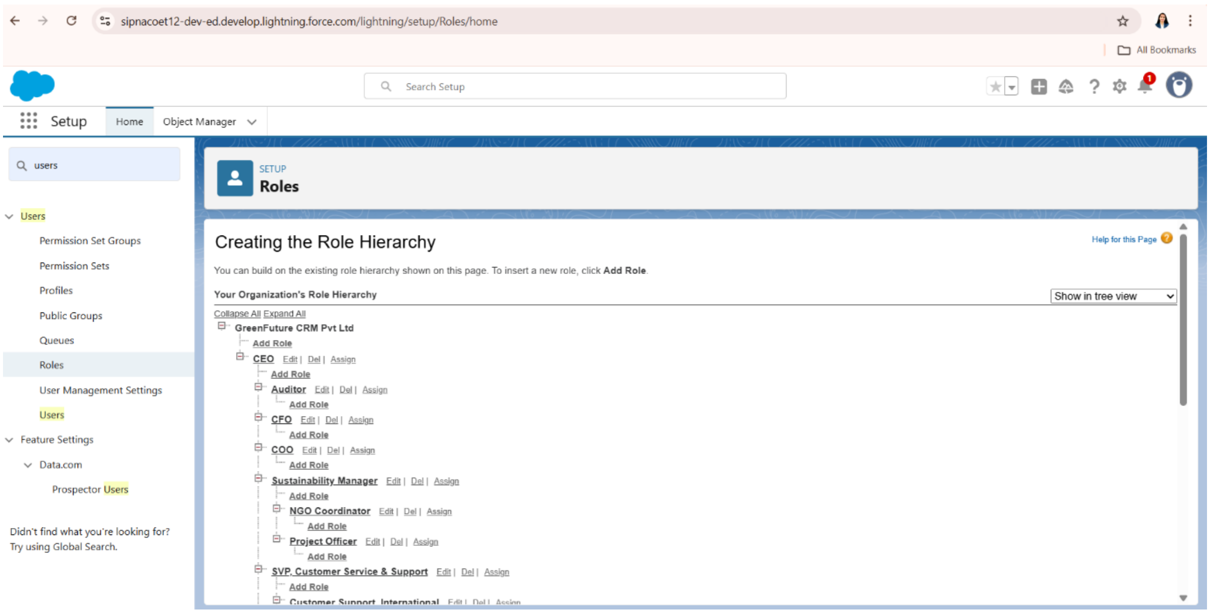

Fig.2.11. Role hierarchy tree diagram

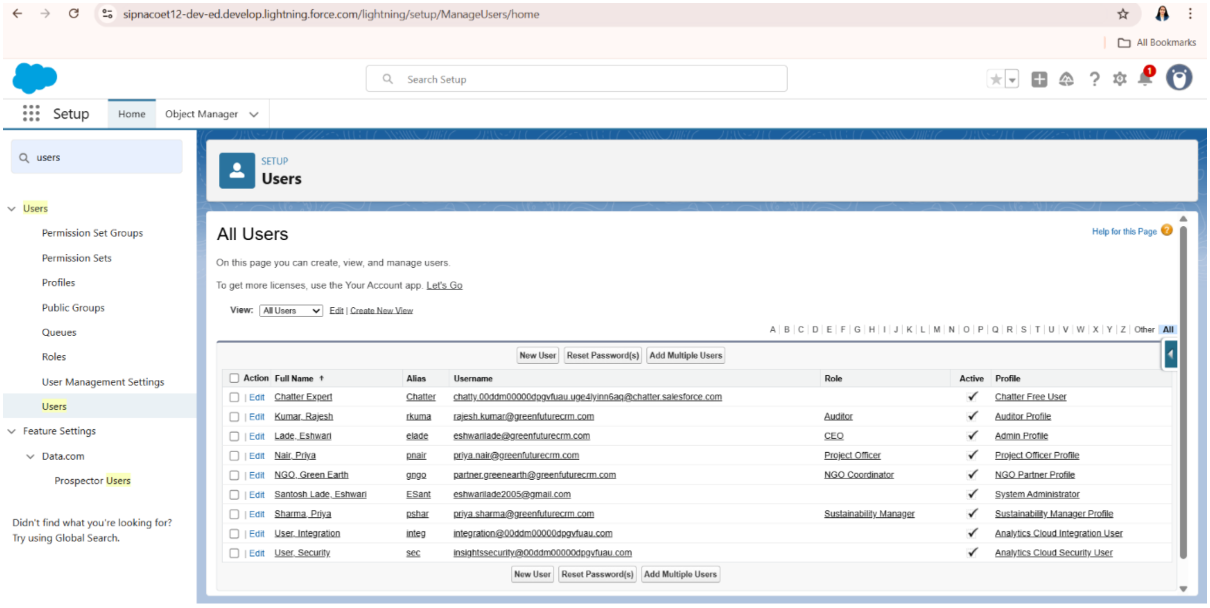

Fig.2.12. Role assignment to a user

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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.

