Phase 2: Org Setup & Configuration

Goal: Prepare Salesforce environment to build EcoCart Logistics CRM.

Introduction

In this phase, the Salesforce environment for **EcoCart Logistics CRM** is prepared. This involves configuring company settings, defining user roles, setting up security rules, and ensuring the org is ready for data modeling and automation. Proper setup at this stage creates a solid foundation for building scalable logistics workflows and maintaining data security.

Objectives

- Configure **Company Profile, Business Hours, and Fiscal Year** for EcoCart Logistics.

- Set up **Users, Roles, and Profiles** to represent organizational hierarchy.

- Define **Permission Sets** for flexible access control.

- Establish **Org-Wide Defaults (OWD) and Sharing Rules** to secure sensitive records.

- Restrict access through **Login Hours and IP Ranges** for agents.

- Enable **Lightning Experience & My Domain** for modern UI and branding.

- Prepare the org for future **data modeling, automation, and integrations**.

Configuration Steps

STEP-0:- Salesforce Edition Setup

- Signed up for a Salesforce Developer Edition
  Org via developer.salesforce.com.

- Verified email and logged in at: https://login.salesforce.com.

- Enabled Lightning Experience (shows modern UI).
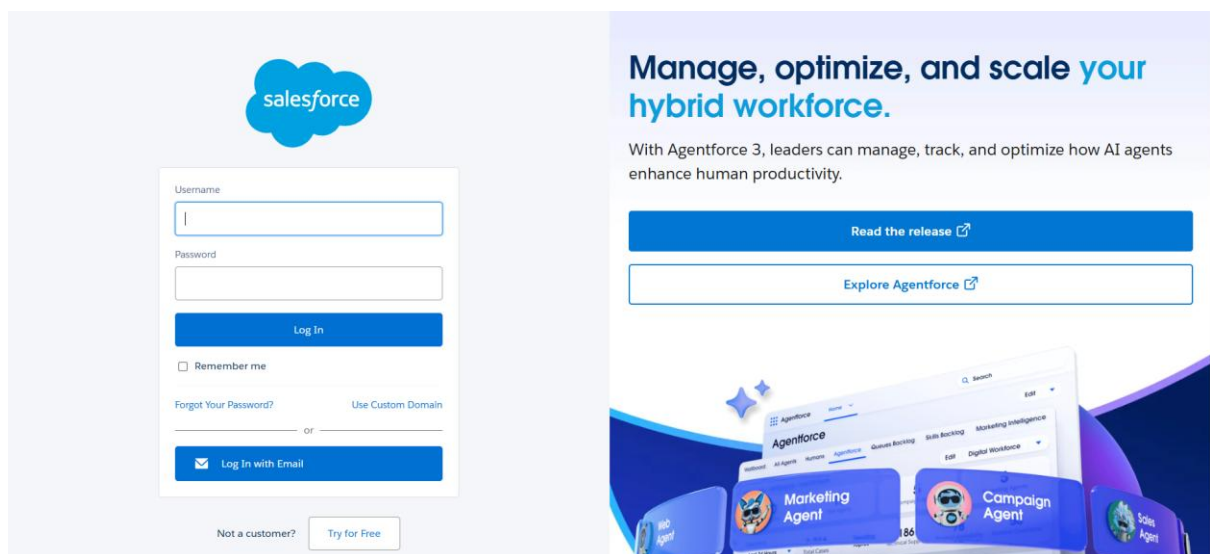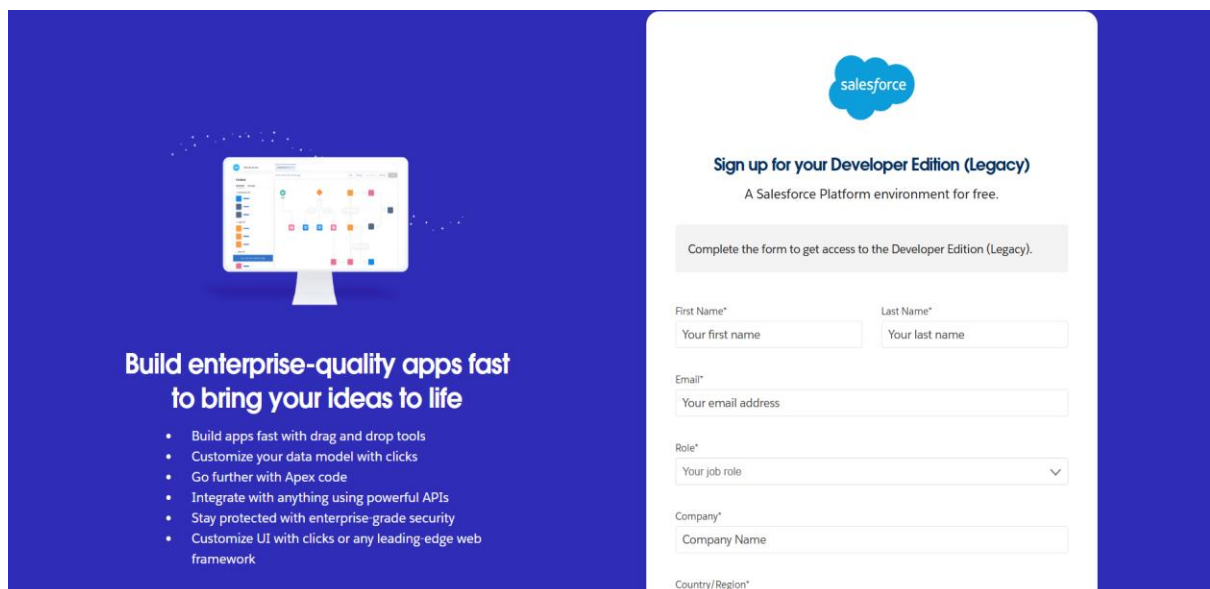
STEP-1:- Company Profile Setup

