

Salesforce Setup Guide: Phase 2 - Org & User Configuration (ShipmentTrack)

This document outlines the foundational steps to configure your Salesforce org for the ShipmentTrack Project (Shipment & Inventory Management System).

Step 1: Set Up Your Developer Org

Purpose: To get a free, safe environment for building and testing.

Action:

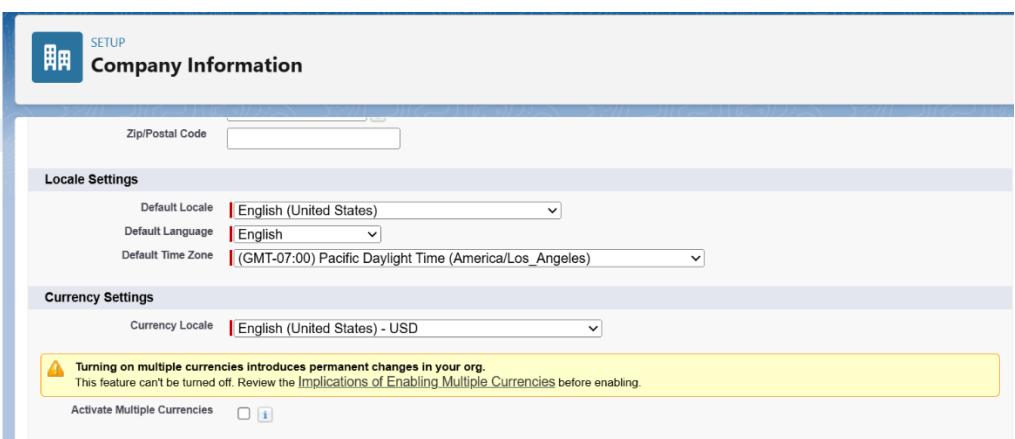
1. Go to developer.salesforce.com/signup.
 2. Fill out the form. Your **Username** must be unique and in an email format (e.g., shipmenttrack@dev.com). Your **Email** must be a real address for verification.
 3. Verify your account via the email link and log in.
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Step 2: Configure Company Information

Purpose: To set the correct time zone and currency for your records.

Action:

1. Go to **Setup → Company Information**.
2. Click **Edit**.
3. Set your **Default Time Zone** and **Default Currency**.
4. Click **Save**.



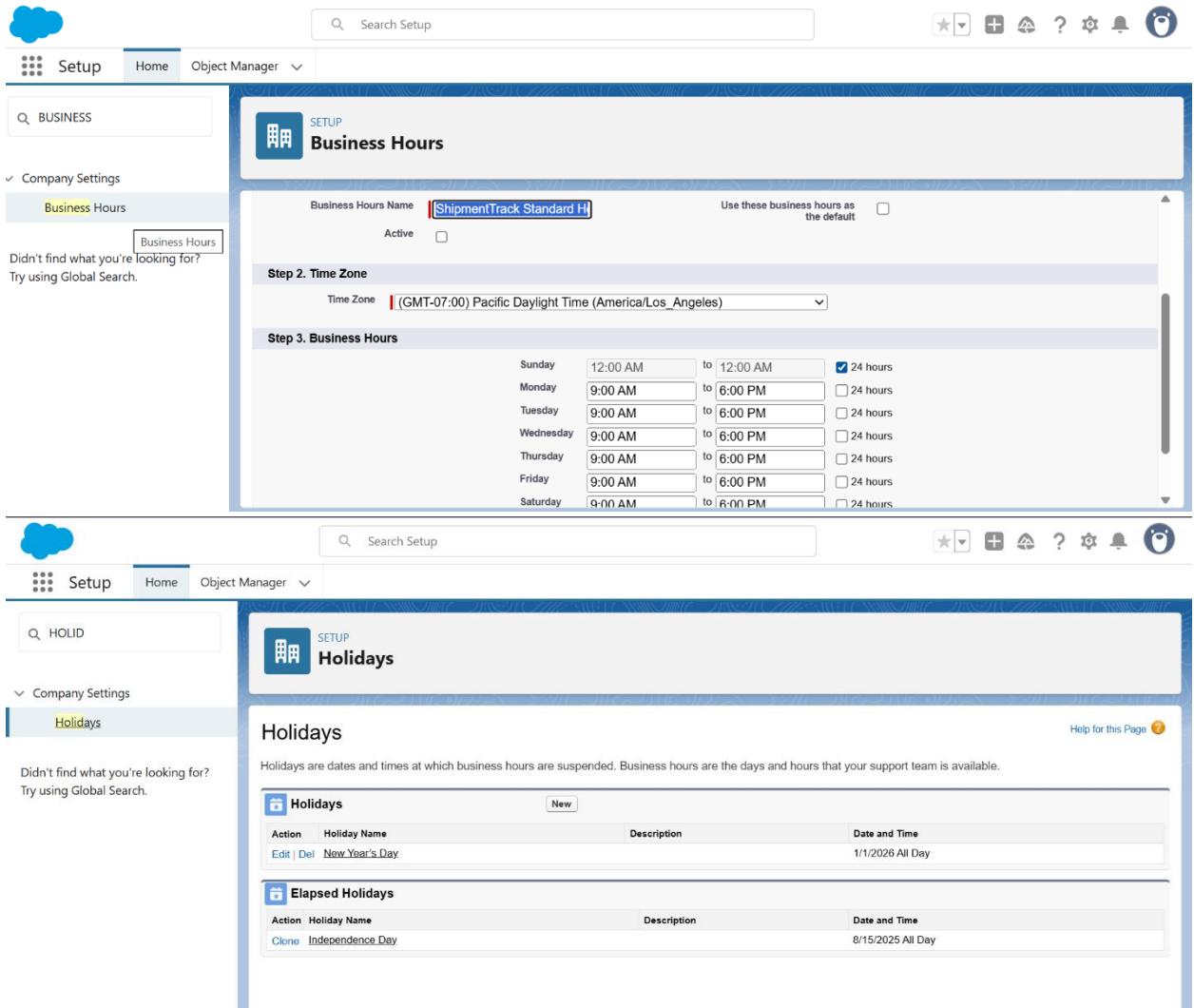
The screenshot shows the 'Company Information' setup page. On the left, there's a sidebar with 'Company Settings' and 'Company Information' selected. The main area has a 'Locale Settings' section with dropdowns for 'Default Locale' (English (United States)), 'Default Language' (English), and 'Default Time Zone' ((GMT-07:00) Pacific Daylight Time (America/Los_Angeles)). Below that is a 'Currency Settings' section with a dropdown for 'Currency Locale' (English (United States) - USD). A yellow warning box at the bottom states: '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.' There's also an 'Activate Multiple Currencies' checkbox.