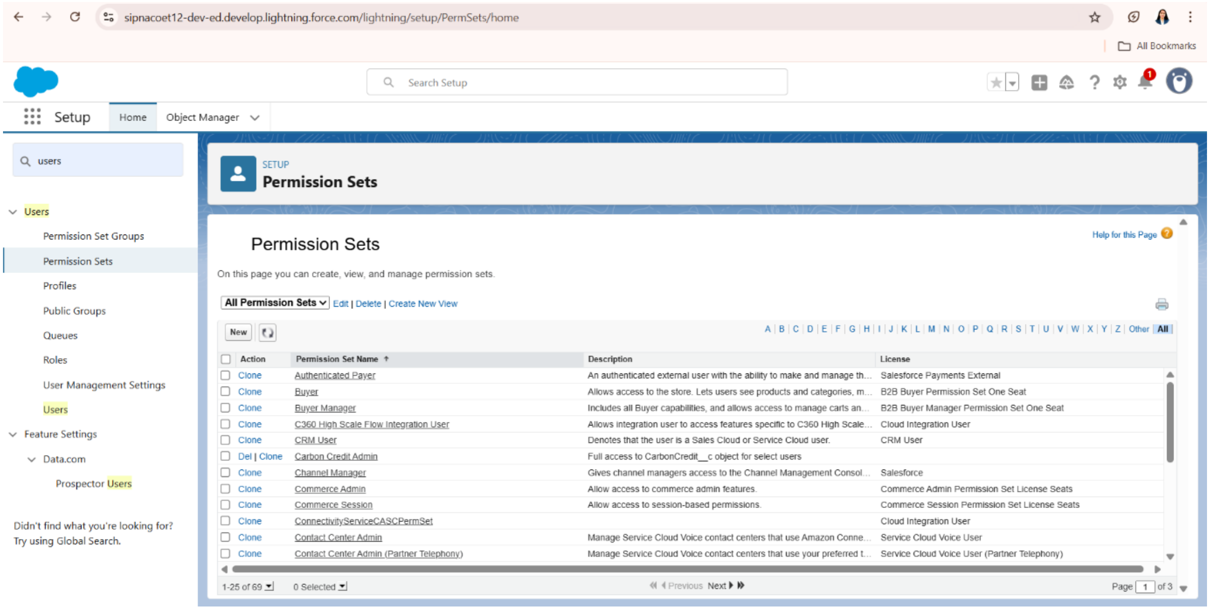

Fig.2.13. Permission Sets list page

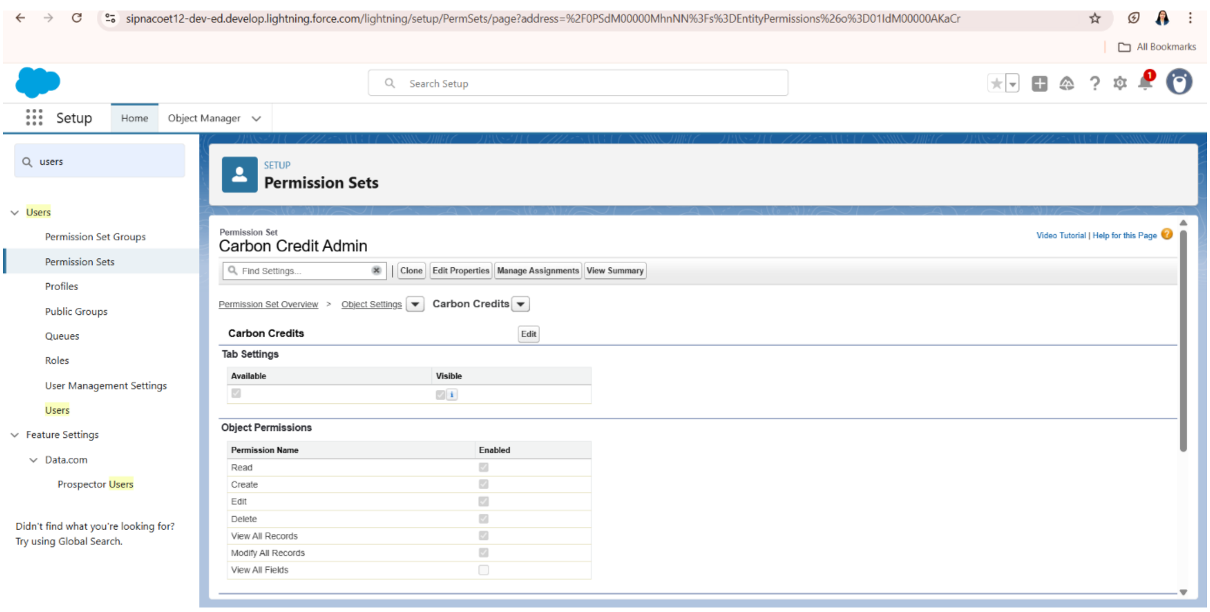

Fig.2.14. Permission Set detail page

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9. Organization-Wide Defaults (OWD)

Purpose: Define baseline record-level security for objects.

