Phase 2:

Org Setup & Configuration

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1. Salesforce Edition Setup

● Using **Salesforce Developer Edition** (free, suitable for capstone projects).

● Org named **"GreenTrack Sustainability Portal"**.

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2. Company Profile Setup

● **Company Info:** GreenTrack | Industry: Environmental Sustainability.

● **Locale Settings:** Default to India (GMT +5:30, INR currency).

SETUP
Company Information

Company Information
GreenTrack Sustainability Portal

The organization's profile is below.

Help for this Page ⑦

User Licenses [10+] | Permission Set Licenses [10+] | Feature Licenses [11] | Usage-based Entitlements [10+]

Organization Detail   Edit

Organization Name	GreenTrack Sustainability Portal	Phone	
Primary Contact	Jatin Awankar	Fax	
Division		Default Locale	English (India)
Address	India	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	☐	Currency Locale	English (India) - INR
Enable Data Translation	☐	Used Data Space	342 KB (7%) [View]
Newsletter	✓	Used File Space	17 KB (0%) [View]
Admin Newsletter	✓	API Requests, Last 24 Hours	60 (15,000 max)
Hide Notices About System Maintenance	☐	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	☐	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00DgK00000BKnuH
		Organization Edition	Developer Edition
		Instance	CAN96
Created By	OrgFarm EPIC, 9/11/2025, 6:04 AM	Modified By	Jatin Awankar, 9/15/2025, 1:19 AM

Edit

- **Business Hours & Holidays:**

  - Business hours: 9 AM – 6 PM (for activity/event scheduling).

  - Holidays: Added national holidays to simulate event blackout dates.

3. Fiscal Year Settings

- Standard fiscal year setup → Jan–Dec.

- Activities & CO_2 impact will be tracked quarterly and yearly.

4. User Setup & Licenses

- **Profiles Created:**

  - `System Admin` (default).

  - `NGO Manager Profile` → Manage activities & dashboards.

- ○ `Participant Profile` → Log activities, view own impact.

- **Licenses Assigned:** Salesforce Platform license for non-admin users.

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5. Roles & Hierarchy

- `Admin` (highest)
  - ↳ `NGO Manager`
  - ↳ `Participants`

SETUP
Roles
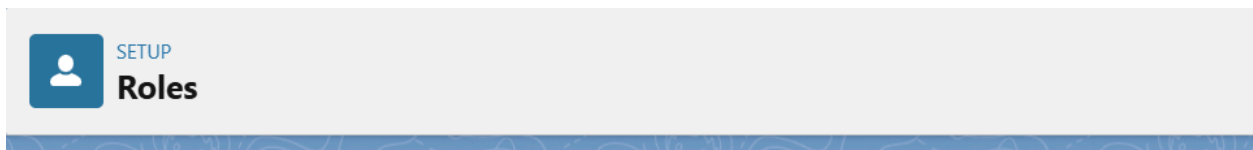
Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

Collapse All Expand All

- **GreenTrack Sustainability Portal**
  - Add Role
  - **Admin**   Edit | Del | Assign
    - Add Role
    - **NGO Manager**   Edit | Del | Assign
      - Add Role
      - **Participant**   Edit | Del | Assign
        - **Add Role**
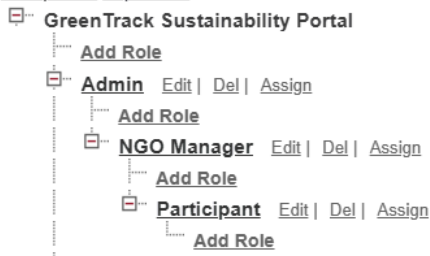
- Ensures data visibility rolls up for monitoring but stays restricted at participant level.

6. Permission Sets

- `Badge Assignment Access` → Grants managers ability to update badges.

- `Dashboard Viewer` → Grants participants access to view sustainability dashboards.

7. Security Settings (OWD & Sharing Rules)

- **OWD (Organization-Wide Defaults):**

  - Eco Activities → Public Read/Write (anyone can log activities).

  - Impact Scores → Private (only user & managers can see).

  - Badges → Read-only for participants, editable by managers.

- **Sharing Rules:**

  - Allow NGO Managers to see all participant activities.

8. Login Access Policies

- IP ranges restricted to simulate internal org use.

- Session timeout set to 1 hour for security.

SETUP
Session Settings

Session Settings

Set the session security and session expiration timeout for your organization.

Help for this Page

Session Timeout

Timeout Value   2 hours

☐ Disable session timeout warning popup
☑ Force logout on session timeout

Session Settings

☑ Lock sessions to the IP address from which they originated
☑ Lock sessions to the domain in which they were first used
☐ Terminate all of a user's sessions when an admin resets that user's password ⓘ
☑ Force relogin after Login-As-User
☐ Require HttpOnly attribute
☐ Use POST requests for cross-domain sessions
☐ Enforce login IP ranges on every request ⓘ
☐ When embedding a Lightning application in a third-party site, use a session token instead of a session cookie.

Extended use of IE11 with Lightning Experience

EXTENDED USE OF IE11 WITH LIGHTNING EXPERIENCE HAS NOW ENDED

AS OF DECEMBER 31, THE EXTENDED PERIOD HAS ENDED, AND USE OF INTERNET EXPLORER 11 (IE 11) WITH LIGHTNING EXPERIENCE IS NO LONGER SUPPORTED. ISSUES WITH PERFORMANCE OR FUNCTIONALITY THAT AFFECT ONLY IE 11 WILL NOT BE FIXED. PLEASE SWITCH TO A SUPPORTED BROWSER.

9. Admin email & case setup (notifications)

- Flows/alerts will send emails — ensure sender addresses exist.

- Support email:

SETUP
Organization-Wide Addresses

Organization-Wide Email Addresses

An org-wide email address allows each user in a user profile to send email using this address. All messages use the same display name and email address. You can also designate an org-wide email address for unmonitored mailboxes that require a verified address.

WARNING: A VERIFIED email address is needed for: Default No-Reply Address

Organization-Wide Email Addresses for User Selection and Default No-Reply Use   [Add] [Previous Page] [Next Page]

Actions	Display Name	Email Address	Allowed Profiles	Status	Created Date	Purpose
Edit | Del	GreenTrack Support	support@greentrack.dev	System Administrator	Verification Request Sent 9/15/2025 [Resend]	9/15/2025	User Selection

[Previous Page] [Next Page]

10. App Shell (create a Lightning App for GreenTrack)

- Isolates the project in the App Launcher.

- Gives a nice demo experience.

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

*App Name ⓘ

GreenTrack

*Developer Name ⓘ

GreenTrack

Description ⓘ

App for Eco Activity & Impact Tracking

App Branding

Image ⓘ

GreenTrack

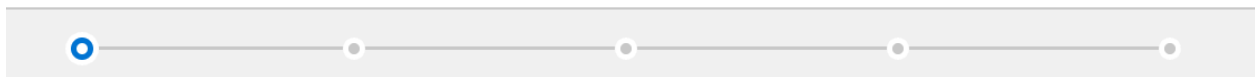Clear

Primary Color Hex
Value ⓘ

#28a745

Org Theme Options

☑ Use the app's image and color instead of the org's

11. Dev Org Setup & Sandbox Usage

- Primary development in **Developer Org**.

- (Optional) Sandbox for testing advanced automation before final deployment.

12. Deployment Basics

- Change Sets prepared for future migration (Flows, Objects, Dashboards).

- Version control with GitHub repository (docs + metadata).