

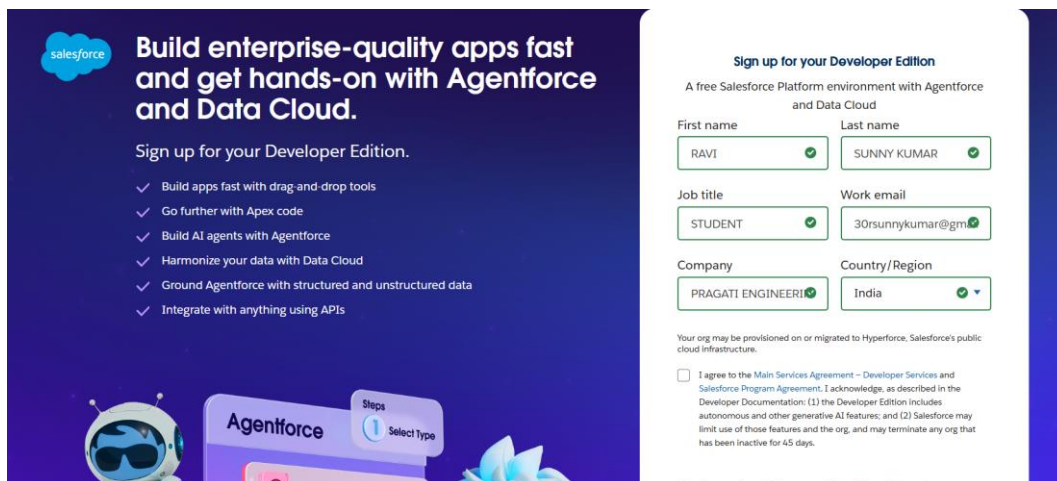
Salesforce Project Phase-2 :-

Org setup & Configuration

Title :- Dairy Management System Private Limited Using Salesforce CRM

1. Salesforce Edition

- Login to your existing Salesforce Developer Org.
- Setup → Company Information → Check *Edition* (Developer Edition).



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First name: RAVI ✓ Last name: SUNNY KUMAR ✓

Job title: STUDENT ✓ Work email: 30rsunnykumar@gmail.com ✓

Company: PRAGATI ENGINEERING ✓ 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.

2. Company Profile Setup

- Organization Name: **Dairy Management System Private Limited**
- Primary Contact: **Ravi Sunny Kumar**
- Default Locale: English (India)
- Default Currency: INR
- Time Zone: (GMT+05:30) IST

SETUP

Company Information

Company Information

DAIRY MANAGEMENT SYSTEM PRIVATE LIMITED

The organization's profile is below.

User Licenses (100) | Permission Set Licenses (100) | Feature Licenses (10) | Usage-based Entitlements (100)

Organization Detail

Edit

Organization Name	DAIRY MANAGEMENT SYSTEM PRIVATE LIMITED	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (India)
Address	Yelamanchili 531055 Andhra Pradesh 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	348 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	39 (10,000 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	00DGL00000BoI8F
		Organization Edition	Developer Edition
		Instance	CAN96

Created By

OrgFarm EPIC, 9/15/2025, 7:46 PM

Modified By

RAVI SUNNY KUMAR, 9/19/2025, 12:45 AM

3. Business Hours & Holidays

Business Hours:

- Name: **Dairy Company Standard Hours**
- Time Zone: **IST**
- Active for **All Days (Mon–Sun)**

SETUP

Business Hours

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

Business Hours Edit

Save Cancel

Step 1. Business Hours Name

Business Hours Name

Active ☒

Use these business hours as the default ☒

Step 2. Time Zone

Time Zone

Step 3. Business Hours

Sunday	<input type="text" value="9:00 AM"/>	to	<input type="text" value="10:00 PM"/>	<input type="checkbox"/> 24 hours
Monday	<input type="text" value="9:00 AM"/>	to	<input type="text" value="10:00 PM"/>	<input type="checkbox"/> 24 hours
Tuesday	<input type="text" value="9:00 AM"/>	to	<input type="text" value="10:00 PM"/>	<input type="checkbox"/> 24 hours
Wednesday	<input type="text" value="9:00 AM"/>	to	<input type="text" value="10:00 PM"/>	<input type="checkbox"/> 24 hours
Thursday	<input type="text" value="9:00 AM"/>	to	<input type="text" value="10:00 PM"/>	<input type="checkbox"/> 24 hours
Friday	<input type="text" value="9:00 AM"/>	to	<input type="text" value="10:00 PM"/>	<input type="checkbox"/> 24 hours
Saturday	<input type="text" value="9:00 AM"/>	to	<input type="text" value="10:00 PM"/>	<input type="checkbox"/> 24 hours

Save

Cancel

4. Fiscal Year

- Start Month: **April** (aligns with India's financial year).

