

# Phase 2 — Org Setup & Configuration

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

**Prepared By:** Ijjapureddy Parvathi Devi

**Status:** Completed

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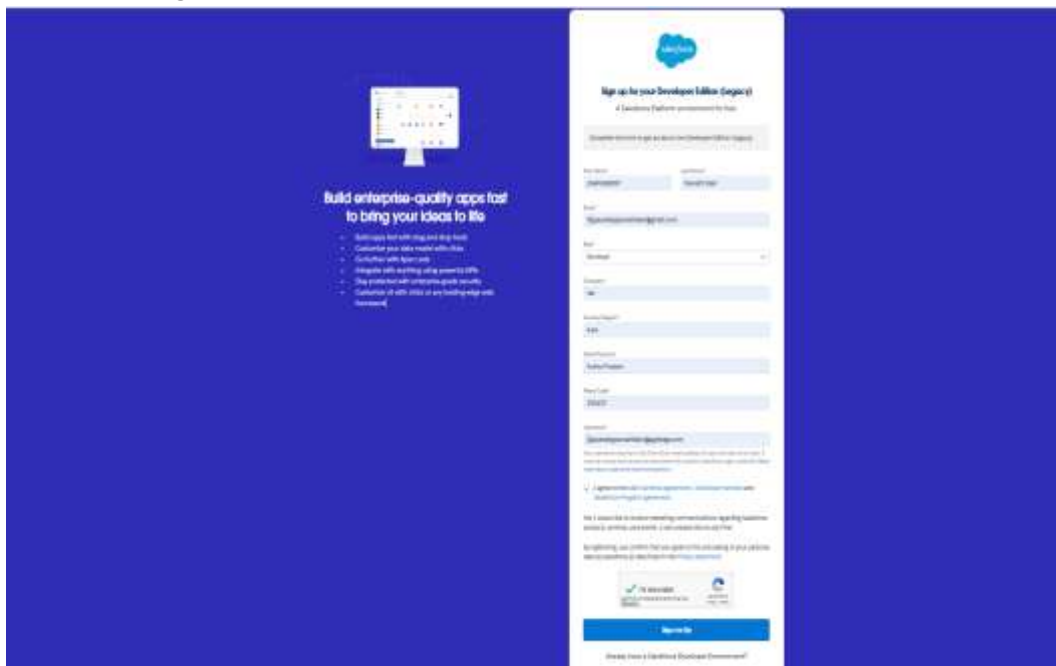
## 1.Executive summary

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.

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## 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.



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## 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**

The organization's profile is below:

Organization Detail

Organization Name	AgriEdge Or-Mange Ltd	Phone	945025425
Primary Contact	Sapureddy Parvathi Devi	Fax	
Address	Hyderabad Hyderabad Telangana India	Default Locale	English (India)
		Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Connections	<input type="checkbox"/>	Connector Locale	English (India) - (N/A)
Enable Data Translation	<input type="checkbox"/>	Used Data Space	442 KB (5%) (Data)
Newsletter	<input checked="" type="checkbox"/>	Used File Space	13 KB (7%) (Data)
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	0 (10,000 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 Format	ICU	Infoatica.com Organization ID	0000000000000000
		Organization Edition	Developer Edition
		Instance	IND136

Created By: SAPUREDDY Parvathi Devi 15/09/2025, 12:14 pm

Modified By: SAPUREDDY Parvathi Devi 15/09/2025, 4:16 pm

## 4. Business Hours & Holidays

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

o 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

**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.

Business Hours Detail

Business Hours Name	AgriEdge Business Hours	Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Business Hours	Sunday: 24 Hours Monday: 9:00 am to 6:00 pm Tuesday: 9:00 am to 6:00 pm Wednesday: 9:00 am to 6:00 pm Thursday: 9:00 am to 6:00 pm Friday: 9:00 am to 6:00 pm Saturday: 9:00 am to 6:00 pm	Default Business Hours	

