

Phase 2: Org Setup & Configuration

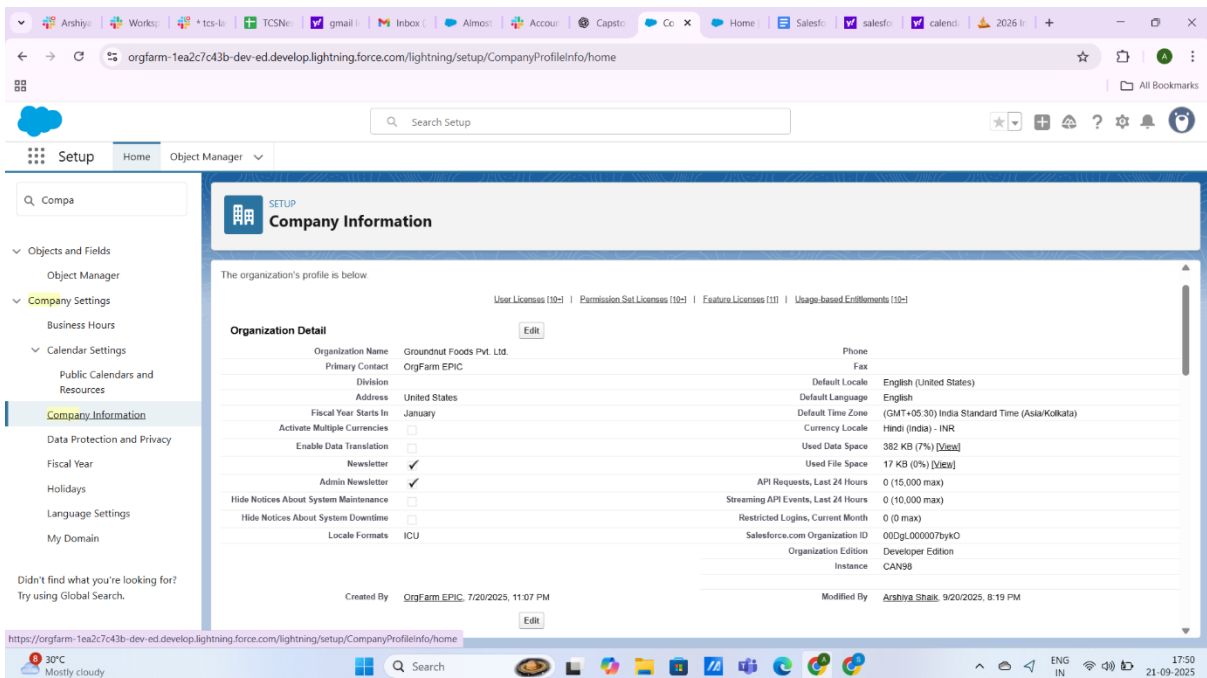
Capstone Project: Groundnut Foods Pvt. Ltd.

1. Salesforce Edition

- **Edition Used:** Salesforce Developer Edition (Free)
- **Reason:** Developer Edition provides all required features (Objects, Security, Automation, Apex, LWC) without license cost.
- This org will be used for the entire implementation.

2. Company Profile Setup

- **Company Name:** Groundnut Foods Pvt. Ltd.
- **Default Locale:** India
- **Currency:** INR
- **Default Time Zone:** Asia/Kolkata



The screenshot shows the Salesforce Setup interface for a Developer Edition org. The left sidebar contains a navigation menu with options like 'Setup', 'Home', 'Object Manager', and 'Company Information'. The main content area is titled 'Company Information' and displays the organization's profile details. The profile includes fields for Organization Name, Primary Contact, Division, Address, Fiscal Year Starts In, Activate Multiple Currencies, Enable Data Translation, Newsletter, Admin Newsletter, Hide Notices About System Maintenance, Hide Notices About System Downtime, Locale Formats, Phone, Fax, Default Locale, Default Language, Default Time Zone, Currency Locale, Used Data Space, Used File Space, API Requests, Streaming API Events, Restricted Logins, Salesforce.com Organization ID, Organization Edition, and Instance. The profile is created by OrgFarm EPIC on 7/20/2025 at 11:07 PM and modified by Arshiva Shukla on 9/20/2025 at 8:19 PM.

