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

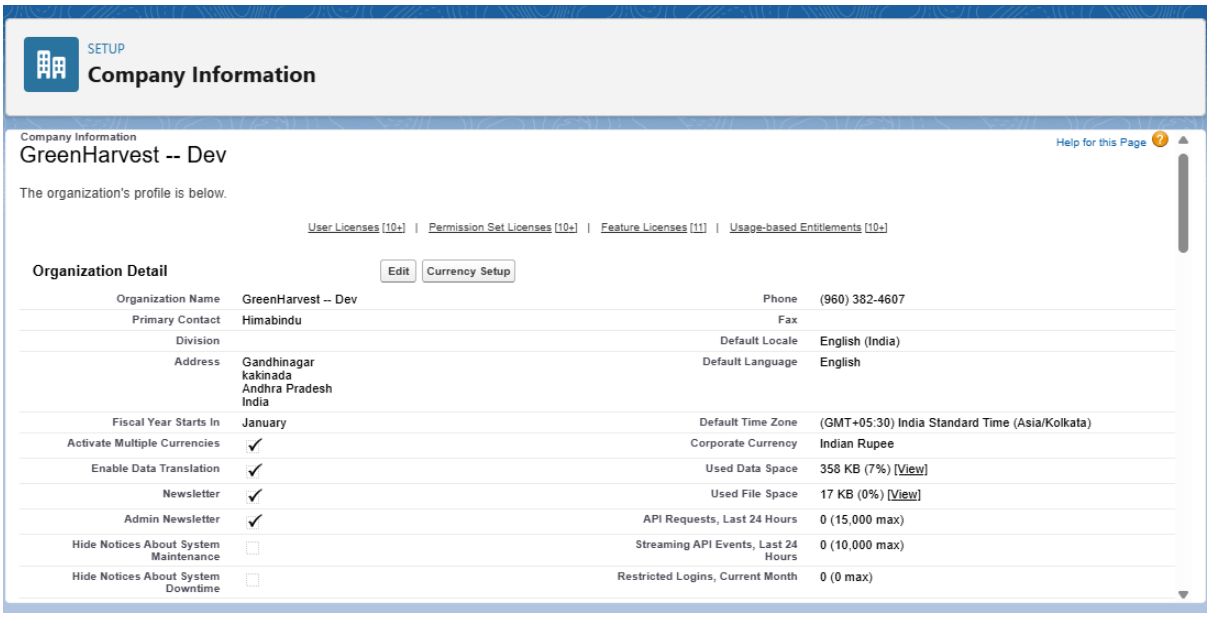
Default Currency: INR

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.

