

Phase 2: Org Setup & Configuration

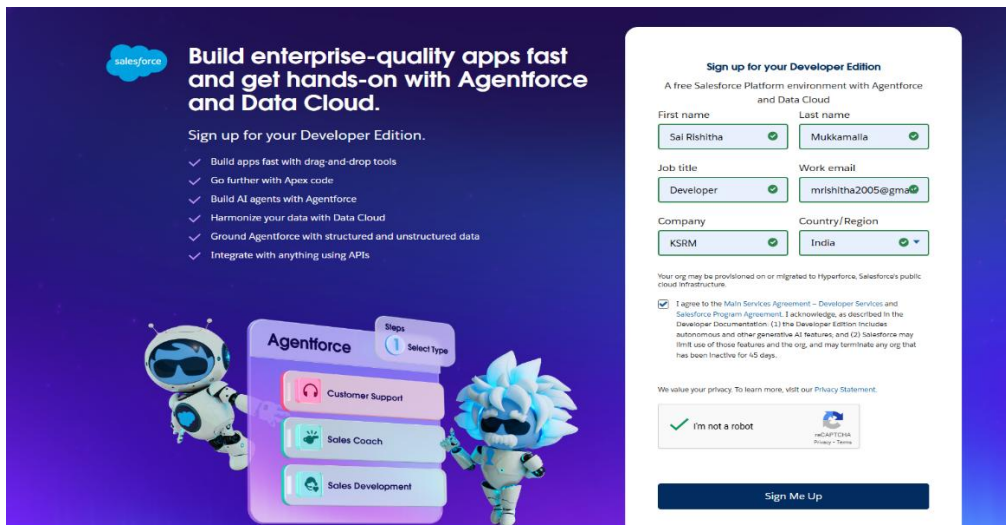
AgriConnect

Salesforce-Based Farmer Support & Marketplace System

Step 1: Salesforce Editions

Where to check the Edition:

- Login to your Salesforce Org.
- Click on the Setup (Gear Icon) in the top-right corner.
- From the left menu → Go to Company Settings → Company Information.
- On this page, you will see the Salesforce Edition (e.g., Enterprise Edition, Developer Edition, Professional Edition).



Step 2: Company Profile Setup

- Go to **Setup** → **Company Settings** → **Company Information**
- Entered details:
 - **Company Name:** AgriConnect
 - **Primary Contact** details filled

- **Address & Time Zone** set
- **Default Locale:** English (India)
- **Default Currency:** INR (₹)

The screenshot shows the 'Company Information' page in Salesforce Setup. The left sidebar lists navigation options: Setup, Home, Object Manager, and a search bar. The main content area is titled 'Company Information' and shows details for 'AgriConnect Pvt. Ltd.'. The page includes a search bar, a 'Help for this Page' link, and a 'Did not find what you're looking for?' message. The 'Organization Detail' section contains various fields for company information, including Organization Name, Primary Contact, Division, Address, Phone, Fax, Default Locale, Default Language, Fiscal Year, Fiscal Year Starts In, Custom Fiscal Year, Default Time Zone, Currency Locale, Used Data Space, Used File Space, API Requests, Streaming API Events, Business Hours, and Organization Edition. The page is created by 'Gyrfarm EPC' on 10/09/2025 at 8:11 am and modified by 'Admin AgriConnect' on 17/09/2025 at 4:52 pm.

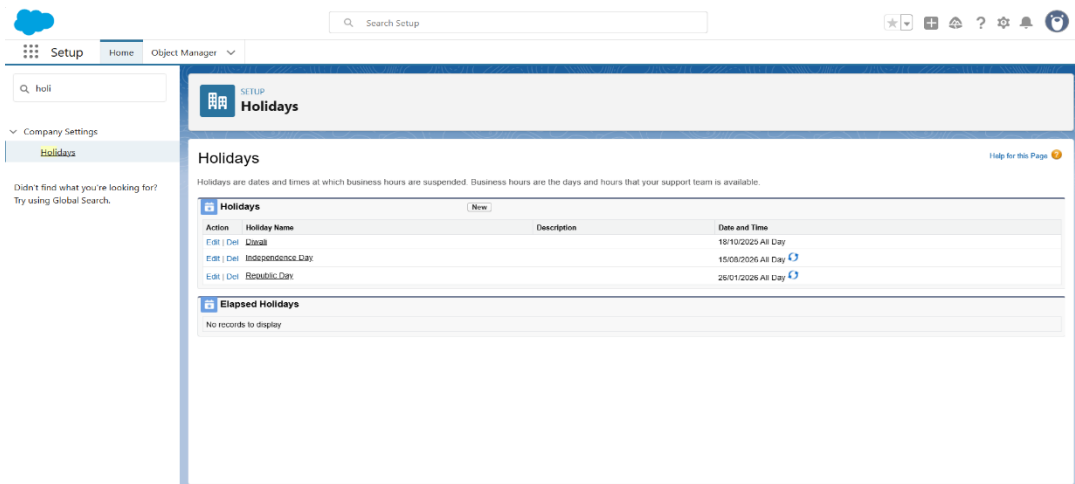
Step 3: Business Hours & Holidays

- Go to **Setup** → **Company Settings** → **Business Hours**
- Created **Default Business Hours: 9:00 AM – 6:00 PM**

The screenshot shows the 'Business Hours' page in Salesforce Setup. The left sidebar lists navigation options: Setup, Home, Object Manager, and a search bar. The main content area is titled 'Business Hours' and shows details for 'AgriConnect Support Hours'. The page includes a search bar, a 'Help for this Page' link, and a 'Did not find what you're looking for?' message. The 'Business Hours Detail' section contains various fields for business hours information, including Business Hours Name, Time Zone, Default Business Hours, and a table for Business Hours. The table lists days of the week and their corresponding business hours. The page is created by 'Sai Rishitha Mukkamalla' on 16/09/2025 at 10:10 pm and last modified by 'Sai Rishitha Mukkamalla' on 17/09/2025 at 12:25 pm. The 'Holidays' section shows 'No records to display' and a link to 'Add/Remove'.

