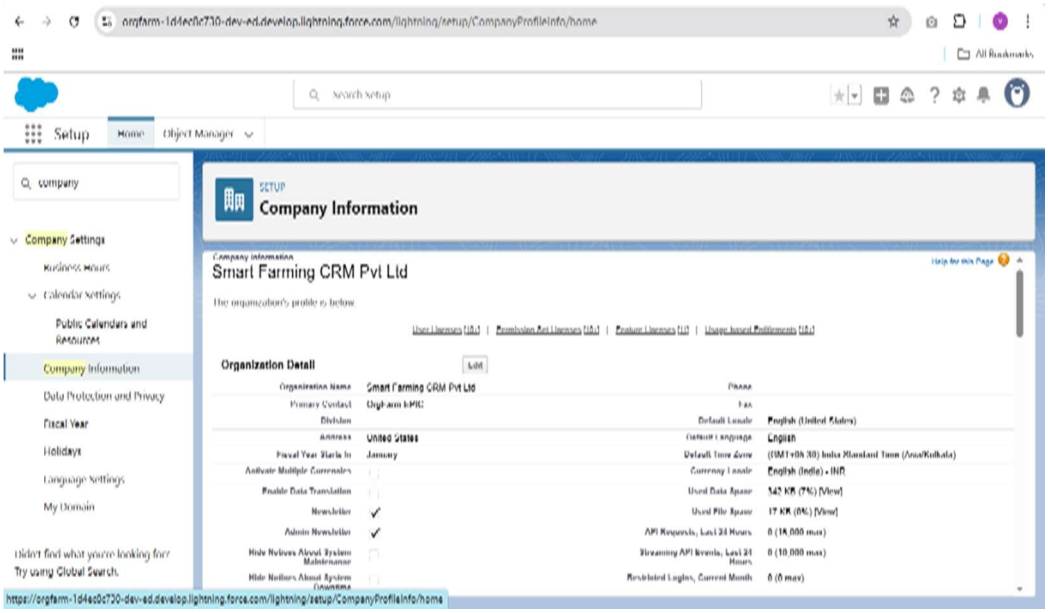
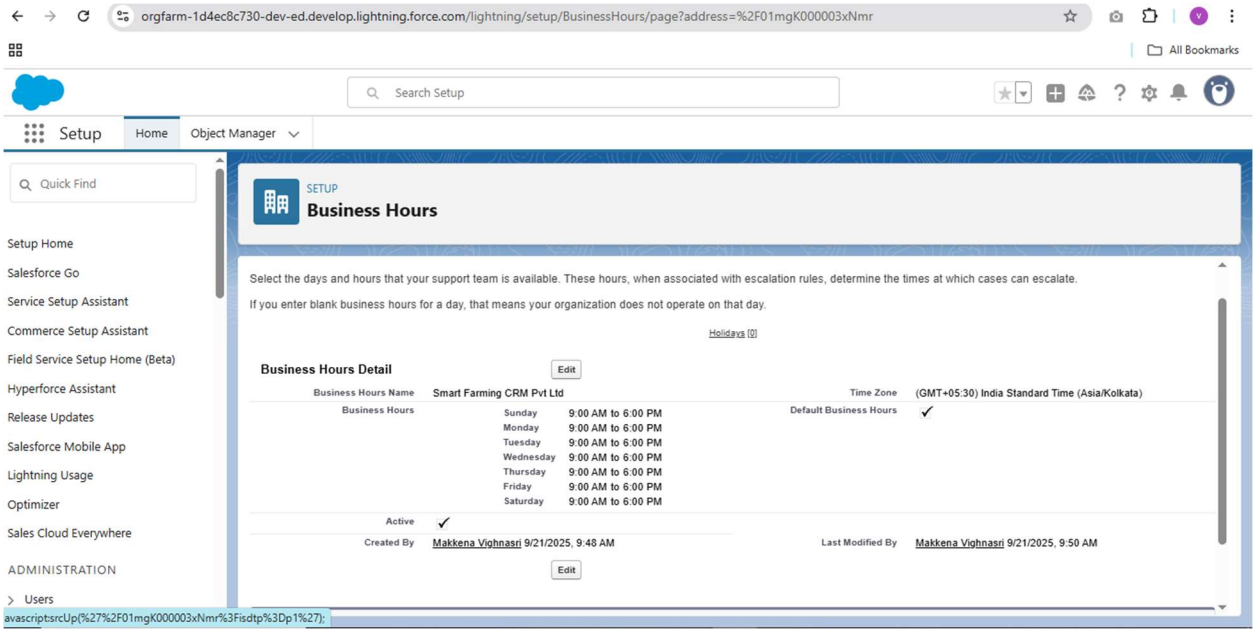
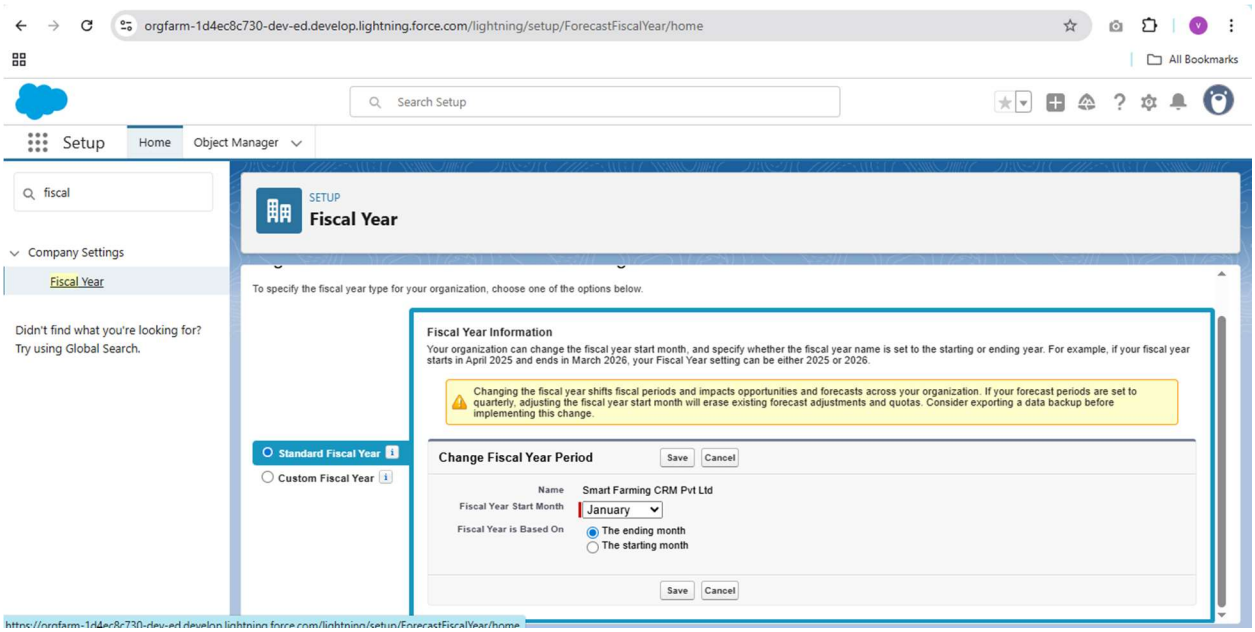
ORG SETUP AND CONFIGURATION-PHASE 2

