

## 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.

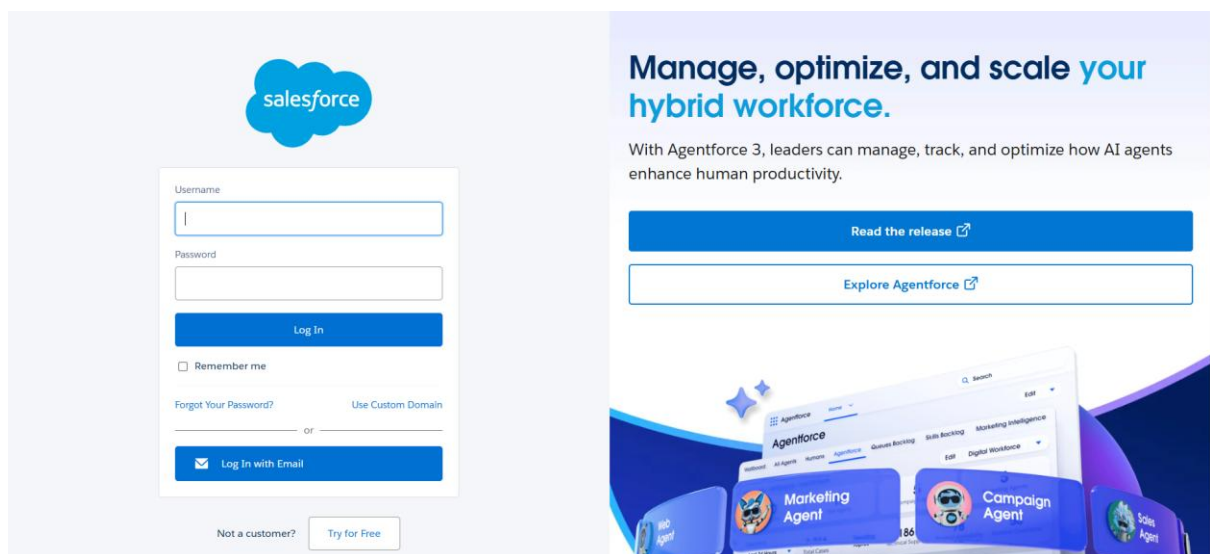
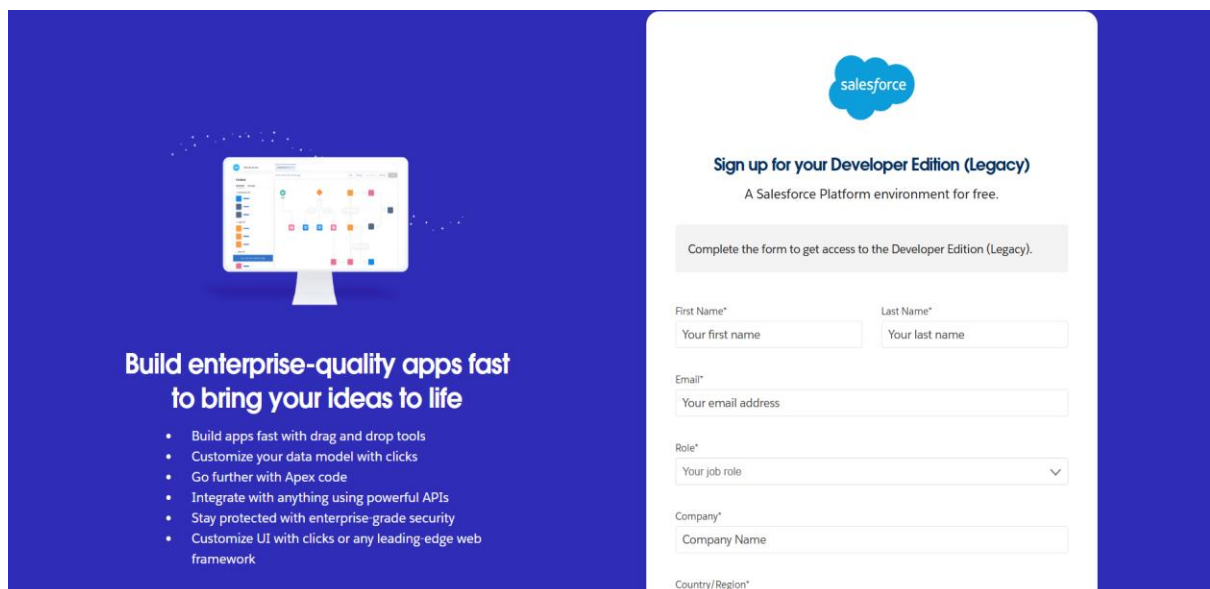
### Objectives

