

## **Phase 2: Org Setup & Configuration**

Project: GreenForce – Carbon Footprint & Sustainability Management Platform on Salesforce

### **Introduction**

Following the completion of Phase 1 (Problem Understanding & Industry Analysis), Phase 2 focuses on the technical setup of Salesforce to support GreenForce. This involves preparing the Salesforce Org, configuring data models, defining user roles, automating workflows, and creating dashboards for sustainability tracking.

### **Salesforce Org Setup**

#### **Environment Preparation**

- Salesforce Org created (Developer/Enterprise Edition).
- User Roles defined: Sustainability Manager, Analyst, Supplier, Employee.
- Profiles and Permission Sets applied for access control.
- Sandbox strategy outlined for development, testing, and deployment.

#### **Branding & Customization**

- GreenForce branding applied (logo, colors).
- Company settings configured: locale, currency, fiscal year, and working hours.
- Collaboration enabled via Chatter/Slack integration.

### **Custom Objects & Data Model**

- Emissions Record (Carbon, Energy, Waste, Travel).
- Sustainability Initiative (projects & programs).
- Supplier Engagement (supplier compliance reporting).
- Employee Engagement (employee-driven initiatives).

#### **Relationships & Record Types**

- Master-Detail / Lookup relationships implemented.
- Junction objects for many-to-many use cases (e.g., Initiative ↔ Supplier).
- Record Types created for different sustainability categories.

### **Page Layouts & Record Types**

- Emissions Record Layout → Scope 1, 2, 3 sections.
- Initiative Layout → Details, progress tracking, approvals.
- Supplier/Employee Layouts → Simplified external-facing pages.

### **Automation Setup**

- Flows / Workflow Rules → Auto-calculate emission totals, send supplier reminders.
- Approval Process → Manager approvals required for initiatives.
- Validation Rules → Data accuracy enforced (numeric checks, required fields).

## **Reporting & Dashboards**

- Carbon Footprint Dashboard → Emissions by category & trend.
- Supplier Performance Dashboard → Compliance levels.
- Employee Engagement Dashboard → Participation and contributions.

## **Deliverables**

- ✓■ Salesforce Org setup & branding.
- ✓■ Roles, profiles, and permissions configured.
- ✓■ Custom objects & fields created.
- ✓■ Page layouts & record types implemented.
- ✓■ Automation (flows, validations, approvals) in place.
- ✓■ Dashboards & reports developed.

## **Conclusion**

Phase 2 established the technical foundation of GreenForce by configuring Salesforce Org, data models, workflows, and dashboards. This ensures that the platform is scalable, secure, and aligned with sustainability goals. It prepares GreenForce for Phase 3 – Data Integration & Advanced Analytics.