

Phase 2: Org Setup & Configuration

Project: Logistics & Shipment Tracking System

1. Salesforce Edition Used

- Edition: Salesforce Developer Edition (Free)
- Purpose: Ideal for prototyping, customization, and testing before production.
- Tools Installed: Salesforce CLI (SFDX), VS Code with Salesforce extensions, Git (for version control).

2. Company Profile Setup

- Path: Setup → Company Settings → Company Information → Edit
- Company Name: Logistics Shipment Tracking System
- Primary Contact: Shrawani Gongshe
- Default Locale: English (India), Time Zone: Asia/Kolkata, Currency: INR
- Configured base org identity and settings.

The screenshot displays the Salesforce Setup interface. On the left, a navigation menu shows 'Setup' with sub-items: Home, Object Manager, and Company Settings. Under 'Company Settings', 'Company Information' is selected. The main content area is titled 'Company Information' and shows the profile for 'Logistics Shipment Tracking System'. It includes an 'Edit' button and a table of organization details. The table lists various settings such as Organization Name, Primary Contact, Address, Fiscal Year, and various system settings. At the bottom, it shows 'Created By' and 'Modified By' information.

Organization Detail	
Organization Name	Logistics Shipment Tracking System
Primary Contact	Shrawani Gongshe
Division	
Address	Maharashtra, India
Fiscal Year Starts In	January
Activate Multiple Currencies	<input type="checkbox"/>
Enable Data Translation	<input type="checkbox"/>
Newsletter	<input checked="" type="checkbox"/>
Admin Newsletter	<input checked="" type="checkbox"/>
Hide Notices About System Maintenance	<input type="checkbox"/>
Hide Notices About System Downtime	<input type="checkbox"/>
Locale Formats	ICU
Phone	
Fax	
Default Locale	English (India)
Default Language	English
Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Currency Locale	English (India) - INR
Used Data Space	342 KB (7%) [View]
Used File Space	17 KB (0%) [View]
API Requests, Last 24 Hours	13 (15,000 max)
Streaming API Events, Last 24 Hours	0 (10,000 max)
Restricted Logins, Current Month	0 (0 max)
Salesforce.com Organization ID	00DgI.00000Bgl0z
Organization Edition	Developer Edition
Instance	CAN98

Created By: Driver_One, 9/14/2025, 5:19 AM
Modified By: Shrawani Gongshe, 9/18/2025, 9:25 AM

3. Business Hours & Holidays

- Business Hours: Mon–Fri, 9:00 AM – 6:00 PM IST
- Holidays: Republic Day, Independence Day, Gandhi Jayanti, Diwali & local holidays
- Configured using Setup → Business Hours and Setup → Holidays.

Search Setup

Setup Home Object Manager

Q compan

Company Settings

Business Hours

Calendar Settings

Public Calendars and Resources

Company Information

Data Protection and Privacy

Fiscal Year

Holidays

Language Settings

My Domain

Didn't find what you're looking for? Try using Global Search.

Business Hours

If you enter blank business hours for a day, that means your organization does not operate on that day.

Holidays (3)

Business Hours Detail

Business Hours Name Logistic Business Hours Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata)

Business Hours Name	Logistic Business Hours	Time Zone
Sunday	24 Hours	Default Business Hours
Monday	9:00 AM to 6:00 PM	
Tuesday	9:00 AM to 6:00 PM	
Wednesday	9:00 AM to 6:00 PM	
Thursday	9:00 AM to 6:00 PM	
Friday	9:00 AM to 6:00 PM	
Saturday	24 Hours	

Active

Created By Shrawani Gongshe 9/17/2025, 9:42 AM

Last Modified By Shrawani Gongshe 9/17/2025, 9:42 AM

Holidays

Holiday Name	Description	Date and Time
Gandhi Jayanti		10/2/2025 All Day
Independence Day		8/15/2026 All Day
Republic Day		1/26/2026 All Day

Back To Top

Always show me more records per related list

4. Fiscal Year Settings

- Type: Standard Fiscal Year (Jan–Dec)
- Reason: Aligns with logistics company reporting cycles.