1. Company Profile Setup

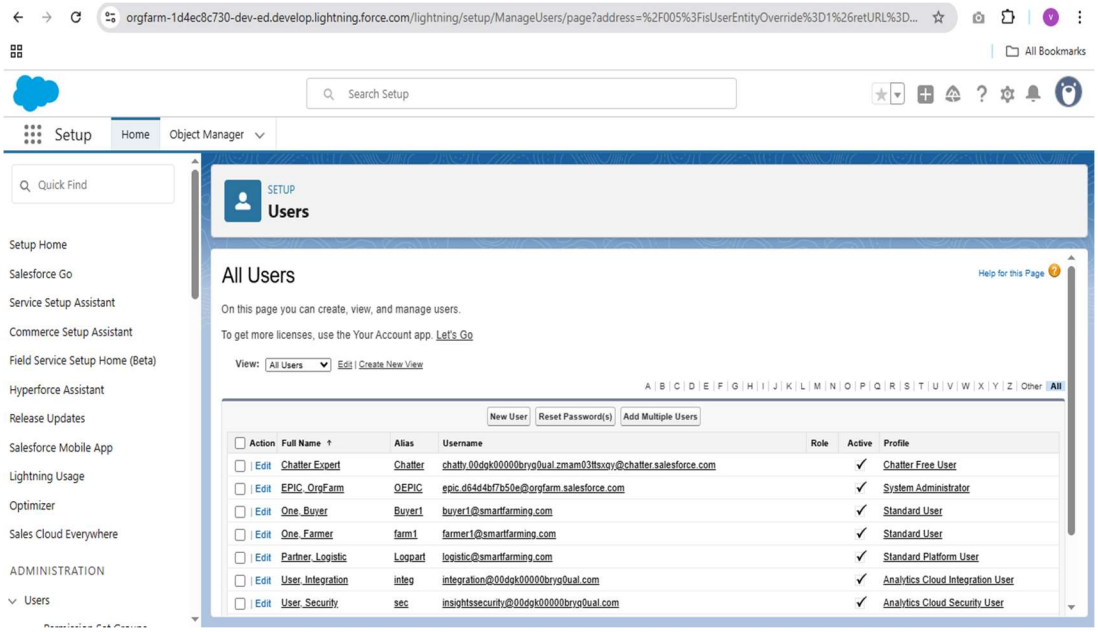


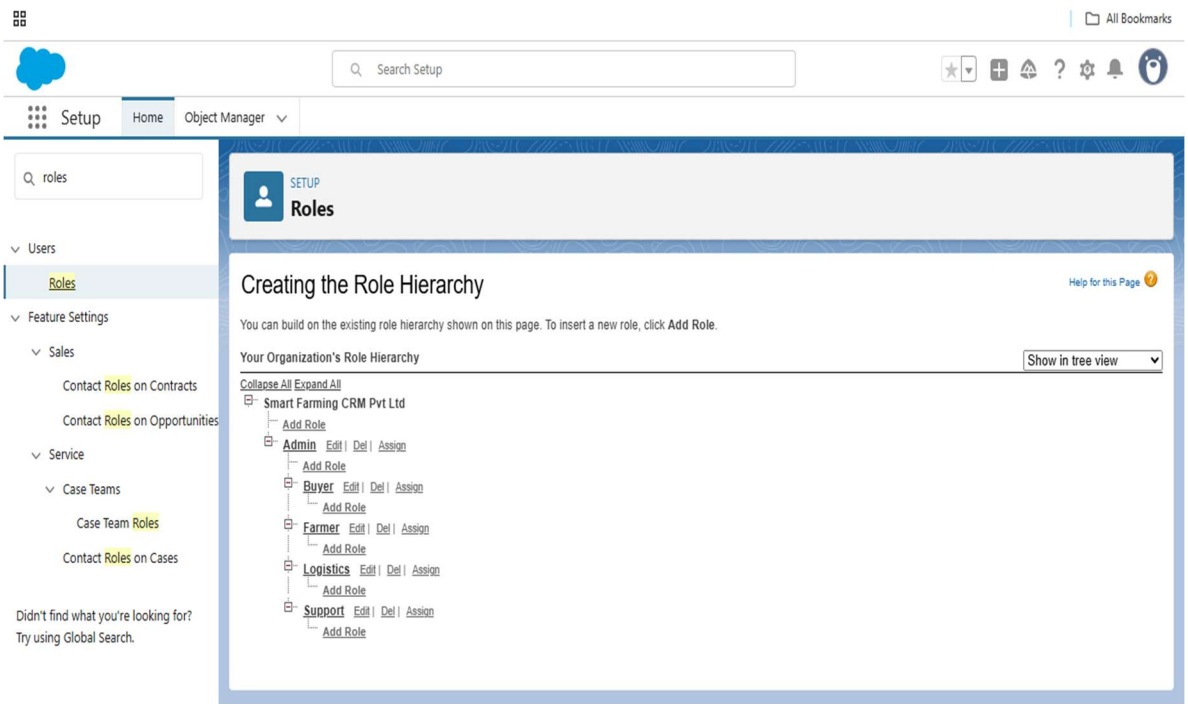




2.Users & Roles

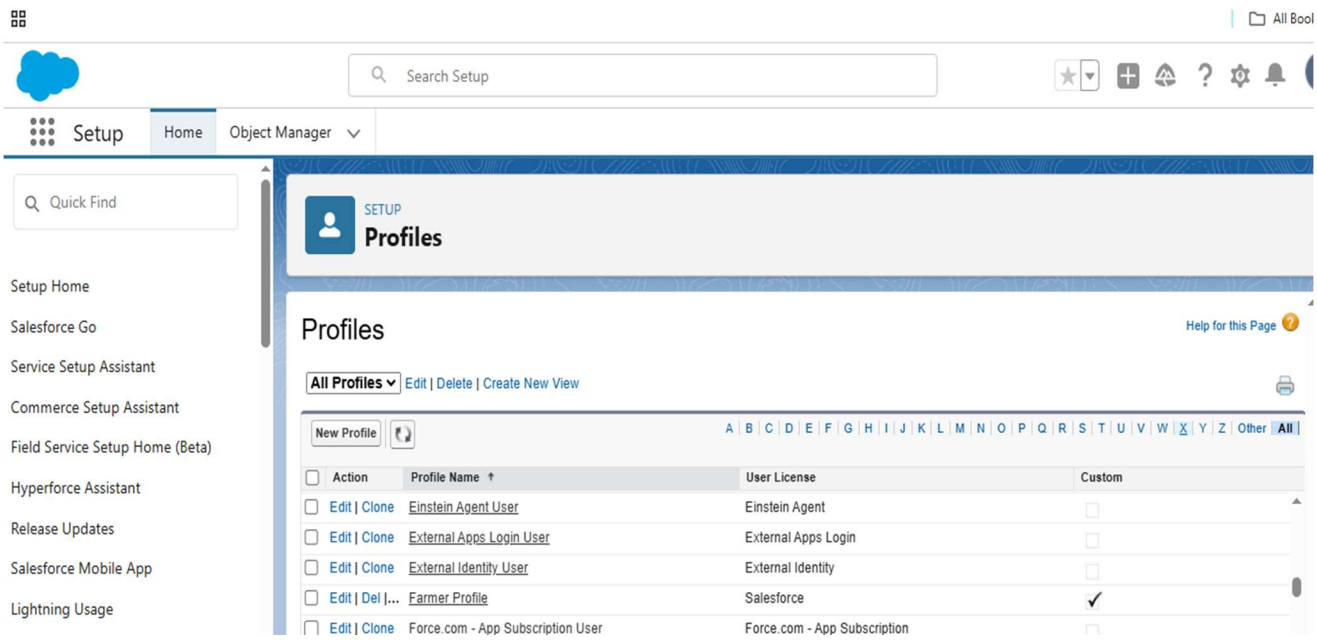
Created roles for Farmers, Buyers, Logistics, and Support to define hierarchy and data visibility. Users were assigned to these roles for structured access.

