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 🛠

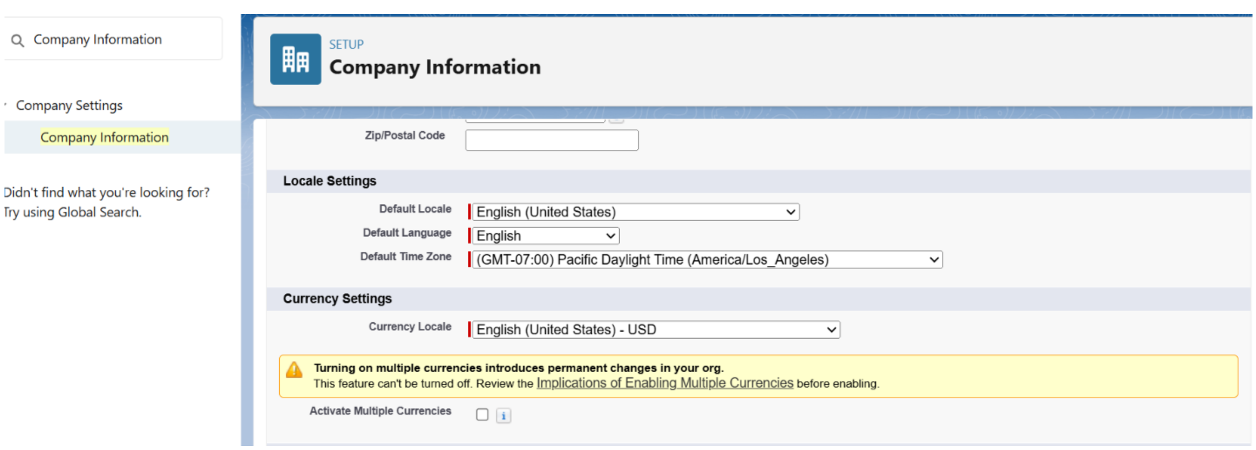
Purpose: To get a free, safe environment for building and testing.
Action:

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.

Step 2: Configure Company Information 🏢

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

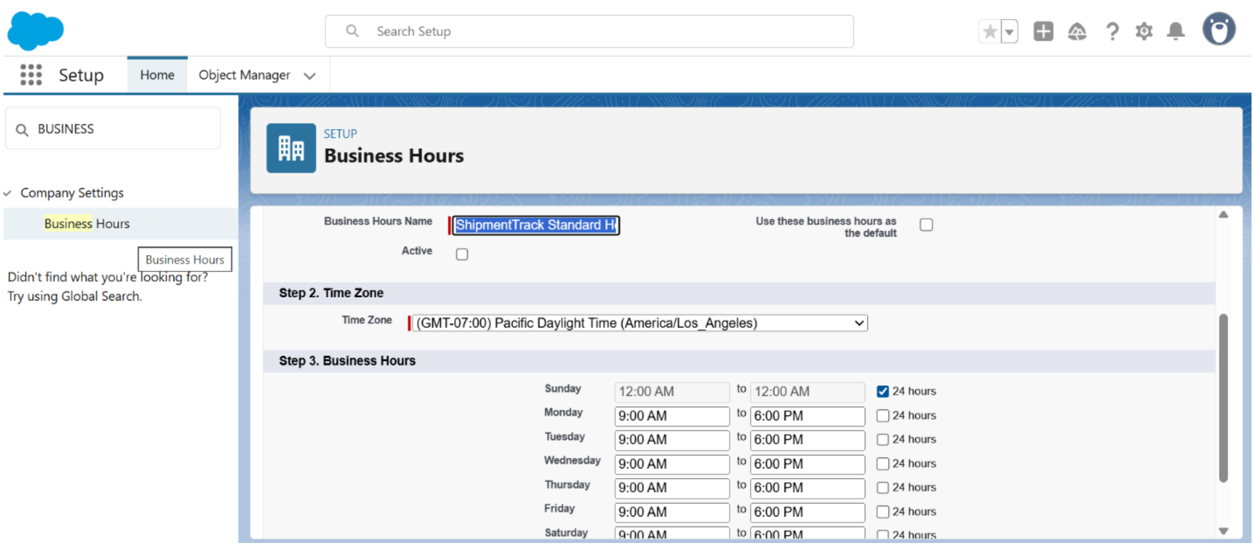
1. Go to **Setup → Company Information**.
2. Click **Edit**.
3. Set your **Default Time Zone** and **Default Currency**.
4. Click **Save**.

