

# Salesforce Project

## Problem statement:

Revolutionizing agriculture with AgriEdge Or-Mange Ltd: A Salesforce-Driven order management solution

AgriEdge Or-Mange Ltd, a prominent player in the agriculture and food production sector, is committed to transforming its order management processes through the implementation of a Salesforce-driven Order Management System (OMS). The company operates in a dynamic industry where efficient order processing, precise inventory tracking, and exceptional customer service are crucial for maintaining a competitive edge and ensuring customer satisfaction. AgriEdge Or-Mange Ltd handles a wide range of products, from seeds and fertilizers to harvested crops and processed food items, necessitating a robust system to manage the complexities of its supply chain operations.

The company currently faces challenges such as manual order processing errors, lack of real-time inventory visibility, and disjointed customer service channels, which can lead to delays, stockouts, and dissatisfied customers. To address these issues and enhance overall operational efficiency, AgriEdge Or-Mange Ltd has decided to leverage Salesforce's powerful platform to develop a customized OMS. This system will not only automate and streamline order processing but also provide real-time insights into inventory levels, facilitate seamless supply chain operations, and integrate with existing customer service channels to deliver a cohesive and responsive customer experience.

## Requirements/solution:

To meet the company's objectives, the OMS must fulfill several critical requirements. Firstly, it needs to support automated order processing to minimize manual errors and enhance efficiency. This includes creating tasks for new orders, updating order statuses, and sending automated notifications to relevant stakeholders. Secondly, the system should offer real-time inventory tracking to ensure accurate stock levels and prompt reordering when necessary. This will help prevent stockouts and overstock situations, optimizing inventory management.

Thirdly, the OMS must integrate seamlessly with existing customer service channels, such as email, phone, and online portals, to provide a unified and responsive customer service experience. This integration will enable customer service representatives to access up-to-date order and inventory information, allowing them to resolve customer inquiries more effectively and promptly.

Data security and compliance with industry standards are also paramount. The system must protect sensitive information, such as customer details and order data, through robust security measures and ensure compliance with relevant regulations. Lastly, the OMS should provide robust reporting and analytics capabilities, offering insights into order trends, inventory levels, and supply chain performance. This data-driven approach will enable

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AgriEdge Or-Mange Ltd to make informed decisions, optimize operations, and drive continuous improvement.

## Use cases:

- Salesforce Data Modelling
- Formula fields and Validation Rules
- Salesforce Data Security
- User Management
- Automation using Process Builder
- Apex Class, Apex Triggers and Test Class

## Overall Implementation:

AgriEdge Or-Mange Ltd aims to enhance agricultural supply chain efficiency using **Salesforce**. This project focuses on optimizing **order processing, inventory management, farmer support, and automated workflows** to ensure seamless operations in the agriculture sector.

1. Salesforce CRM Implementation
2. Process Automation & Workflows
3. Apex & Trigger Implementations
4. Batch Jobs & Scheduled Processes
5. Data Security & Access Control

## Phase 2: Org Setup & Configuration:

The developer org is created with the

username: [gajjalashashidharreddy866@agentforce.com](mailto:gajjalashashidharreddy866@agentforce.com)

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First name: Gajjala ✓ Last name: reddy ✓

Job title: Developer ✓ Work email: gajjalashashidharreddy866@agentforce.com ✓

Company: salesforce ✓ Country/Region: India ✓

Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud Infrastructure.

☒ I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement. I acknowledge, as described in the Developer Documentation: (1) the Developer Edition Includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

## Roles Creation:

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## Role created for sales Representative

SETUP

Roles

Role

Sales Representative

Help for this Page

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: salesforce » CEO » Sales Representative

Siblings: [SVP\\_Sales & Marketing](#), [SVP\\_Customer Service & Support](#), [CFO](#), [SVP\\_Human Resources](#), [COO](#), [Finance Team](#), [WareHouse Manager](#)

[Users in Sales Representative Role](#) (0)

Role Detail

Edit

Delete

Label	Sales Representative	Role Name	Sales_Representative
This role reports to	CEO	Role Name as displayed on reports	
Modified By	Shashidhar Reddy Gajjala, 9/18/2025, 5:51 AM	Sharing Groups	Role, Role and Internal Subordinates
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases		

