

## Phase 2 — Org Setup & Configuration

**Project:** Revolutionizing Agriculture with AgriEdge Or-Mange Ltd — Salesforce OMS

**Prepared By:** Sai Teja Kotipalli

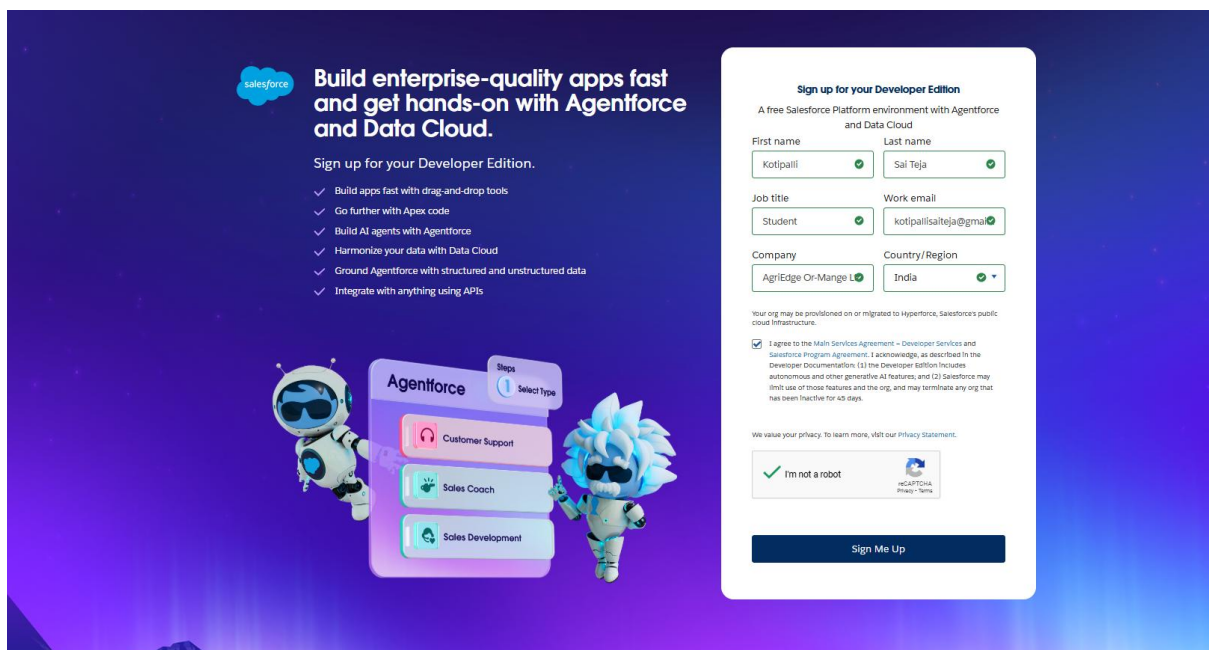
**Status:** Completed

### 1. Executive summary

This document lists everything created and configured in **Phase 2: Org Setup & Configuration** for the AgriEdge OMS project. It includes the org basics, users, roles, profiles, permission sets, org-wide defaults, sharing rules, business hours/holidays, and login/access settings. Use this document as proof for submission and as a checklist for your mentor review.

### 2. Developer Org

- **Org purpose:** Development and build for AgriEdge Order Management System
- **Org display name:** *AgriEdge Order Management* (created during signup)
- **Recommended verification:** Setup → Company Information — confirm Company Name and Org Edition.



### 3. Company Profile (Company Information)

- **Company Name:** AgriEdge Or-Mange Ltd
- **Address:** Hyderabad, Telangana, India
- **Default Time Zone:** Asia/Kolkata
- **Currency:** INR

- **Fiscal Year:** Standard (Jan–Dec)

**Where to verify:** Setup → Company Settings → Company Information

Company Information  
**AgriEdge Or-Mange Ltd**

The organization's profile is below.