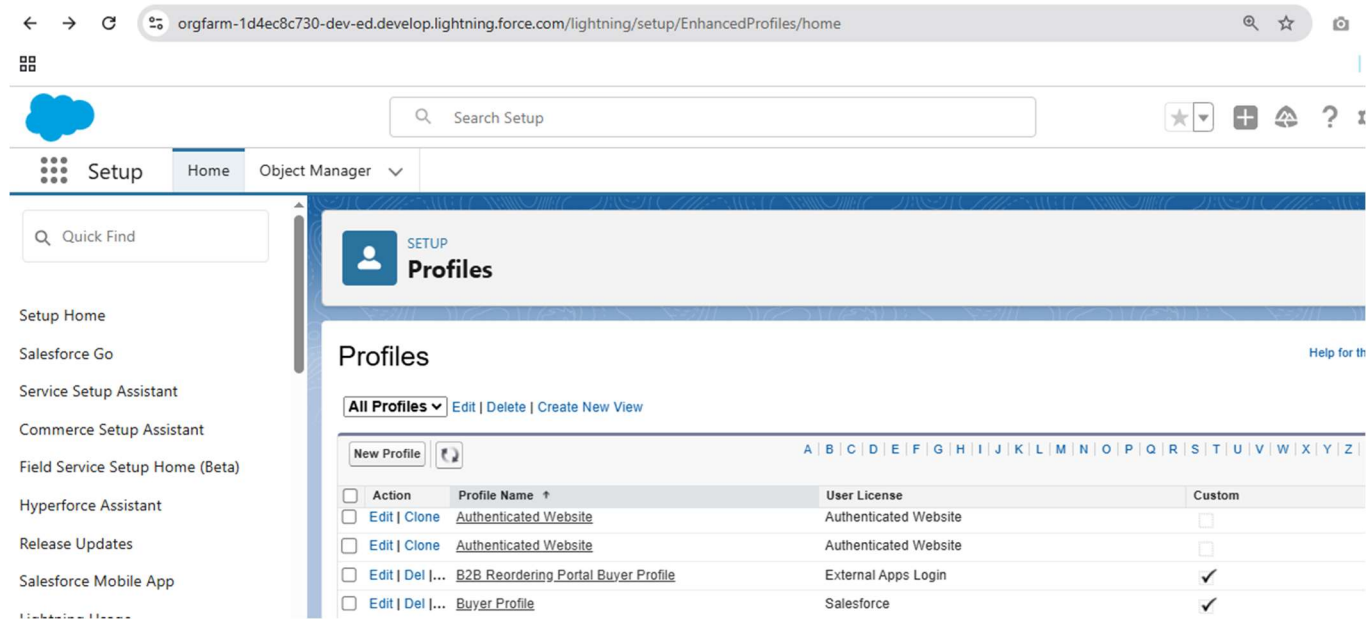


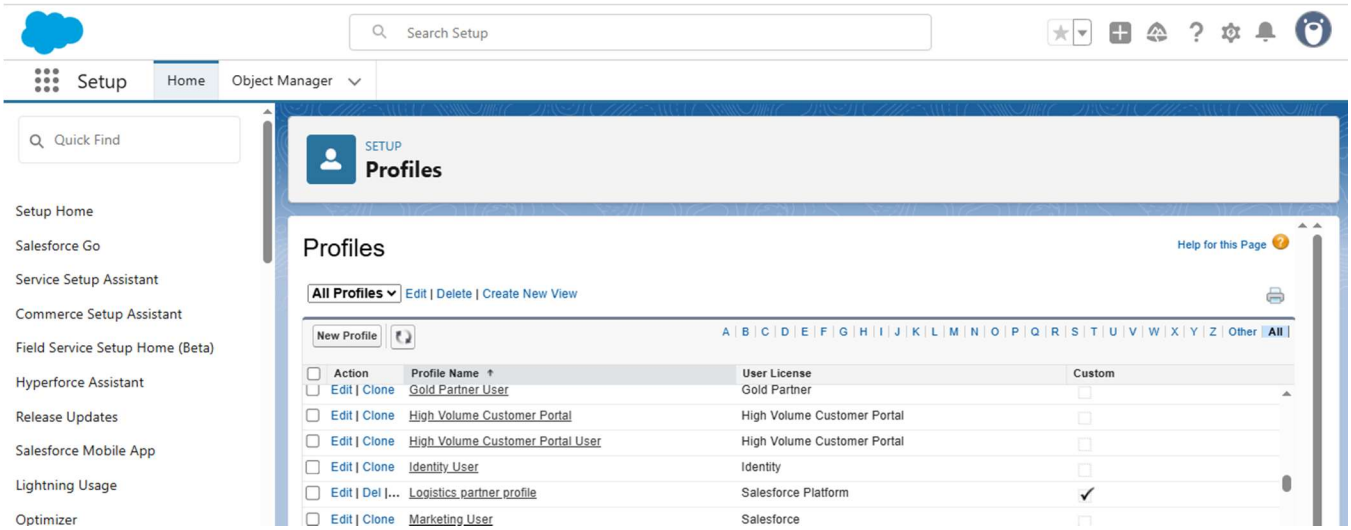


3. Profiles

Custom profiles were built to control object-level and field-level permissions. Each user type (Farmer, Buyer, Logistics, Support) was given a suitable profile.