SETUP

Fiscal Year

Setup

Organization Fiscal Year Edit: DAIRY MANAGEMENT SYSTEM PRIVATE LIMITED

[Help for this Page](#)

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

☒ Standard Fiscal Year
 ☐ Custom Fiscal Year

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.

Change Fiscal Year Period

Save

Cancel

Name	DAIRY MANAGEMENT SYSTEM PRIVATE LIMITED
Fiscal Year Start Month	<div> <div>April</div> <div></div> </div>
Fiscal Year is Based On	<input checked="" type="radio"/> The ending month <input type="radio"/> The starting month

Save

Cancel

5. Roles Setup

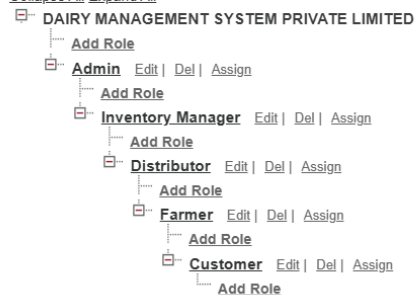
- **Dairy Admin** – Full control
- **Farmer** – Can manage cattle & milk production records
- **Inventory manager** – Handles the products
- **Distributor** – Handles orders and customers
- **Customer Manager** – Manages customer orders & offers

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](#)



6. Users

- Ravi Sunny Kumar – System Admin
- Created demo user to assign each profile as the dev org has limited licenses

- **Farmer User – Standard User (access to Cattle & Milk Production)**

SETUP

Users

User

Admin

Permission Set Assignments (1) | 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) | Chatter Apps (0) | Third-Party Account Links (0) | Built-In Authenticators (0) | Installed Mobile Apps (0) | Authentication Settings for External Systems (0) | Login History (2) | User Provisioning Accounts (0)

User Detail

Edit | Sharing | Reset Password | Login | Freeze | View Summary

Name	Admin	Role	
Alias	admin	User License	Salesforce
Email	adminsystem@gmail.com Modify	Profile	System Administrator
Username	adminsystemm@dairygnail.com	Active	<input checked="" type="checkbox"/>
Nickname	User17582770597237028781	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		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	
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/>

7. Profiles

- **Dairy Admin Profile** → Clone System Admin
- **Inventory Profile** → Access to Cattle, Milk Production (Read, Create, Edit)
- **Farmer Profile** → Access to Cattle, Milk Production (Read, Create, Edit)
- **Distributor Profile** → Access to Inventory, Orders (Read, Create, Edit)
- **Customer Profile** → Access to Orders, Festival Offers (Read, Create, Edit)

SETUP

Profiles

Profile

Farmer

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 Custom Permissions (0)

Profile Detail

Edit | Clone | Delete | View Users

Name	Farmer	Custom Profile	<input checked="" type="checkbox"/>
User License	Salesforce		
Description			
Created By	RAVI SUNNY KUMAR, 9/21/2025, 11:25 PM	Modified By	RAVI SUNNY KUMAR, 9/21/2025, 11:25 PM

Page Layouts

Standard Object Layouts			
Global	Global Layout [View Assignment]	Location Group Assignment	Location Group Assignment Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Macro	Macro Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Account	Account Layout [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Opportunity	Opportunity Layout [View Assignment]
Appointment Location	Appointment Location Layout	Opportunity Product	Opportunity Product Layout

SETUP

Profiles

Profile

Distributor

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 Custom Permissions (0)

Profile Detail

EditCloneDeleteView Users

Name	Distributor	Custom Profile	✓
User License	Salesforce		
Description			
Created By	RAVI SUNNY KUMAR, 9/21/2025, 11:26 PM	Modified By	RAVI SUNNY KUMAR, 9/21/2025, 11:26 PM

Page Layouts

Standard Object Layouts			
Global	Global Layout [View Assignment]	Location Group Assignment	Location Group Assignment Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Macro	Macro Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Account	Account Layout [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Opportunity	Opportunity Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout	Opportunity Product	Opportunity Product Layout

8. Permission Sets

- Label: **Inventory Management**
- Objects: Orders (Read, Create, Edit), Inventory (Read, Create, Edit), Festival Offers (Read).
- Assigned to Inventory users.