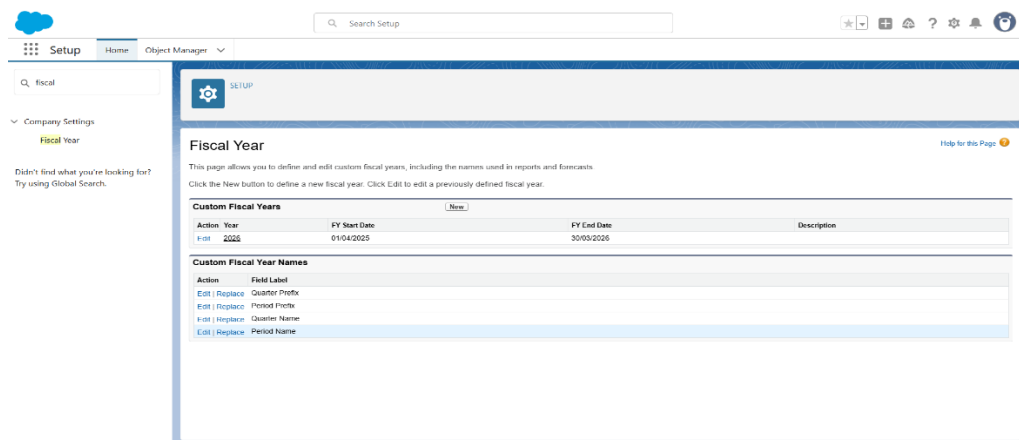
- Added **Holidays** under **Setup** → **Holidays**:

- Republic Day
- Independence Day
- Diwali



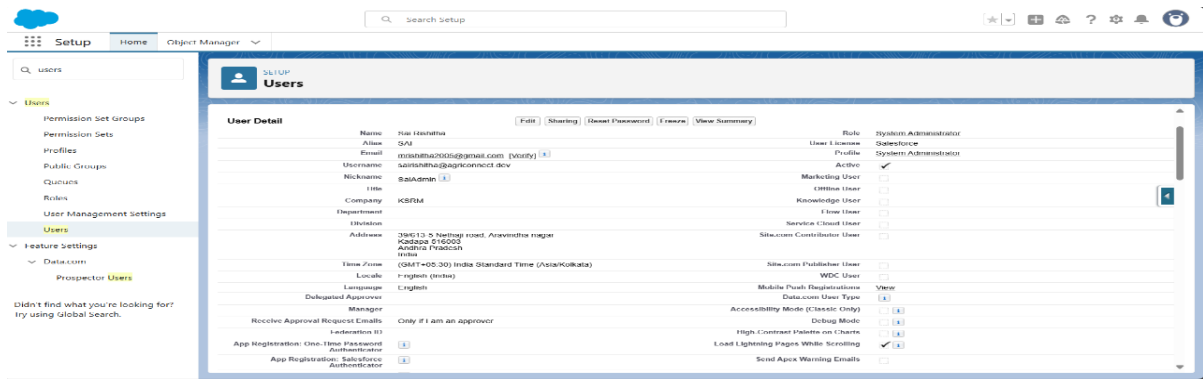
Step 4: Fiscal Year Settings

- Go to **Setup** → **Company Settings** → **Fiscal Year**
- Selected **Standard Fiscal Year (April–March)**
- Did not enable **Custom Fiscal Year**