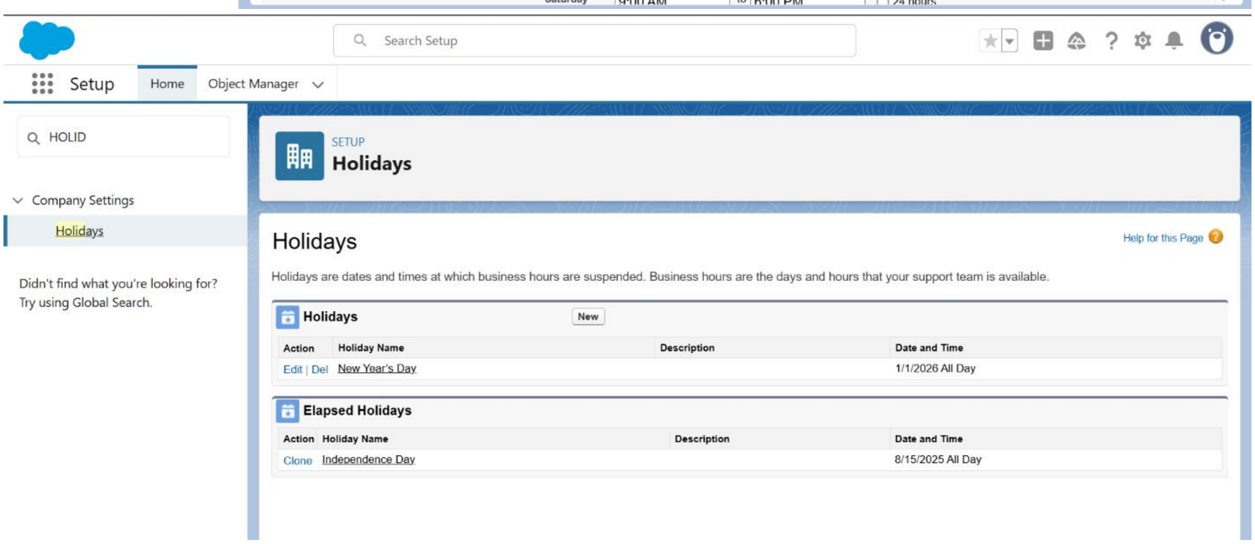


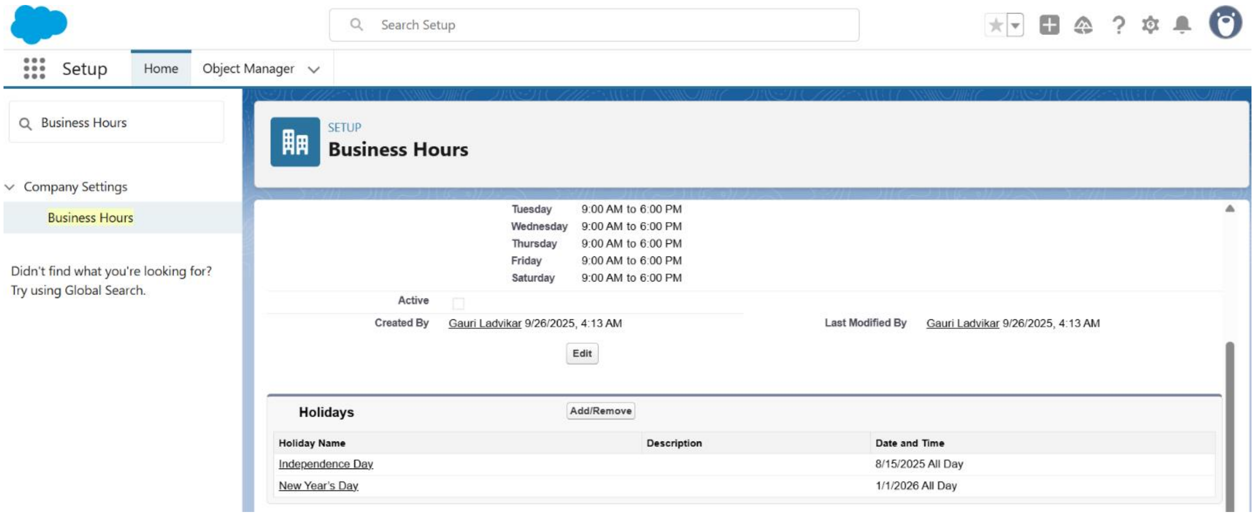
Step 3: Define Business Hours & Holidays

