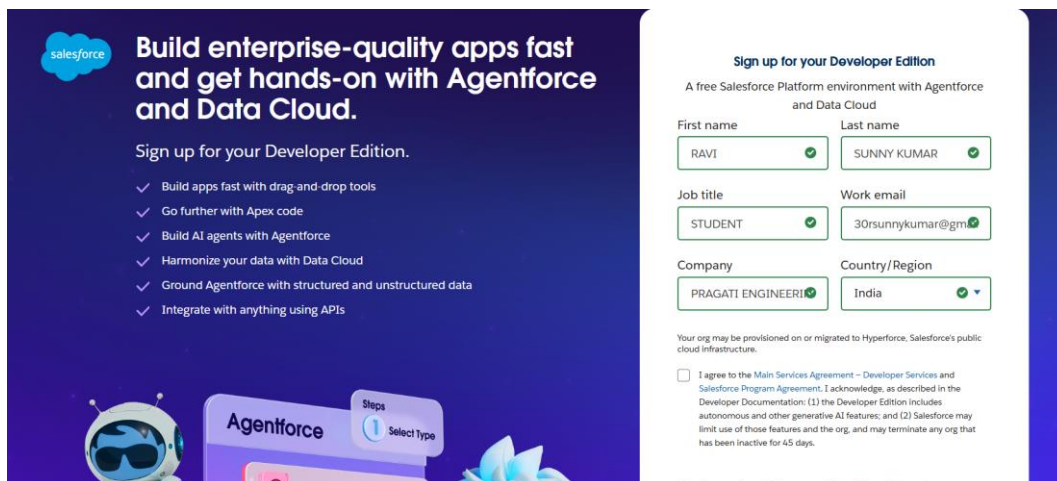# Salesforce Project Phase-2 :-

Org setup & Configuration

Title :- Dairy Management System Private Limited Using Salesforce CRM

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1. Salesforce Edition

- Login to your existing Salesforce Developer Org.

- Setup → Company Information → Check *Edition* (Developer Edition).

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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

3. Business Hours & Holidays

Business Hours:

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

4. Fiscal Year

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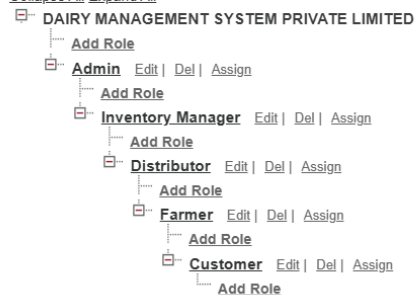
5. Roles Setup

- **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

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)

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)

8. Permission Sets

- Label: **Inventory Management**

- Objects: Orders (Read, Create, Edit), Inventory (Read, Create, Edit), Festival Offers (Read).

- Assigned to Inventory users.

9. Organization-Wide Defaults (OWD)

- Cattle → Private

- Milk Production → Private

- Orders → Private

- Inventory → Public Read Only

- Festival Offers → Public Read/Write

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).

11. Login Access Policies

- Enable **"Administrators can log in as any user."**

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.