Implementation Steps:

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

- SustainabilityProject__c → Private
- Partner__c → Public Read Only

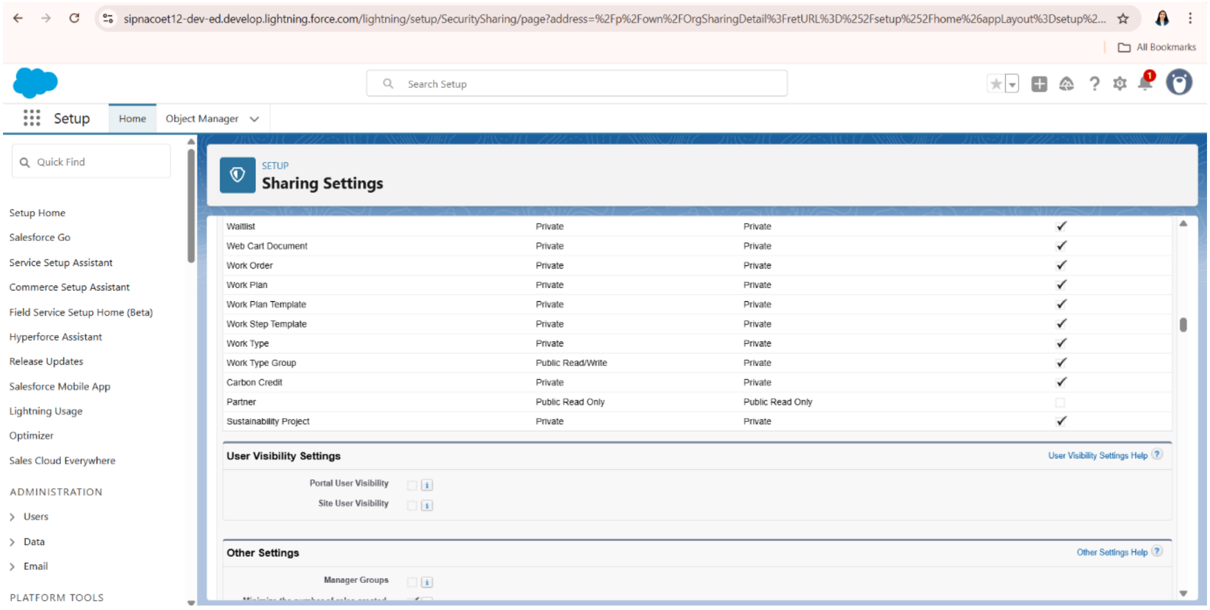

Fig.2.15. Sharing Settings page

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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.

