

AgriTrust Connect – Phase 2: Org Setup & Configuration Report

Project Title: AgriTrust Connect – Sustainable Agriculture CRM

Phase: 2 – Org Setup & Configuration

Date: 22 September 2025

Prepared By: SRI VAISHNAVI B

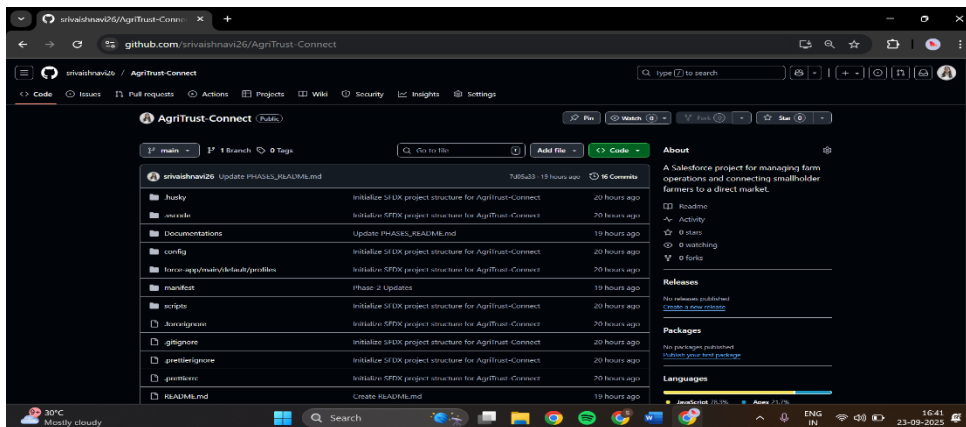
1. Introduction

Phase 2 of the AgriTrust Connect project focused on setting up the Salesforce Developer Org, configuring the company profile, defining business hours, fiscal year, users, roles, and implementing basic security and access control.

The purpose of this phase was to establish the technical foundation of the system, ensuring that all stakeholders (farmers, extension officers, buyers, suppliers, and government officers) have the appropriate access, permissions, and configurations before moving into data modeling in Phase 3.

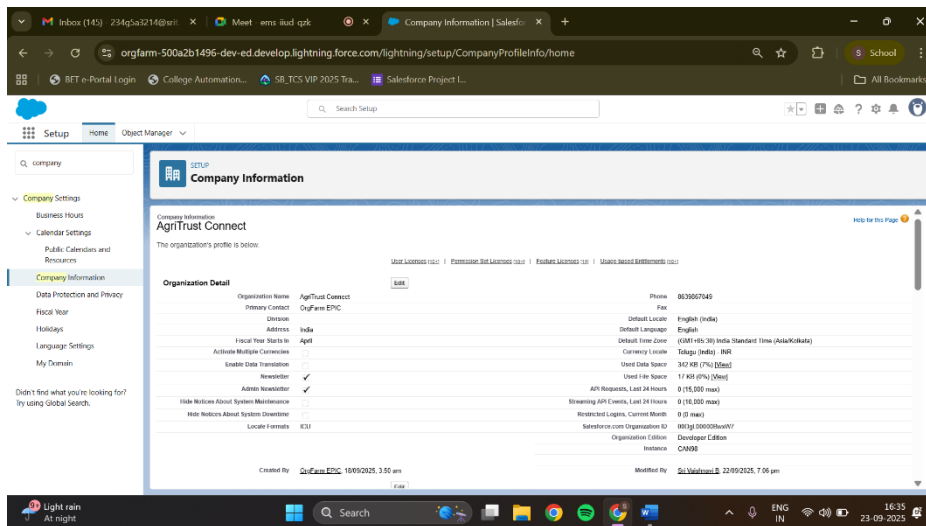
2. Developer Org & DevOps Setup

- Salesforce Developer Edition Org created
- Tools installed and configured:
 - VS Code with Salesforce extensions
 - Salesforce CLI (SFDX)
- GitHub repository created and connected
- Initial DevOps workflow established using SFDX commands and GitHub version control