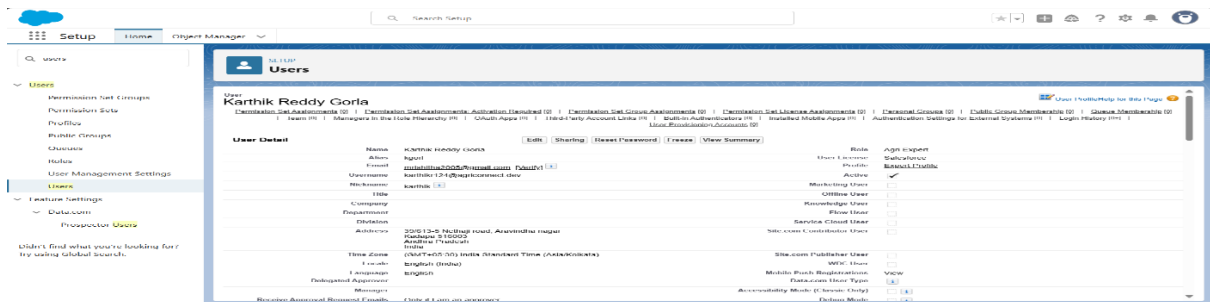


Step 5: User Setup & Licenses

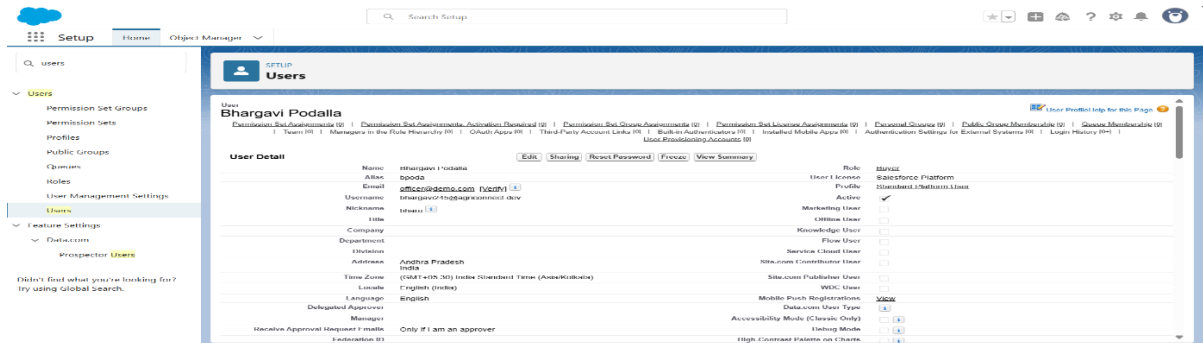
- Go to **Setup** → **Users** → **Users** → **New User**
- Created users:
 - **First Name: Test | Last Name: Farmer** → License: Salesforce Platform



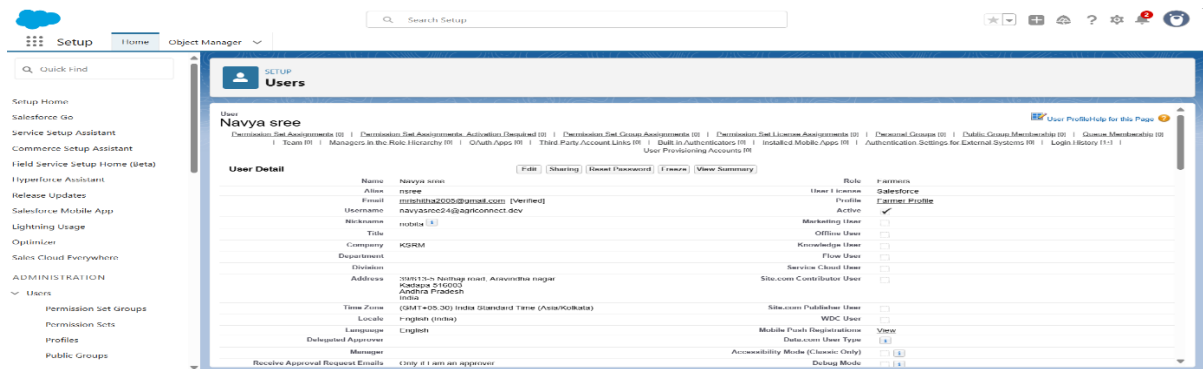
- First Name: Test | Last Name: Admin → License: Salesforce



- First Name: Test | Last Name: Manager → License: Salesforce



- First Name: Test | Last Name: Expert → License: Salesforce Platform



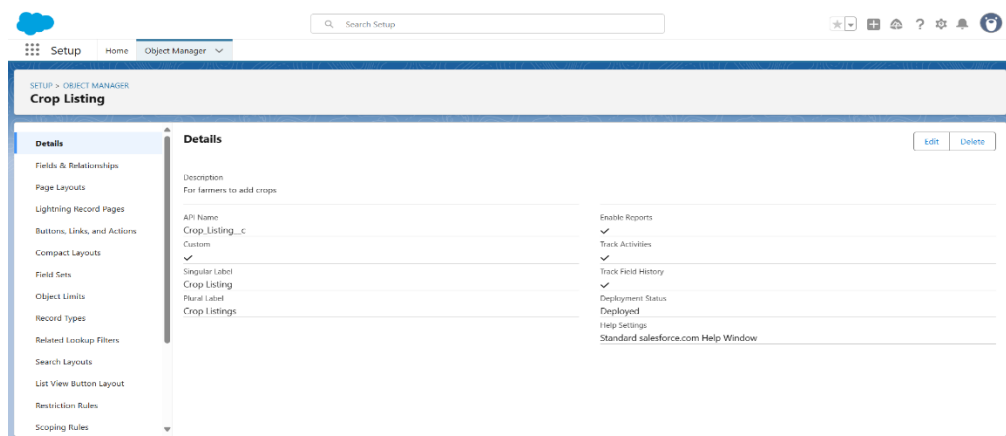
- Assigned **Profiles** and **Roles** to each user

Custom Objects Created in AgriConnect

After setting up users, I created **custom objects** to store and manage data related to farming, marketplace, and support.