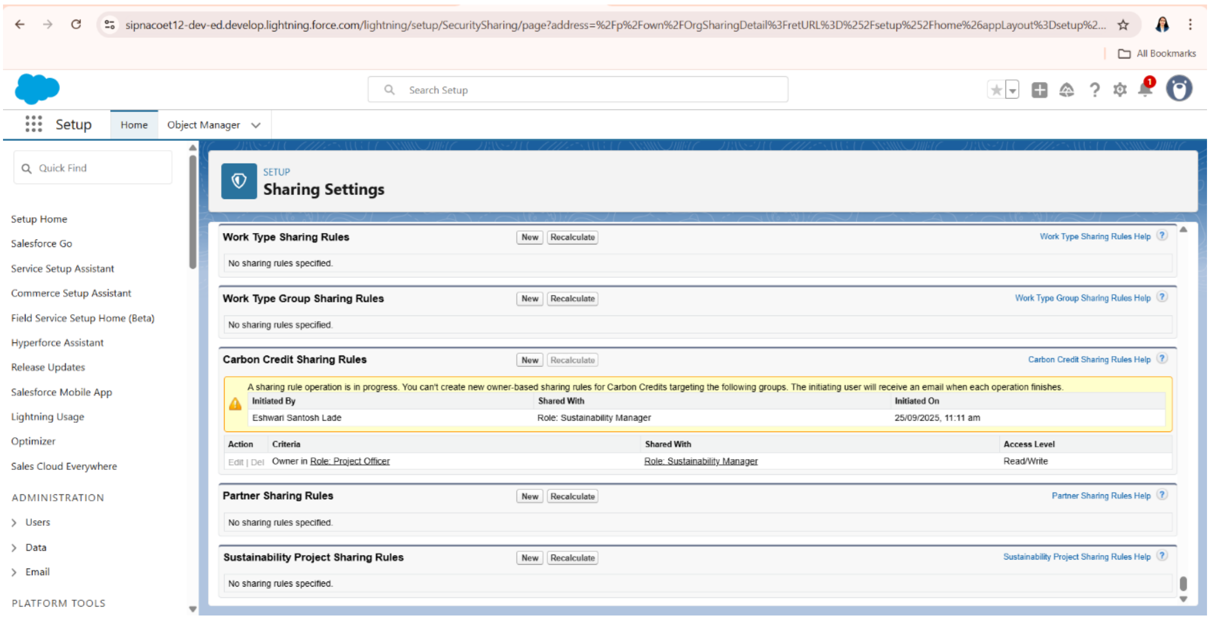

Fig.2.16. Sharing Rules list page

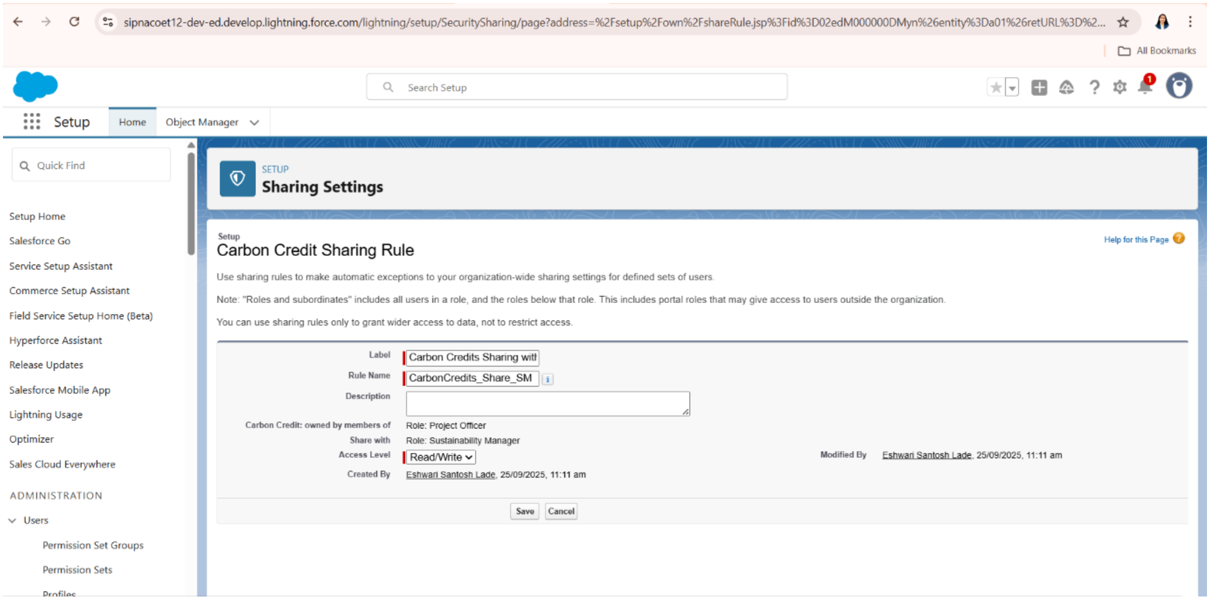

Fig.2.17. Sharing Rule detail

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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

