

AgriTrust Connect – Phase 2: Org Setup & Configuration Report

Project Title: AgriTrust Connect – Sustainable Agriculture CRM

Phase: 2 – Org Setup & Configuration

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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: [Your Name]
- 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
- Extension Officer User – Access to farmer data in their region
- Buyer User – Procurement access
- Supplier User – Product catalog/order management access

5. Roles, Profiles & Permission Sets

Roles Created:

- System Administrator
- Farmer
- Extension Officer
- Buyer
- Supplier
- Government Officer

Profiles Defined:

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

Permission Sets:

- Weather Data Access
- Financial Data Access

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

OWD Settings:

- Farmer records: Private
- Crop/advisory data: Controlled by Parent
- Buyer/Supplier data: Read Only

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