- 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](https://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.

**SETUP** Company Information

Edit Organization Profile  
EcoCart Logistics Pvt. Ltd.

Use the form below to edit your organization profile.

**Organization Edit**

**General Information** Required Information

Organization Name: EcoCart Logistics Pvt. Ltd.  
Primary Contact: OrgFarm EPIC  
Division:   
Phone:   
Fax:

**Address**

Country: India  
Street:   
City:   
State/Province: Andhra Pradesh  
Zip/Postal Code:

**Locale Settings**

Default Locale: English (India)

**SETUP** Company Information

**Locale Settings**

Default Locale: English (India)  
Default Language: English  
Default Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)

**Currency Settings**

Currency Locale: Telugu (India) - INR

**Warning:** Turning on multiple currencies introduces permanent changes in your org. This feature can't be turned off. Review the [Implications of Enabling Multiple Currencies](#) before enabling.

Activate Multiple Currencies ☐

**Translation Settings**

Enable Data Translation ☐

**Salesforce Newsletter Settings**

☒ Users receive the Salesforce newsletter  
☒ Users receive the Salesforce admin newsletter

**Login Notifications**

Hide Notices About System Maintenance ☐ Hide Notices About System Downtime ☐

## 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).

SETUP

Business Hours

Organization Business Hours

Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate.  
If you enter blank business hours for a day, that means your organization does not operate on that day.

Holidays (0)

Business Hours Detail

Edit

Business Hours Name	EcoCart Business Hours	Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Business Hours	<div><div>Sunday</div><div>Monday</div><div>Tuesday</div><div>Wednesday</div><div>Thursday</div><div>Friday</div><div>Saturday</div></div> <div><div>9:00 AM to 7:00 PM</div><div>9:00 AM to 7:00 PM</div><div>9:00 AM to 7:00 PM</div><div>9:00 AM to 7:00 PM</div><div>9:00 AM to 7:00 PM</div><div>9:00 AM to 7:00 PM</div><div>9:00 AM to 7:00 PM</div></div>	Default Business Hours	<input type="checkbox"/>
Active	<input checked="" type="checkbox"/>		
Created By	ANIMIREDDY SAI GOWTHAM 9/23/2025, 6:02 PM	Last Modified By	ANIMIREDDY SAI GOWTHAM 9/23/2025, 6:02 PM

Edit

Holidays

Add/Remove

No records in display

SETUP

Holidays

Holidays are dates and times at which business hours are suspended.  
Enter the dates and times at which to suspend business hours and escalation rules associated with business hours.