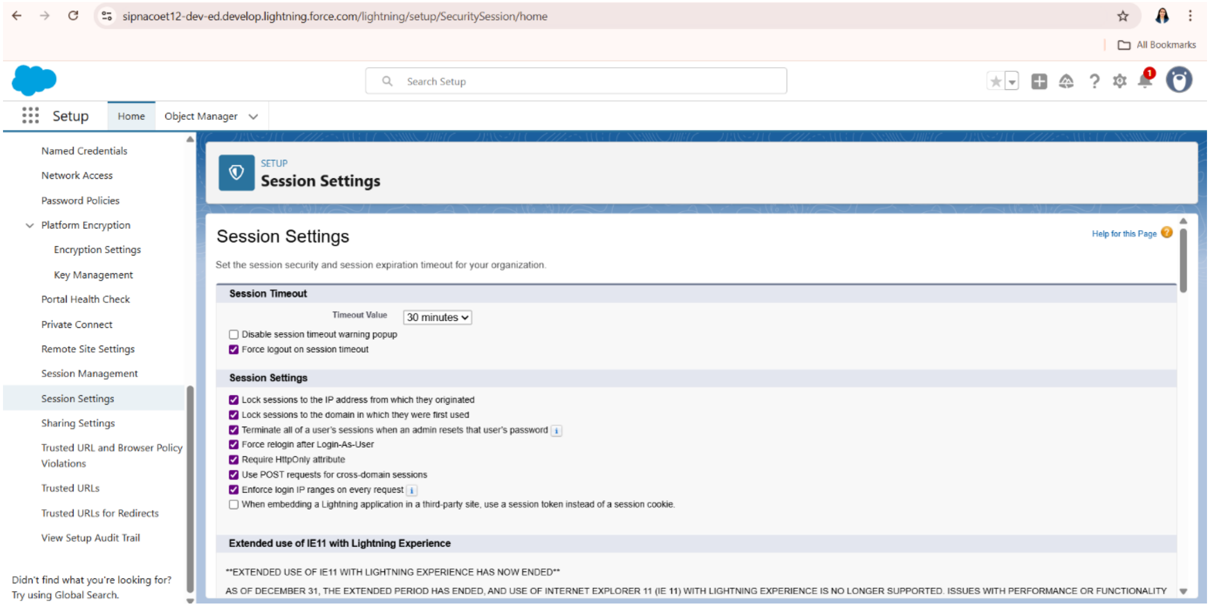

Fig.2.18. Session Settings page

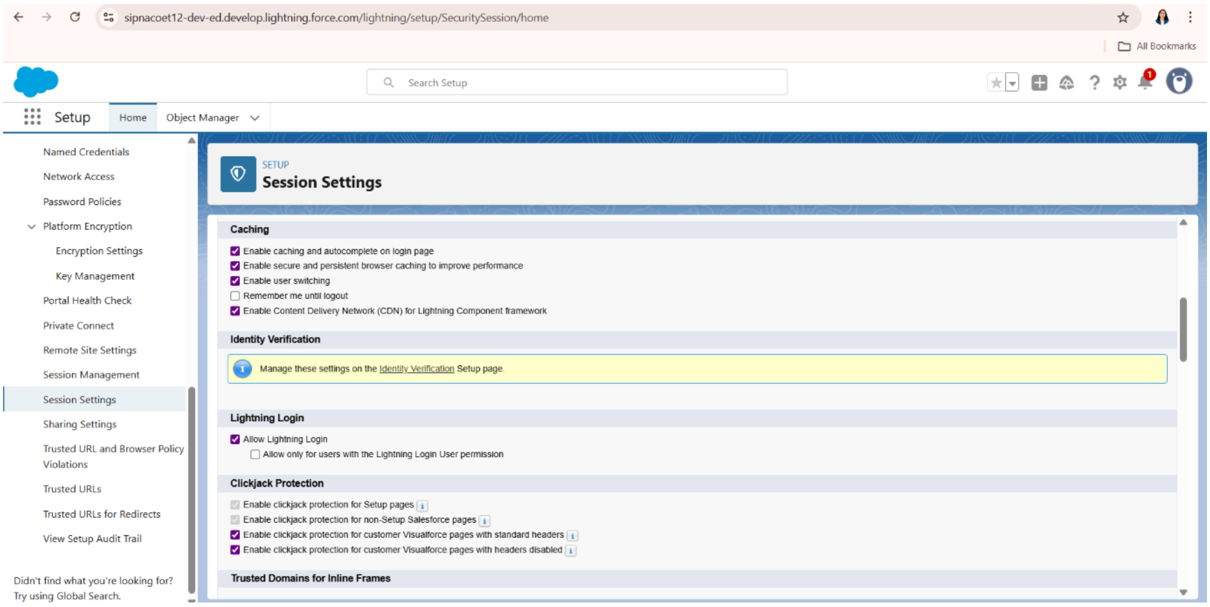

Fig.2.19. Clickjack Protection Section

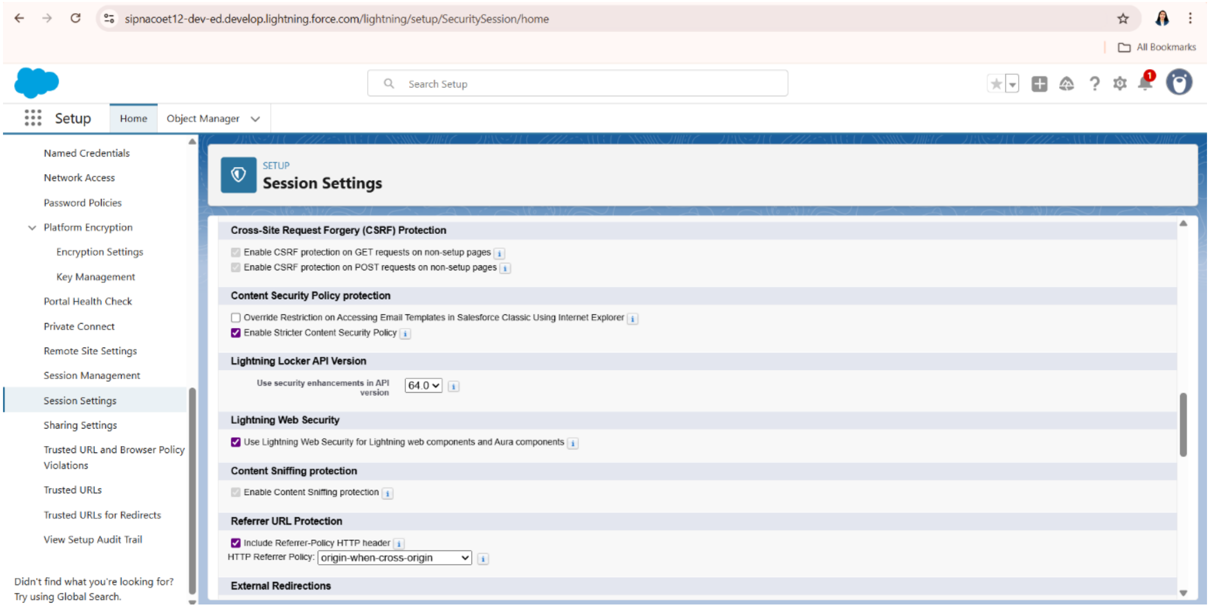

Fig.2.20. CSRF & CSP Section