Search Setup

Setup Home Object Manager

Q compan

Company Settings

Business Hours

Calendar Settings

Public Calendars and Resources

Company Information

Data Protection and Privacy

Fiscal Year

Holidays

Language Settings

My Domain

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Fiscal Year

Setup

Organization Fiscal Year Edit: Logistics Shipment Tracking System

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

Name Logistics Shipment Tracking System

Fiscal Year Start Month January

Fiscal Year is Based On

The ending month

The starting month

Save Cancel

Save Cancel

Help for this Page

https://crafarm-ea94b837ca-dev-ed.develop.lightning.force.com/lightning/setup/ForecastFiscalYear/home

5. Roles

- Path: Setup → Users → Roles → Set Up Roles
- Created hierarchy: CEO → Logistics Manager → (Logistics Agent & Driver)
- Purpose: Controls record visibility based on role.

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 Show in tree view

Collapse All Expand All

- Logistics Shipment Tracking System**
 - Add Role**
 - CEO** [Edit](#) [Del](#) [Assign](#)
 - Add Role**
 - CFO** [Edit](#) [Del](#) [Assign](#)
 - Add Role**
 - COO** [Edit](#) [Del](#) [Assign](#)
 - Add Role**
 - Logistics Manager** [Edit](#) [Del](#) [Assign](#)
 - Add Role**
 - Driver** [Edit](#) [Del](#) [Assign](#)
 - Add Role**
 - Logistics Agent** [Edit](#) [Del](#) [Assign](#)
 - Add Role**
 - SVP Customer Service & Support** [Edit](#) [Del](#) [Assign](#)
 - Add Role**
 - SVP Human Resources** [Edit](#) [Del](#) [Assign](#)
 - Add Role**
 - SVP Sales & Marketing** [Edit](#) [Del](#) [Assign](#)
 - Add Role**

6. Profiles

- Path: Setup → Profiles → Clone Standard User
- Logistics Manager Profile: Full access
- Logistics Agent Profile: Read/Create/Edit shipments
- Driver Profile: Read/Edit only own shipments
- Purpose: Controls what each user can do.

7. Users

- Path: Setup → Users → New User
- Created 3 internal users with License: Salesforce
- Assigned appropriate Role + Profile to each user.

Setup Users

All Users

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](#)

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

Action	Full Name *	Alias	Username	Role	Active	Profile
Edit	Agent_Logistics	laji	agent1@project.local	Logistics Agent	✓	Logistics Agent Profile
Edit	Chatter_Expert	Chatter	chatty.00dpl00000bgl0zuab.xb7.1mm5zgcrc@chatter.salesforce.com		✓	Chatter Free User
Edit	Gongshe_Shravani	sgo	sgongshe790@agentforce.com		✓	System Administrator
Edit	Manager_Logistics	lman	manager1@project.local	Logistics Manager	✓	Logistics Manager Profile
Edit	Qin_Dir	dir	qin@pro.local	Marketing Team	□	Profile
Edit	Qin_Driver	drv	driver1@project.local	Driver	✓	Driver Profile
Edit	User_Integration	integ	integration@00dpl00000bgl0zuab.com		✓	Analytics Cloud Integration User
Edit	User_Security	sec	insightsecurity@00dpl00000bgl0zuab.com		✓	Analytics Cloud Security User

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

8. Permission Sets

- Created: Reports_Access, Driver_Mobile_Access
- Assigned to respective users via Permission Set Assignments.

Setup Home Object Manager

Search Setup

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Didn't find what you're looking for? Try using Global Search.

SETUP

Permission Sets

Permission Set: Reports_Access

Find Settings... Clone Delete Edit Properties Manage Assignments View Summary

Permission Set Overview

Description	API Name
Grants ability to run, create and manage reports and view dashboards. Assign to Managers and Agents.	Reports_Access

License	Namespace Prefix

Session Activation Required	Created By
<input type="checkbox"/>	Shrawani Gongshi, 9/18/2025, 8:34 AM

Permission Set Groups Added To	Last Modified By
0	Shrawani Gongshi, 9/18/2025, 8:57 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

Setup Home Object Manager

Search Setup

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Didn't find what you're looking for? Try using Global Search.