Organization Detail	
Organization Name	Groundnut Foods Pvt. Ltd.
Primary Contact	OrgFarm EPIC
Division	United States
Address	
Fiscal Year Starts In	January
Activate Multiple Currencies	<input type="checkbox"/>
Enable Data Translation	<input type="checkbox"/>
Newsletter	<input checked="" type="checkbox"/>
Admin Newsletter	<input checked="" type="checkbox"/>
Hide Notices About System Maintenance	<input type="checkbox"/>
Hide Notices About System Downtime	<input type="checkbox"/>
Locale Formats	ICU
Phone	
Fax	
Default Locale	English (United States)
Default Language	English
Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Currency Locale	Hindi (India) - INR
Used Data Space	382 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	00DgI.000007bykO
Organization Edition	Developer Edition
Instance	CAN98

3. Business Hours & Holidays

- **Business Hours:** 9 AM – 6 PM (Monday–Saturday)

- **Holidays Configured:**
 - Republic Day (26 Jan)
 - Ramzan (as per Indian calendar)

The screenshot shows the 'Business Hours' configuration page in Salesforce Setup. The page is titled 'Business Hours' and has a 'Setup' tab selected. The left sidebar shows the navigation menu with 'Company Settings' expanded, and 'Business Hours' selected. The main content area is divided into three steps:

- Step 1: Business Hours Name**: The 'Business Hours Name' field is set to 'Groundnut Foods Standard'. There is a checkbox 'Use these business hours as the default' which is checked. A red icon indicates 'Required Information'.
- Step 2: Time Zone**: The 'Time Zone' dropdown is set to '(GMT+05:30) India Standard Time (Asia/Kolkata)'.
- Step 3: Business Hours**: A table shows the business hours for each day of the week. Each day has a 'Start' time (HH:MM), an 'End' time (HH:MM), and a checkbox for '24 hours'.

Day	Start (HH:MM)	End (HH:MM)	24 hours
Sunday	9:00 AM	6:00 PM	<input type="checkbox"/>
Monday	9:00 AM	6:00 PM	<input type="checkbox"/>
Tuesday	9:00 AM	6:00 PM	<input type="checkbox"/>
Wednesday	9:00 AM	6:00 PM	<input type="checkbox"/>
Thursday	9:00 AM	6:00 PM	<input type="checkbox"/>
Friday	9:00 AM	6:00 PM	<input type="checkbox"/>
Saturday	9:00 AM	6:00 PM	<input type="checkbox"/>

The screenshot shows the 'Holidays' configuration page in Salesforce Setup. The page is titled 'Holidays' and has a 'Setup' tab selected. The left sidebar shows the navigation menu with 'Company Settings' expanded, and 'Holidays' selected. The main content area is divided into two sections:

- Holidays**: A table with columns 'Action', 'Holiday Name', 'Description', and 'Date and Time'. It contains one entry: 'Ramzan' with a description of '3/20/2026 All Day'.
- Elapsed Holidays**: A table with columns 'Action', 'Holiday Name', 'Description', and 'Date and Time'. It contains one entry: 'Republic Day' with a description of '1/26/2025 All Day'.