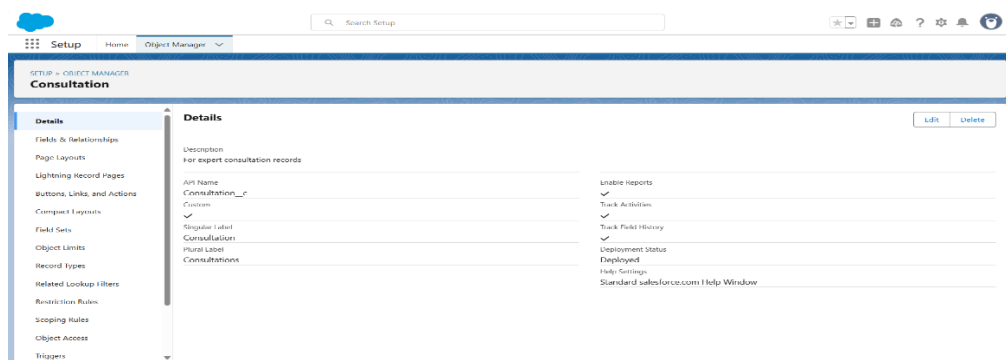
1. Crop Listing

- Purpose: To store details of crops that farmers list for sale.
- Key Fields: Crop Name, Crop Type, Quantity, Price, Farmer ID.
- Used by: Farmers (to list crops) & Buyers (to view listings).



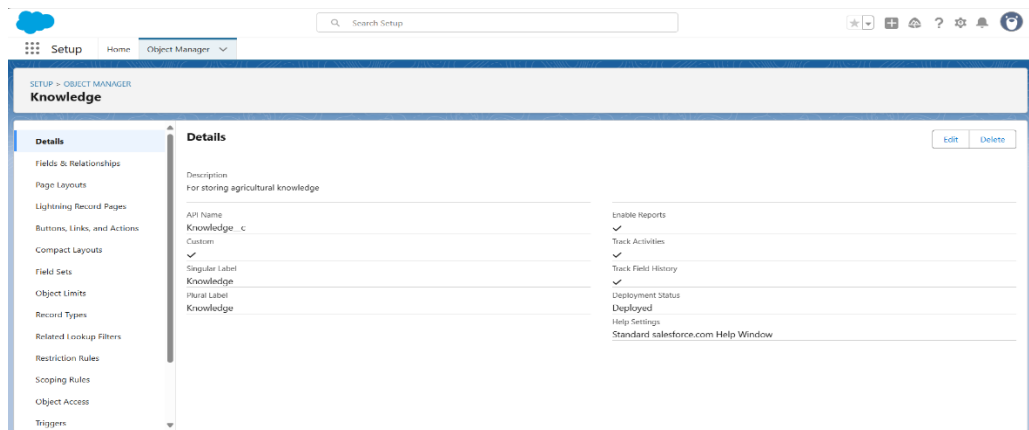
2. Consultation

- Purpose: To manage farmer consultations with agricultural experts.
- Key Fields: Consultation Date, Farmer ID, Expert ID, Advice Given, Status.
- Used by: Farmers (to request help) & Experts (to provide advice).



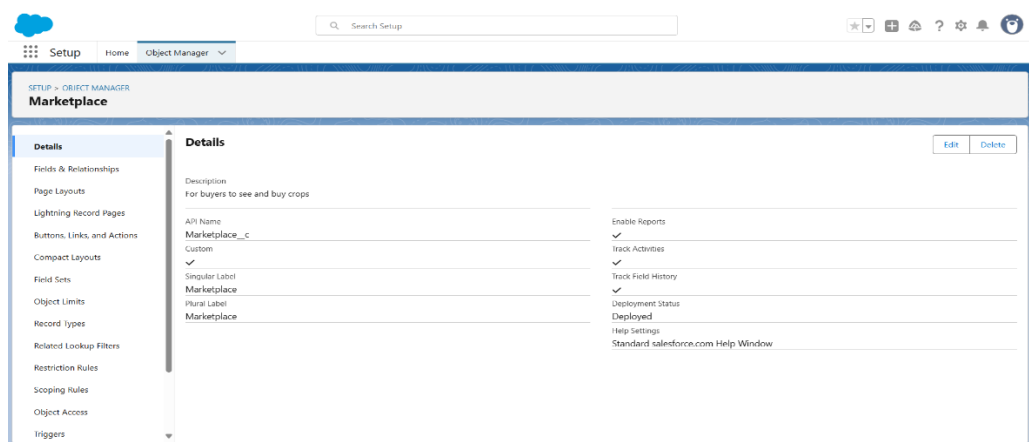
3. Knowledge

- Purpose: To store knowledge base articles and resources for farmers.
- Key Fields: Article Title, Category, Content, Author.
- Used by: Experts & Admins (to upload guides, best practices, problem-solving steps).



