

# Phase 2: Org Setup & Configuration

## Project: Consumer Goods Distributor Partner Portal (Salesforce Experience Cloud)

### Company Profile Setup FreshPack Ltd.

Organization Name: FreshPack Ltd.

Address: Hyderabad, India

Default Currency: INR

Default Locale: English (India)

### Implementation Steps:

1. Navigate to Setup → Company Information → Company Profile.
2. Update Organization Name to : FreshPack Ltd..
3. Set default locale to English (India) and currency to INR.
4. Verify address and fiscal details are correct.

SETUP

Company Information

Company Information

FreshPack Ltd.

The organization's profile is below.

[User Licenses \(100\)](#) | [Permission Set Licenses \(100\)](#) | [Feature Licenses \(11\)](#) | [Usage-based Entitlements \(100\)](#)

Organization Detail

Organization Name

FreshPack Ltd.

Primary Contact

Tarun

Division

Address

Bharathi Nagar  
Vijayawada 520008  
Andhra Pradesh  
India

Fiscal Year Starts In

January

Activate Multiple Currencies

☒

Enable Data Translation

☒

Newsletter

☒

Admin Newsletter

☒

Hide Notices About System Maintenance

☐

Hide Notices About System Downtime

☐

Locale Formats

ICU

Phone

+91 7063048137

Fax

Default Locale

English (India)

Default Language

English

Default Time Zone

(GMT+05:30) India Standard Time (Asia/Kolkata)

Corporate Currency

Indian Rupee

Used Data Space

362 KB (7%) [View](#)

Used File Space

17 KB (0%) [View](#)

API Requests, Last 24 Hours

0 (15,000 max)

Streaming API Events, Last 24 Hours

0 (10,000 max)

Restricted Logins, Current Month

0 (0 max)

Salesforce.com Organization ID

00DgL000007U00b

Organization Edition

Developer Edition

Instance

CAN08

Created By

OrgFam EPIC, 7/17/2025, 6:03 PM

Modified By

Tarun Dwarakacharla, 9/13/2025, 11:11 PM

Edit

Currency Setup

Edit

Currency Setup

User Licenses

[User Licenses Help](#)

## User Setup & Licenses

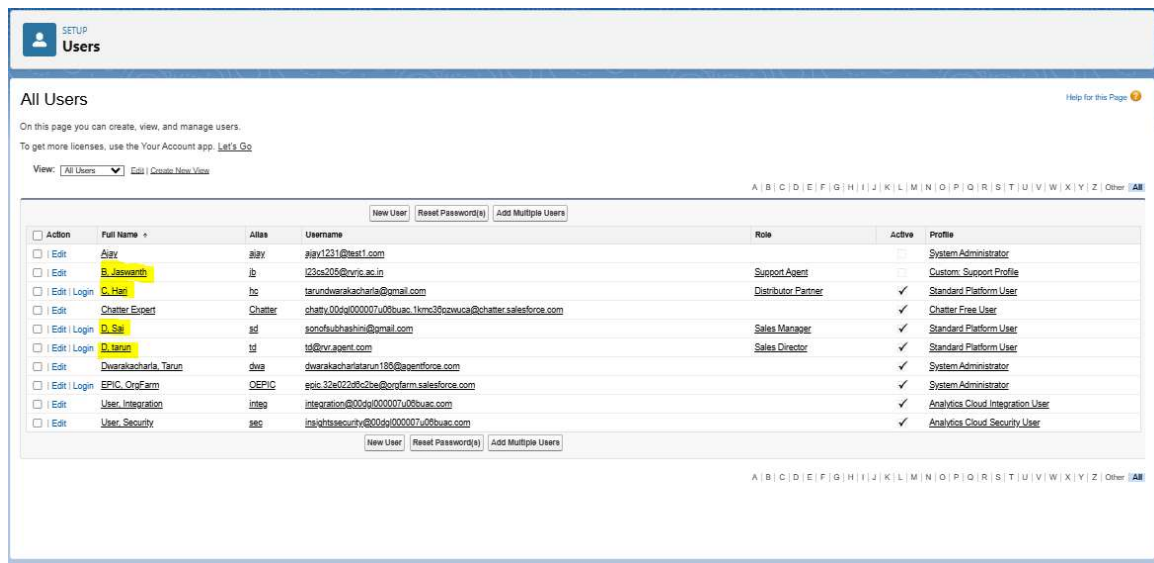
Users created: C. Hari (Distributor), Jaswanth (Support Agent), Sai(Sales Manager)

Tarun(Sales Director)

Assigned Licenses: Salesforce Platform.