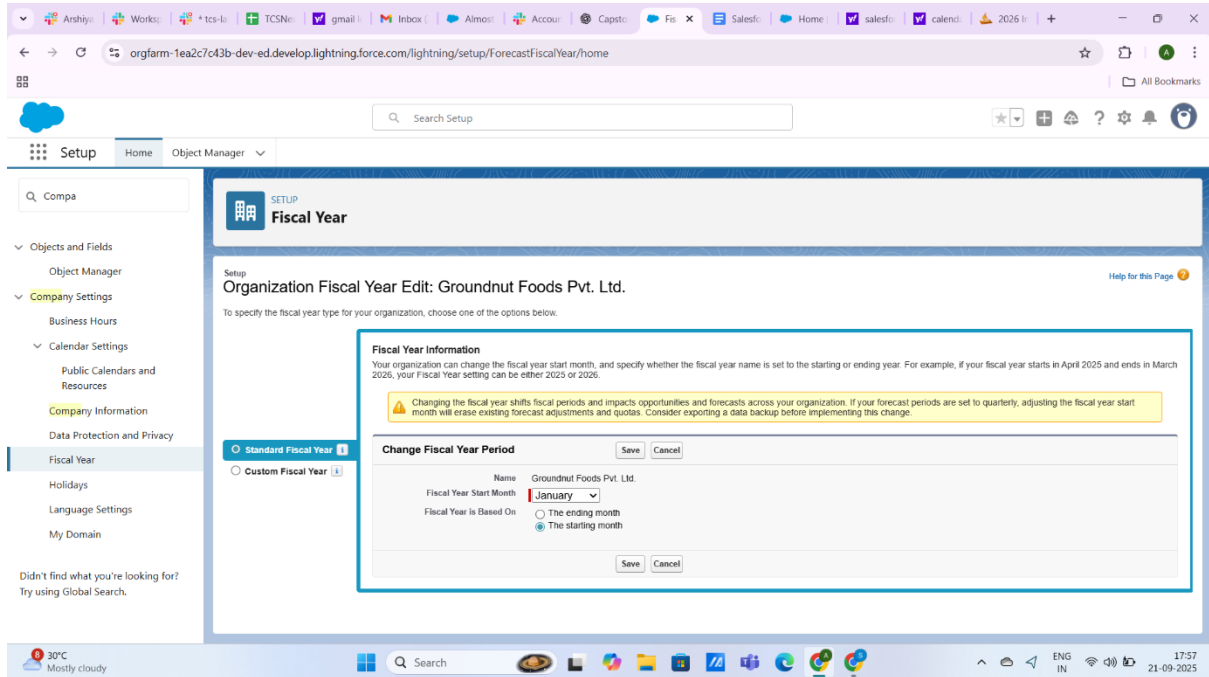
Action	Holiday Name	Description	Date and Time
Edit Del	Ramzan		3/20/2026 All Day

Action	Holiday Name	Description	Date and Time
Clone	Republic Day		1/26/2025 All Day

4. Fiscal Year Settings

- **Type:** Standard Fiscal Year
- **Start:** January 1

- **End:** January 31
- **Reason:** Indian businesses commonly follow April–March accounting cycle.



✦ 5. User Setup & Licenses

Created sample users for different roles in the business:

User Role	License	Purpose
Owner/Manager	System Admin	Full access to configure and manage org
Supervisor	Standard User	Manage workers, batches, and sales reports
Worker	Chatter Free	Log production batch updates
Sales Clerk	Standard User	Create and manage Sales Orders

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](#)

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty_00d9t000007yvsouaa.dboxmqsngz35@chatter.salesforce.com		✓	Chatter Free User
Edit Login	Clerk_Sales	scler	sales_clerk@groundnut.com	Groundnut_company_Sales clerk	✓	Standard Platform User
Edit Login	EPIC_OrgFarm	OEPIC	epic.39dtt7748172@orgfarm.salesforce.com		✓	System Administrator
Edit Login	Manager_Owner	omana	owner.manager@groundnut.com	Groundnut_Company_Owner	✓	System Administrator
Edit	Shaik_Arshi	arshi	arshishaikce77@gmail.com	test role	✗	System Administrator
Edit	Shaik_Arshiya	ars	arshishaikce77311@agentforce.com		✓	System Administrator
Edit	User_Integration	integ	integration800d9t000007yvsouaa.com		✓	Analytics Cloud Integration User
Edit	User_Security	sec	insightsecurity800d9t000007yvsouaa.com		✓	Analytics Cloud Security User
Edit Login	User_Supervisor	suser	supervisor@groundnut.com	Groundnut_company_Supervisor	✓	Standard User
Edit	User_Worker	wuser	worker@groundnut.com		✓	Chatter Free User