SETUP

Permission Sets

Permission Set: Driver_Mobile_Access

Find Settings... Clone Edit Properties Manage Assignments View Summary

Permission Set Overview

Description	API Name
Gives drivers access to the mobile app, file upload and ability to update assigned shipments/checkpoints.	Driver_Mobile_Access

License	Namespace Prefix

Session Activation Required	Created By
<input type="checkbox"/>	Shrawani Gongshi, 9/18/2025, 9:00 AM

Permission Set Groups Added To	Last Modified By
0	Shrawani Gongshi, 9/18/2025, 9:15 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

9. Org-Wide Defaults (OWD)

- Path: Setup → Sharing Settings
- Shipment__c: Private, Driver__c: Public Read Only, Checkpoint__c: Public Read/Write.

Setup Home Object Manager

Search Setup

sharin

Security

Guest User Sharing Rule Access Report

Sharing Settings

Didn't find what you're looking for? Try using Global Search.

SETUP

Sharing Settings

Whatist	Private	Private	✓
Web Cart Document	Private	Private	✓
Work Order	Private	Private	✓
Work Plan	Private	Private	✓
Work Plan Template	Private	Private	✓
Work Step Template	Private	Private	✓
Work Type	Private	Private	✓
Work Type Group	Public Read/Write	Private	✓
Checkpoint	Public Read/Write	Private	✓
Driver	Public Read Only	Private	✓
Shipment	Private	Private	✓

Other Settings

Manager Groups ☐ 1

Secure guest user record access ☒ 1

Require permission to view record names in lookup fields ☐ 1

Other Settings Help

10. Sharing Rules

- Shared Agent's Shipments to Manager
- Shared Drivers to Agents and Managers (Read).

Setup

Home

Object Manager

Q sharin

Security

Guest User Sharing Rule Access Report

Sharing Settings

Didn't find what you're looking for? Try using Global Search.

Sharing Settings

Work Step Template Sharing Rules

No sharing rules specified.

Work Type Sharing Rules

No sharing rules specified.

Work Type Group Sharing Rules

No sharing rules specified.

Checkpoint Sharing Rules

No sharing rules specified.

Driver Sharing Rules

Action	Criteria	Shared With	Access Level
Edit Del	Driver: Driver Name NOT EQUAL TO NULL	Role: Logistics Agent	Read Only
Edit Del	Driver: Driver Name NOT EQUAL TO 0	Role: Logistics Manager	Read Only

Shipment Sharing Rules

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

11. Login Access Policies

- Restricted Driver login hours (9 AM–6 PM)
- Enabled 2FA for Manager/Admin
- Enabled IP restrictions for office networks.

Setup

Home

Object Manager

Q profiles

Users

Profiles

Didn't find what you're looking for? Try using Global Search.

Profiles

Login Hours

Day	Start Time	End Time
Sunday	8:30 PM PDT	5:30 AM PDT
Monday	8:30 PM PDT	5:30 AM PDT
Tuesday	8:30 PM PDT	5:30 AM PDT
Wednesday	8:30 PM PDT	5:30 AM PDT
Thursday	8:30 PM PDT	5:30 AM PDT
Friday	8:30 PM PDT	5:30 AM PDT
Saturday	8:30 PM PDT	5:30 AM PDT

Login IP Ranges

Action	IP Start Address	IP End Address	Description
Edit Del	47.11.15.1	47.11.16.254	