### Implementation Steps:

5. Go to Setup → Users → New User.
6. Enter details for Sai,jaswant,tarun,hari
7. Assign appropriate licenses: Tarun → Salesforce
8. Activate users.



**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](#)

[New User](#) | [Reset Password\(s\)](#) | [Add Multiple Users](#)

Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	Ajay	ajay	ajay1231@test1.com			System Administrator
<a href="#">Edit</a>	B. Jaswanth	jb	03cs205@vynic.as.in	Support Agent		Custom: Support Profile
<a href="#">Edit</a>   <a href="#">Login</a>	C. Hari	hc	tarundwarakacharla@gmail.com	Distributor Partner	✓	Standard Platform User
<a href="#">Edit</a>   <a href="#">Login</a>	Chatter Expert	Chatter	chatty.00q4000007u00buac.1kmc30cqvaca@chatter.salesforce.com		✓	Chatter Free User
<a href="#">Edit</a>   <a href="#">Login</a>	D. Sai	sd	sonofaishashini@gmail.com	Sales Manager	✓	Standard Platform User
<a href="#">Edit</a>   <a href="#">Login</a>	D. Tarun	td	td@cov.agent.com	Sales Director	✓	Standard Platform User
<a href="#">Edit</a>	Dwarakacharla, Tarun	dwa	dwarakacharatarun185@agentforce.com		✓	System Administrator
<a href="#">Edit</a>   <a href="#">Login</a>	EPIC, OneFarm	CEPIC	seic.32e02a6c2ee@corfarm.salesforce.com		✓	System Administrator
<a href="#">Edit</a>	User, Integration	integ	integration@00d90000007u00buac.com		✓	Analytics Cloud Integration User
<a href="#">Edit</a>	User, Security	sec	insightssecurity@00d90000007u00buac.com		✓	Analytics Cloud Security User

[New User](#) | [Reset Password\(s\)](#) | [Add Multiple Users](#)

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](#)

## Profiles

Custom Profiles created: Distributor Profile, Support Agent Profile, Sales Manager Profile.

Each profile includes role-based permissions to access specific objects and fields.

### Implementation Steps:

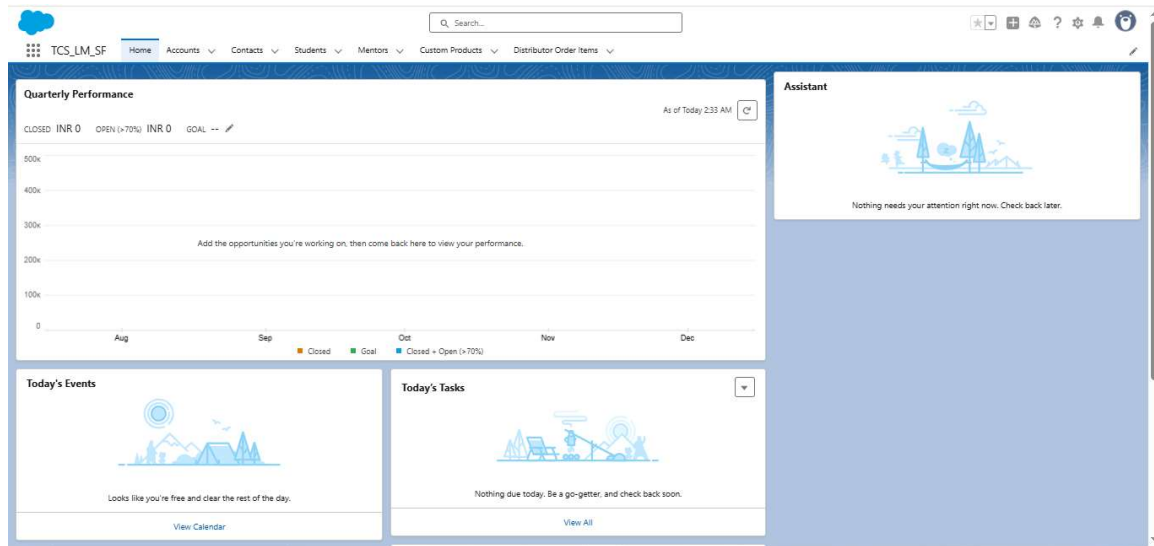
9. Navigate to Setup → Profiles.
10. Clone Standard User profile to create 'Distributor Profile'.
11. Define object permissions: Read/Write on Orders, Read-only on Inventory.
12. Repeat steps for 'Support Agent Profile' and 'Sales Manager Profile'.

