

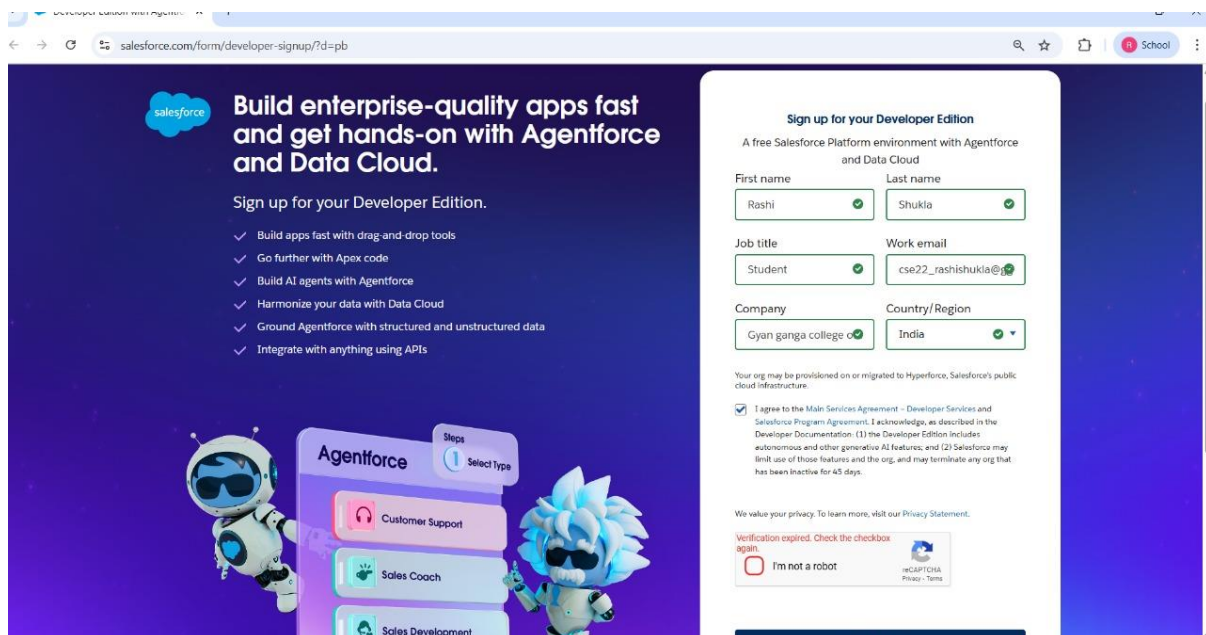
## Phase 2: Org Setup & Configuration

### Project: Last Mile Delivery CRM

This document summarizes the work performed in Phase 2 of the capstone: setting up the Salesforce Developer Org and configuring the resources required for the Last Mile Delivery CRM project. It includes step-by-step actions completed and a screenshot (to be attached) of the custom objects & fields created for delivery management.