Enabled Apex Class Access

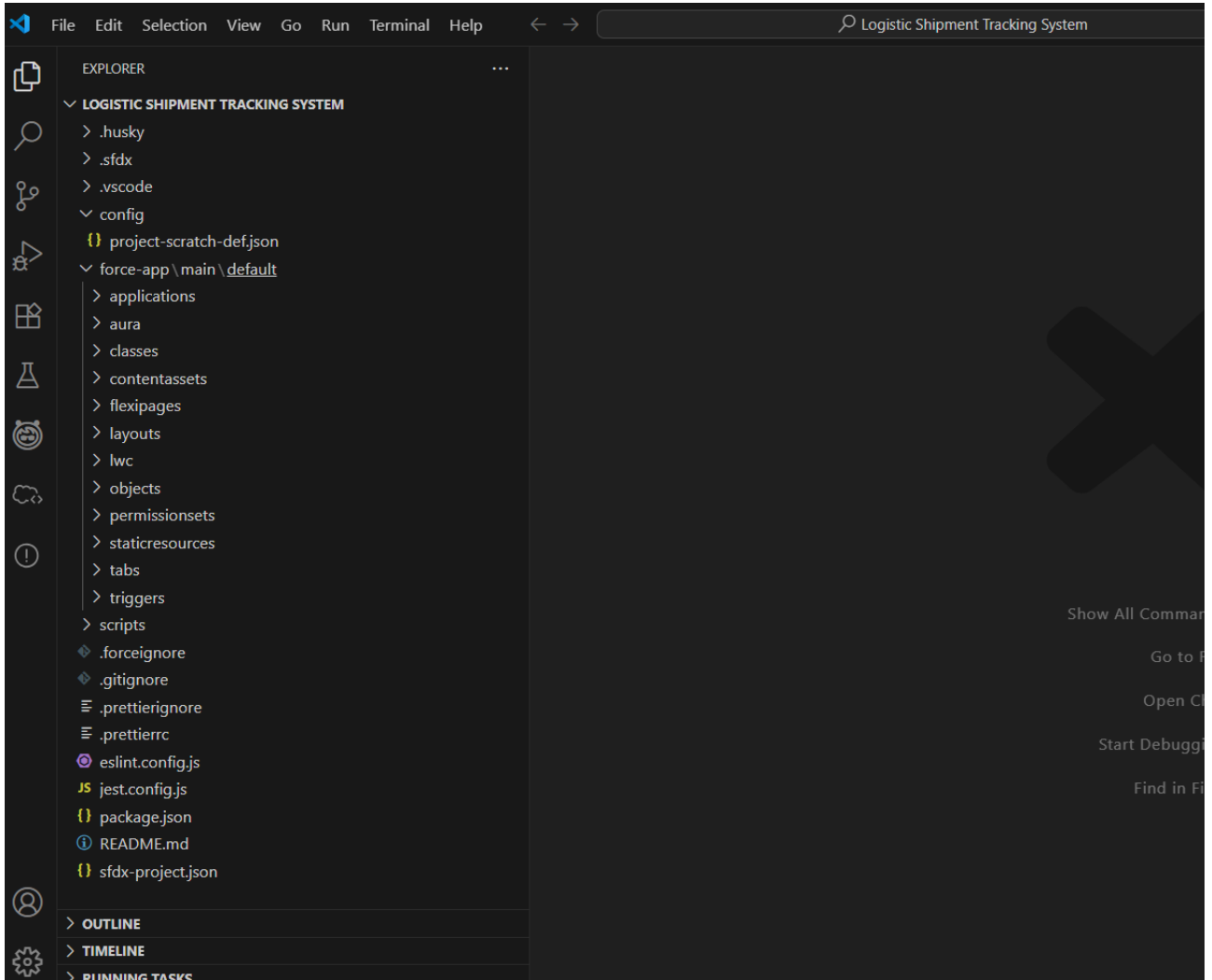
No Apex Classes enabled

Enabled Visualforce Page Access

No Visualforce Pages enabled

12. Developer Org Setup

- Created Salesforce Developer Org
- Connected to SFDX using alias MyOrg
- Commands used: `sf force:org:list`, `sf force:org:open -u MyNewOrg`



13. Sandbox Usage

- *This is not required in my project*

14. Deployment Basics

- *This is not required in my project*

■ Phase 2 Architecture Overview

System Admin			Permission Sets
↓			↓
Logistics Manager			Reports_Access Driver_Mobile_Access
↓	↓		
Logistics Agent	Driver		
(Create/Track Shipments)	(Update Status)		

Org-Wide Defaults (OWD):

- Shipment__c → Private
- Driver__c → Public Read Only
- Checkpoint__c → Public Read/Write

Security Settings:

- Login hours for drivers
- 2FA for manager/admin
- IP restrictions for admins

■ ***Phase 2 Deliverables Achieved***

- Configured company info, business hours, holidays
- Created roles, profiles, and users
- Assigned permission sets
- Set OWD and sharing rules
- Established login policies
- Connected Developer Org + SFDX