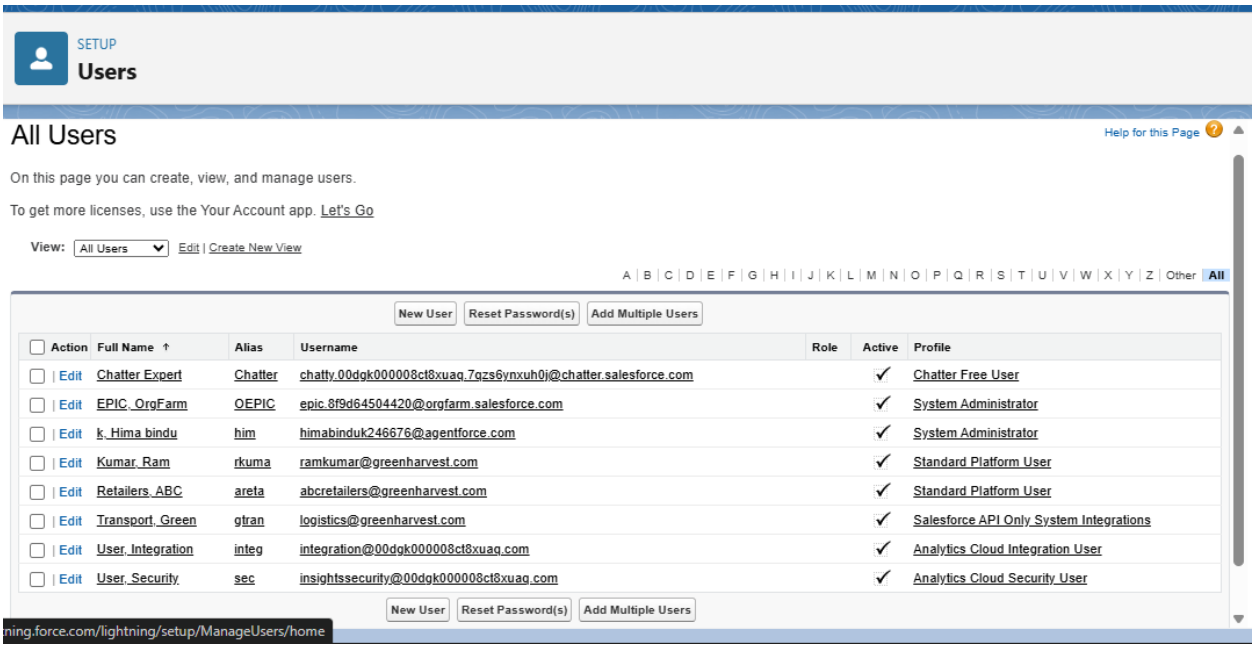


User Setup & Licenses

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**



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**.

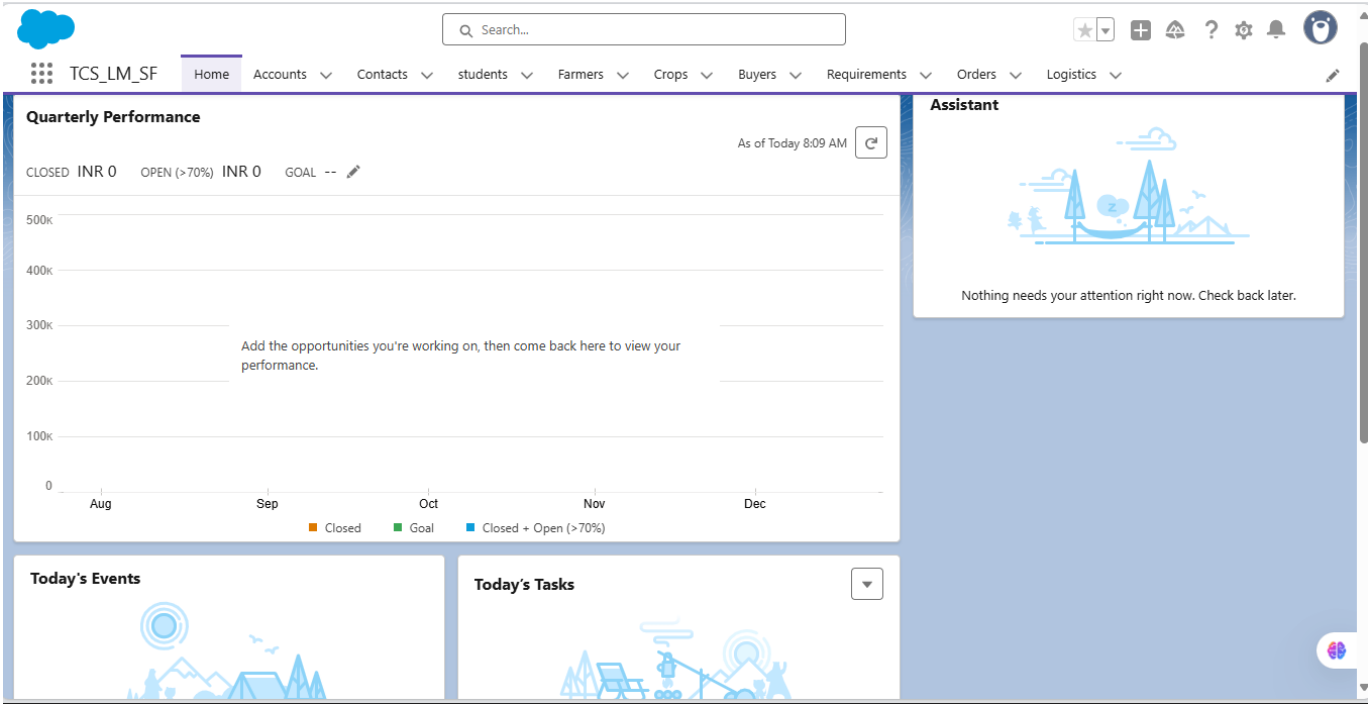
- Define object permissions: Read/Write on **Crops** and **Orders** (own records only).
- Repeat steps to create **Buyer Profile** (Read/Write on Requirements, Read-only on Orders), **Logistics Profile** (Read/Write on Logistics and Order Delivery Status), and **Government Profile** (Read-only on all 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
- 14. Log in and verify access to the Dev Org.
- 15. Use this org for testing, training, and demo purposes.