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.





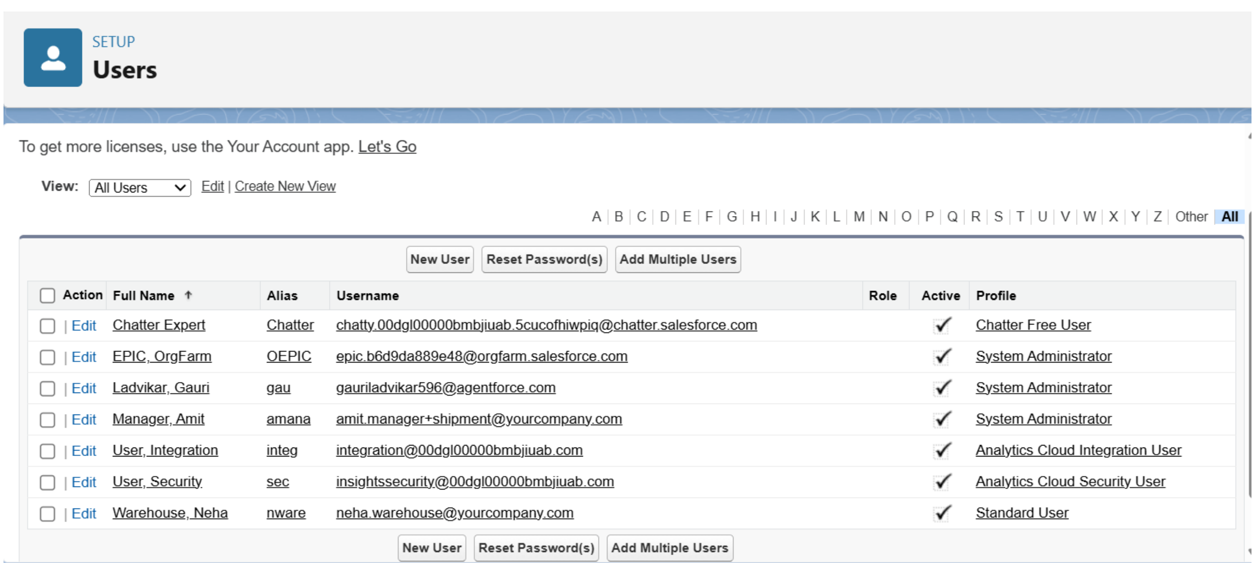


Step 4: Create Users 👥

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.