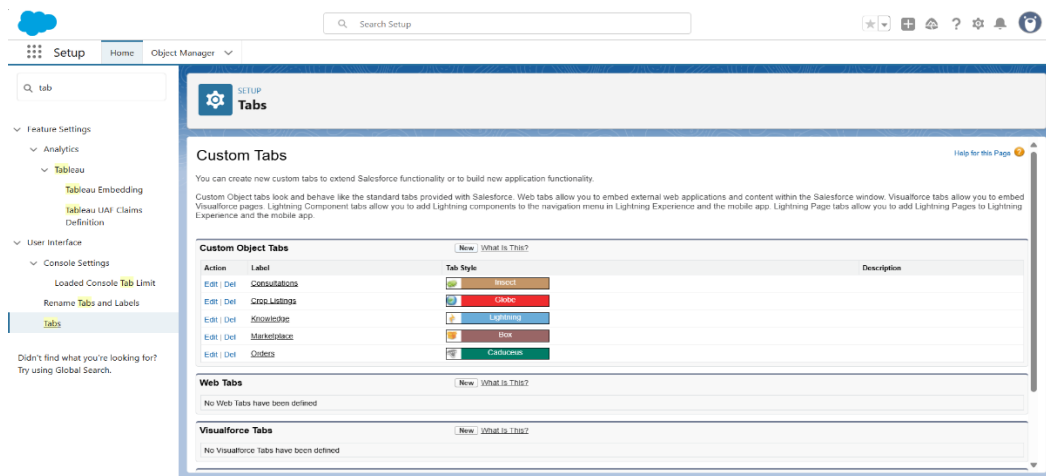
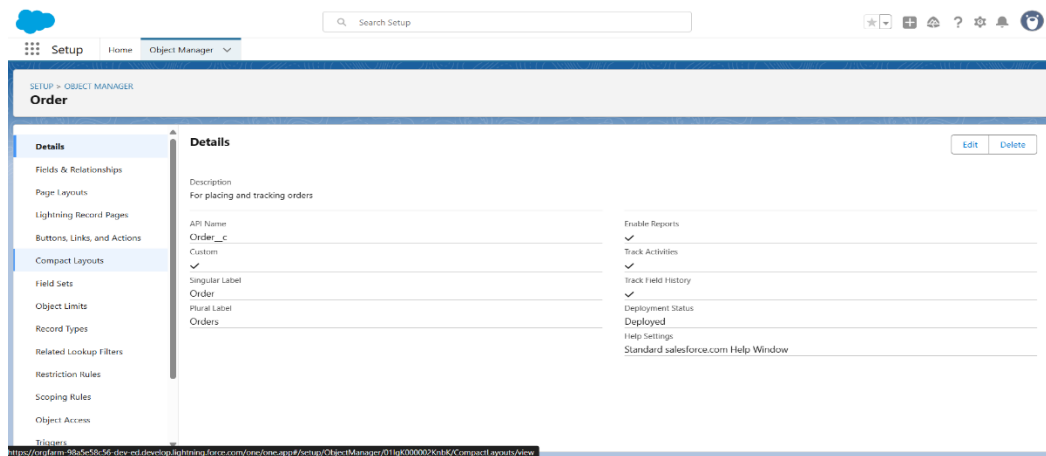
4. Marketplace

- Purpose: To provide a platform for buying and selling agricultural products.
- Key Fields: Product Name, Category, Price, Seller ID, Buyer ID, Status.
- Used by: Farmers (as sellers), Buyers (to purchase products), Managers (to monitor transactions).



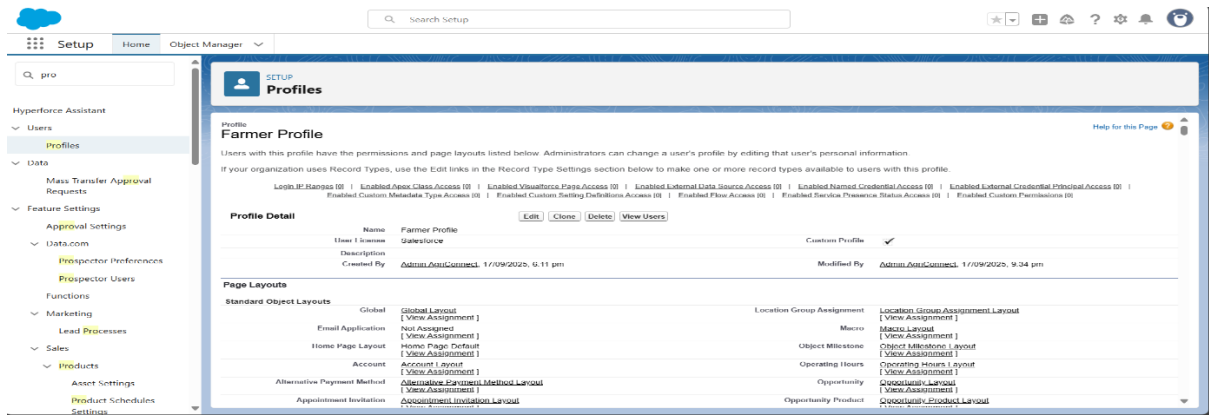
5. Orders

- Purpose: To track and manage orders placed in the marketplace.
- Key Fields: Order Number, Product ID, Buyer ID, Seller ID, Order Status, Payment Info.
- Used by: Buyers (to place orders), Farmers (to fulfill them), Admins (to track sales).

