

AgriChainX Project – Phase 2: Org Setup & Configuration

Project: AgriChainX – Farm-to-Consumer Transparency Platform

Phase 2

The goal of Phase 2 is to set up the foundational Salesforce environment for AgriChainX. This includes configuring company settings, creating users, defining roles and profiles, and establishing security policies.

Phase 2 Implementation Steps

Step 1: Login to Salesforce

1. Go to [Salesforce Developer](#) → Login → Developer Edition.
2. Enter your username/password.
3. Open **Lightning Home Page**.

Step 2: Open Setup

1. Click **Gear Icon** (⚙️) → **Setup**.
2. You are now in **Salesforce Setup**.

Step 3: Company Information

1. Quick Find → **Company Information** → click it.
2. Check Organization Name : AgriChainX
3. Click **Edit**:
 - Default Time Zone → (GMT-05:00) Central Daylight Time (America/Chicago) (e.g., GMT+5:30)
 - Default Currency → INR or USD
 - Default Language → English
4. Click **Save**

The screenshot shows the Salesforce Setup page for Company Information. The page title is "Company Information" with a sub-header "AgriChainX". Below the title, it says "The organization's profile is below." and provides links for "User Licenses (11)", "Permission Set Licenses (11)", "Feature Licenses (11)", and "License-based Entitlements (11)".

The "Organization Detail" section includes an "Edit" button and the following fields:


Field	Value
Organization Name	AgriChainX
Primary Contact	OrgFarm EPIC
Division	
Address	India
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/Colombo)
Currency Locale	English (United States) - USD
Used Data Space	460 KB (9%) View
Used File Space	25 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	00Dgt.000007RvOUJ
Organization Edition	Developer Edition
Instance	CAN98

Created By: [OrgFarm EPIC](#), 7/17/2025, 8:07 AM

Modified By: [Om Gorle](#), 9/21/2025, 10:27 AM

Step 4: Business Hours

1. Setup → Quick Find → **Business Hours** → click **New Business Hours**.
2. Fill the form:
 - Name: AgriChainX Business Hours
 - Time Zone: your local timezone
 - Days & Hours: 24/7
 - Click **Save**