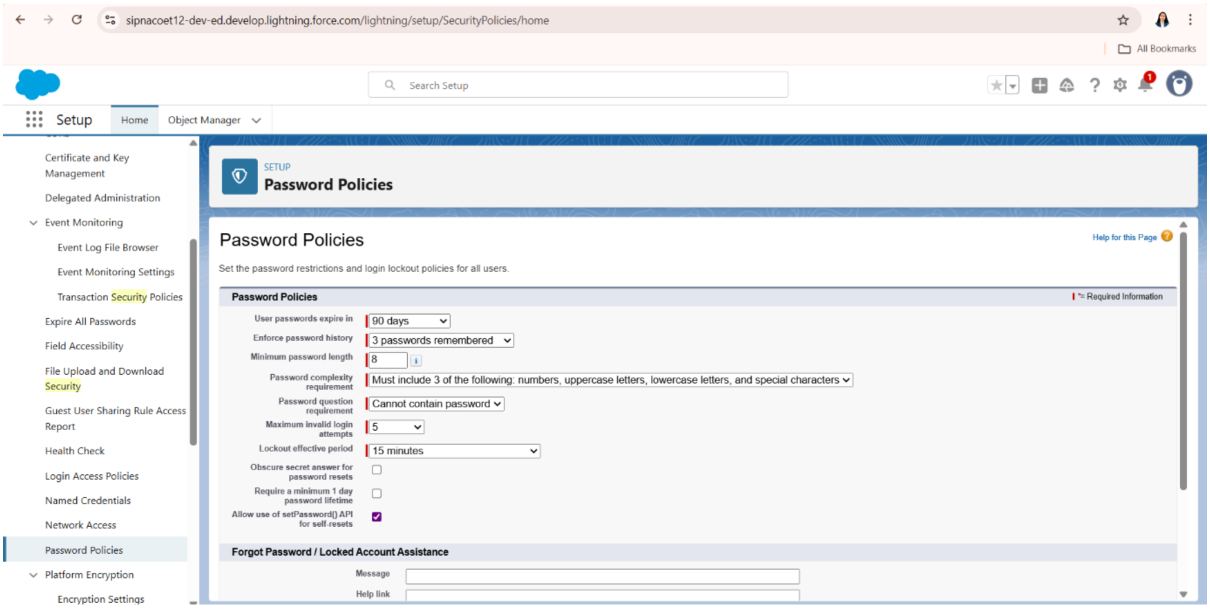

Fig.2.21. Password Policies Setup Page

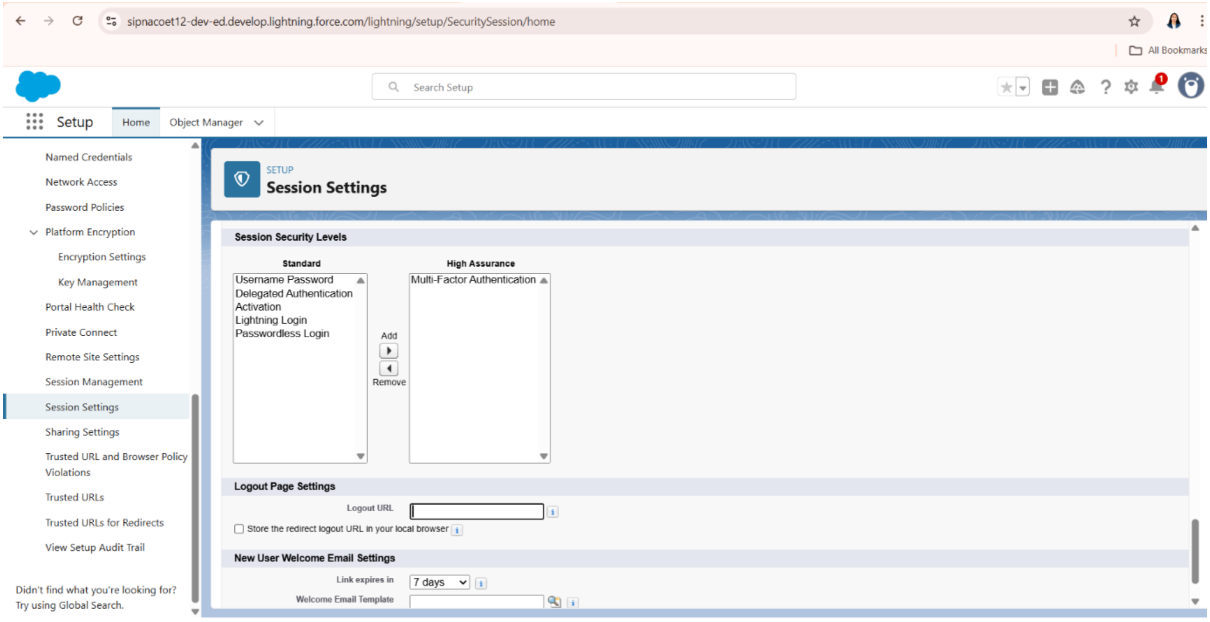

Fig.2.22. Session Security Levels Section Page

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.