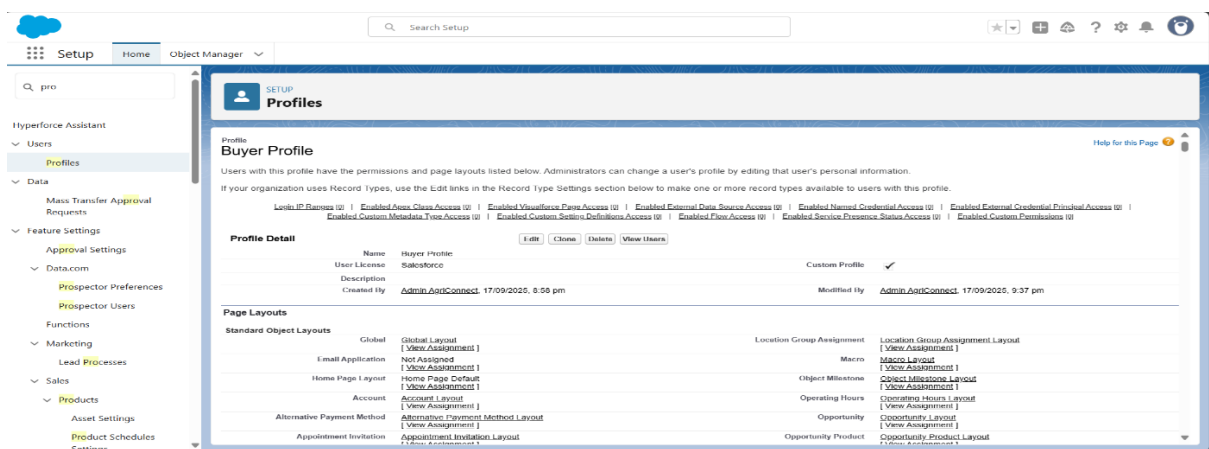


Step 6: Profiles

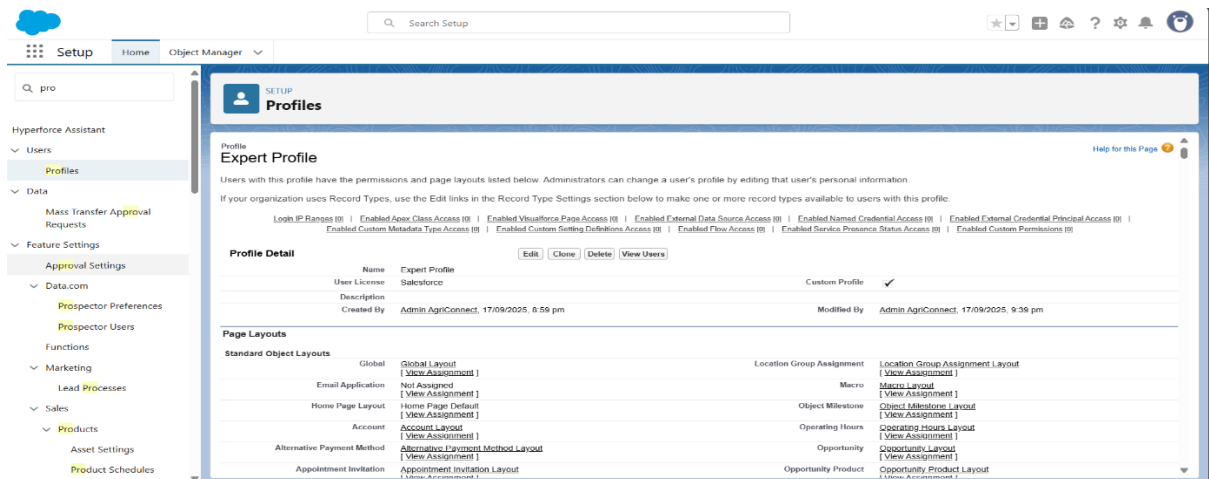
- Go to Setup → Profiles
- Created/Configured Profiles:
 - Farmer Profile → Access only Marketplace, Crops



- **Buyer Profile** → Access farmer data in their region



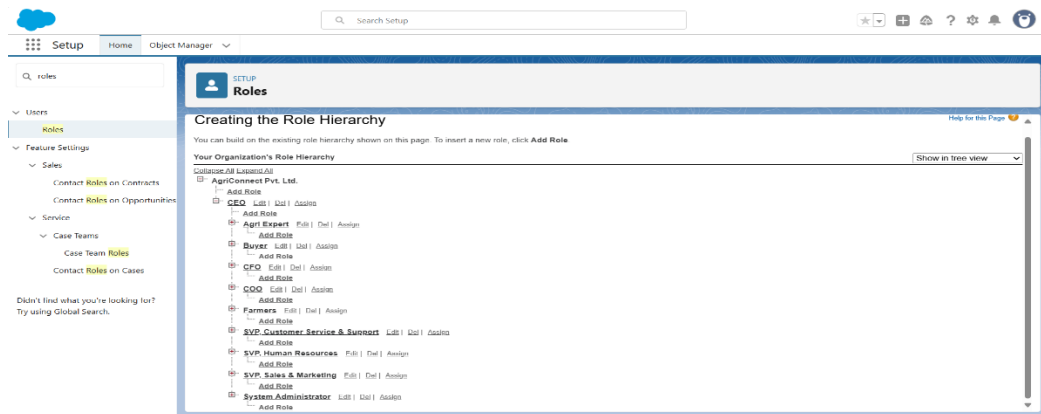
- **Expert Profile** → Access advisory & knowledge base