 **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](#)

Business Hours Edit

SaveCancel

Step 1. Business Hours Name

Business Hours NameAgriChainX Business Hour

Active☐

Use these business hours as the default☐

Required Information

Step 2. Time Zone

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

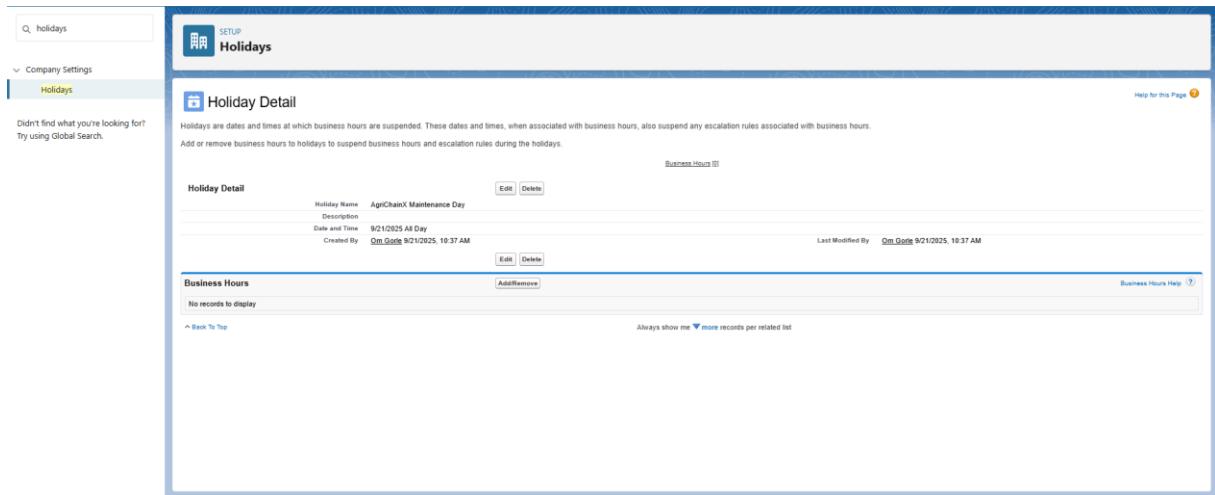
Step 3. Business Hours

Sunday	12:00 AM	to	12:00 AM	<input checked="" type="checkbox"/> 24 hours
Monday	12:00 AM	to	12:00 AM	<input checked="" type="checkbox"/> 24 hours
Tuesday	12:00 AM	to	12:00 AM	<input checked="" type="checkbox"/> 24 hours
Wednesday	12:00 AM	to	12:00 AM	<input checked="" type="checkbox"/> 24 hours
Thursday	12:00 AM	to	12:00 AM	<input checked="" type="checkbox"/> 24 hours
Friday	12:00 AM	to	12:00 AM	<input checked="" type="checkbox"/> 24 hours
Saturday	12:00 AM	to	12:00 AM	<input checked="" type="checkbox"/> 24 hours

SaveCancel

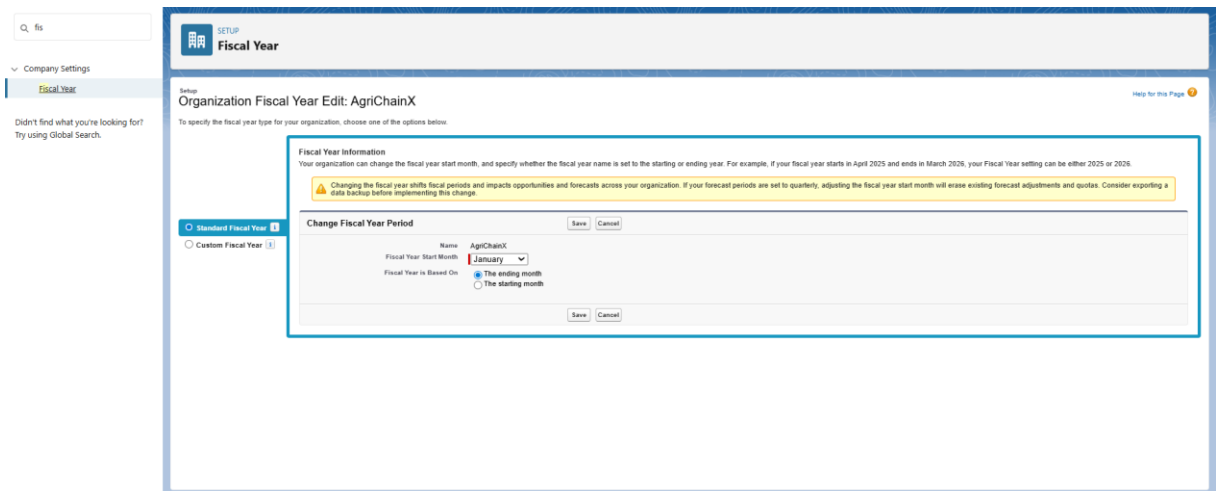
Step 5: Holidays

1. Setup → Quick Find → **Holidays** → click **New Holiday**.
2. Fill fields:
 - Holiday Name: Maintenance Day (example)
 - Date → select
3. Click **Save**



Step 6: Fiscal Year

1. Setup → Quick Find → **Fiscal Year** → click **Fiscal Year Settings**.
2. Select **Standard Fiscal Year** → Click **Save**



Step 7: Create Users

Step 4: Create the Custom Profiles

3. In Setup, use the quick find search bar and type **Profiles**.
4. Click on **Profiles**.
5. You will see a long list of standard profiles. **Do not edit these**.
6. Instead, you will **clone** the standard "Standard User" profile for each of your roles.
7. Click on the **Standard User** profile.
8. Click the **Clone** button.
9. **Profile Name:** Enter **Farmer**.
10. Click **Save**.
11. Repeat steps 5-8 three more times to create the following profiles:
 - **Distributor**
 - **Store Manager**
 - **Consumer**
- i. **Farmer Profile**