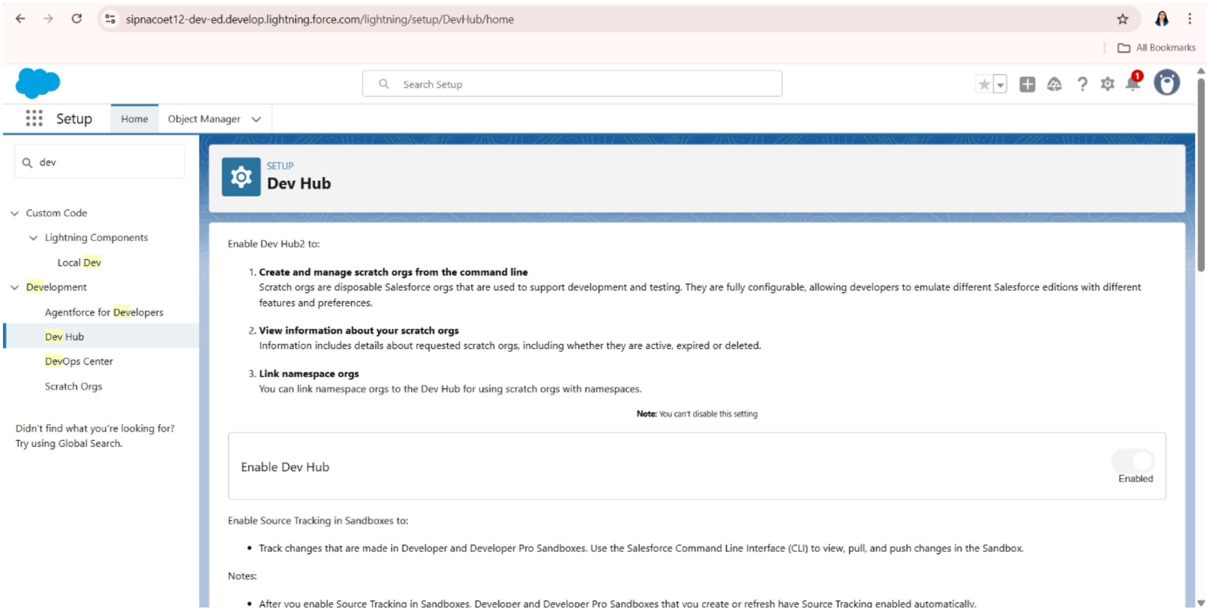

Fig.2.23. Dev Hub Enabled

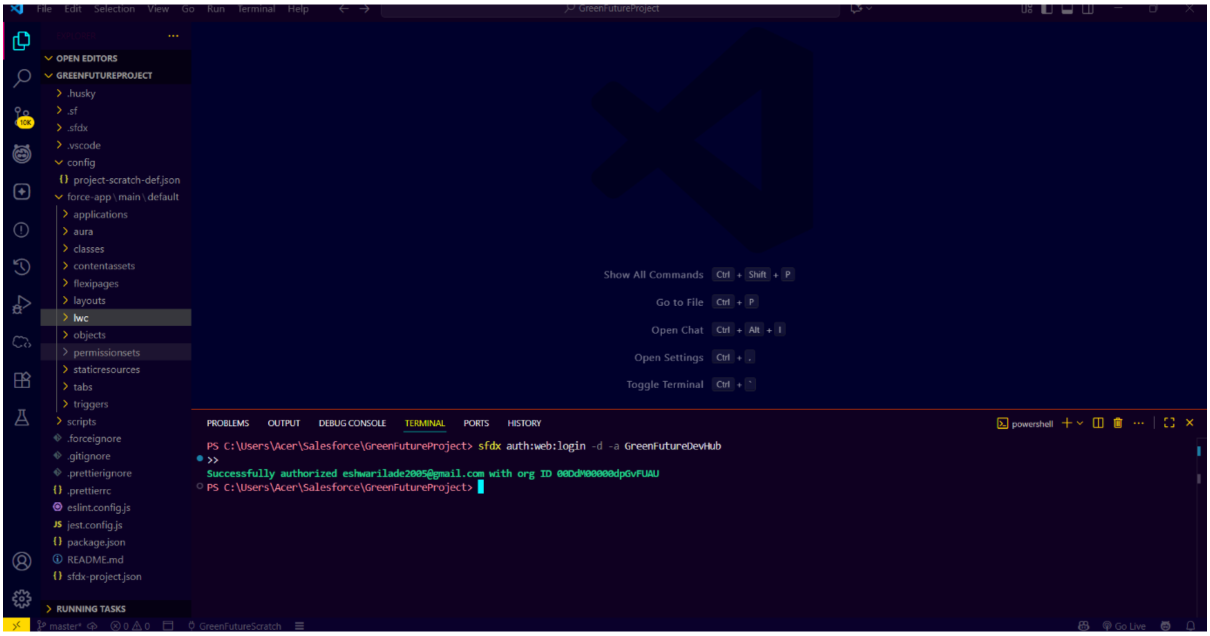

Fig.2.24. Authenticate Dev Hub

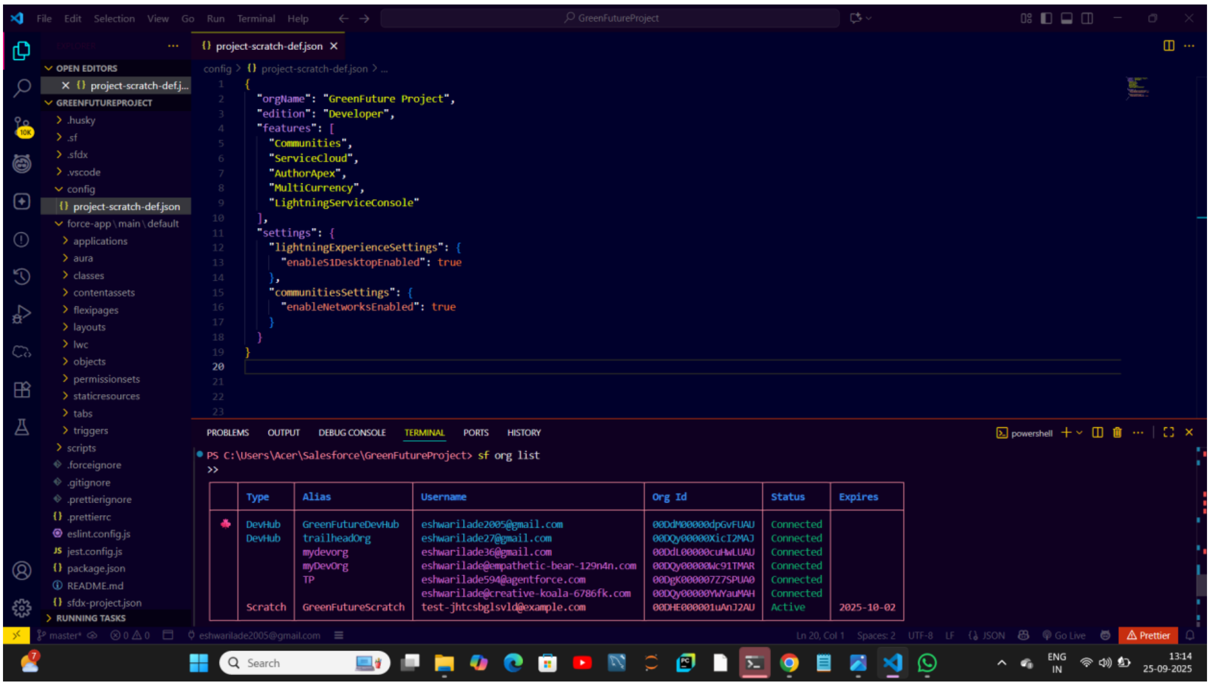