Step 7: Roles

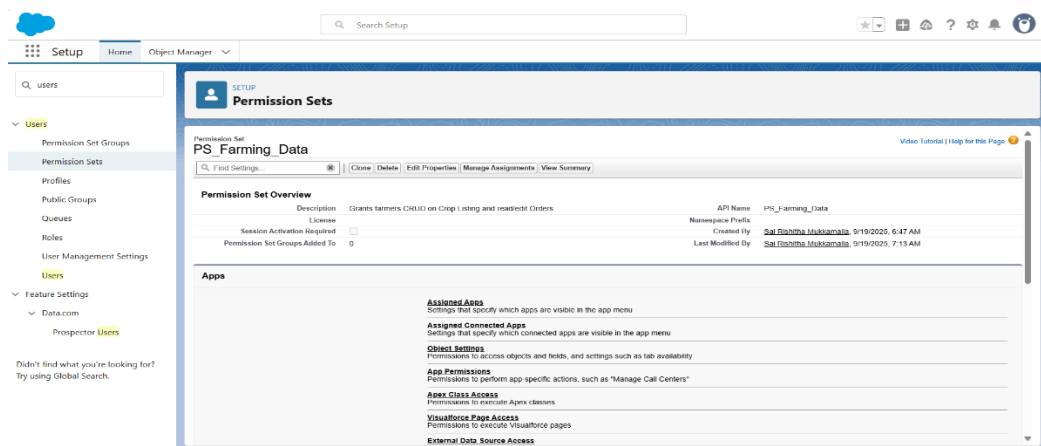
- Go to Setup → Users → Roles → Set Up Roles
- Configured hierarchy:

- **System Admin (Top)**
 - **Regional Manager (Reports to Admin)**
 - **Expert (Reports to Manager)**
 - **Farmer (Lowest Level)**
- Ensured managers can see farmer records in their region

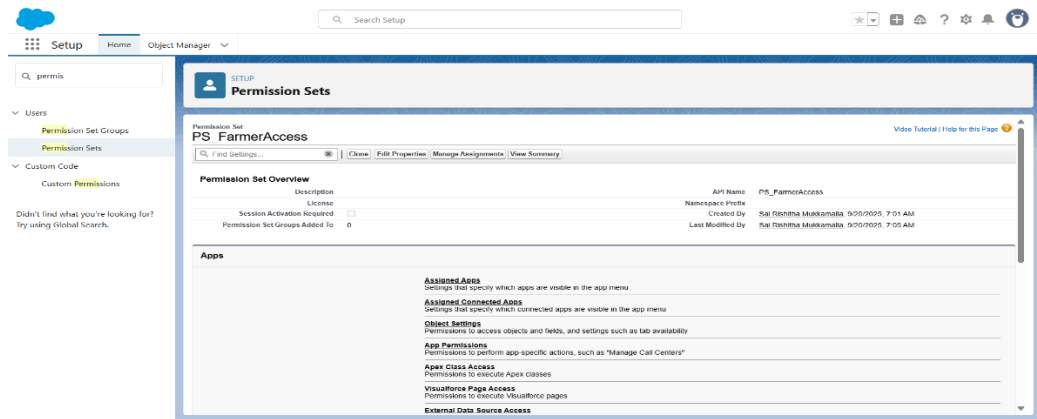


Step 8: Permission Sets

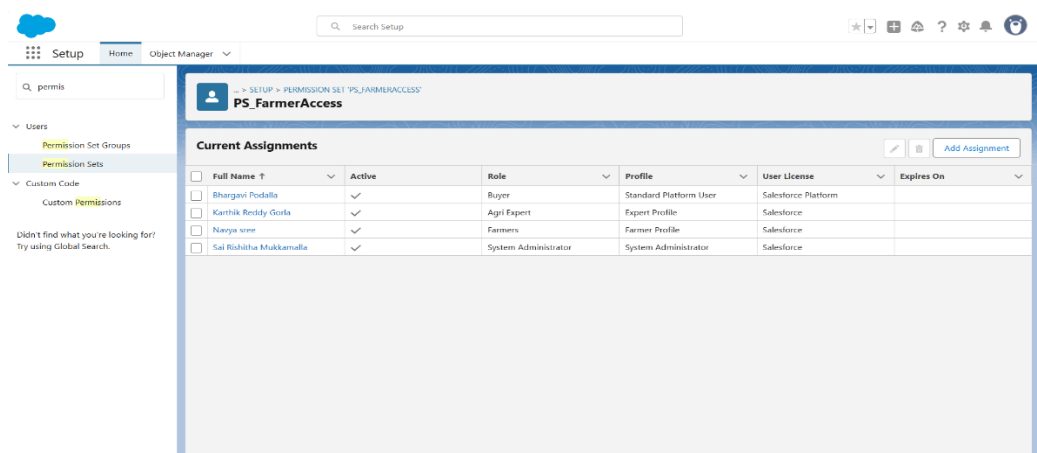
- Go to **Setup** → **Permission Sets**
- Created:
- **ps_farming** → Access to Crop custom object