[Use Licenses \(10\)](#) | [Permission Set Licenses \(10\)](#) | [Feature Licenses \(1\)](#) | [Usage-based Entitlements \(10\)](#)

### Organization Detail

[Edit](#)

Organization Name	AgriEdge Or-Mange Ltd	Phone	
Primary Contact	OrgFam EPIC	Fax	
Division		Default Locale	English (United States)
Address	Hyderabad 50001 Telangana 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	408 KB (8%) <a href="#">View</a>
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) <a href="#">View</a>
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	396 (15,000 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	000DgK00000BDKoz
		Organization Edition	Developer Edition
		Instance	CAN96
Created By	OrgFam EPIC 9/9/2025, 10:36 PM	Modified By	Kotipalli Sai Teja 9/12/2025, 6:44 PM

[Edit](#)

## 4. Business Hours & Holidays

- **Business Hours entry created:** *AgriEdge Business Hours*

- Mon–Sat: 09:00 – 18:00 IST

- **Holidays added (examples):** Republic Day, Diwali, Independence Day

**Where to verify:** Setup → Company Settings → Business Hours and Setup → Company Settings → Holidays

**SETUP Business Hours**

### Organization Business Hours

Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate.

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

[Help for this Page](#)

[Holidays \(0\)](#)

#### Business Hours Detail

[Edit](#)

Business Hours Name	AgriEdge Business Hours	Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Business Hours	<div> <div>Sunday</div> <div>No Hours</div> </div> <div> <div>Monday</div> <div>9:00 AM to 6:00 PM</div> </div> <div> <div>Tuesday</div> <div>9:00 AM to 6:00 PM</div> </div> <div> <div>Wednesday</div> <div>9:00 AM to 6:00 PM</div> </div> <div> <div>Thursday</div> <div>9:00 AM to 6:00 PM</div> </div> <div> <div>Friday</div> <div>9:00 AM to 6:00 PM</div> </div> <div> <div>Saturday</div> <div>9:00 AM to 6:00 PM</div> </div>	Default Business Hours	<input checked="" type="checkbox"/>
Active	<input checked="" type="checkbox"/>		
Created By	OrgFam EPIC 9/9/2025, 10:36 PM	Last Modified By	Kotipalli Sai Teja 9/12/2025, 6:44 PM

[Edit](#)

#### Holidays

[Add/Remove](#)

No records to display

[Back To Top](#) Always show me [more records per related list](#)

Holidays are dates and times at which business hours are suspended. Business hours are the days and hours that your support team is available


Holidays				New
Action	Holiday Name		Description	Date and Time
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Divali</a>			10/21/2025 All Day
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Independence Day</a>			8/15/2026 All Day <a href="#">↻</a>
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Republic Day</a>			1/26/2026 All Day <a href="#">↻</a>

## 5. Users & Licenses (sample users created)

These users were created to represent typical stakeholders. Ensure actual usernames in your org match what you submitted.

Name	Role assigned (see Roles)	Profile (initial)
Sai Teja (you)	System Administrator	System Administrator
Pavan Gokavarapu	Sales Manager	Sales User Profile (custom)
Yaswanth Tadiparthi	Warehouse Manager	Warehouse Profile / Sales User Profile
Iswarya Kotipalli	Sales Rep	Standard User (or Sales User Profile)
Sai Teja Kotipalli	Sales Manager	Sales User Profile

**Where to verify:** Setup → Users — check Active checkbox, email, username, and Profile column.



SETUP

Users

All Users

Edit

Create New User

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

All Users

Edit

Create New User

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

New User

Reset Password(s)

Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<div>Edit</div>	Chatter Expert	Chatter	chatty00d9k0000bdkozuah.3yz2rgkgr4@chatter.salesforce.com		✓	Chatter Free User
<div>Edit</div> <div>Login</div>	EPIC_OrgFarm	OEPIE	epic.e9d92765371d@orgfarm.salesforce.com		✓	System Administrator
<div>Edit</div> <div>Login</div>	Isvarya_Kotipalli	kiswa	kotipallisvarya@gmail.com	Sales Reps	✓	Standard Platform User
<div>Edit</div> <div>Login</div>	Pavan_Gokavaram	gpava	gpavan8688449334@gmail.com	Sales Manager	✓	Standard User
<div>Edit</div>	Sai Teja_Kotipalli	kat	kotipallisaiTeja129@agentforce.com	Sales Manager	✓	System Administrator
<div>Edit</div>	User_Integration	integ	integration@00d9k0000bdkozuah.com		✓	Analytics Cloud Integration User
<div>Edit</div>	User_Security	sec	insightssecurity@00d9k0000bdkozuah.com		✓	Analytics Cloud Security User
<div>Edit</div> <div>Login</div>	Yaswanth_Tadiparthi	tyasw	yaswanthtadiparthi2004@gmail.com	Warehouse Manager	✓	Standard 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

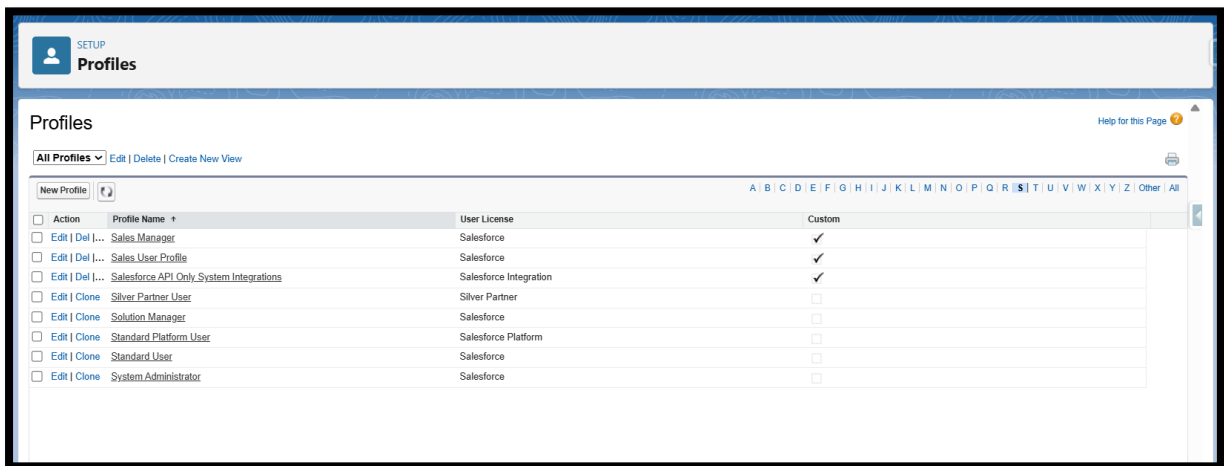
Other

All

---

## 6. Profiles

- **Created / cloned:**
  - *Sales User Profile* — cloned from Standard User (restricted to relevant object access)
  - (Optional) *Warehouse Profile* — cloned if a separate profile was needed
- **Key profile settings:** Object permissions adjusted to allow Read/Create/Update on Orders, Order Line Items, Products, Inventory, Deliveries for Sales / Warehouse profiles.  
**Where to verify:** Setup → Profiles → [Profile Name] → Object Settings