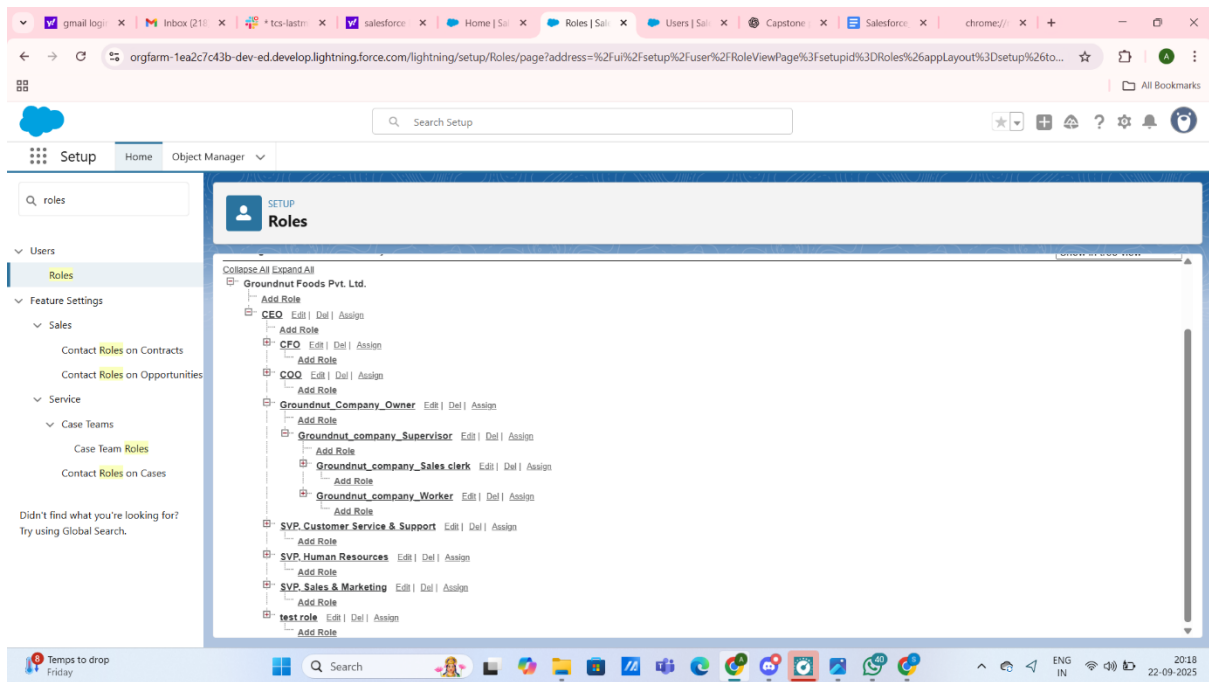
6. Profiles & Roles

- Profiles:**

- System Admin → Full access
- Standard User → Basic access
- Chatter Free → Limited collaboration access