- **ps_FarmerAccess** → Extra permissions for Experts

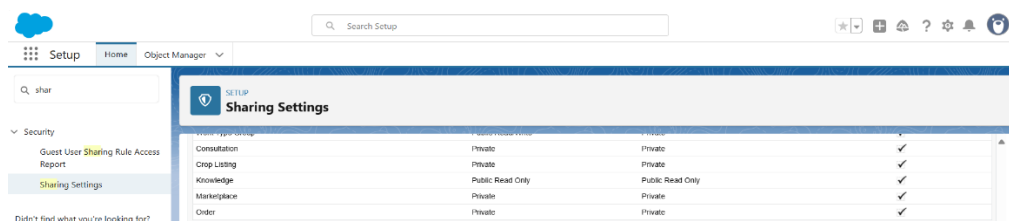


- Assigned permission sets to specific users in addition to profiles



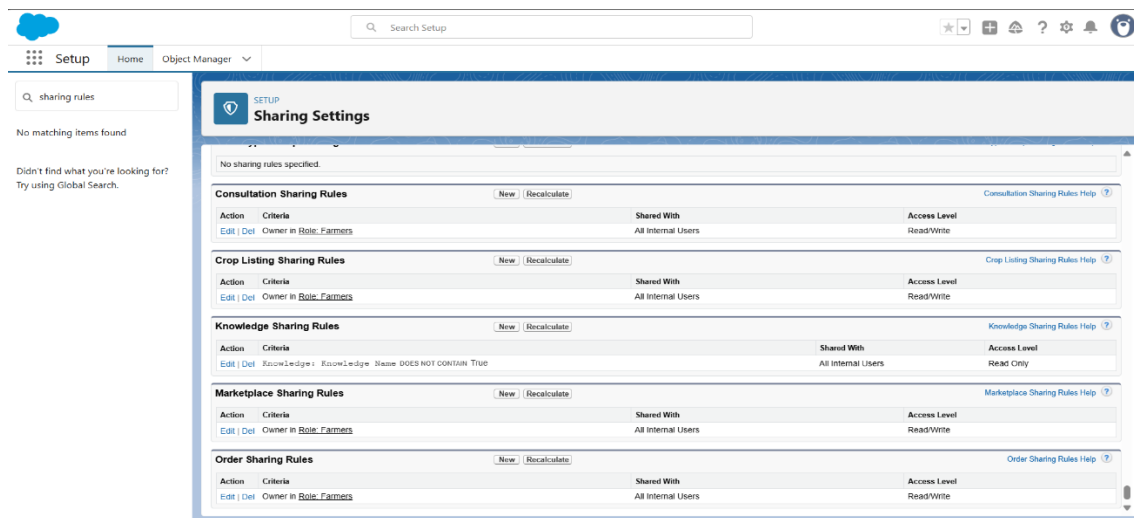
Step 9: Organization-Wide Defaults (OWD)

- Go to Setup → Security → Sharing Settings
- Set OWD as:
 - Crop Data → Private
 - Marketplace Listings → Public Read/Write
 - Farmer Details → Private
- Ensures security of farmer data



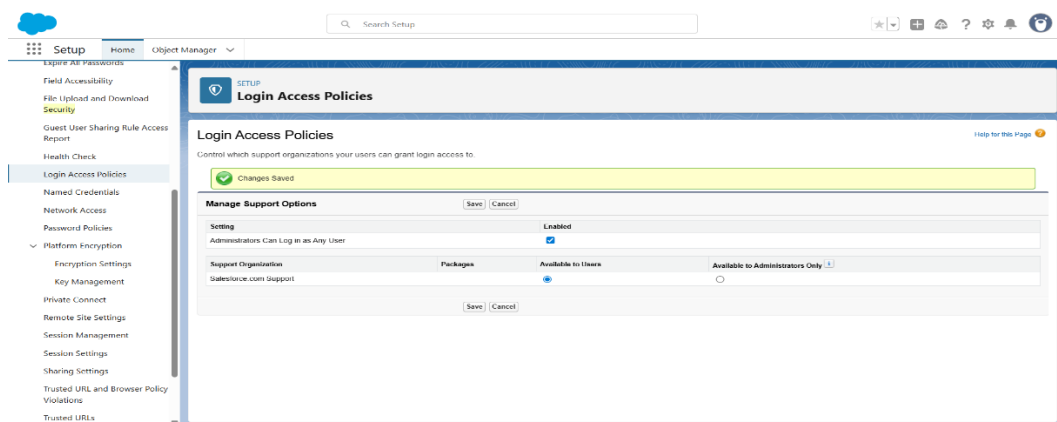
Step 10: Sharing Rules

- Go to **Setup** → **Security** → **Sharing Settings** → **Sharing Rules**
- Created rule:
- Share **Farmer Crop Records** → With **Regional Managers** → Access: Read/Write
- Created rule for **Advisory Data** → Shared with **Experts**



Step 11: Login Access Policies

- Go to **Setup** → **Security** → **Login Access Policies**
- Enabled:
- **Admin Login Access** for troubleshooting
- **Delegated Admin Access** for selected managers



Step 12: Dev Org Setup

- Created **Developer Org** (free Salesforce Dev Edition)
- Added:
 - Custom Objects (Crop, Marketplace Listing, Farmer Advisory)
 - Basic data model for testing

Step 13: Sandbox Usage

- Go to Setup → Sandboxes
- Created Developer Sandbox for testing customizations
- Used sandbox for:
 - Workflow Rules
 - Validation Rules
 - Page Layouts

Step 14: Deployment Basics

- Used **Outbound Change Sets** to move changes from Sandbox → Production
- Explored **Salesforce CLI (SFDX)** for metadata deployment
- Followed best practice: Test in Sandbox → Deploy in Production

Conclusion

In Phase 2 of AgriConnect, the Salesforce Org was successfully configured with essential settings. We set up the company profile, business hours, fiscal year, and created users, roles, and profiles to define access. Security was ensured through OWD, sharing rules, and permission sets. A sandbox and deployment setup were prepared for safe testing and migration. Finally, key custom objects (*Crop Listing*, *Consultation*, *Knowledge*, *Marketplace*, *Orders*) were created to establish the core data model.