## Dev Org Setup

A Salesforce Developer Edition Org was created for testing and development. This environment is used to configure and validate portal functionality before deployment.

### Implementation Steps:

13. Sign up for Salesforce Developer Edition at [developer.salesforce.com](https://developer.salesforce.com).
14. Log in and verify access to the Dev Org.
15. Use this org for testing, training, and demo purposes.



## Business Hours & Holidays

Business Hours: Monday–Friday, 9 AM – 6 PM IST.

Holidays: Republic Day, Independence Day, New Year ,Gandhi Jayanthi.

### Implementation Steps:

16. Navigate to Setup → Business Hours.
17. Set standard hours to 9 AM – 6 PM, Monday–Friday.
18. Go to Setup → Holidays and add Diwali, Independence Day, and New Year as official holidays.



## Roles

Created roles: Distributor, Support Agent, Sales Manager.

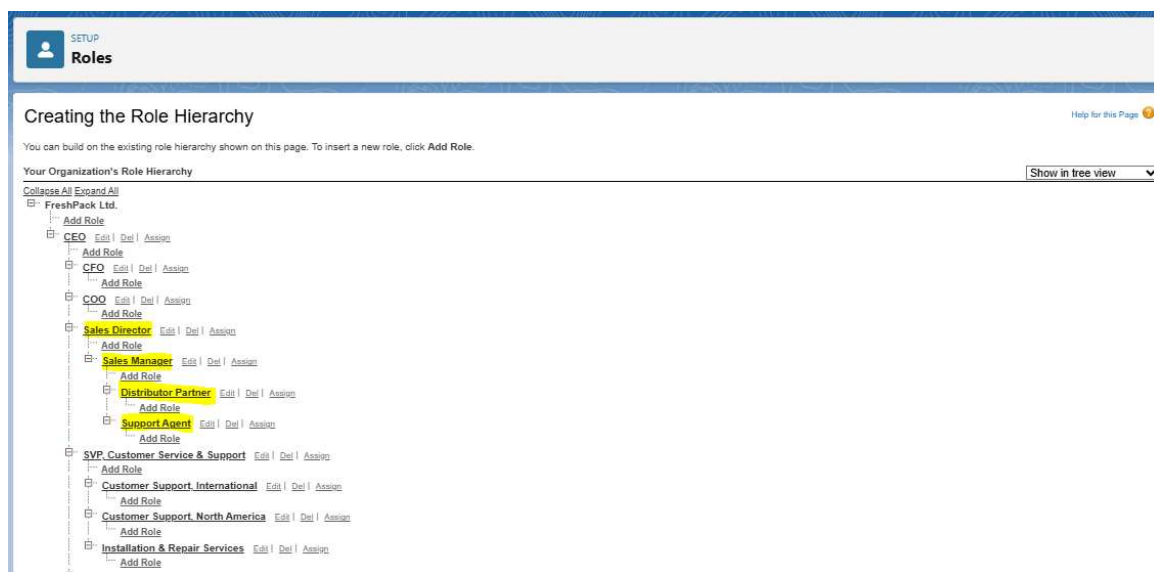
Role hierarchy established: Sales Manager → Support Agent → Distributor.

## Implementation Steps:

22. Navigate to Setup → Roles → Set Up Roles.

23. Add new roles: Distributor, Support Agent, Sales Manager.

24. Arrange hierarchy such that Sales Manager is above Support Agent, and Support Agent above Distributor.



## Organization-Wide Defaults (OWD)

Sharing settings for key objects:

Orders: Private

Distributor\_Order\_Item: Controlled by Parent

Cases: Public Read/Write.