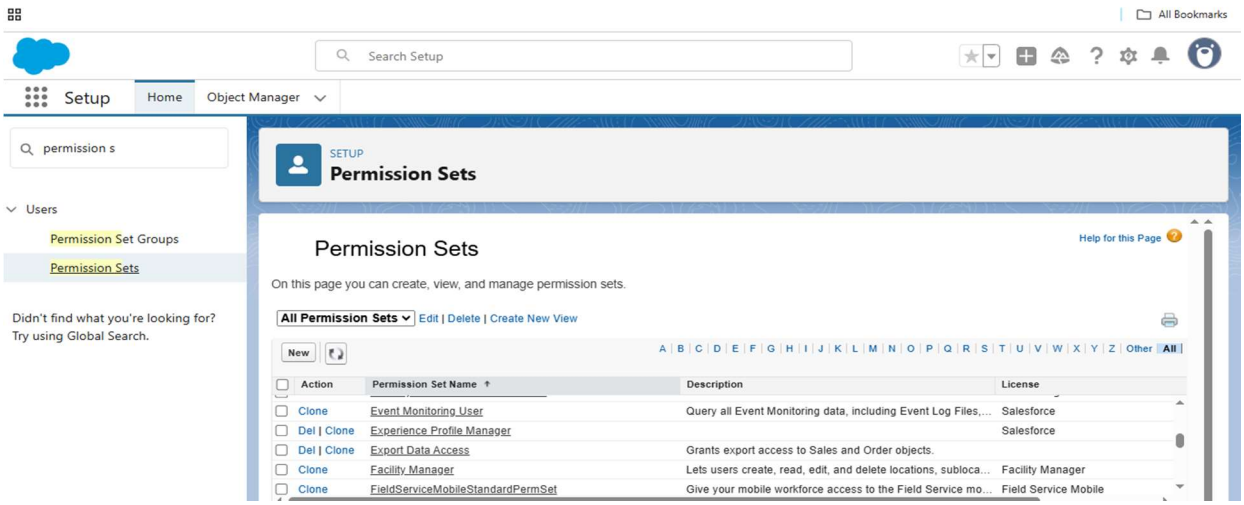


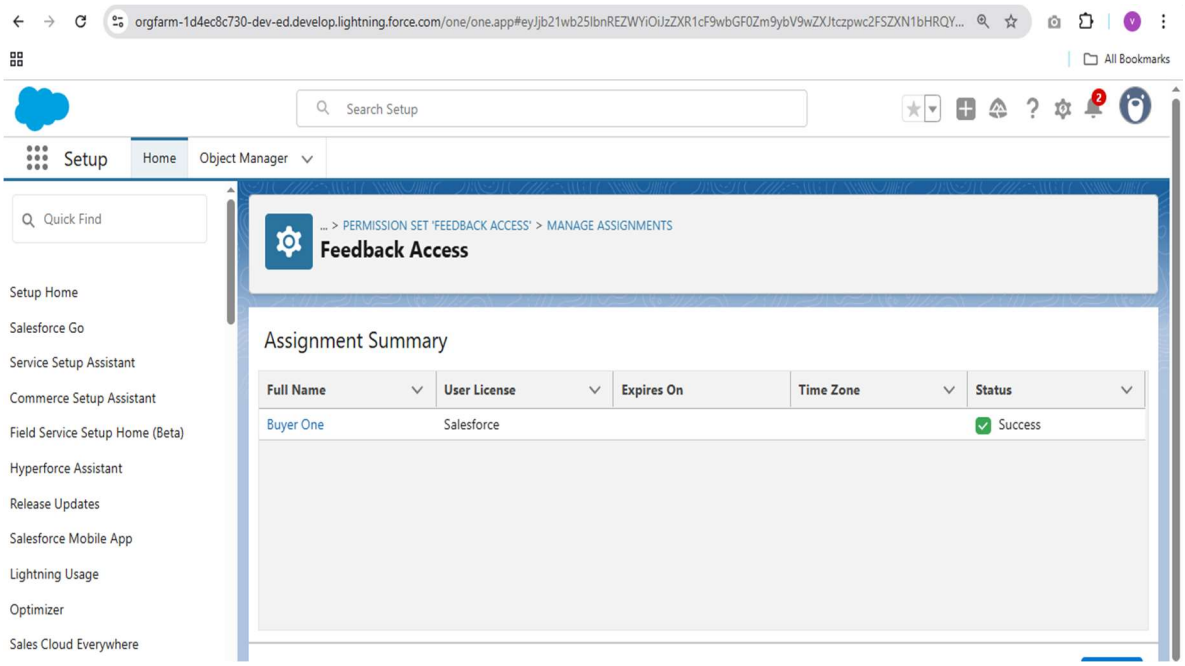




4. Permission Sets

A Feedback Access permission set was created to grant buyers additional rights (Read/Create/Edit) on the Feedback object without changing their base profile.