- Path: Setup → Company Settings → Company Information.

- Updated fields:

    - Company Name: EcoCart Logistics Pvt. Ltd.

    - Default Locale: English (India).

    - Currency: INR.

    - Time Zone: (GMT+05:30) India Standard Time.

STEP-2:- Business Hours & Holidays

- Path: Setup → Company Settings → Business Hours.

- Created EcoCart Business Hours: 9:00 AM – 7:00 PM IST.

- Path: Setup → Company Settings → Holidays.

- Added holidays such as Independence Day (15th August) and New Year's Day (1st Jan).

STEP-3:- Fiscal Year Settings

- Path: Setup → Company Settings → Fiscal Year.

- Selected Standard Fiscal Year (Jan–Dec).

- Purpose: Align reports and dashboards with financial reporting cycles.

STEP-4:- User Setup & Licenses

- Path: **Setup → Users → New User**.

- Created users with Salesforce licenses:

    - **Manager:** Full access.

    - **Logistics Agent:** Restricted access (update shipments).

    - **Customer Support Agent:** Limited access (handle exceptions/reschedules).

- Assigned usernames like: manager@ecocart.com, agent1@ecocart.com.

STEP-5:- Roles

- Path: **Setup → Roles → Set Up Roles**.

- Defined role hierarchy:

    - **Manager** (top) → sees all Orders/Shipments.

    - **Logistics Agents** (under Manager) → see only their records.

    - **Support Staff** (parallel role) → limited visibility for customer complaints.

STEP-5:- Profiles

- Path: Setup → Profiles → Clone Profile.

- Created:

  - EcoCart Agent Profile: Can create & update Shipments, cannot delete Orders.

  - EcoCart Manager Profile: Full CRUD permissions on Orders, Shipments, Reports.

STEP-6:- Permission Sets

- Path: Setup → Permission Sets → New.

- Created Reports Access Permission Set:

  - Gave "View Reports" & "Run Reports" permissions.

- Assigned to selected agents without changing profiles.

STEP-7:- Login Access Policies

- Path: Setup → Profiles → Login Hours / Login IP Ranges.

- Restricted agent logins between 9:00 AM – 7:00 PM IST.

- Added office network IP range: 192.168.1.0 – 192.168.1.255.

Results Achieved

- **Company profile configured** with timezone, locale, and default currency (INR/USD).

- **Business hours & holidays defined**, ensuring processes align with working schedules.

- **Users created** (Manager, Logistics Agents, Support Staff) with appropriate licenses.

- **Profiles & Roles structured**, providing data visibility as per hierarchy.

- **Permission Sets implemented**, allowing extra access (like reporting) without modifying profiles.

- **Org-Wide Defaults and Sharing Rules enforced**, securing Orders & Shipments.

- **Login hours & IP restrictions applied**, improving security.

- **Lightning Experience enabled** with custom domain (ecocart-dev.my.salesforce.com).

Next Steps

- Begin **Phase 3: Data Modeling & Relationships** to design the underlying data structure.

- Create **custom objects** (Order, Shipment) and establish relationships.

- Define **fields, record types, and page layouts** to capture logistics details.

- Use **Schema Builder** to visualize relationships between Orders, Shipments, and Customers.

- Prepare the foundation for **process automation in Phase 4** by ensuring accurate data models.