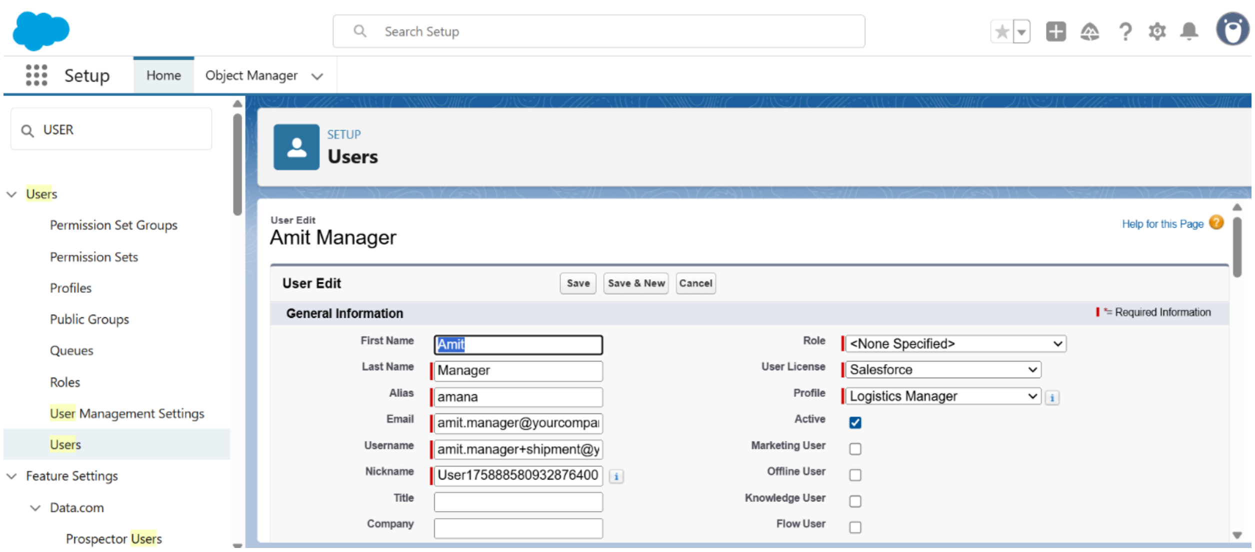
- Ensure each user has a **unique username** and a **real email** for setup.

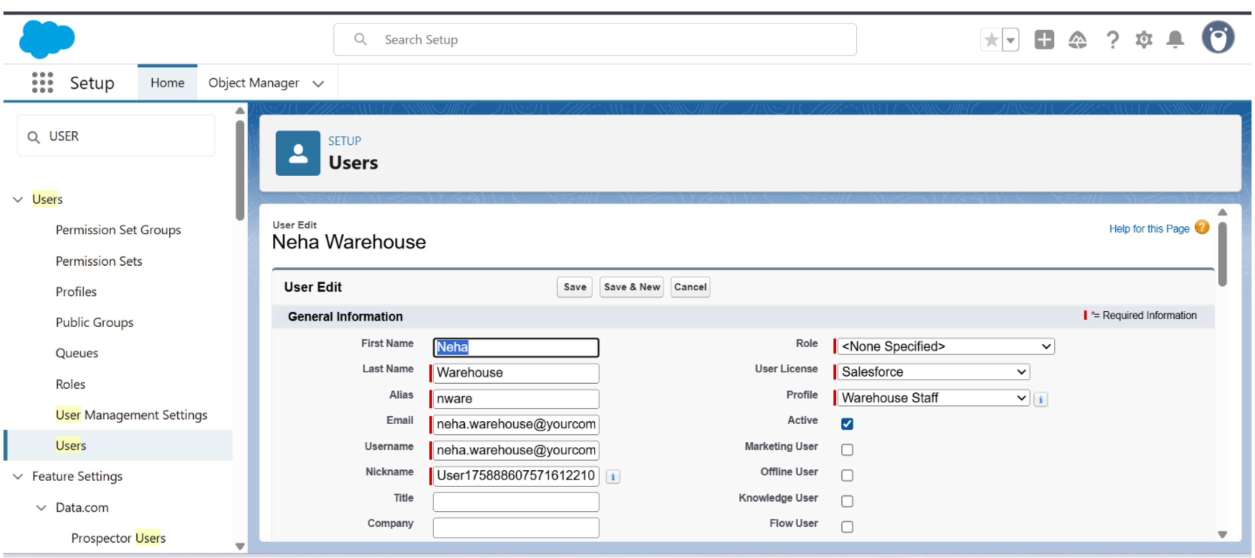


Step 5: Configure Custom Profiles 🎭

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.





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**.