SETUP

Profiles

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

Enabled Apex Class Access

Enabled Visualforce Page Access

Enabled External Data Source Access

Enabled Named Credential Access

Enabled External Credential Principal Access

Enabled Custom Metadata Type Access

Enabled Custom Setting Definitions Access

Enabled Flow Access

Enabled Service Presence Status Access

Enabled Custom Permissions

Profile Detail

EditCloneDeleteView Users

Name	Farmer		
User License	Salesforce	Custom Profile	✓
Description			
Created By	Om Gole, 9/21/2025, 8:48 AM	Modified By	Om Gole, 9/21/2025, 8:48 AM

Page Layouts

Standard Object Layouts			
Global	Global Layout (View Assignment)	Location Group	Location Group Layout (View Assignment)
Email Application	Not Assigned (View Assignment)	Location Group Assignment	Location Group Assignment Layout (View Assignment)
Home Page Layout	Home Page Default (View Assignment)	Macro	Macro Layout (View Assignment)
Account	Account Layout (View Assignment)	Object Milestone	Object Milestone Layout (View Assignment)
Alternative Payment Method	Alternative Payment Method Layout (View Assignment)	Operating Hours	Operating Hours Layout (View Assignment)
Appointment Invitation	Appointment Invitation Layout (View Assignment)	Opportunity	Opportunity Layout (View Assignment)
Asset	Asset Layout (View Assignment)	Opportunity Product	Opportunity Product Layout (View Assignment)
Asset Action	Asset Action Layout (View Assignment)	Order	Order Layout (View Assignment)
Asset Action Source	Asset Action Source Layout (View Assignment)	Order Product	Order Product Layout (View Assignment)
Asset Relationship	Asset Relationship Layout (View Assignment)	Payment	Payment Layout (View Assignment)
Asset State Period	Asset State Period Layout (View Assignment)	Payment Authorization	Payment Authorization Layout (View Assignment)
Assigned Resource	Assigned Resource Layout (View Assignment)	Payment Authorization Adjustment	Payment Authorization Adjustment Layout (View Assignment)
Associated Location	Associated Location Layout (View Assignment)	Payment Gateway	Payment Gateway Layout (View Assignment)
Async Operation Log	Async Operation Log Layout (View Assignment)	Payment Gateway Log	Payment Gateway Log Layout (View Assignment)

ii. Distributor

SETUP

Profiles

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

Enabled Apex Class Access

Enabled Visualforce Page Access

Enabled External Data Source Access

Enabled Named Credential Access

Enabled External Credential Principal Access

Enabled Custom Metadata Type Access

Enabled Custom Setting Definitions Access

Enabled Flow Access

Enabled Service Presence Status Access

Enabled Custom Permissions

Profile Detail

EditCloneDeleteView Users

Name	Distributor		
User License	Salesforce	Custom Profile	✓
Description			
Created By	Om Gole, 9/21/2025, 8:50 AM	Modified By	Om Gole, 9/21/2025, 8:50 AM