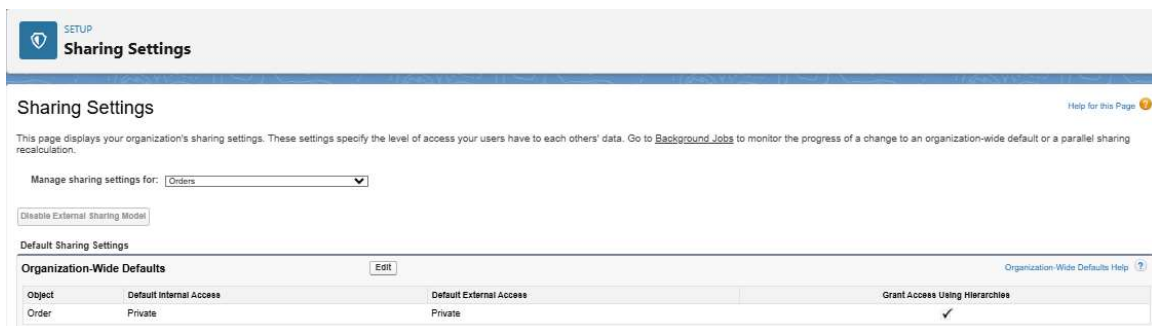
## Implementation Steps:

25. Navigate to Setup → Sharing Settings.

26. Set Orders to Private.

27. Set Distributor\_Order\_Item to Controlled by Parent.

28. Set Cases to Public Read/Write.



**SETUP**  
**Sharing Settings**

Help for this Page

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

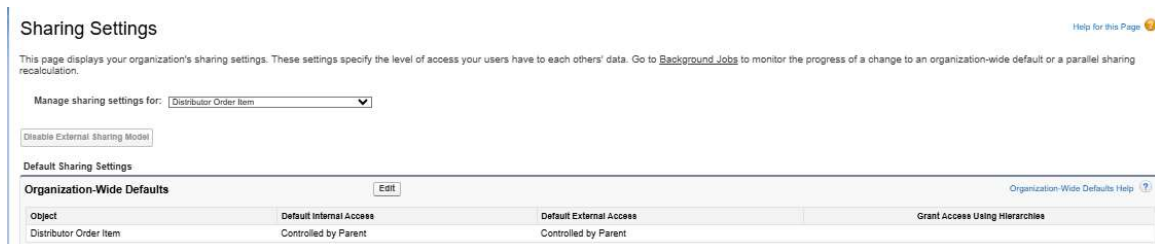
Manage sharing settings for: **Orders**

[Disable External Sharing Model](#)

**Default Sharing Settings**

**Organization-Wide Defaults** [Edit](#) [Organization-Wide Defaults Help](#)

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Order	Private	Private	✓



**Sharing Settings**

Help for this Page

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Manage sharing settings for: **Distributor Order Item**

[Disable External Sharing Model](#)

**Default Sharing Settings**

**Organization-Wide Defaults** [Edit](#) [Organization-Wide Defaults Help](#)

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Distributor Order Item	Controlled by Parent	Controlled by Parent	

## Sharing Settings

[Help for this Page](#)

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: Cases

[Disable External Sharing Model](#)

### Default Sharing Settings

#### Organization-Wide Defaults

[Edit](#)

[Organization-Wide Defaults Help](#)

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Case	Private	Private	✓

## Sharing Rules

Created sample rule: Automatically share Orders with Support Agents if Status = Pending.

### Implementation Steps:

29. Navigate to Setup → Sharing Rules.

30. Create a rule for Orders: Share with role 'Support Agent' when Status = Pending.

31. Save and verify.

SETUP

Sharing Settings

Other Settings

Manager Groups

☐

[i](#)

Minimize the number of roles created, which improves performance by cutting down processing loads

☒

[i](#)

Grant site users access to related cases

☒

[i](#)

Secure guest user record access

☒

[i](#)

Require permission to view record names in lookup fields

☐

[i](#)

Sharing Rules

Order Sharing Rules

[New](#) [Recalculate](#)

[Order Sharing Rules Help](#)

Action	Criteria	Shared With	Order
<a href="#">Edit</a> <a href="#">Del</a>	Owner in Role: <a href="#">Distributor Partner</a>	<a href="#">Role: Sales Manager</a>	Read Only

Sharing Overrides