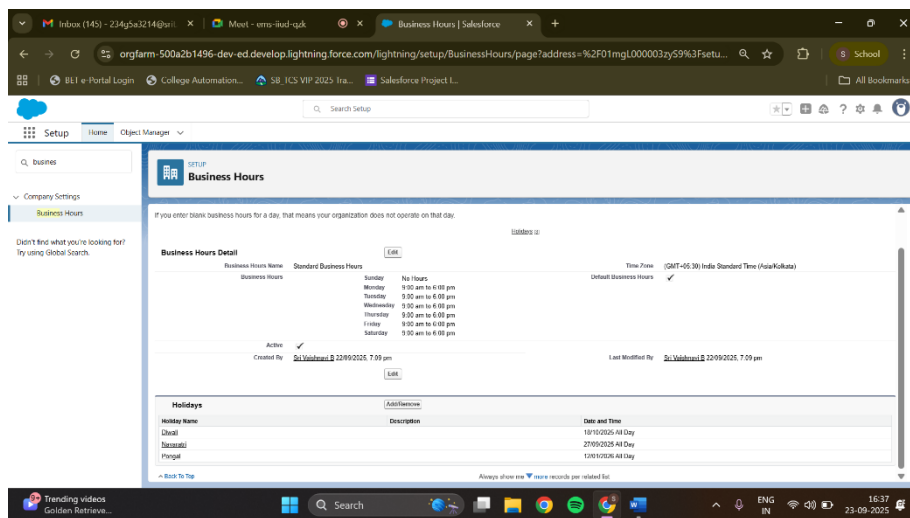
3. Company Profile & Global Settings

- Company Name: AgriTrust Connect Pvt. Ltd
- Primary Contact: SRI VAISHNAVI B - 8639867049
- Locale: English (India)
- Time Zone: IST (GMT+05:30)
- Currency: INR



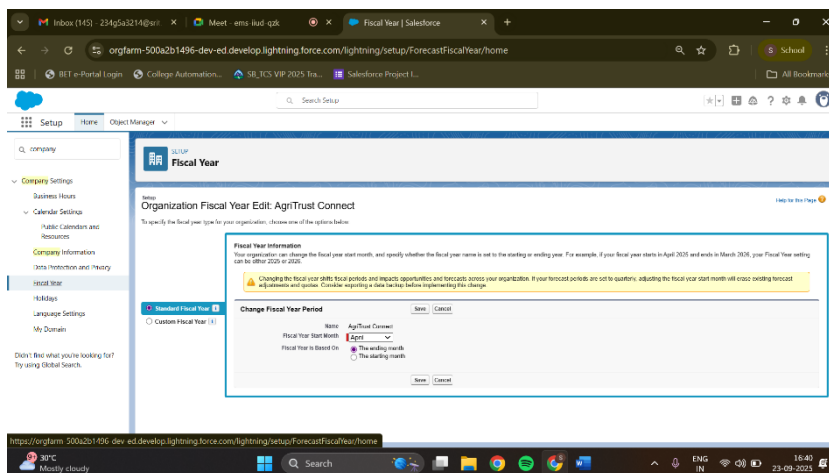
Business Hours & Holidays:

- Monday – Saturday, 9:00 AM – 6:00 PM
- Holidays configured: Diwali, Pongal, Independence Day, Republic Day



Fiscal Year:

- Standard Fiscal Year, starting April



4. User Setup & Licenses

- Admin User – Full access
- Farmer User – Limited access to own records

- The screenshot displays the Salesforce Lightning 'Manage Users' interface. The browser's address bar shows the URL: `orgfarm-500a2b1496-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home`. The page's top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A left-hand sidebar lists various setup options, with 'Users' selected. The main content area, titled 'Users', provides instructions on user management and a link to 'Let's Go' for more licenses. Below the instructions, there is a table of users. The table has columns for 'Action', 'Full Name', 'Alias', 'Username', 'Role', 'Active', and 'Profile'. The users listed are: B. Sri Vaisnavi (System Administrator), Chatter Expert (Chatter Free User), EPIC_OrgFarm (System Administrator), Test_Admin (System Administrator), TEST_Farmer (Standard User), Test_Officer (Standard Platform User), User_Integration (Analytics Cloud Integration User), and User_Security (Analytics Cloud Security User). The table also includes buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	B. Sri Vaisnavi	SVB	234g5a321496@orgfarm.com	System Administrator	✓	System Administrator
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty_00d900000bxxw7uaj_mctbyc6voevy@chatter.salesforce.com	Chatter Free User	✓	Chatter Free User
<input type="checkbox"/> Edit	EPIC_OrgFarm	OEPIC	epic_r964c2952c64@orgfarm.salesforce.com	System Administrator	✓	System Administrator
<input type="checkbox"/> Edit	Test_Admin	@test	admin.test@agritrust.com	System Administrator	✓	System Administrator
<input type="checkbox"/> Edit	TEST_Farmer	fone	farmer.test@agritrust.com	Standard User	✓	Standard User
<input type="checkbox"/> Edit	Test_Officer	oleat	officer.test@agritrust.com	Standard Platform User	✓	Standard Platform User
<input type="checkbox"/> Edit	User_Integration	Integ	Integration@00d900000bxxw7uaj.com	Analytics Cloud Integration User	✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d900000bxxw7uaj.com	Analytics Cloud Security User	✓	Analytics Cloud Security User