Page Layouts

Standard Object Layouts			
Global	Global Layout (View Assignment)	Location Group	Location Group Layout (View Assignment)
Email Application	Not Assigned (View Assignment)	Location Group Assignment	Location Group Assignment Layout (View Assignment)
Home Page Layout	Home Page Default (View Assignment)	Macro	Macro Layout (View Assignment)
Account	Account Layout (View Assignment)	Object Milestone	Object Milestone Layout (View Assignment)
Alternative Payment Method	Alternative Payment Method Layout (View Assignment)	Operating Hours	Operating Hours Layout (View Assignment)
Appointment Invitation	Appointment Invitation Layout (View Assignment)	Opportunity	Opportunity Layout (View Assignment)
Asset	Asset Layout (View Assignment)	Opportunity Product	Opportunity Product Layout (View Assignment)
Asset Action	Asset Action Layout (View Assignment)	Order	Order Layout (View Assignment)
Asset Action Source	Asset Action Source Layout (View Assignment)	Order Product	Order Product Layout (View Assignment)
Asset Relationship	Asset Relationship Layout (View Assignment)	Payment	Payment Layout (View Assignment)
Asset State Period	Asset State Period Layout (View Assignment)	Payment Authorization	Payment Authorization Layout (View Assignment)
Assigned Resource	Assigned Resource Layout (View Assignment)	Payment Authorization Adjustment	Payment Authorization Adjustment Layout (View Assignment)
Associated Location	Associated Location Layout (View Assignment)	Payment Gateway	Payment Gateway Layout (View Assignment)
Async Operation Log	Async Operation Log Layout (View Assignment)	Payment Gateway Log	Payment Gateway Log Layout (View Assignment)

iii. Store Manager

SETUP

Profiles

Profile

Store Manager

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

Enabled Apex Class Access

Enabled Visualforce Page Access

Enabled External Data Source Access

Enabled Named Credential Access

Enabled External Credential Principal Access

Enabled Custom Metadata Type Access

Enabled Custom Setting Definitions Access

Enabled Flow Access

Enabled Service Presence Status Access

Enabled Custom Permissions

Profile Detail

EditCloneDeleteView Users

Name	Store Manager		
User License	Salesforce	Custom Profile	✓
Description			
Created By	Om Gole, 9/21/2025, 8:52 AM	Modified By	Om Gole, 9/21/2025, 8:52 AM

Page Layouts

Standard Object Layouts			
Global	Global Layout (View Assignment)	Location Group	Location Group Layout (View Assignment)
Email Application	Not Assigned (View Assignment)	Location Group Assignment	Location Group Assignment Layout (View Assignment)
Home Page Layout	Home Page Default (View Assignment)	Macro	Macro Layout (View Assignment)
Account	Account Layout (View Assignment)	Object Milestone	Object Milestone Layout (View Assignment)
Alternative Payment Method	Alternative Payment Method Layout (View Assignment)	Operating Hours	Operating Hours Layout (View Assignment)
Appointment Invitation	Appointment Invitation Layout (View Assignment)	Opportunity	Opportunity Layout (View Assignment)
Asset	Asset Layout (View Assignment)	Opportunity Product	Opportunity Product Layout (View Assignment)
Asset Action	Asset Action Layout (View Assignment)	Order	Order Layout (View Assignment)
Asset Action Source	Asset Action Source Layout (View Assignment)	Order Product	Order Product Layout (View Assignment)
Asset Relationship	Asset Relationship Layout (View Assignment)	Payment	Payment Layout (View Assignment)

iv. Consumer

SETUP

Profiles

Profile

Consumer

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

Enabled Apex Class Access

Enabled Salesforce Page Access

Enabled External Data Source Access

Enabled Named Credential Access

Enabled External Credential Principal Access

Enabled Custom Metadata Type Access

Enabled Custom Setting Definitions Access

Enabled File Access

Enabled Service Presence Status Access

Enabled Custom Permissions

Profile Detail

Edit

Clone

Delete

View Users

Name	Consumer		
User License	Salesforce	Custom Profile	✓
Description			
Created By	Om Gorte 9/21/2025, 8:53 AM	Modified By	Om Gorte 9/21/2025, 8:53 AM