Step 3: Define Business Hours & Holidays

Purpose: To ensure time-based rules (like shipment delivery SLAs) are calculated accurately.

Action:

1. Go to **Setup** → **Business Hours** → **New Business Hours**.
2. Name it “**ShipmentTrack Standard Hours**”, set the hours (e.g., 9 AM to 6 PM, Monday–Saturday), and Save.
3. Go to **Setup** → **Holidays** → **New**.
4. Add a few holidays (e.g., “Independence Day”, “New Year’s Day”).
5. Return to your **Business Hours** record, Edit it, and add the holidays you created.



The screenshot shows two screenshots of the Salesforce Setup interface side-by-side.

Top Screenshot: Business Hours Setup

The left sidebar shows "Company Settings" with "Business Hours" selected. The main area is titled "SETUP Business Hours". It shows a "Business Hours Name" field with "ShipmentTrack Standard H" entered, and an "Active" checkbox which is unchecked. Below this is a "Time Zone" section with "Time Zone" set to "(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)". The "Step 3. Business Hours" section lists daily business hours from Sunday to Saturday, all set from 9:00 AM to 6:00 PM, with the "24 hours" checkbox checked for each day.

Bottom Screenshot: Holidays Setup

The left sidebar shows "Company Settings" with "Holidays" selected. The main area is titled "SETUP Holidays". It shows a "Holidays" table with one entry: "New Year's Day" (Action: New, Holiday Name: New Year's Day, Description: None, Date and Time: 1/1/2026 All Day). Below this is an "Elapsed Holidays" table with one entry: "Independence Day" (Action: Clone, Holiday Name: Independence Day, Description: None, Date and Time: 8/15/2025 All Day).

Step 4: Create Users

Purpose: To create accounts for the people who will use the system.

Action:

1. Go to **Setup → Users → New User**.
2. Create **Amit Manager**: Use the **System Administrator** profile.
3. Create **Neha Warehouse**: Use the **Standard User** profile.
- Ensure each user has a **unique username** and a **real email** for setup.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00dg100000bmbjuab.5cucofhiwpq@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	EPIC_OrgFarm	OEPIC	epic.b6d9da889e48@orgfarm.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Ladyvikar_Gauri	gau	gauriladyvikar596@agentforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Manager_Amit	amana	amit_manager+shipment@yourcompany.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User_Integration	integ	integration@00dg100000bmbjuab.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00dg100000bmbjuab.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input type="checkbox"/> Edit	Warehouse_Neha	nware	neha.warehouse@yourcompany.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard User

Step 5: Configure Custom Profiles 🎯

Purpose: To create specific permission sets for each job role.

Action:

1. Go to **Setup → Profiles**.
2. Clone the **System Administrator** profile and name the new one **Logistics Manager**.
3. Clone the **Standard User** profile and name the new one **Warehouse Staff**.
4. Go back to **Setup → Users**.
5. Edit **Amit Manager** and assign him the **Logistics Manager** profile.
6. Edit **Neha Warehouse** and assign her the **Warehouse Staff** profile.

The image consists of two screenshots of the Salesforce Setup interface, showing the 'User Edit' screen for two different users: 'Amit Manager' and 'Neha Warehouse'. Both screens are identical in layout, showing the 'General Information' section with various user details and profile selection options.

User Edit: Amit Manager

Field	Value
First Name	Amit
Last Name	Manager
Alias	amana
Email	amit.manager@yourcompa
Username	amit.manager+shipment@y
Nickname	User17588580932876400
Title	
Company	
Role	<None Specified>
User License	Salesforce
Profile	Logistics Manager
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>

User Edit: Neha Warehouse

Field	Value
First Name	Neha
Last Name	Warehouse
Alias	nware
Email	neha.warehouse@yourcom
Username	neha.warehouse@yourcom
Nickname	User17588607571612210
Title	
Company	
Role	<None Specified>
User License	Salesforce
Profile	Warehouse Staff
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>

Step 6: Establish the Role Hierarchy

Purpose: To allow managers to see the records of their direct reports.

Action:

1. Go to **Setup → Roles → Set Up Roles**.
2. Under the company name, **Add Role** and name it **Logistics Manager**.
3. Under the new “**Logistics Manager**” role, **Add Role** and name it **Warehouse Staff**.
4. From the role tree, click **Assign** next to each role:
 - Assign **Amit Manager** to **Logistics Manager**.
 - Assign **Neha Warehouse** to **Warehouse Staff**.