#### Step 1 – Sign Up

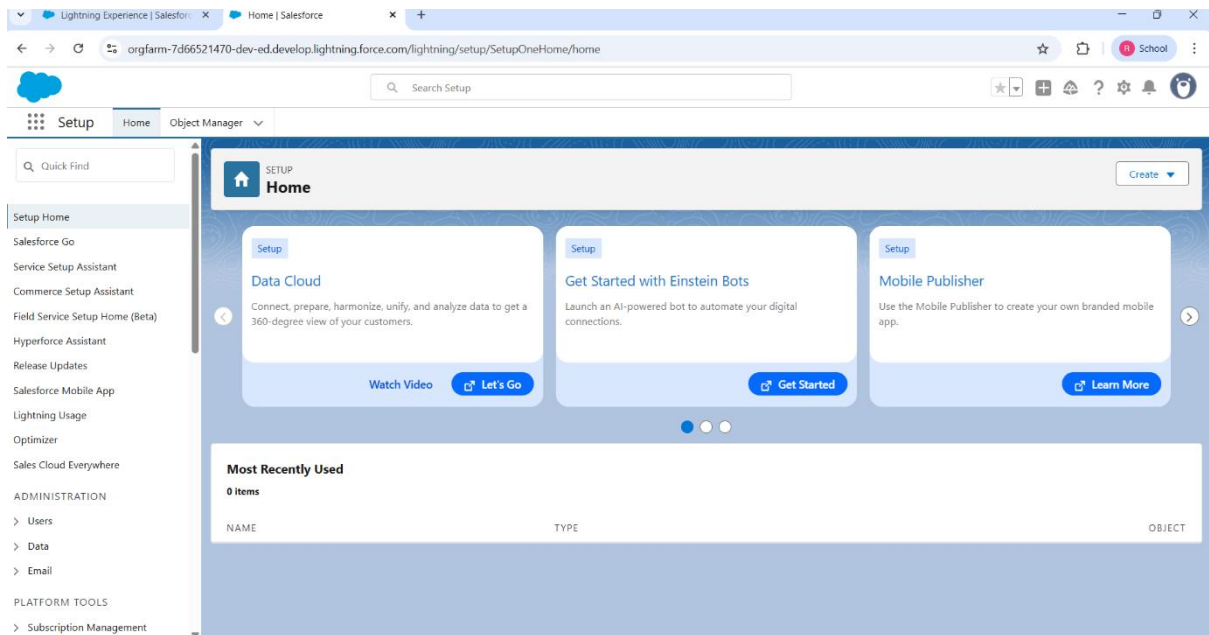
Sign up for your Salesforce Developer Edition.



The screenshot shows the Salesforce Developer Edition sign-up page. The left side features a dark blue background with the Salesforce logo and the text "Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud." Below this, it says "Sign up for your Developer Edition." and lists several benefits: "Build apps fast with drag-and-drop tools", "Go further with Apex code", "Build AI agents with Agentforce", "Harmonize your data with Data Cloud", "Ground Agentforce with structured and unstructured data", and "Integrate with anything using APIs". There is also an illustration of two robots. The right side is a white form titled "Sign up for your Developer Edition" with the subtitle "A free Salesforce Platform environment with Agentforce and Data Cloud". The form contains fields for "First name" (Rashi), "Last name" (Shukla), "Job title" (Student), "Work email" (cse22\_rashishukla@gmail.com), "Company" (Gyan ganga college), and "Country/Region" (India). Below these fields, there is a checkbox for "I agree to the Main Services Agreement - Developer Services and Salesforce Program Agreement" which is checked. At the bottom, there is a "Verification expired. Check the checkbox again" message and a "I'm not a robot" checkbox which is unchecked. There is also a "Privacy - Terms" link.

#### Step 2 – Open Setup

Login to Salesforce Lightning.



Click the ⚙ Gear icon in the top-right → select Setup.

### Step 3 – Update Company Information

In Setup, use Quick Find → type Company Information → open it.

Click Edit.

Update:

Organization Name: Last Mile Delivery Solutions

Default Time Zone: (Based on operating region, e.g., 09:00 – 18:00 IST)

Click Save.

Setup Home Object Manager

Search Setup

company

Company Settings

- Business Hours
- Calendar Settings
- Public Calendars and Resources
- Company Information**
- Data Protection and Privacy
- Fiscal Year
- Holidays
- Language Settings
- My Domain

Didn't find what you're looking for? Try using Global Search.

Company Information

SETUP

Company Information

Last Mile Delivery Solutions

The organization's profile is below.