Fig.2.25. Phase2_OrgList_DefaultOrg

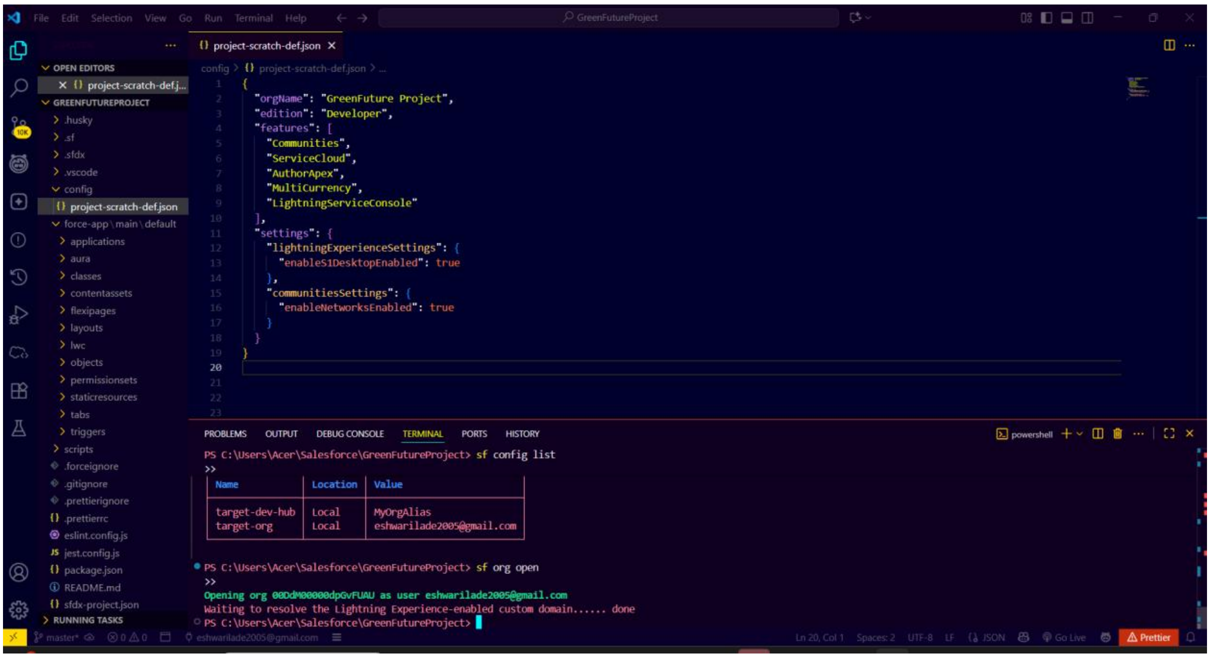

Fig.2.26. Phase2_DefaultOrg_ConfigAndOpen

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.