

ORG SETUP AND CONFIGURATION-PHASE 2

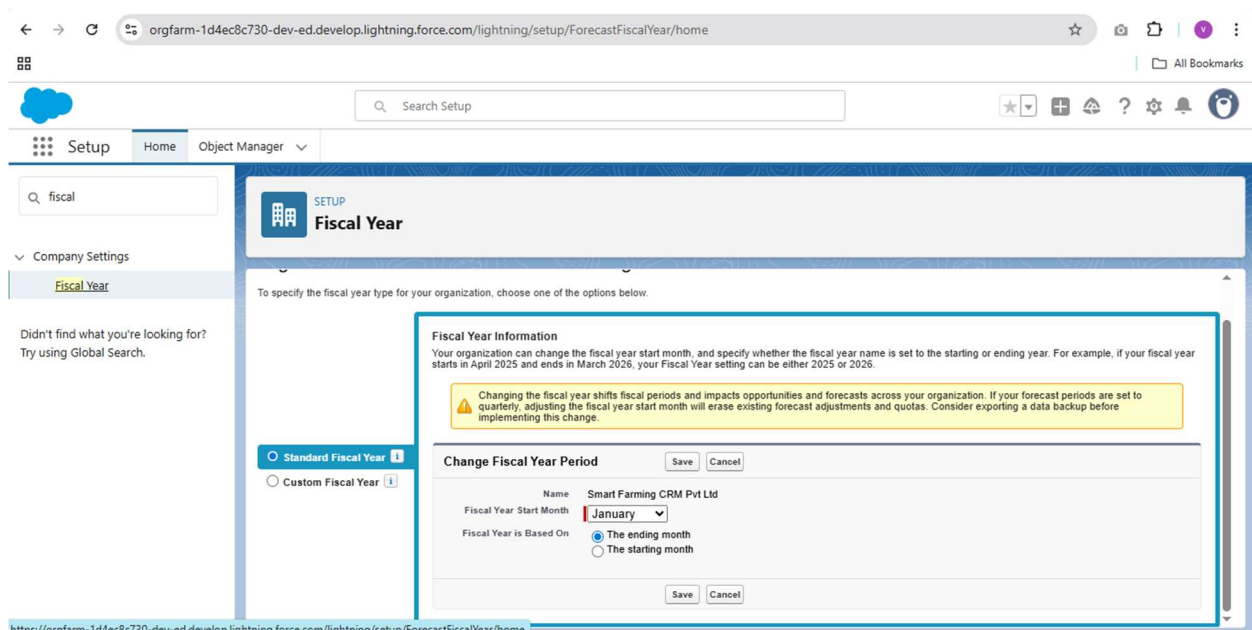
1. Company Profile Setup

The screenshot shows the Salesforce Setup interface for 'Company Information'. The left sidebar contains a 'Setup' menu with options like 'Company Settings', 'Business Hours', 'Calendar Settings', 'Public Calendars and Resources', 'Company Information', 'Data Protection and Privacy', 'Fiscal Year', 'Holidays', 'Language Settings', and 'My Domain'. The main content area is titled 'Company Information' and displays details for 'Smart Farming CRM Pvt Ltd'. The organization's profile is shown with various settings and options.

Organization Detail	
Organization Name	Smart Farming CRM Pvt Ltd
Primary Contact	Uday-son b-MPL
Address	UNIND STATE
Primary Year Starts In	January
Default Time Zone	English (India) Standard Time (Asia/Kolkata)
Default Language	English (India) Standard Time (Asia/Kolkata)
Default Currency	Indian Rupee (INR)
Default Data Space	17 KB (max)
Default File Space	0 (10,000 max)
API Requests, Last 24 Hours	0 (10,000 max)
Streaming API Events, Last 24 Hours	0 (10,000 max)
Revised Logins, Current Month	0 (10 max)

