

Salesforce Project

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

Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud.

Sign up for your Developer Edition.

- ✓ Build apps fast with drag-and-drop tools
- ✓ Go further with Apex code
- ✓ Build AI agents with Agentforce
- ✓ Harmonize your data with Data Cloud
- ✓ Ground Agentforce with structured and unstructured data
- ✓ Integrate with anything using APIs

Sign up for your Developer Edition
A free Salesforce Platform environment with Agentforce and Data Cloud

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:

Salesforce Project

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 & Support](#), [CFO](#), [SVP_Human Resources](#), [COO](#), [Finance Team](#), [WareHouse Manager](#)

[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;

Salesforce Project

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

Edit

Delete

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 Role

New 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	Global Layout [View Assignment]
Lead	Lead Layout [View Assignment]
Email Application	Not Assigned [View Assignment]
Location	Location Layout [View Assignment]

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

Salesforce Project

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})