User Licenses (10x) | Permission Set Licenses (10x) | Feature Licenses (10) | Usage-based Entitlements (10x)

Organization Detail

Organization Name	Last Mile Delivery Solutions	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (United States)
Address	United States	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT-09:00) Hawaii-Aleutian Daylight Time (America/Adak)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (United States) - USD
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	39 (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	000f0000086j.h
		Organization Edition	Developer Edition
		Instance	USA1044
Created By	OrgFarm EPIC, 9/25/2025, 7:11 AM	Modified By	Bashil Shukla, 9/25/2025, 11:34 AM

## Step 4 – Set Business Hours

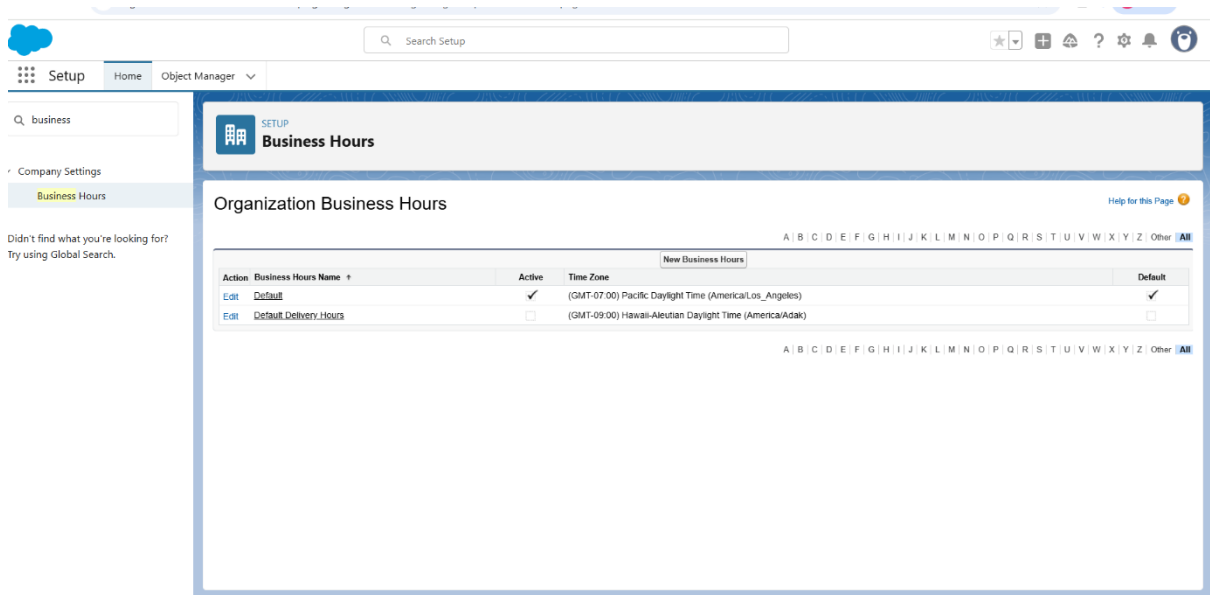
Quick Find → Business Hours → click New.

Fill in:

Name: Default Delivery Hours

Hours: 09:00 – 22:00 (or actual delivery hours)

Click Save.



Why: Defines working hours for order dispatches, delivery notifications, and service-level agreements (SLAs).

## Step 5 – Profiles

Profiles define what users can do. For Last Mile Delivery CRM, create these Salesforce profiles:

### System Administrator

Full access to all standard/custom objects, settings, and configuration.

Used by IT/Admins.

### Dispatcher

Access to orders, routes, delivery schedules, and driver assignment.

### Delivery Agent

Limited access to assigned delivery orders, route tracking, and customer confirmations

## Customer Support

Access to customer records, order tracking, and issue resolution.

## Step 6 – Standard and Custom Objects

### LMD Customer

Stores all customer details (profile, delivery address, contact preferences).

Central object linking orders, routes, and feedback.

### LMD Order

Tracks orders scheduled for delivery.

Links with customers, products, and delivery agents.

### LMD Route

Stores optimized delivery routes.

Connects delivery orders and driver assignments.

### LMD Delivery Vehicle

Maintains vehicle details (type, capacity, availability).

Helps in route and order allocation.

#### LMD Delivery Agent

Manages delivery personnel information (name, shifts, assigned routes).

Links with orders and performance tracking.

#### LMD Feedback

Captures post-delivery feedback from customers.

Used to improve delivery experience and satisfaction.