- Admin Profile (Full Access)
- Farmer Profile (Restricted Access)
- Extension Officer Profile (Farmer data access)
- Buyer Profile (Procurement data)
- Supplier Profile (Input/product data)

Profiles			
<div> <div>All Profiles</div> <div> <a>Edit <a>Delete <a>Create New View </div> </div>			
<div> <div>New Profile</div> <div> <div></div> <div></div> </div> </div>			
Action	Profile Name	User Licenses	Custom
<a>Edit <a>Del ...	Admin Profile	Salesforce	<input checked="" type="checkbox"/>
<a>Edit <a>Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<a>Edit <a>Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<a>Edit <a>Clone	Anypoint Integration	Identity	<input type="checkbox"/>
<a>Edit <a>Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<a>Edit <a>Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<a>Edit <a>Del ...	B2B Recordering Portal Buyer Profile	External Appx Login	<input checked="" type="checkbox"/>
<a>Edit <a>Del ...	Buyer Profile	Salesforce	<input checked="" type="checkbox"/>
<a>Edit <a>Clone	Chatter External User	Chatter External	<input type="checkbox"/>
<a>Edit <a>Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
<a>Edit <a>Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<a>Edit <a>Clone	Contract Manager	Salesforce	<input type="checkbox"/>
<a>Edit <a>Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<a>Edit <a>Del ...	Custom Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
<a>Edit <a>Del ...	Custom Sales Profile	Salesforce	<input checked="" type="checkbox"/>
<a>Edit <a>Del ...	Custom Support Profile	Salesforce	<input checked="" type="checkbox"/>
<a>Edit <a>Clone	Customer Community Login User	Customer Community Login	<input type="checkbox"/>
<a>Edit <a>Clone	Customer Community Plus Login User	Customer Community Plus Login	<input type="checkbox"/>
<a>Edit <a>Clone	Customer Community Plus User	Customer Community Plus	<input type="checkbox"/>
<a>Edit <a>Clone	Customer Community User	Customer Community	<input type="checkbox"/>
<a>Edit <a>Clone	Customer Portal Manager Custom	Customer Portal Manager Custom	<input type="checkbox"/>
<a>Edit <a>Clone	Customer Portal Manager Standard	Customer Portal Manager Standard	<input type="checkbox"/>
<a>Edit <a>Clone	Einstein Agent User	Einstein Agent	<input type="checkbox"/>
<a>Edit <a>Del ...	Extension Officer Profile	Salesforce	<input checked="" type="checkbox"/>
<a>Edit <a>Clone	External Appx Login User	External Appx Login	<input type="checkbox"/>
<a>Edit <a>Clone	External Identity User	External Identity	<input type="checkbox"/>
<a>Edit <a>Del ...	Farmer Profile	Salesforce	<input checked="" type="checkbox"/>
<a>Edit <a>Clone	Force.com - App Subscription User	Force.com - App Subscription	<input type="checkbox"/>
<a>Edit <a>Clone	Force.com - Free User	Force.com - Free	<input type="checkbox"/>
<a>Edit <a>Clone	Gold Partner User	Gold Partner	<input type="checkbox"/>
<a>Edit <a>Clone	High Volume Customer Portal	High Volume Customer Portal	<input type="checkbox"/>
<a>Edit <a>Clone	High Volume Customer Portal User	High Volume Customer Portal	<input type="checkbox"/>
<a>Edit <a>Clone	Identity User	Identity	<input type="checkbox"/>
<a>Edit <a>Clone	Marketing User	Salesforce	<input type="checkbox"/>
<a>Edit <a>Clone	Minimum Access - API Only Integrations	Salesforce Integration	<input type="checkbox"/>
<a>Edit <a>Clone	Minimum Access - Salesforce	Salesforce	<input type="checkbox"/>
<a>Edit <a>Clone	Partner App Subscription User	Partner App Subscription	<input type="checkbox"/>
<a>Edit <a>Clone	Partner Community Login User	Partner Community Login	<input type="checkbox"/>
<a>Edit <a>Clone	Partner Community User	Partner Community	<input type="checkbox"/>
<a>Edit <a>Del ...	Read Only	Salesforce	<input checked="" type="checkbox"/>
<a>Edit <a>Del ...	Salesforce API Only System Integrations	Salesforce Integration	<input checked="" type="checkbox"/>
<a>Edit <a>Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
<a>Edit <a>Clone	Solution Manager	Salesforce	<input type="checkbox"/>
<a>Edit <a>Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<a>Edit <a>Clone	Standard User	Salesforce	<input type="checkbox"/>
<a>Edit <a>Del ...	Supplier Profile	Salesforce	<input checked="" type="checkbox"/>
<a>Edit <a>Clone	System Administrator	Salesforce	<input type="checkbox"/>
<a>Edit <a>Clone	Work.com Only User	Work.com Only	<input type="checkbox"/>
<div> <div>1-48 of 48</div> <div>0 Selected</div> </div>			

