

Phase 2:

Org Setup & Configuration

1. Salesforce Edition Setup

- Using **Salesforce Developer Edition** (free, suitable for capstone projects).
- Org named **“GreenTrack Sustainability Portal”**.

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.

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	<input type="checkbox"/>	Currency Locale	English (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	342 KB (7%) View
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) View
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	60 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	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.

 **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	GreenTrack Office Hours	Time Zone
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>24 Hours</div><div>9:00 AM to 6:00 PM</div><div>9:00 AM to 6:00 PM</div><div>9:00 AM to 6:00 PM</div><div>9:00 AM to 6:00 PM</div><div>9:00 AM to 6:00 PM</div><div>24 Hours</div></div>	(GMT+05:30) India Standard Time (Asia/Kolkata)
Default Business Hours		<input checked="" type="checkbox"/>

Active ☒

Created By Jatin Awankar 9/15/2025, 1:25 AM

Last Modified By Jatin Awankar 9/15/2025, 1:25 AM


Edit

Holidays Add/Remove

No records to display

3. Fiscal Year Settings

- Standard fiscal year setup → Jan–Dec.
- Activities & CO₂ impact will be tracked quarterly and yearly.


 **SETUP**
Fiscal Year

Organization Fiscal Year Edit: Prof. Ram Meghe Institute of Technology and Research

To specify the fiscal year type for your organization, choose one of the options below.

Fiscal Year Information

Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example, if your fiscal year starts in April 2025 and ends in March 2026, your Fiscal Year setting can be either 2025 or 2026.

 Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing this change.

☒ **Standard Fiscal Year**

☐ Custom Fiscal Year

Change Fiscal Year Period Save Cancel

Name

Prof. Ram Meghe Institute of Technology and Research

Fiscal Year Start Month

January

Fiscal Year is Based On

☒ The ending month

☐ The starting month

Save Cancel

4. User Setup & Licenses

- Profiles Created:
 - System Admin (default).

SETUP

Users

User

Admin GT

[Permission Set Assignments \(0\)](#) | [Permission Set Assignments: Activation Required \(0\)](#) | [Permission Set Group Assignments \(0\)](#) | [Permission Set License Assignments \(0\)](#) | [Personal Groups \(0\)](#) | [Public Group Membership \(0\)](#) | [Queue Membership \(0\)](#) | [Team \(0\)](#) | [Managers in the Role Hierarchy \(0\)](#) | [OAuth Apps \(0\)](#) | [Third-Party Account Links \(0\)](#) | [Built-in Authenticators \(0\)](#) | [Installed Mobile Apps \(0\)](#) | [Authentication Settings for External Systems \(0\)](#) | [Login History \(0+\)](#) | [User Provisioning Accounts \(0\)](#)

User Detail

Edit

Sharing

Reset Password

Freeze

View Summary

Name	Admin GT	Role	
Alias	adminGT	User License	Salesforce
Email	admin@greentrack.dev Verify	Profile	System Administrator
Username	admin@greentrack.dev	Active	<input checked="" type="checkbox"/>
Nickname	adminGT	Marketing User	<input type="checkbox"/>
Title	Admin	Offline User	<input type="checkbox"/>
Company	GreenTrack	Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	i
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> i
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> i
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> i

- NGO Manager Profile → Manage activities & dashboards.

SETUP

Users

User

Manager GT

[Permission Set Assignments \(0\)](#) | [Permission Set Assignments: Activation Required \(0\)](#) | [Permission Set Group Assignments \(0\)](#) | [Permission Set License Assignments \(0\)](#) | [Personal Groups \(0\)](#) | [Public Group Membership \(0\)](#) | [Queue Membership \(0\)](#) | [Team \(0\)](#) | [Managers in the Role Hierarchy \(0\)](#) | [OAuth Apps \(0\)](#) | [Third-Party Account Links \(0\)](#) | [Built-in Authenticators \(0\)](#) | [Installed Mobile Apps \(0\)](#) | [Authentication Settings for External Systems \(0\)](#) | [Login History \(0+\)](#) | [User Provisioning Accounts \(0\)](#)

User Detail

Edit

Sharing

Reset Password

Freeze

View Summary

Name	Manager GT	Role	
Alias	mgrGT	User License	Salesforce
Email	manager@greentrack.dev Verify	Profile	NGO Manager Profile
Username	manager@greentrack.dev	Active	<input checked="" type="checkbox"/>
Nickname	mgrGT	Marketing User	<input type="checkbox"/>
Title	Manager	Offline User	<input type="checkbox"/>
Company	GreenTrack	Knowledge User	<input type="checkbox"/>
Department	Management	Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	i
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> i
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> i
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> i

- **Participant Profile** → Log activities, view own impact.