Users in Sales Representative Role

Assign Users to Role

New User

Users in Sales Representative Role Help

No records to display

## Role created for WareHouse Manager

SETUP

Roles

Role

WareHouse Manager

Help for this Page

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: salesforce » CEO » WareHouse Manager

Siblings: [SVP\\_Sales & Marketing](#), [SVP\\_Customer Service](#), [Role: WareHouse Manager ~ Salesforce - Developer Edition](#), [Sales Representative](#)

[Users in WareHouse Manager Role](#) (0)

Role Detail

Edit

Delete

Label	WareHouse Manager	Role Name	WareHouse_Manager
This role reports to	CEO	Role Name as displayed on reports	
Modified By	Shashidhar Reddy Gajjala, 9/18/2025, 5:51 AM	Sharing Groups	Role, Role and Internal Subordinates
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases		

Users in WareHouse Manager Role

Assign Users to Role

New User

Users in WareHouse Manager Role Help

No records to display

Fsetupid%3DRoles%26isdtp%3Dp1%27;

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Role created for Finance Team

SETUP

Roles

Role

Finance Team

Help for this Page

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: [salesforce](#) » [CEO](#) » [Finance Team](#)

Siblings: [SVP\\_Sales & Marketing](#) | [SVP\\_Customer Service & Support](#) | [CFO](#) | [SVP\\_Human Resources](#) | [COO](#) | [Sales Representative](#) | [WareHouse Manager](#)

[Users in Finance Team Role \(0\)](#)

Role Detail

EditDelete

Label	Finance Team	Role Name	Finance_Team
This role reports to	CEO	Role Name as displayed on reports	
Modified By	Shashidhar Reddy Gajjala, 9/18/2025, 5:51 AM	Sharing Groups	Role, Role and Internal Subordinates
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases		

Users in Finance Team Role

Assign Users to RoleNew User

Users in Finance Team Role Help

No records to display

## Profile creation:

For the above created roles the profile is created and the custom objects created are added in those profiles

### 1. Platform 1:

SETUP

Profiles

Profile

Platform 1

Help for this Page

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \(0\)](#) | [Enabled Apex Class Access \(0\)](#) | [Enabled Visualforce Page Access \(0\)](#) | [Enabled External Data Source Access \(0\)](#) | [Enabled Named Credential Access \(0\)](#) | [Enabled External Credential Principal Access \(0\)](#) | [Enabled Custom Metadata Type Access \(0\)](#) | [Enabled Custom Setting Definitions Access \(0\)](#) | [Enabled Flow Access \(0\)](#) | [Enabled Service Presence Status Access \(0\)](#) |

Enabled External Credential Principal Access

Edit

No External Credential Principals enabled

User License	Salesforce Platform	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	Shashidhar Reddy Gajjala, 9/18/2025, 6:10 AM	Modified By	Shashidhar Reddy Gajjala, 9/18/2025, 6:11 AM

Page Layouts

Standard Object Layouts

Global	<a href="#">Global Layout</a> [ View Assignment ]	Lead	<a href="#">Lead Layout</a> [ View Assignment ]
Email Application	Not Assigned [ View Assignment ]	Location	<a href="#">Location Layout</a> [ View Assignment ]

Access for the profile platform 1 for the created custom objects:

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The screenshot shows the Salesforce Setup interface for Profiles. The 'Custom Object Permissions' section is expanded, showing permissions for 'AgriEdge Invenrorys', 'AgriEdge Orders', 'AgriEdge OrderItems', and 'AgriEdge Shipments'. The 'Session Settings' section shows 'Session Times Out After' set to '2 hours of inactivity' and 'Session Security Level Required at Login' set to '--None--'. The 'Password Policies' section shows 'User passwords expire in' set to '90 days', 'Enforce password history' set to '3 passwords remembered', 'Minimum password length' set to '8', 'Password complexity requirement' set to 'Must include alpha and numeric characters', and 'Password question requirement' set to 'Cannot contain password'.