---

## 7. Roles & Role Hierarchy

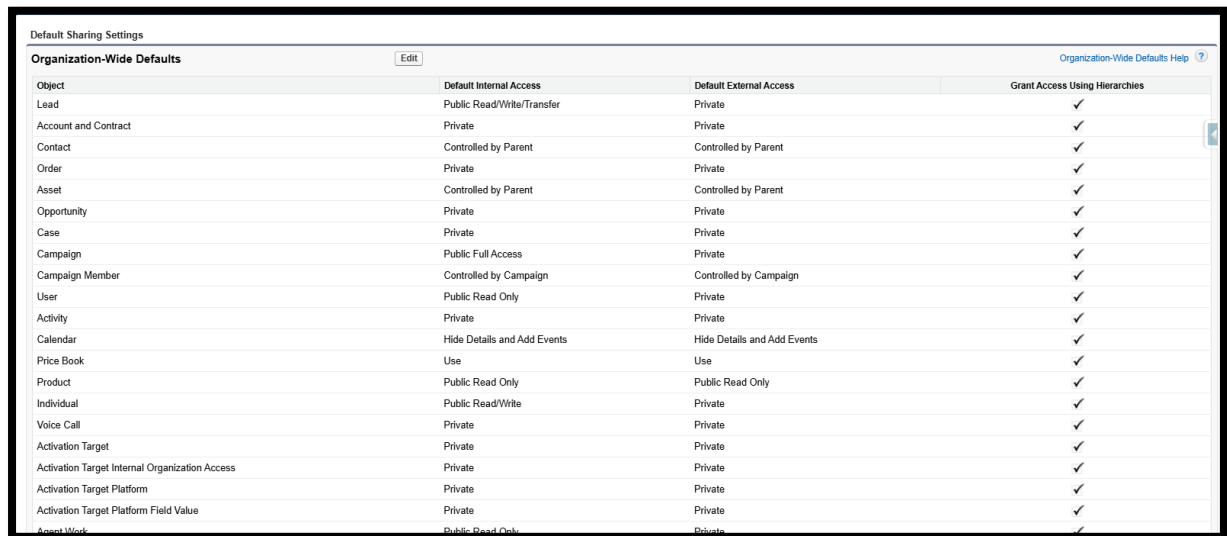
- **Role structure created:**
  - CEO (top)
    - Sales Manager
      - Sales Reps
    - Warehouse Manager
    - Customer Support
- **Purpose:** Enforce data visibility & approval routing (via role hierarchy and sharing).  
**Where to verify:** Setup → Users → Roles → Set Up Roles (view tree)



## 9. Org-Wide Defaults (OWD)

Configured to follow least privilege principle:

- **Accounts:** Private
  - **Orders:** Private
  - **Products:** Public Read Only
  - **Inventory:** Public Read Only
- Where to verify:** Setup → Security → Sharing Settings (Org-Wide Defaults section)



Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Private	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Private	Private	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Private	Private	✓
Case	Private	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓
Product	Public Read Only	Public Read Only	✓
Individual	Public Read/Write	Private	✓
Voice Call	Private	Private	✓
Activation Target	Private	Private	✓
Activation Target Internal Organization Access	Private	Private	✓
Activation Target Platform	Private	Private	✓
Activation Target Platform Field Value	Private	Private	✓
Account Work	Public Read Only	Private	✓

## 10. Sharing Rules

**Rule created:** Sales to Warehouse Orders

- **Rule Type:** Based on record owner
- **Object:** Order
- **Owned by members of:** Role = *Sales Manager* (includes Sales Reps as subordinates where applicable)
- **Share with:** Role = *Warehouse Manager*
- **Access level:** Read/Write

**Purpose:** Ensures Orders created by Sales can be seen and updated by Warehouse staff for processing/dispatch.

**Where to verify:** Setup → Security → Sharing Settings → Order → Sharing Rules (open rule to confirm settings)

SETUP

Sharing Settings

Setup

Order 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.

Label

Sales to Warehouse Orders

Rule Name

Sales\_to\_Warehouse\_Order

Description

Order: owned by members of

Role: Sales Manager

Share with

Role: Warehouse Manager

Order Access

Read/Write

Created By

Kotipalli Sai Teja 9/13/2025, 6:07 PM

Modified By

Kotipalli Sai Teja 9/13/2025, 6:07 PM

Save

Cancel

## 11. Login & Access Policies

- **Admin login access:** Enabled (so admin can login as other users for testing)
- **Password policies / login IP:** Default dev org settings (you can tighten these for production)  
**Where to verify:** Setup → Security → Login Access Policies and Setup → Security → Session Settings

SETUP

Login Access Policies

Login Access Policies

Help for this Page

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

Manage Support Options

Save

Cancel

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"/>

Save

Cancel