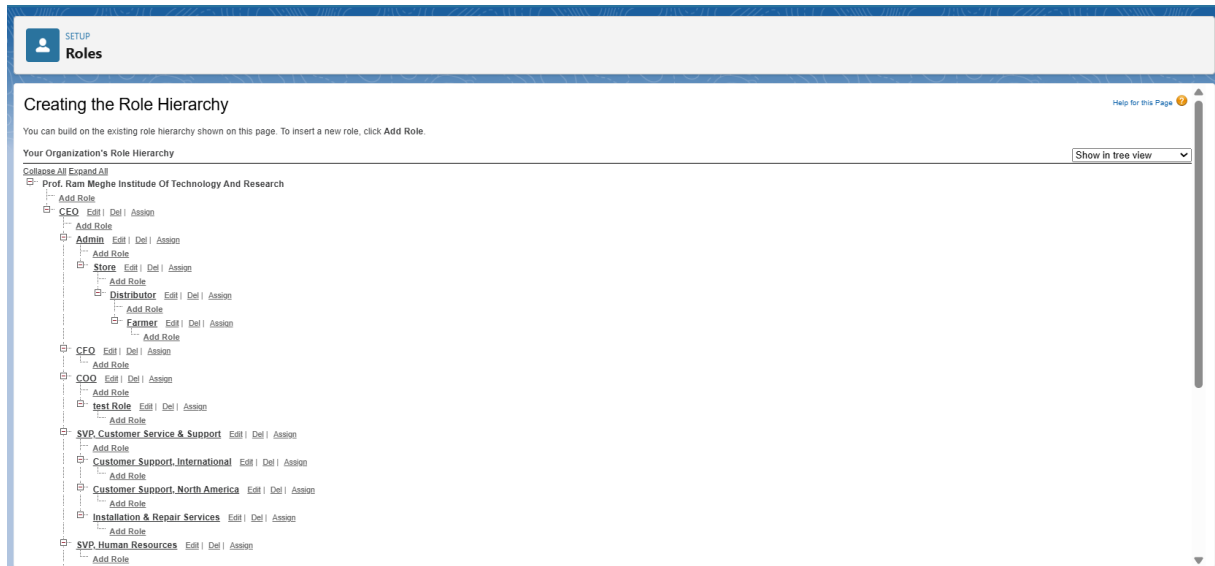
Page Layouts

Standard Object Layouts

Global	Global Layout (View Assignment)	Location Group	Location Group Layout (View Assignment)
Email Application	Not Assigned (View Assignment)	Location Group Assignment	Location Group Assignment Layout (View Assignment)
Home Page Layout	Home Page Default (View Assignment)	Macro	Macro Layout (View Assignment)
Account	Account Layout (View Assignment)	Object Milestone	Object Milestone Layout (View Assignment)
Alternative Payment Method	Alternative Payment Method Layout (View Assignment)	Operating Hours	Operating Hours Layout (View Assignment)
Appointment Invitation	Appointment Invitation Layout (View Assignment)	Opportunity	Opportunity Layout (View Assignment)
Asset	Asset Layout (View Assignment)	Opportunity Product	Opportunity Product Layout (View Assignment)
Asset Action	Asset Action Layout (View Assignment)	Order	Order Layout (View Assignment)
Asset Action Source	Asset Action Source Layout (View Assignment)	Order Product	Order Product Layout (View Assignment)
Asset Relationship	Asset Relationship Layout (View Assignment)	Payment	Payment Layout (View Assignment)

Step 9: Roles

1. Setup → Quick Find → **Roles** → click **Set Up Roles**
2. Create hierarchy:
 - Admin (top)
 - Coordinator → reports to Admin
 - Doctor → reports to Coordinator
 - Courier → reports to Coordinator
3. Click **Save**



Step 10: Permission Sets

1. Setup → Quick Find → **Permission Sets** → click **New**
2. Name: Alert Manager
3. Assign object permissions → Edit Alerts
4. Assign users (Admin + Coordinator) → Save

Expected Outcome: Extra permissions granted without changing profiles.

Step 11: Organization-Wide Defaults (OWD)

Note: Cannot configure yet.

- OWD requires custom objects to exist.
- Will be done **after Phase 3 (Data Modeling & Relationships)** once objects like **Organ, Transport Case, Alerts** are created.

Step 12: Sharing Rules

Note: Cannot configure yet.

- Sharing Rules depend on custom objects.
- Will be configured **after Phase 3**, based on roles and object criteria.