Similarly I have created the platform 2 and 3 and give access for the created custom objects

## User Creation:

Users are created for the profiles created:

The screenshot shows the Salesforce Setup interface for Users. The 'User Detail' section is expanded, showing details for 'John Production Engineer Sandbox 1'. The details include Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Role, User License, Profile, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, and WDC User.

Similarly I have created the users Quality Inspector and plant Manger and updated with the profiles platform 2 and platform 3.

## Phase 3: Data Modelling & Relationships

Custom Object creations:

1. AgriEdge\_Order\_\_c (Custom Object)

Order Number (Auto Number, Format: ORD-{0000})

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- Customer\_\_c (Lookup to Account)
- Order Status\_\_c (Picklist: New, Processing, Shipped, Delivered, Canceled)
- Order Date\_\_c (Date/Time)
- Total Amount\_\_c (Currency)
- Payment Status\_\_c (Picklist: Pending, Paid, Failed)
- Shipping Address\_\_c (Text Area)
- Discounted Total\_\_c (Formula: Total\_Amount\_\_c - (Total\_Amount\_\_c \* 0.1))

Setup

Home

Object Manager

Search Setup

AgriEdge Order

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Details

Description

API Name

AgriEdge\_Order\_\_c

Custom

Singular Label

AgriEdge Order

Plural Label

AgriEdge Orders

Enable Reports

Track Activities

Track Field History

Deployment Status

Help Settings

Standard salesforce.com Help Window

Edit

Delete

Setup

Home

Object Manager

Search Setup

AgriEdge Order

Fields & Relationships

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Fields & Relationships

11 Items. Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
AgriEdge Order Name	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Customer	Customer__c	Lookup(Customer)		✓
Discounted Total	Discounted_Total__c	Formula (Currency)		
Last Modified By	LastModifiedById	Lookup(User)		
Order Date	Order_Date__c	Date/Time		
Order Status	Order_Status__c	Picklist (Multi-Select)		
Owner	OwnerId	Lookup(User:Group)		✓
Payment Status	Payment_Status__c	Picklist		
Shipping Address	Shipping_Address__c	Text Area(255)		
Total Amount	Total_Amount__c	Currency(18, 0)		

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Similarly I have created the custom objects and their relation fields for the following objects.

## 2. AgriEdge\_OrderItem\_\_c (Custom Object)

Order\_\_c (Lookup to AgriEdge\_Order\_\_c)

Product\_\_c (Lookup to Product2)

Quantity\_\_c (Number)

Unit Price\_\_c (Currency)

Total Price\_\_c (Formula: Quantity\_\_c \* Unit Price\_\_c)

## 3. AgriEdge\_Inventory\_\_c (Custom Object)

Product\_\_c (Lookup to Product2)

Stock Quantity\_\_c (Number)

Reorder Level\_\_c (Number)

Warehouse Location\_\_c (Text)

Stock Status\_\_c (Formula: IF(Stock\_Quantity\_\_c <= Reorder\_Level\_\_c, "Low", "Sufficient"))

## 4. AgriEdge\_Shipment\_\_c (Custom Object)

Order\_\_c (Lookup to Order)

Tracking Number\_\_c (Text)

