

# Phase 2: Org Setup & Configuration

## Project: GreenHarvest: Revolutionizing Farmerto-Market Supply Chain with Salesforce

### Salesforce Editions

A **Salesforce Developer Edition Org** was created for GreenHarvest project. This environment is used for testing, development, and demo purposes.

### Company Profile Setup

Basic organization details were configured to reflect the project's identity and operational context. This is the primary identifying information for the Salesforce instance

Organization Name: GreenHarvest --Dev

Address: Hyderabad, India

Default Currency: INR

Default Locale: English (India)

Default Time Zone: GMT+05:30 (Asia/Kolkata)

### Implementation Steps:

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

The screenshot shows the Salesforce Setup interface for 'Company Information'. The page title is 'GreenHarvest -- Dev'. Below the title, it states 'The organization's profile is below.' and provides links for 'User Licenses (10+)', 'Permission Set Licenses (10+)', 'Feature Licenses (11)', and 'Usage-based Entitlements (10+)'. The 'Organization Detail' section includes fields for Organization Name, Primary Contact, Division, Address, Phone, Fax, Default Locale, Default Language, Fiscal Year Starts In, and various system settings like 'Activate Multiple Currencies', 'Enable Data Translation', 'Newsletter', 'Admin Newsletter', 'Hide Notices About System Maintenance', and 'Hide Notices About System Downtime'. The 'Currency Setup' button is also visible.

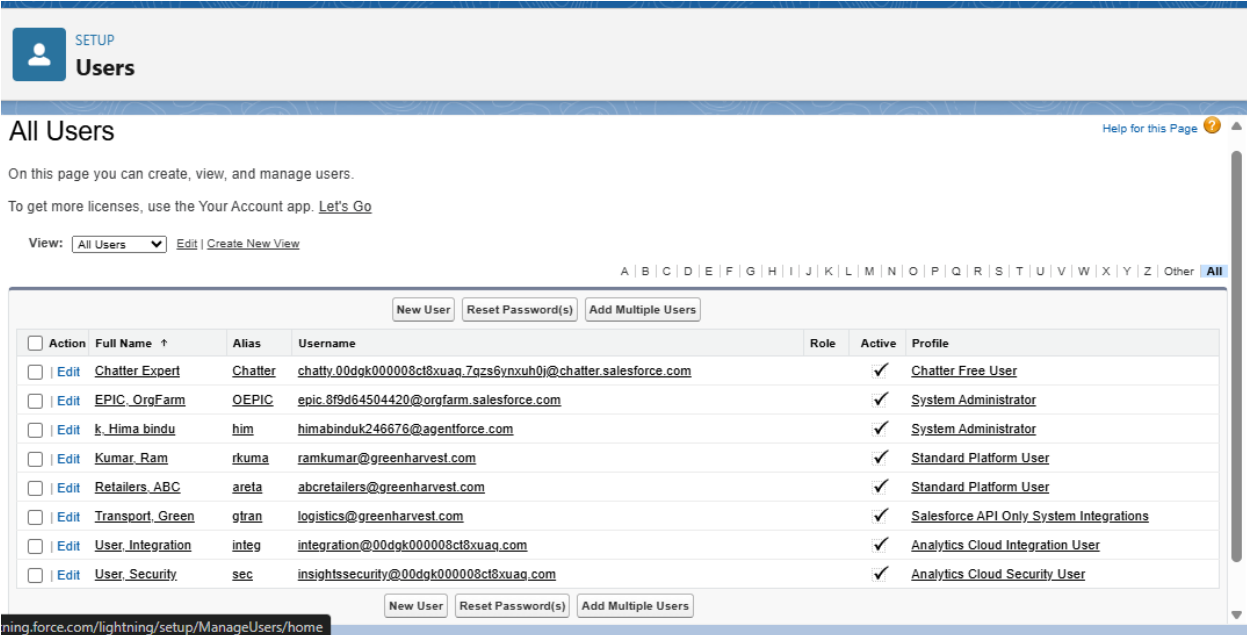
Organization Detail	
Organization Name	GreenHarvest -- Dev
Primary Contact	Himabindu
Division	
Address	Gandhinagar Kakinada Andhra Pradesh India
Phone	(960) 382-4607
Fax	
Default Locale	English (India)
Default Language	English
Fiscal Year Starts In	January
Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input checked="" type="checkbox"/>
Corporate Currency	Indian Rupee
Enable Data Translation	<input checked="" type="checkbox"/>
Used Data Space	358 KB (7%) <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	0 (15,000 max)
Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>
Restricted Logins, Current Month	0 (0 max)
Hide Notices About System Downtime	<input type="checkbox"/>

## User Setup & Licenses

In the GreenHarvest project, the following users were created to represent key stakeholders: **Hima Bindu** as the System Administrator and project lead, **Ram Kumar** as a Farmer, **ABC Retailers** as a Buyer, **Green Transport** as a Logistics Partner, and **Agri Officer** as a Government User. Each user was added through *Setup → Users → New User* and assigned the **Salesforce Platform license**, except for Hima Bindu who retained the **System Administrator license** for full system access.