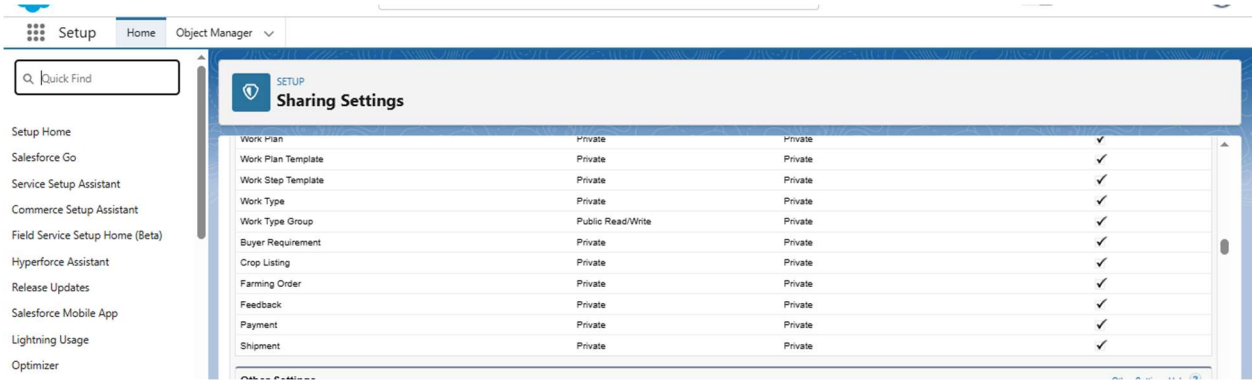




5.

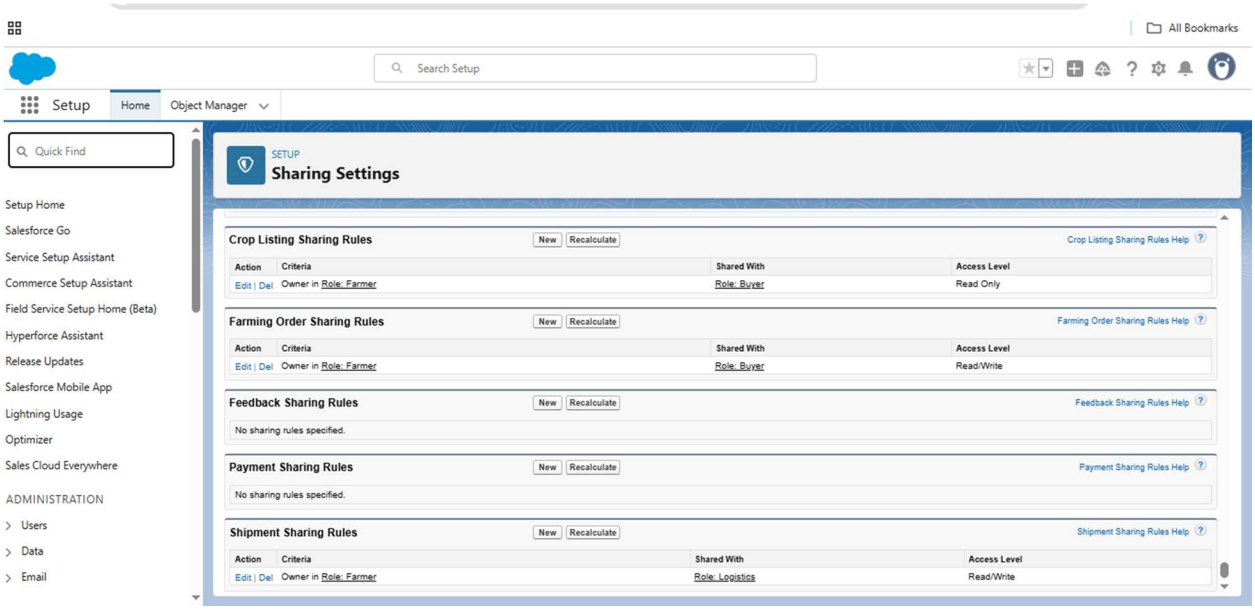
5.Org-Wide Defaults (OWD)

OWD was set to **Private** for most objects to ensure strict record-level security. Controlled by Parent was applied where available (e.g., Orders, Contacts).