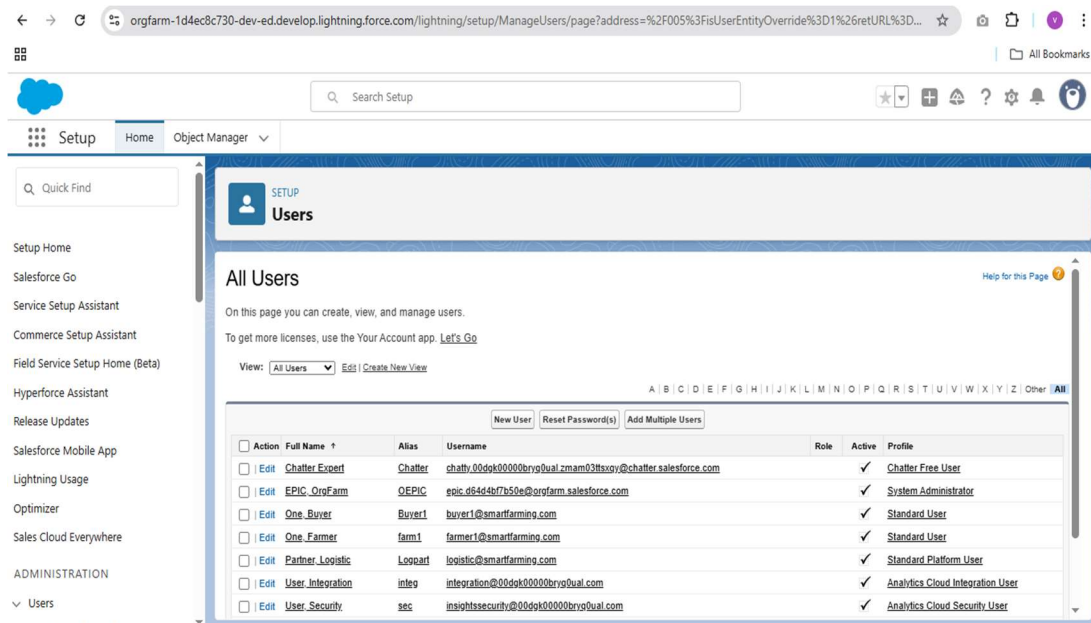
The screenshot shows the Salesforce Setup interface for 'Business Hours'. The left sidebar contains a 'Setup' menu with options like 'Setup Home', 'Salesforce Go', 'Service Setup Assistant', 'Commerce Setup Assistant', 'Field Service Setup Home (Beta)', 'Hyperforce Assistant', 'Release Updates', 'Salesforce Mobile App', 'Lightning Usage', 'Optimizer', 'Sales Cloud Everywhere', 'ADMINISTRATION', and 'Users'. The main content area is titled 'Business Hours' and displays details for 'Smart Farming CRM Pvt Ltd'. The business hours are set for Sunday through Saturday, from 9:00 AM to 6:00 PM. The time zone is set to '(GMT+05:30) India Standard Time (Asia/Kolkata)'. The business hours are active, and the created by is 'Makkena Vijaynagar' on 9/21/2025, 9:48 AM. The last modified by is 'Makkena Vijaynagar' on 9/21/2025, 9:50 AM.

Business Hours Detail	
Business Hours Name	Smart Farming CRM Pvt Ltd
Business Hours	Sunday 9:00 AM to 6:00 PM Monday 9:00 AM to 6:00 PM Tuesday 9:00 AM to 6:00 PM Wednesday 9:00 AM to 6:00 PM Thursday 9:00 AM to 6:00 PM Friday 9:00 AM to 6:00 PM Saturday 9:00 AM to 6:00 PM
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Default Business Hours	✓
Active	✓
Created By	Makkena Vijaynagar 9/21/2025, 9:48 AM
Last Modified By	Makkena Vijaynagar 9/21/2025, 9:50 AM



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.



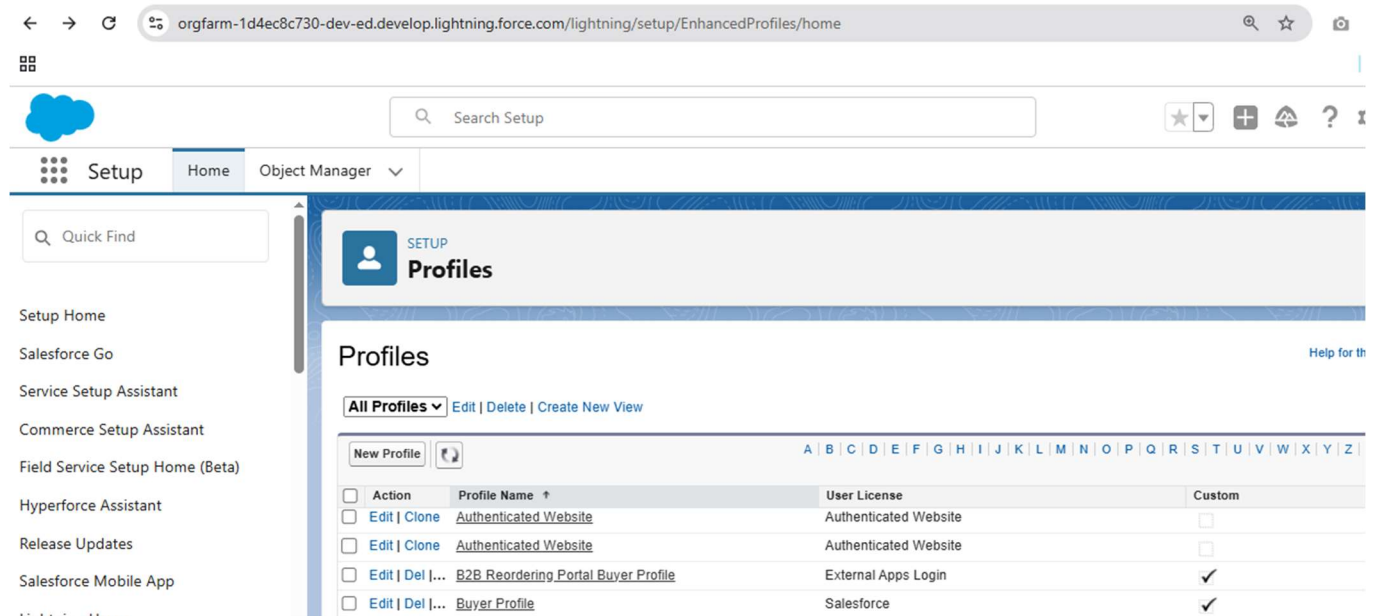
The screenshot shows the Salesforce Setup interface with the 'Roles' page selected. The left sidebar contains a search bar and a navigation menu with categories like Users, Feature Settings, Sales, Service, and Case Teams. The main content area is titled 'Creating the Role Hierarchy' and displays a tree view of the organization's role hierarchy for 'Smart Farming CRM Pvt Ltd'. The hierarchy starts with 'Admin' at the top, followed by 'Buyer', 'Farmer', 'Logistics', and 'Support'. Each role has an 'Add Role' link below it. The 'Show in tree view' dropdown is set to 'Show in tree view'.