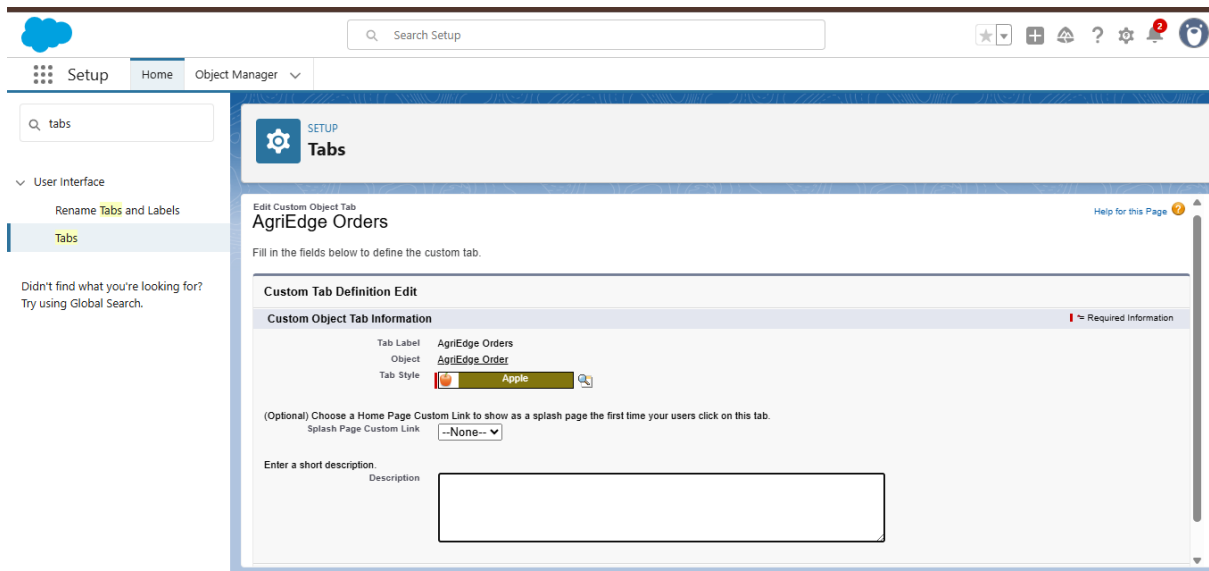
Carrier\_\_c (Picklist: FedEx, UPS, DHL, Local Courier)

Status\_\_c (Picklist: Pending, In Transit, Delivered)

## Custom tab creation:

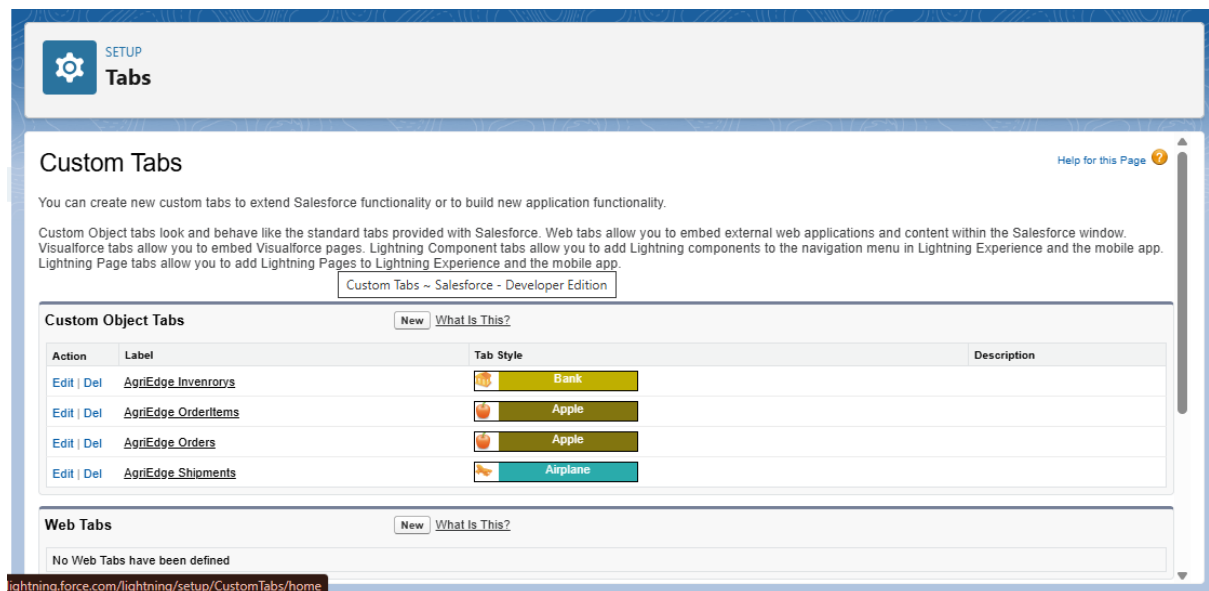
The new custom object tabs are created for the each custom object we have created.