SETUP

Permission Sets

Permission Set

Inventory Management

Video Tutorial | Help for this Page

Find Settings...

CloneEdit PropertiesManage AssignmentsView Summary

Permission Set Overview

Description	Assign product & stock objects.	API Name	Inventory_Management
License		Namespace Prefix	
Session Activation Required	<input type="checkbox"/>	Created By	RAVI SUNNY KUMAR, 9/21/2025, 11:33 PM
Permission Set Groups Added To	0	Last Modified By	RAVI SUNNY KUMAR, 9/21/2025, 11:58 PM

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. Organization-Wide Defaults (OWD)

- Cattle → Private

- Milk Production → Private
- Orders → Private
- Inventory → Public Read Only
- Festival Offers → Public Read/Write

SETUP

Sharing Settings

Organization-Wide Sharing Defaults Edit

Help for this Page

Edit your organization-wide sharing defaults below. Changing these defaults will cause all sharing rules to be recalculated. This could require significant system resources and time depending on the amount of data in your organization. Setting an object to Private makes records visible to record owners and those above them in the role hierarchy, and access can be extended using sharing rules.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	<input checked="" type="checkbox"/>
Account and Contract	Public Read/Write	Private	<input checked="" type="checkbox"/>
Order	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Contact	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Asset	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Opportunity	Public Read/Write	Private	<input checked="" type="checkbox"/>
Case	Public Read/Write/Transfer	Private	<input checked="" type="checkbox"/>
Campaign	Public Full Access	Private	<input checked="" type="checkbox"/>
Campaign Member	Controlled by Campaign	Controlled by Campaign	<input checked="" type="checkbox"/>
User	Public Read Only	Private	<input checked="" type="checkbox"/>
Individual	Public Read/Write	Private	<input checked="" type="checkbox"/>
Voice Call	Private	Private	<input checked="" type="checkbox"/>
Activity	Private	Private	<input checked="" type="checkbox"/>
Calendar	Hide Details and Add Events	Hide Details and Add Events	<input checked="" type="checkbox"/>

SETUP

Sharing Settings

Setup

Inventory Sharing Rule

Help for this Page

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.

Note: "Roles and subordinates" includes all users in a role, and the roles below that role.

You can use sharing rules only to grant wider access to data, not to restrict access.

Step 1: Rule Name

Label

Inventory Distributors

Rule Name

Inventory_Distributors

Description

Step 2: Select your rule type

Rule Type

☒ Based on record owner ☐ Based on criteria

Step 3: Select which records to be shared

Inventory: owned by members of

Roles

Distributor

10. Sharing Rules

- **Farmers → Milk Production:** Share records with Dairy Admin (Read/Write).
- **Distributors → Orders:** Share scheduled orders with Distributor Role (Read).
- **Inventory → Customers:** Share available stock with Customer Manager (Read).
- **Festival Offers:** Share active offers with all Customers (Read Only).

Distributor Sharing Rules			
Action	Criteria	Shared With	Access Level
Edit Del	Owner in Role: Distributor	Role: Admin	Read/Write

Farmer Sharing Rules			
Action	Criteria	Shared With	Access Level
Edit Del	Owner in Role: Admin	Role: Inventory Manager	Read/Write

Festival Offer Sharing Rules

No sharing rules specified.

Inventory Sharing Rules			
Action	Criteria	Shared With	Access Level
Edit Del	Owner in Role: Distributor	Role: Inventory Manager	Read Only

Milk Production Sharing Rules			
Action	Criteria	Shared With	Access Level
Edit Del	Owner in Role: Admin	Role: Inventory Manager	Read/Write

Online Order Sharing Rules			
Action	Criteria	Shared With	Access Level

11. Login Access Policies

- Enable “Administrators can log in as any user.”

SETUP Login Access Policies

Control which support organizations your users can grant login access to.

Changes Saved

Manage Support Options			
Setting	Enabled		
Administrators Can Log in as Any User	<input checked="" type="checkbox"/>		

Support Organization	Packages	Available to Users	Available to Administrators Only
Salesforce.com Support		<input checked="" type="radio"/>	<input type="radio"/>

11. Sandbox Usage:

- **Dairy Management System Private Limited CRM Project**, since we are working with a Salesforce Developer Org Sandboxes are not available.
- since we are working with a Salesforce Developer Org Sandboxes are not available.

12. Deployment Basics:

- Sandbox is not available, so all development and testing are done directly in the main org.
- Profiles, Roles, OWD, Sharing Rules, and Login Access Policies are applied to simulate real-world Dairy Management Access.