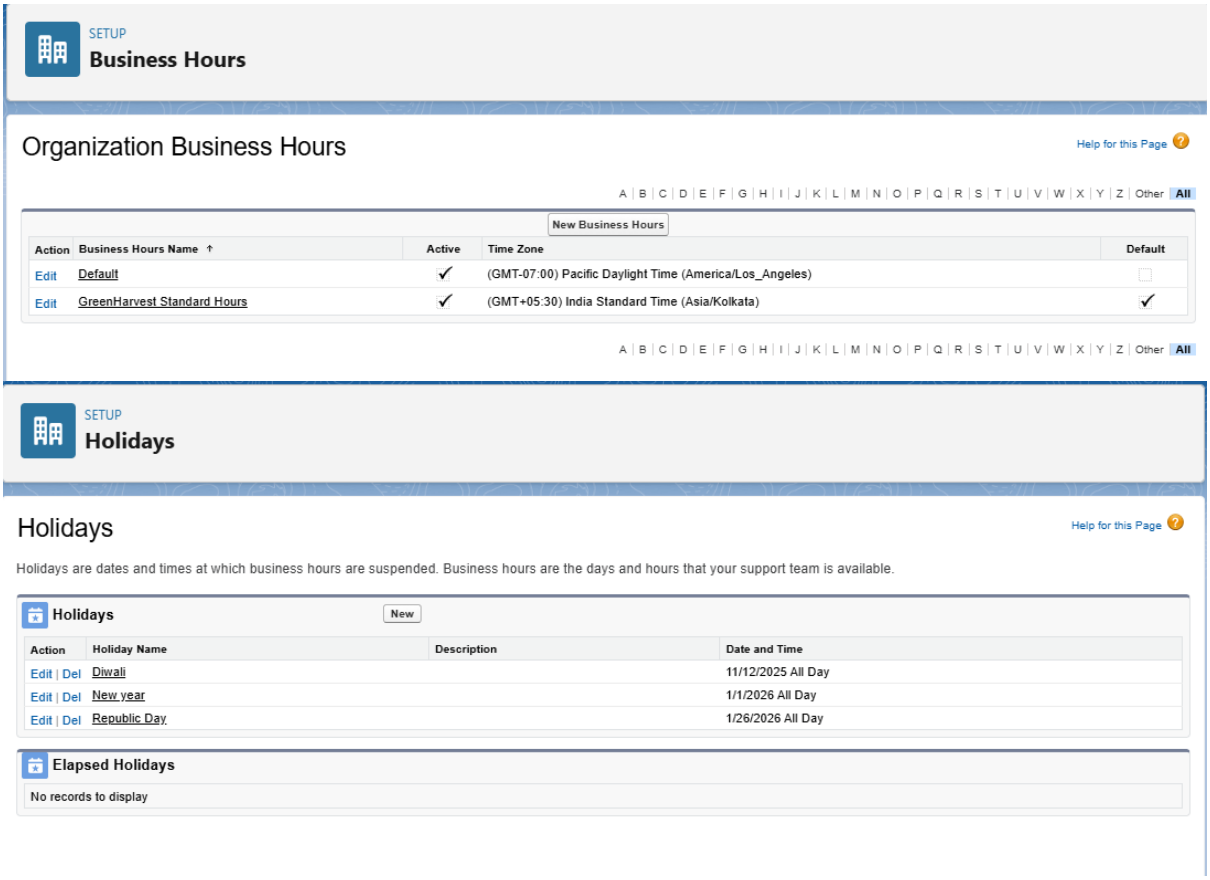


Business Hours & Holidays

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.

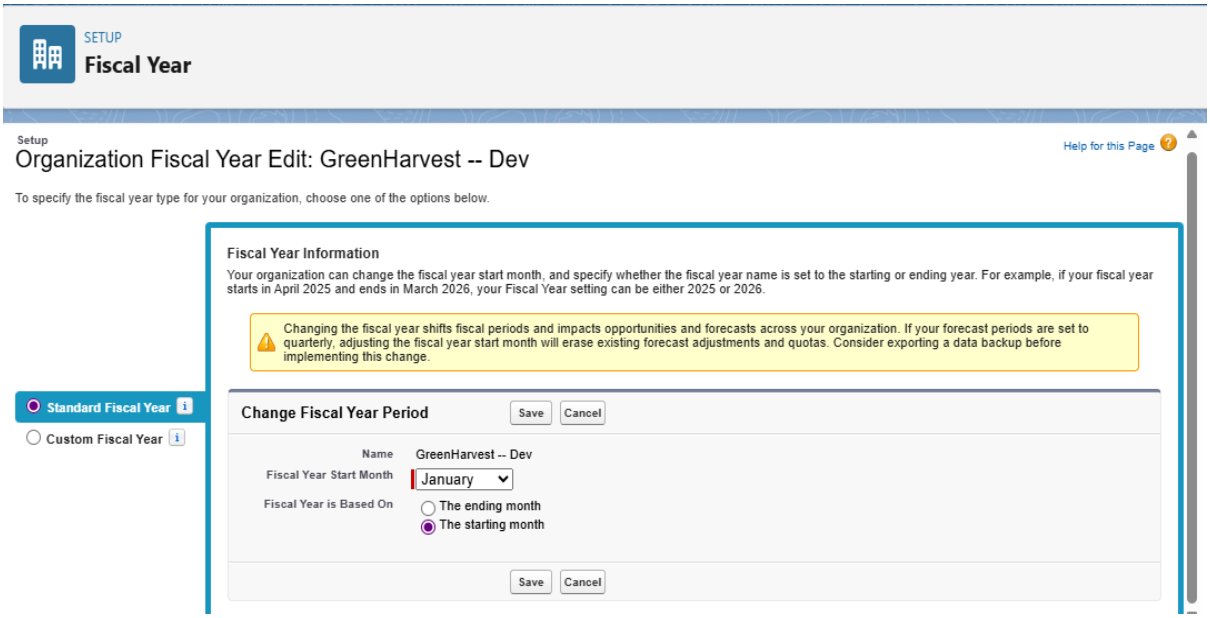


Fiscal Year Settings

Selected Fiscal Year: Standard, starting January.