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The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'tabs' entered. Under 'User Interface', 'Rename Tabs and Labels' is selected, and 'Tabs' is highlighted. The main content area is titled 'AgriEdge Orders' and 'Edit Custom Object Tab'. It contains a 'Custom Tab Definition Edit' section with 'Custom Object Tab Information'. The 'Tab Label' is 'AgriEdge Orders', the 'Object' is 'AgriEdge\_Order', and the 'Tab Style' is 'Apple'. There is a dropdown for 'Splash Page Custom Link' set to '--None--'. A description field is also present.

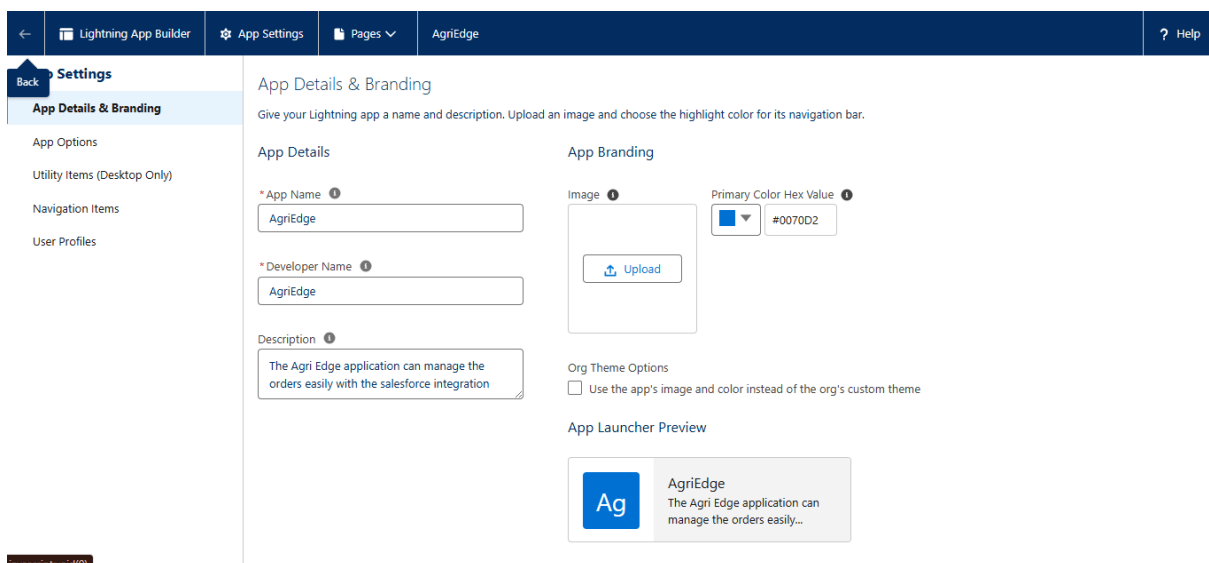
Similarly the custom object tab is created for the remaining custom objects we have created



The screenshot shows the 'Custom Tabs' page in Salesforce Setup. It includes a 'Custom Object Tabs' table with columns for Action, Label, Tab Style, and Description. The table lists four tabs: 'AgriEdge\_Invenrorys' (Bank style), 'AgriEdge\_OrderItems' (Apple style), 'AgriEdge\_Orders' (Apple style), and 'AgriEdge\_Shipments' (Airplane style). Below the table is a 'Web Tabs' section stating 'No Web Tabs have been defined'.

Action	Label	Tab Style	Description
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">AgriEdge_Invenrorys</a>	Bank	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">AgriEdge_OrderItems</a>	Apple	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">AgriEdge_Orders</a>	Apple	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">AgriEdge_Shipments</a>	Airplane	

New lightning app creation for AgriEdge:



The screenshot shows the 'App Details & Branding' page in the Lightning App Builder. The left sidebar has 'Settings' selected, and 'App Details & Branding' is highlighted. The main content area has two sections: 'App Details' and 'App Branding'. The 'App Details' section has fields for 'App Name' (AgriEdge), 'Developer Name' (AgriEdge), and 'Description' (The Agri Edge application can manage the orders easily with the salesforce integration). The 'App Branding' section has an 'Image' upload button, a 'Primary Color Hex Value' dropdown set to '#0070D2', and an 'Org Theme Options' checkbox. Below these is an 'App Launcher Preview' showing the app icon and name.



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