### Implementation Steps:

- Go to **Setup → Users → New User**.
- Enter user details for Ram Kumar (Farmer), ABC Retailers (Buyer), Green Transport (Logistics), and Agri Officer (Government).
- Assign **Salesforce Platform License** to Farmer, Buyer, Logistics, and Government users.
- Keep **Hima Bindu** as **System Administrator** with **Salesforce License**.
- Save and **Activate all users**



The screenshot shows the Salesforce Setup interface for managing users. The page title is "All Users" with a "Help for this Page" link. Below the title, there is a description: "On this page you can create, view, and manage users." and a link to "Let's Go" for more licenses. The "View:" dropdown is set to "All Users" with links for "Edit" and "Create New View". A navigation bar at the top lists letters A through Z and "Other", with "All" selected. Below this, there are buttons for "New User", "Reset Password(s)", and "Add Multiple Users". The main table lists users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The users listed are Chatter Expert, EPIC\_OrgFarm, k\_Hima bindu, Kumar\_Ram, Retailers\_ABC, Transport\_Green, User\_Integration, and User\_Security. The bottom of the page shows the URL "ning.force.com/lightning/setup/ManageUsers/home" and the same "New User", "Reset Password(s)", and "Add Multiple Users" buttons.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>   <a href="#">Edit</a>	Chatter Expert	Chatter	chatty.00d0k000008ct8xuaq.7qzs6vnxuh0i@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/>   <a href="#">Edit</a>	EPIC_OrgFarm	OEPIIC	epic.8f9d64504420@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/>   <a href="#">Edit</a>	k_Hima bindu	him	himabinduk246676@agentforce.com		✓	System Administrator
<input type="checkbox"/>   <a href="#">Edit</a>	Kumar_Ram	rkuma	ramkumar@greenharvest.com		✓	Standard Platform User
<input type="checkbox"/>   <a href="#">Edit</a>	Retailers_ABC	areta	abcretailers@greenharvest.com		✓	Standard Platform User
<input type="checkbox"/>   <a href="#">Edit</a>	Transport_Green	gltan	logistics@greenharvest.com		✓	Salesforce API Only System Integrations
<input type="checkbox"/>   <a href="#">Edit</a>	User_Integration	integ	integration@00d0k000008ct8xuaq.com		✓	Analytics Cloud Integration User
<input type="checkbox"/>   <a href="#">Edit</a>	User_Security	sec	insightssecurity@00d0k000008ct8xuaq.com		✓	Analytics Cloud Security User

## Profiles

Custom Profiles were created for Farmer, Buyer, Logistics Partner, and Government Officer to control access based on their responsibilities. Each profile includes role-based permissions to access only the relevant objects and fields.

### Implementation Steps:

- Navigate to *Setup → Profiles*.
- Clone the **Standard Platform User** profile to create **Farmer Profile**.

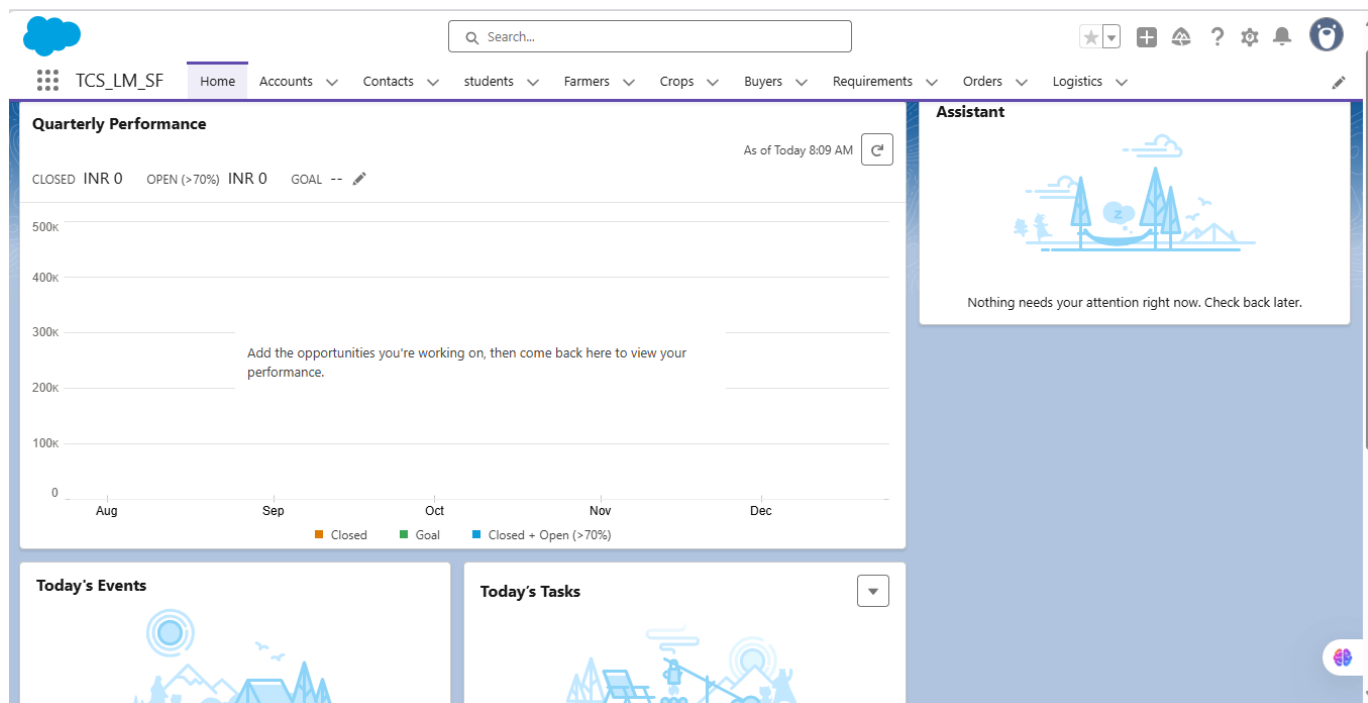
- Define object permissions: Read/Write on **Crops** and **Orders** (own records only).
- Repeat steps to create **Buyer Profile** (Read/Write on Requirements, Read-only on Orders), **Logistics Profile** (Read/Write on Logistics and Order Delivery Status), and **Government Profile** (Read-only on all objects, full access to Reports/Dashboards).