User
Participant1 GT

[Permission Set Assignments \[0\]](#) | [Permission Set Assignments: Activation Required \[0\]](#) | [Permission Set Group Assignments \[0\]](#) | [Permission Set License Assignments \[0\]](#) | [Personal Groups \[0\]](#) | [Public Group Membership \[0\]](#) | [Queue Membership \[0\]](#) | [Team \[0\]](#) | [Managers in the Role Hierarchy \[0\]](#) | [OAuth Apps \[0\]](#) | [Third-Party Account Links \[0\]](#) | [Built-in Authenticators \[0\]](#) | [Installed Mobile Apps \[0\]](#) | [Authentication Settings for External Systems \[0\]](#) | [Login History \[0+\]](#) | [User Provisioning Accounts \[0\]](#)

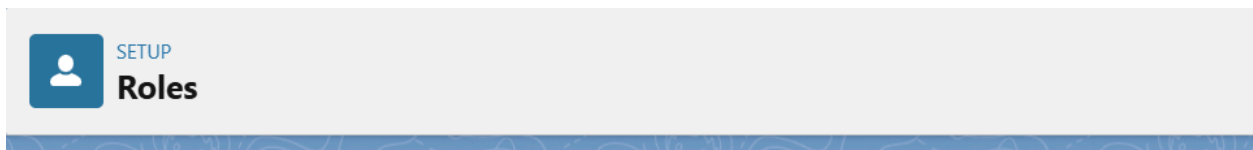
User Detail [Edit](#) [Sharing](#) [Reset Password](#) [Freeze](#) [View Summary](#)

Name	Participant1 GT	Role	
Alias	partGT1	User License	Salesforce Platform
Email	participant1@greentrack.dev Verify	Profile	Standard Platform User
Username	participant1@greentrack.dev	Active	<input checked="" type="checkbox"/>
Nickname	partGT1 i	Marketing User	<input type="checkbox"/>
Title	Participant	Offline User	<input type="checkbox"/>
Company	GreenTrack	Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	i
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> i
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> i
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> i

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

5. Roles & Hierarchy

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

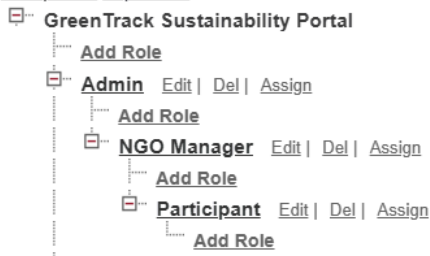


Creating the Role Hierarchy

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](#)



- Ensures data visibility rolls up for monitoring but stays restricted at participant level.

SETUP

Users

All Users

Help for this Page

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users Edit Create New View

New User

Reset Password(s)

Add Multiple Users

<input type="checkbox"/>	Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Edit	Awankar, Jatin	jat	jatinawankar02694@agentforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Edit	Chatter Expert	Chatter	chatty.00d9k00000bknuhuat.a3en9pb6rfgy@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Edit	EPIC_OrgFarm	OEPIG	epic.c27ce7d4d160@orgfarm.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Edit	GT_Admin	adminGT	admin@greentrack.dev	Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Edit	GT_Manager	mgrGT	manager@greentrack.dev	NGO Manager	<input checked="" type="checkbox"/>	NGO Manager Profile
<input type="checkbox"/>	Edit	GT_Participant1	partGT1	participant1@greentrack.dev	Participant	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Edit	User_Integration	integ	integration@00d9k00000bknuhuat.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	Edit	User_Security	sec	insightssecurity@00d9k00000bknuhuat.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User

Reset Password(s)

Add Multiple Users

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

Other

All

6. Permission Sets

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

SETUP

Permission Sets

Permission Set

Video Tutorial | Help for this Page

Badge Manager Access

Find Settings...

Clone

Edit Properties

Manage Assignments

View Summary

Permission Set Overview

Description	API Name	Badge_Manager_Access
License	Namespace Prefix	
Session Activation Required <input type="checkbox"/>	Created By	Jatin Awankar, 9/15/2025, 3:25 AM
Permission Set Groups Added To 0	Last Modified By	Jatin Awankar, 9/15/2025, 3:26 AM

Apps

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

Permissions to execute Visualforce pages

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

The screenshot shows the 'Permission Sets' page in Salesforce Setup. The 'Dashboard Viewer' permission set is selected. The 'Permission Set Overview' section displays the following details:

Field	Value
Description	API Name: Dashboard_Viewer
License	Namespace Prefix
Session Activation Required	Created By: Jatin Awankar, 9/15/2025, 3:27 AM
Permission Set Groups Added To	0 Last Modified By: Jatin Awankar, 9/15/2025, 3:29 AM

The 'Apps' section lists the following categories of permissions:

- 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:** Permissions to execute Visualforce pages.

7. Security Settings (OWD & Sharing Rules)

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

The screenshot shows the 'Sharing Settings' page in Salesforce Setup. The table below represents the data visible in the interface:

Object	Default Sharing Method	Controlled by Parent Object	Controlled by Field
Badge	Public Read Only	Public Read Only	✓
Eco Activity	Private	Private	✓

- 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:**


The screenshot shows the 'Eco Activity Sharing Rules' page. The table below represents the data visible in the interface:

Action	Criteria	Shared With	Access Level
Edit Del	Owner in Role: Participant	Role: NGO Manager	Read/Write

- 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.

 **Session Settings**

Session Settings

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

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:

 **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 ⓘ



[Clear](#)

Primary Color Hex

Value ⓘ

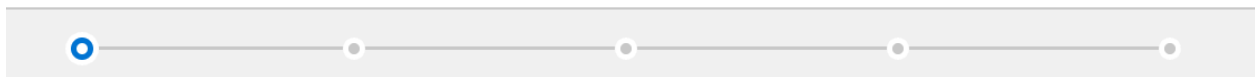


#28a745

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).