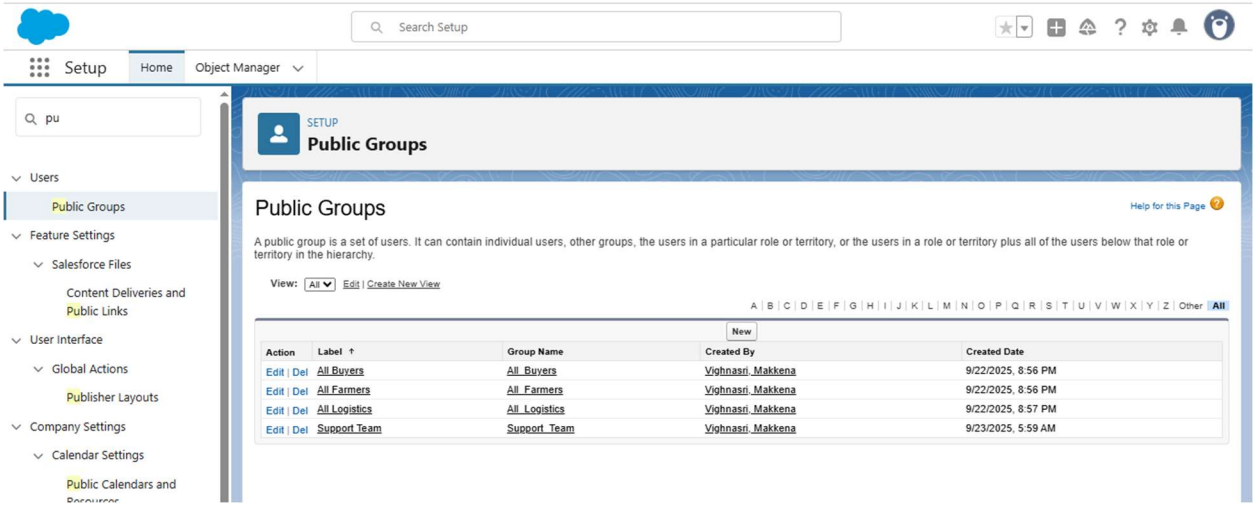
6. Sharing Rules

Rules were added to share Crop Listings with Buyers, Orders between Farmers and Buyers, and Shipments with Logistics. This ensures collaboration while keeping data secure.



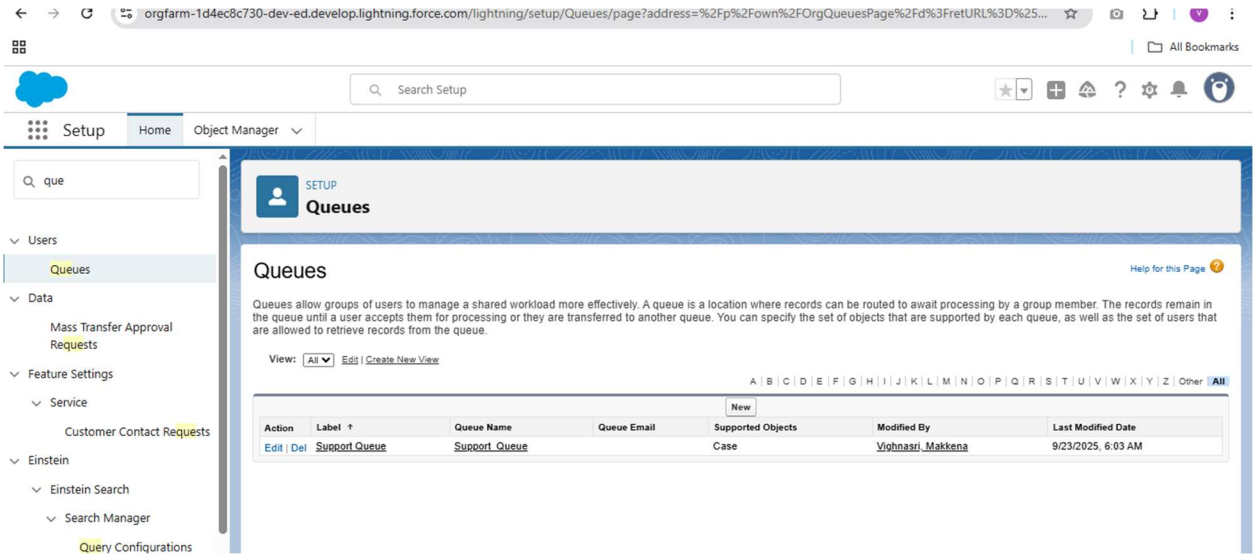
7. Public Groups

Groups were created (All Farmers, All Buyers, All Logistics, Support Team) to simplify sharing and queue assignments.