## 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:

- 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–Saturday, 9 AM – 6 PM IST.

Holidays: Republic Day, Independence Day, New Year.

### Implementation Steps:

Navigate to Setup → Business Hours.

Set standard hours to 9 AM – 6 PM, Monday–Saturday.

Go to Setup → Holidays and add Diwali, Independence Day, and New Year as official holidays.



SETUP

## Business Hours

## Organization Business Hours

[Help for this Page](#)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 Business Hours			
Action	Business Hours Name ↑	Active	Time Zone
<a href="#">Edit</a>	<a href="#">Default</a>	<input checked="" type="checkbox"/>	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
<a href="#">Edit</a>	<a href="#">GreenHarvest Standard Hours</a>	<input checked="" type="checkbox"/>	(GMT+05:30) India Standard Time (Asia/Kolkata)

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**

SETUP

## Holidays

## Holidays

[Help for this Page](#)

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			
<a href="#">New</a>			
Action	Holiday Name	Description	Date and Time
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Diwali</a>		11/12/2025 All Day
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">New year</a>		1/1/2026 All Day
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Republic Day</a>		1/26/2026 All Day

Elapsed Holidays	
No records to display	

## Fiscal Year Settings

Selected Fiscal Year: Standard, starting January.

### Implementation Steps:

- Navigate to Setup → Fiscal Year.
- Enable Standard Fiscal Year.
- Set start month as January.

SETUP

Fiscal Year

Setup

Organization Fiscal Year Edit: GreenHarvest -- Dev

Help for this Page

To specify the fiscal year type for your organization, choose one of the options below.

Fiscal Year Information

Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example, if your fiscal year starts in April 2025 and ends in March 2026, your Fiscal Year setting can be either 2025 or 2026.

Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing this change.

Standard Fiscal Year

Custom Fiscal Year

Change Fiscal Year Period

Save

Cancel

Name

GreenHarvest -- Dev

Fiscal Year Start Month

January

Fiscal Year is Based On

The ending month

The starting month

Save

Cancel

## Organization-Wide Defaults (OWD)

These settings will be configured in **Phase 3** after the custom objects are created.

- **OWD Strategy:** Farmer\_\_c and Buyer\_\_c will be set to **Private** to protect sensitive information. Crops, Requirements, and Orders will be set to **Controlled by Parent** to inherit access from their related records. Logistics\_\_c will be **Public Read/Write** to allow collaboration.

### Implementation Steps:

- Navigate to Setup → Sharing Settings.
- Scroll down to **Organization-Wide Defaults**.
- Set access levels for each object as listed above.
- Save changes.

SETUP

Sharing Settings

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: All Objects

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
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
...	...	...	...

## Sharing Rules

- Orders should be shared with the Logistics role when the Status = In Transit.
- Reports and dashboards should be shared with the **Government Officer** role for monitoring farmer income.

### Implementation Steps:

- Navigate to *Setup* → *Sharing Settings*.
- Scroll to **Sharing Rules** section.
- Create a new **criteria-based rule** on **Order\_\_c**:
- Condition: Status = "In Transit"
- Share with: Role = Logistics Partner
- Create a new **sharing rule** for Reports/Dashboards:
- Share with: Role = Government Officer
- Save and verify that access is applied as expected.

 **SETUP**  
**Sharing Settings**

**Farmer Sharing Rules**

NewRecalculate

Farmer Sharing Rules Help ?

No sharing rules specified.

**Logistics Sharing Rules**

NewRecalculate


Logistics Sharing Rules Help ?

No sharing rules specified.

**Order Sharing Rules**

NewRecalculate

Order Sharing Rules Help ?

 A sharing rule operation is currently in progress. The initiating user will receive an email when each operation finishes.

Action	Criteria	Shared With	Access Level
Edit   Del	(Order: Status EQUALS ) AND (Order: Status EQUALS )	All Internal Users	Read/Write