Holiday Detail

Save

Cancel

Holiday Name

Every Sunday

Description

Date

1/5/2025

Time

from

to

☒ All Day

Recurring Holiday

☒

Frequency

☐ Daily

☒ Weekly

☐ Monthly

☐ Yearly

Recurs every

1

week(s) on

☒ Sunday

☐ Monday

☐ Tuesday

☐ Wednesday

☐ Thursday

☐ Friday

☐ Saturday

Recurrence Start

1/5/2025

Recurrence End

☒ No End Date

Save

Cancel



## 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](mailto: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.

The screenshot displays the 'Roles' setup page in Salesforce. At the top, there's a header with a user icon, the word 'SETUP', and 'Roles'. Below this, the page title is 'Creating the Role Hierarchy'. A sub-header reads: 'You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.' Below this, there's a section titled 'Your Organization's Role Hierarchy' with a 'Show in tree view' dropdown. The hierarchy is shown as a tree structure for 'EcoCart Logistics Pvt. Ltd.'. The root is 'EcoCart Logistics Pvt. Ltd.' with an 'Add Role' link. Below it is 'CEO' with 'Edit', 'Del', and 'Assign' links, and an 'Add Role' link. Under 'CEO' is 'Manager' with 'Edit', 'Del', and 'Assign' links, and an 'Add Role' link. Under 'Manager' is 'Logistics Agent' with 'Edit', 'Del', and 'Assign' links, and an 'Add Role' link. Under 'Logistics Agent' is 'Support Staff' with 'Edit', 'Del', and 'Assign' links, and an 'Add Role' link. A 'Help for this Page' link is visible in the top right corner.

## 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.

The screenshot shows the 'Profiles' page in the Salesforce Setup interface. The page title is 'Profiles' with a 'Help for this Page' link. Below the title, there are tabs for 'All Profiles', 'Edit', 'Delete', and 'Create New View'. A 'New Profile' button is visible. A table lists existing profiles with columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The table contains five rows of profiles. At the bottom, there is a pagination bar showing '1-5 of 5' and '0 Selected'.

Action	Profile Name	User License	Custom
<a href="#">Edit</a>   <a href="#">Del</a>   ...	EcoCart Logistics Agent Profile	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   ...	EcoCart Manager Profile	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Einstein Agent User	Einstein Agent	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	External Apps Login User	External Apps Login	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	External Identity User	External Identity	<input type="checkbox"/>

The screenshot shows the 'Profile Edit' page for the 'EcoCart Manager Profile' in the Salesforce Setup interface. The page title is 'Profile Edit' with a 'Help for this Page' link. Below the title, there is a 'Set the permissions and page layouts for this profile.' instruction. The 'Profile Edit' section includes fields for 'Name' (EcoCart Manager Profile), 'User License' (Salesforce), and 'Description'. A 'Custom Profile' checkbox is checked. Below this, the 'Custom App Settings' section is displayed, showing a table of app settings with 'Visible' and 'Default' columns. The table lists various standard Salesforce apps and their settings. At the bottom, there is a pagination bar showing '1-5 of 5' and '0 Selected'.

App	Visible	Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Approvals (standard__Approvals)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Automation (standard__FlowsApp)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
My Service Journey (standard__MSJApp)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sales Cloud Mobile (standard__SalesCloudMobile)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sales Console	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## 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.

The screenshot shows the Salesforce 'Permission Sets' setup page. The header includes a 'SETUP' icon and the title 'Permission Sets'. Below this, the specific permission set 'Reports Access Permission Set' is selected. A navigation bar contains links: 'Find Settings...', 'Clone', 'Delete', 'Edit Properties', 'Manage Assignments', and 'View Summary'. The 'Permission Set Overview' section displays the following details:

Permission Set Overview	
Description	API Name: Reports_Access_Permission_Set
License	Namespace Prefix
Session Activation Required <input type="checkbox"/>	Created By: ANIMIREDDY SAI GOWTHAM, 9/23/2025, 10:06 PM
Permission Set Groups Added To: 0	Last Modified By: ANIMIREDDY SAI GOWTHAM, 9/23/2025, 10:06 PM

The 'Apps' section lists various configuration areas:

- Assigned Apps**: Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**: Settings that specify which connected apps are visible in the app menu
- Object Settings**: Permissions to access objects and fields, and settings such as tab availability
- App Permissions**: Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**: Permissions to execute Apex classes
- Visualforce Page Access**



### **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.