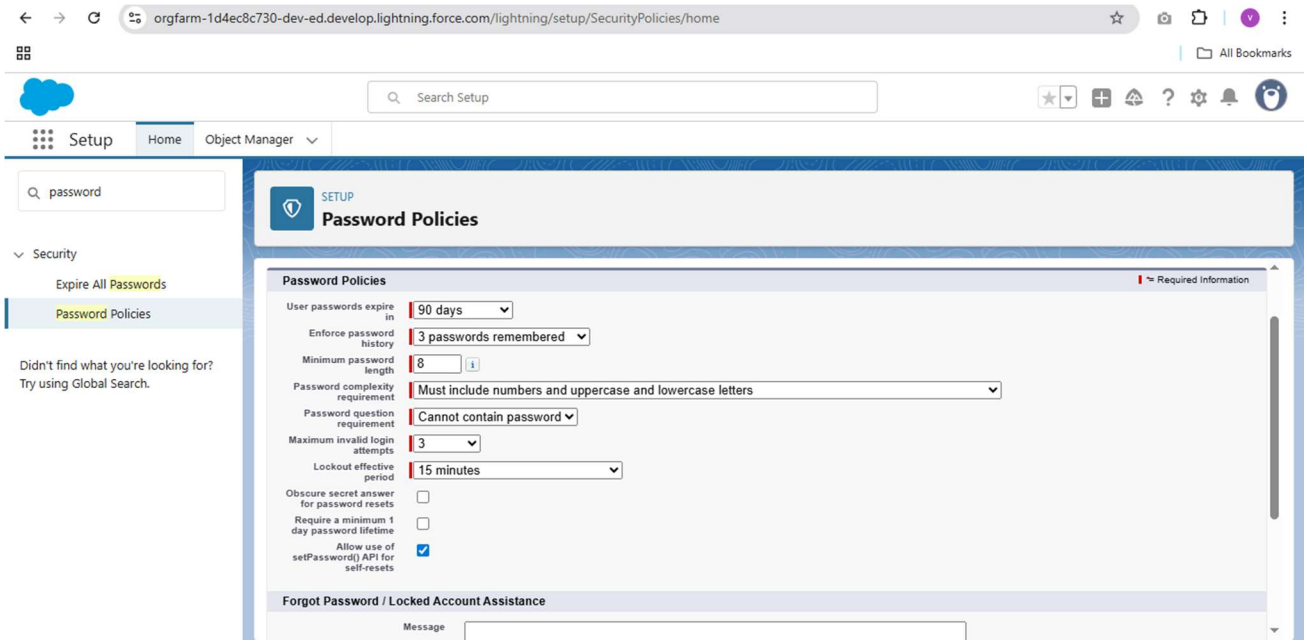
8. Queues

A Support Queue was configured for Cases so multiple support users can manage disputes efficiently.



9. Password & Session Policies

Security was enhanced by enforcing strong password rules, session timeout (2 hrs), and HTTPS-only logins.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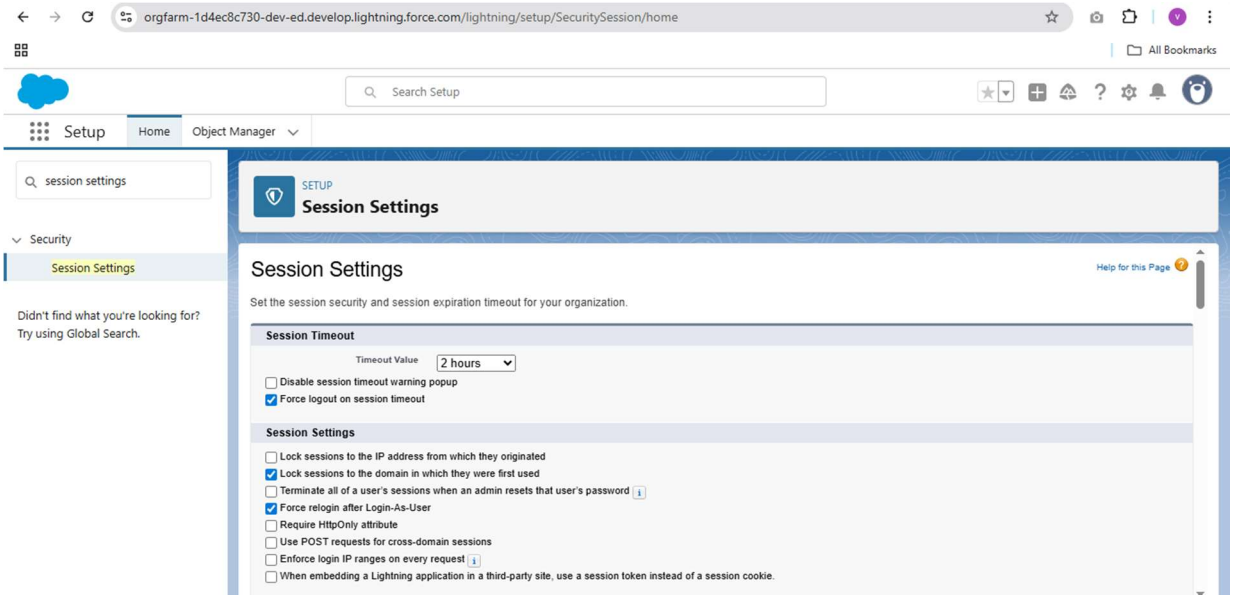
Search Setup
Setup
Home
Object Manager
password
Security
Expire All Passwords
Password Policies
Didn't find what you're looking for?
Try using Global Search.
SETUP
Password Policies
Password Policies
Required Information
User passwords expire in
90 days
Enforce password history
3 passwords remembered
Minimum password length
8
Password complexity requirement
Must include numbers and uppercase and lowercase letters
Password question requirement
Cannot contain password
Maximum invalid login attempts
3
Lockout effective period
15 minutes
Obscure secret answer for password resets
Require a minimum 1 day password lifetime
Allow use of setPassword() API for self-resets
Forgot Password / Locked Account Assistance
Message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All Bookmarks
Search Setup
Setup
Home
Object Manager
session settings
Security
Session Settings
Didn't find what you're looking for?
Try using Global Search.
SETUP
Session Settings
Session Settings
Help for this Page
Set the session security and session expiration timeout for your organization.
Session Timeout
Timeout Value
2 hours
Disable session timeout warning popup
Force logout on session timeout
Session Settings
Lock sessions to the IP address from which they originated
Lock sessions to the domain in which they were first used
Terminate all of a user's sessions when an admin resets that user's password
Force relogin after Login-As-User
Require HttpOnly attribute
Use POST requests for cross-domain sessions
Enforce login IP ranges on every request
When embedding a Lightning application in a third-party site, use a session token instead of a session cookie.