Permission Sets:

- Weather Data Access
- Financial Data Access

Permission Sets			
<div> <div>All Permission Sets</div> <div> <a>Edit <a>Delete <a>Create New View </div> </div>			
<div> <div>New</div> <div> <div></div> <div></div> </div> </div>			
Action	Permission Set Name	Description	License
<a>Del <a>Clone	Weather Data Access		Salesforce

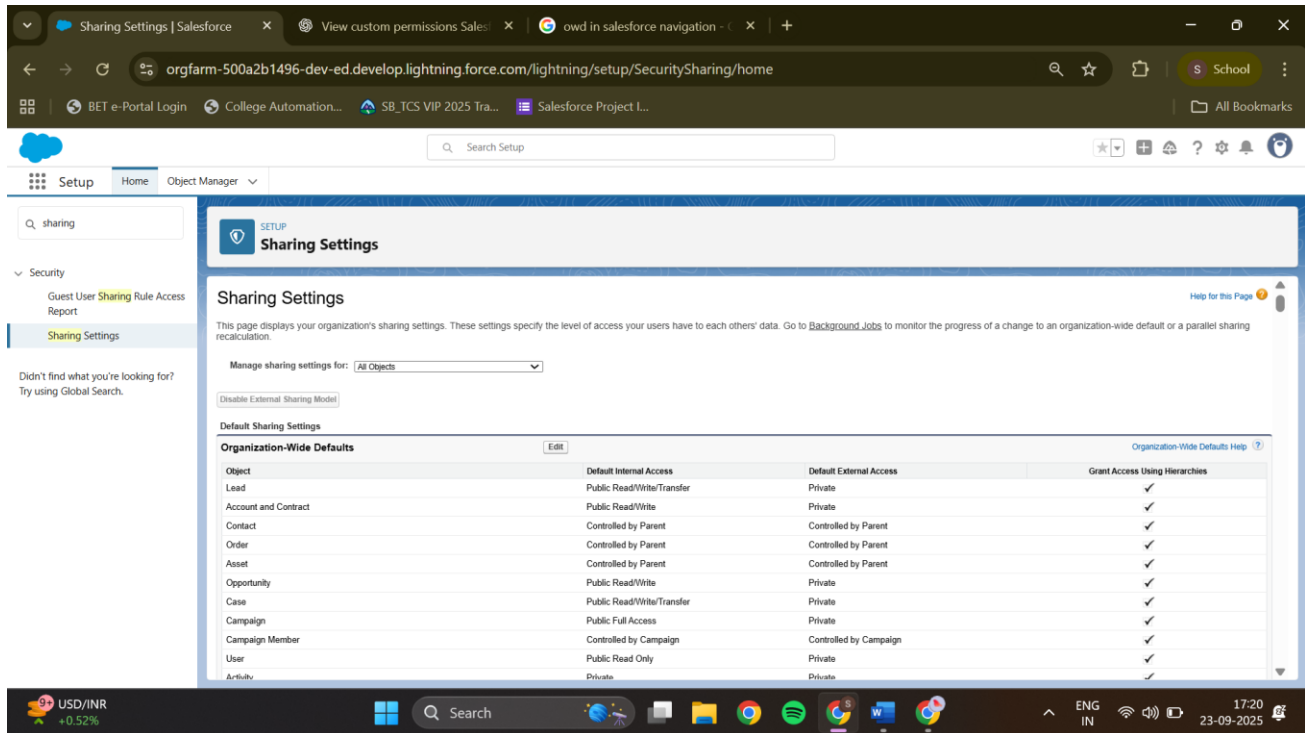
Permission Sets			
<div> <div>All Permission Sets</div> <div> <a>Edit <a>Delete <a>Create New View </div> </div>			
<div> <div>New</div> <div> <div></div> <div></div> </div> </div>			
Action	Permission Set Name	Description	License
<a>Clone	Facility Manager	Lets users create, read, edit, and delete locations, sublocations, queued parties, ...	Facility Manager
<a>Clone	FieldServiceMobileStandardPermSet	Give your mobile workforce access to the Field Service mobile app. Set them up ...	Field Service Mobile
<a>Del <a>Clone	Financial Data Access		Salesforce