- Role Hierarchy:**

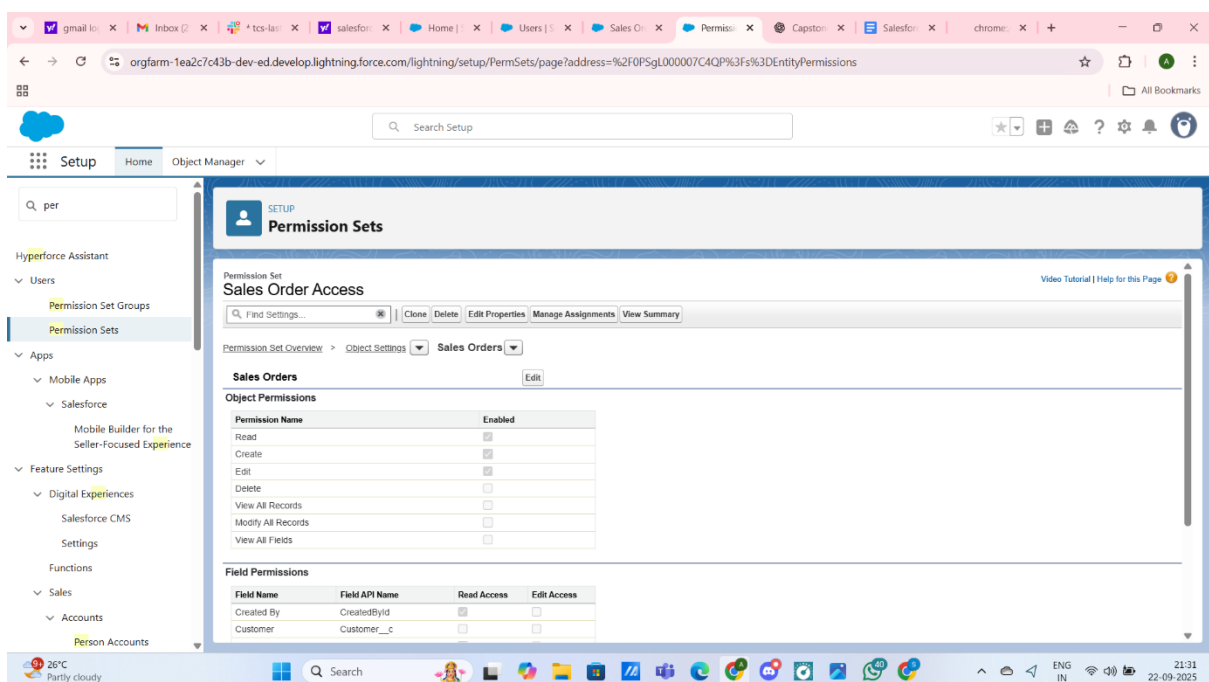
- CEO (top)
 - Supervisor
 - Sales Clerk
 - Worker



7. Permission Sets

Implemented Permission Set: Sales Order Access

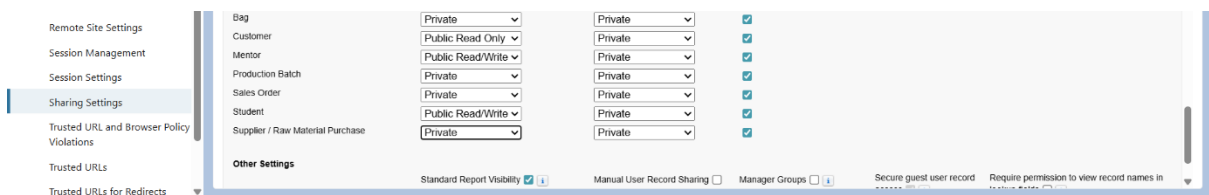
- **Object:** Sales Order (Custom Object)
- **Permissions:** Read, Create, Edit
- **Assigned To:** Sales Clerk
- **Description:** Allows Sales Clerk to manage Sales Orders linked to Customers.