Implementation Steps:

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



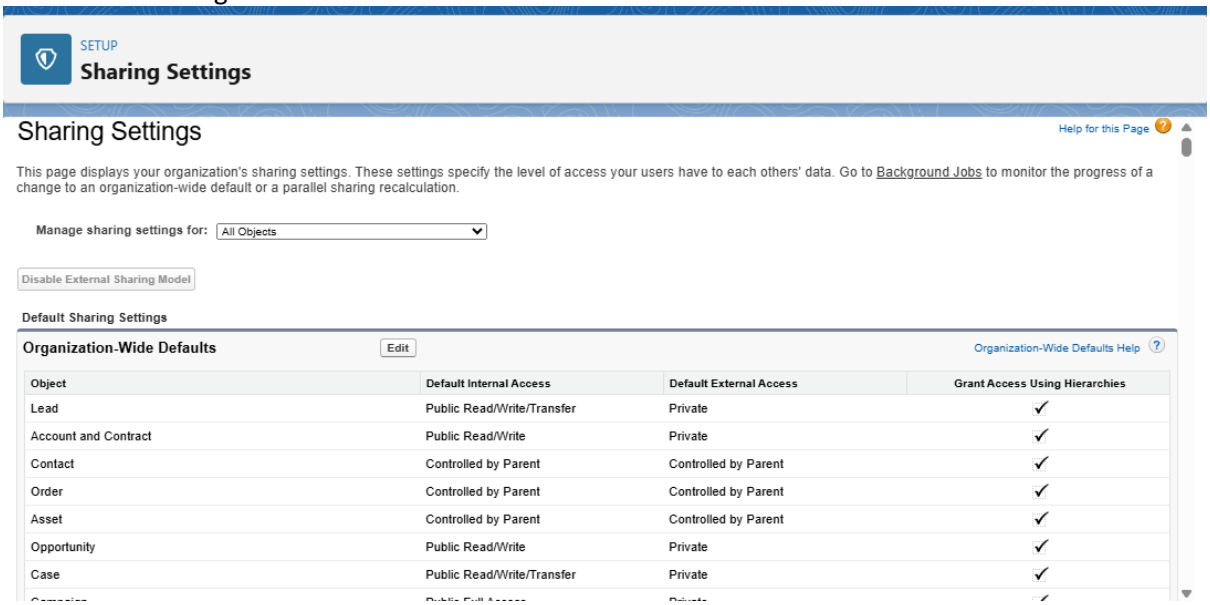
Organization-Wide Defaults (OWD)

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.

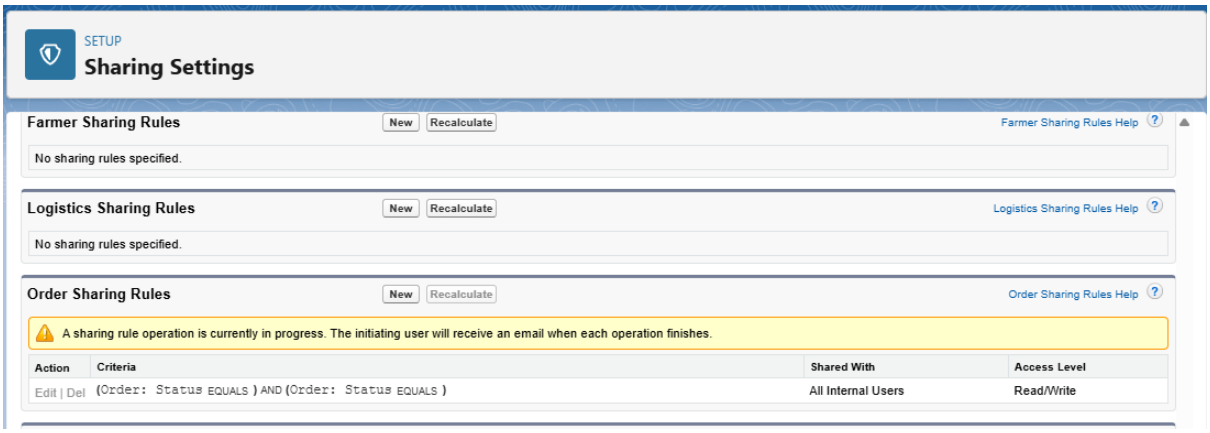
Implementation Steps:

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



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.