Created By: SAPUREDDY Parvathi Devi 15/09/2025, 1:45 pm

Last Modified By: SAPUREDDY Parvathi Devi 15/09/2025, 1:56 pm

Holidays

No records to display

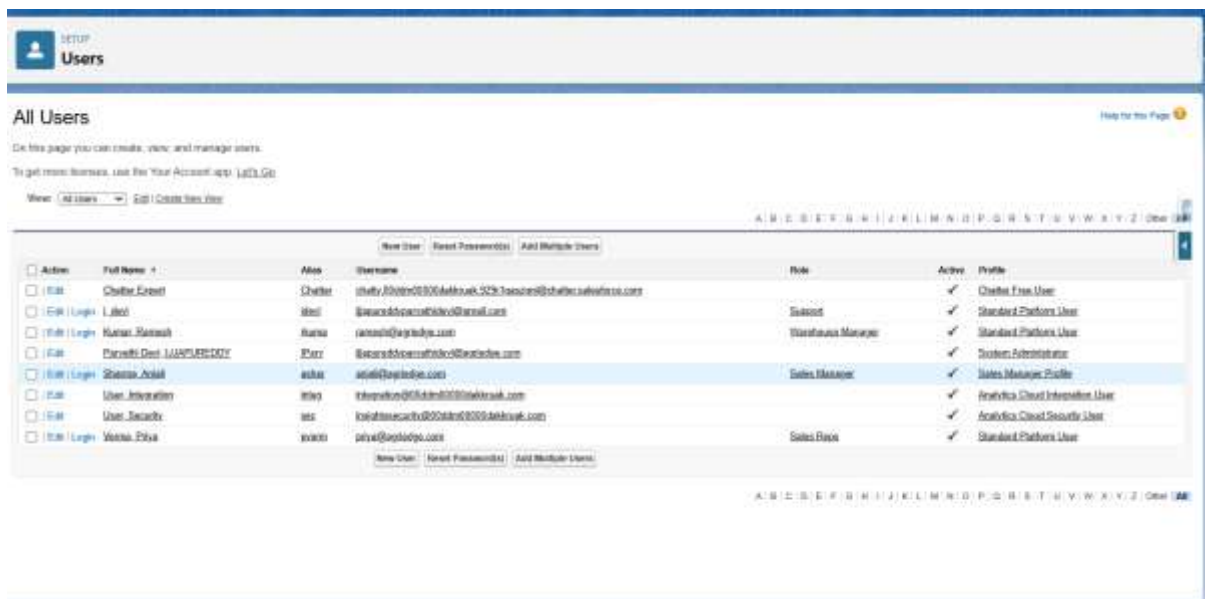


## 5.Users & Licenses (sample users created)

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

Name (Full Name)	Role Assigned	Profile (initial)
Chatter Expert	—	Chatter Free User
i, devi	Support	Standard Platform User
Kumar, Ramesh	Warehouse Manager	Standard Platform User
Parvathi Devi, IJJAPUREDDY	—	System Administrator
Sharma, Anjali	Sales Manager	Sales Manager Profile
User, Integration	—	Analytics Cloud Integration User
User, Security	Sales Reps	Analytics Cloud Security User
Verma, Priya	—	Standard Platform User

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



## 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

Action	Profile Name	User License	Custom
<a href="#">Edit</a> <a href="#">Clone</a>	Sales Manager Profile	Salesforce	✓
<a href="#">Edit</a> <a href="#">Clone</a>	Sales User Profile	Salesforce	✓
<a href="#">Edit</a> <a href="#">Clone</a>	Salesforce API Only System Integration	Salesforce Integration	✓
<a href="#">Edit</a> <a href="#">Clone</a>	Silver Partner User	Silver Partner	
<a href="#">Edit</a> <a href="#">Clone</a>	Solution Manager	Salesforce	
<a href="#">Edit</a> <a href="#">Clone</a>	Standard Platform User	Salesforce Platform	
<a href="#">Edit</a> <a href="#">Clone</a>	Standard User	Salesforce	
<a href="#">Edit</a> <a href="#">Clone</a>	System Administrator	Salesforce	

## 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
User	Public Read/Write/Transfer	Private	✓
Account and Contact	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	✓
Picks 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	✓
Association	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 Reps		
Share with	Role: Warehouse Manager		
Order Access	Read/Write	Modified By: LUAPUREDDY Parvathi Dev. 15/09/2025, 3:54 pm	
Created By	LUAPUREDDY Parvathi Dev. 15/09/2025, 3:54 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="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

[Save](#) [Cancel](#)