8. Organization-Wide Defaults (OWD)

Configured default access levels:

Object	OWD Setting	Reason
Sales Order	Private	Only assigned Sales Clerk & Supervisor should see/edit
Production Batch	Private	Sensitive production details
Bag	Private	Bags should be tracked per batch, visible only to linked users
Customer	Public Read Only	All can view customers, but only certain roles can edit
Supplier / Raw Material Purchase	Private	Procurement details only for supervisors/managers



9. Sharing Rules

Defined rules to open access where collaboration is needed:

1. Sales Order Sharing Rule

- Owner Role: Sales Clerk
- Shared With: Supervisor
- Access: Read/Write
- Purpose: Supervisors can review Sales Orders created by Clerks

2. Production Batch Sharing Rule

- Owner Role: Worker
- Shared With: Supervisor
- Access: Read/Write

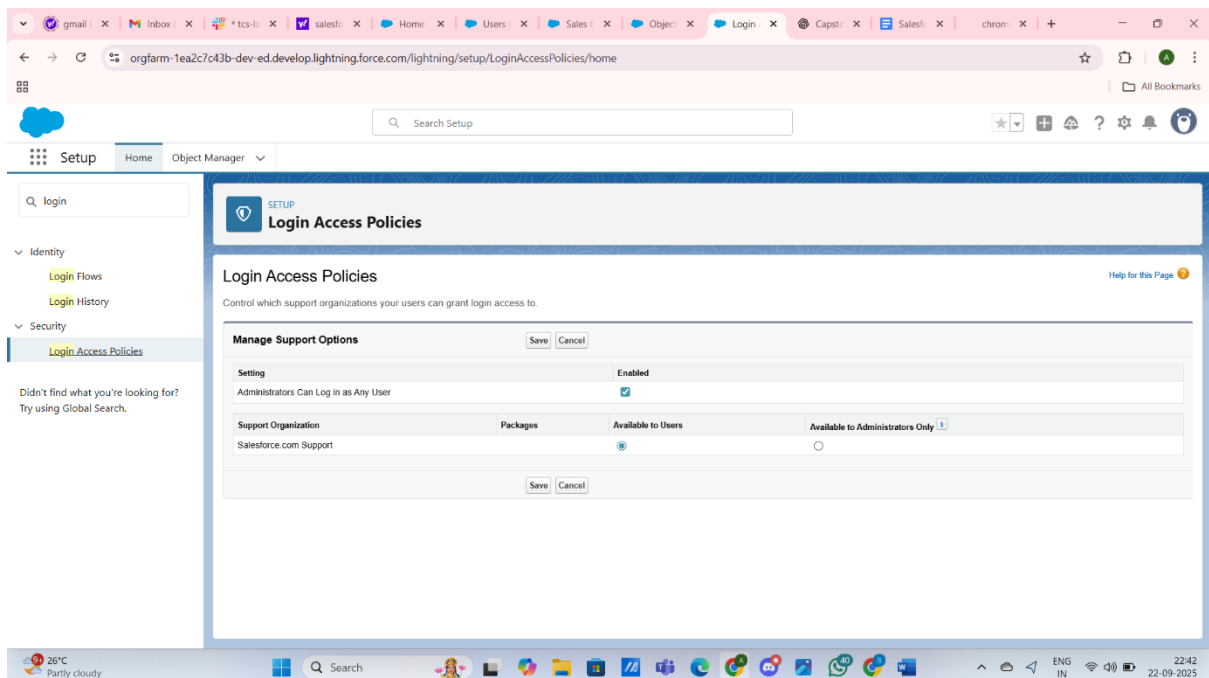
- Purpose: Supervisors can track batches created by Workers

3. Customer Sharing Rule (Optional)

- Shared With: Sales Clerks
- Access: Read/Write
- Purpose: Allow Clerks to update customer details while creating order

10. Login Access Policies

- Configured session settings and login hours (9 AM – 6 PM for workers).
- Ensures data security and prevents unauthorized access outside business hours.



11. Sandbox Usage (Optional)

- Developer Sandbox (for testing new features before deploying to main org).
- Deployment will be done using **Change Sets** in later phases.

Phase 2 Summary

In Phase 2, we successfully set up the Salesforce Org for **Groundnut Foods Pvt. Ltd.** including:

- Company profile, fiscal year, business hours & holidays
- User setup, roles, and profiles
- Permission sets for controlled object access
- OWD & Sharing Rules for secure data visibility
- Login access policies for security