6. Org-Wide Defaults (OWD) & Sharing Rules

OWD Settings:

- Farmer records: Private
- Crop/advisory data: Controlled by Parent

- Buyer/Supplier data: Read Only



The screenshot shows the Salesforce 'Sharing Settings' page in a web browser. The browser tabs include 'Sharing Settings | Salesforce', 'View custom permissions Sales...', and 'owd in salesforce navigation'. The address bar shows the URL 'orgfarm-500a2b1496-dev-ed.develop.lightning.force.com/lightning/setup/SecuritySharing/home'. The page header includes a search bar and navigation links like 'Setup', 'Home', and 'Object Manager'. The left sidebar shows a search bar with 'sharing' and a list of security-related items: 'Security', 'Guest User Sharing Rule Access Report', and 'Sharing Settings'. The main content area is titled 'Sharing Settings' and includes a description: '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.' Below this is a 'Manage sharing settings for:' dropdown set to 'All Objects' and a 'Disable External Sharing Model' link. The 'Default Sharing Settings' section is expanded, showing a table of 'Organization-Wide Defaults'. The table has four columns: 'Object', 'Default Internal Access', 'Default External Access', and 'Grant Access Using Hierarchies'. The objects listed are Lead, Account and Contract, Contact, Order, Asset, Opportunity, Case, Campaign, Campaign Member, User, and Activity. The 'Grant Access Using Hierarchies' column contains checkmarks for all objects. The bottom of the screen shows a Windows taskbar with various application icons and system information like 'USD/INR +0.52%' and the date '23-09-2025'.

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	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓

Sharing Rules:

- Extension Officers can view assigned farmer data
- Buyers can view procurement orders related to them
- Government Officers can view aggregated reports

7. Security & Login Policies

- Password Policies configured
- Login Access: no IP restrictions (dev phase)
- Field-Level Security: restricted for sensitive fields (financial data)
- Audit Trail enabled

8. Deployment Workflow

- Development in Salesforce Developer Org
- Version control with GitHub
- Metadata deployed with SFDX commands
- Future plan: Use Change Sets/Packages for sandbox → production

9. Challenges & Learnings

- Clarified difference between Profiles vs Permission Sets
- Understood importance of OWD & Sharing Rules as security foundation
- Learned Company Profile settings directly impact workflows/reports

10. Next Steps

With Phase 2 completed, the project is now ready for Phase 3: Data Modeling & Relationships.

Next activities:

- Create custom objects (Farmers, Farms, Crop Cycles, Soil Health Records)
- Define relationships between objects
- Setup Record Types, Page Layouts, and Schema Builder visualization

Phase 2 Completion Status: DONE

Prepared for Phase 3 Development