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.

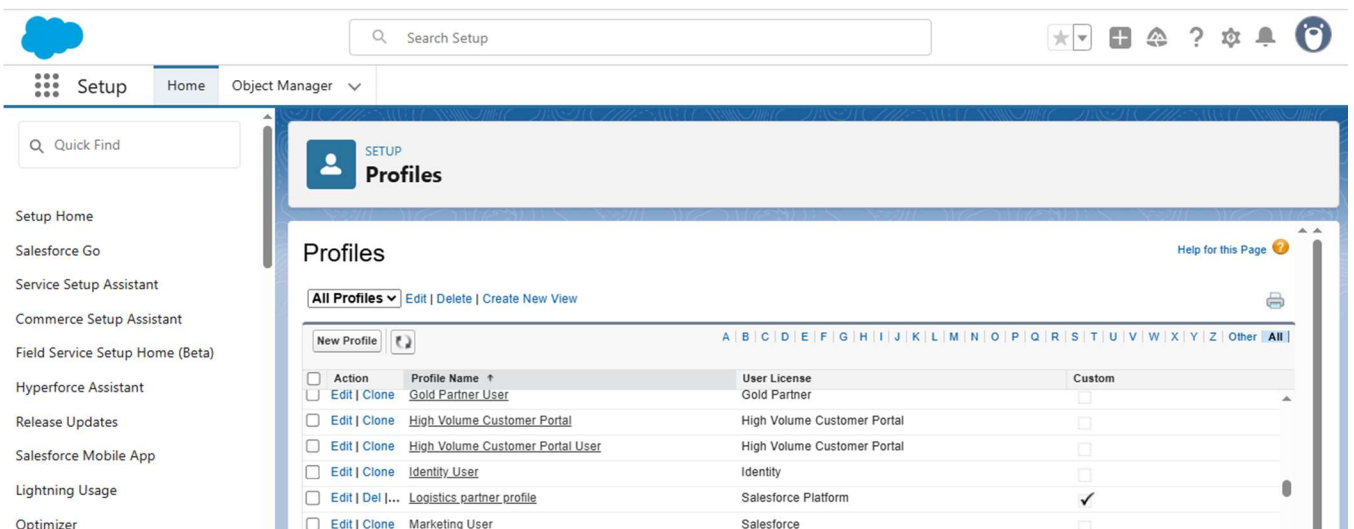
The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The left sidebar contains a search bar and a navigation menu with categories like Setup Home, Salesforce Go, Service Setup Assistant, Commerce Setup Assistant, Field Service Setup Home (Beta), Hyperforce Assistant, Release Updates, Salesforce Mobile App, and Lightning Usage. The main content area is titled 'Profiles' and displays a table of profiles. The table has columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The 'Farmer Profile' is highlighted with a checkmark in the 'Custom' column.

Action	Profile Name	User License	Custom
Edit Clone	Einstein Agent User	Einstein Agent	<input type="checkbox"/>
Edit Clone	External Apps Login User	External Apps Login	<input type="checkbox"/>
Edit Clone	External Identity User	External Identity	<input type="checkbox"/>
Edit Del ...	Farmer Profile	Salesforce	<input checked="" type="checkbox"/>
Edit Clone	Force.com - App Subscription User	Force.com - App Subscription	<input type="checkbox"/>



The screenshot shows the Salesforce Setup interface for Profiles. The left sidebar contains navigation links: Setup Home, Salesforce Go, Service Setup Assistant, Commerce Setup Assistant, Field Service Setup Home (Beta), Hyperforce Assistant, Release Updates, Salesforce Mobile App, and Release History. The main content area is titled "Profiles" and includes a "Quick Find" search bar. Below the title, there are tabs for "All Profiles", "Edit", "Delete", and "Create New View". A table lists existing profiles with columns for Action, Profile Name, User License, and Custom. The table includes profiles like "Authenticated Website", "B2B Reordering Portal Buyer Profile", and "Buyer Profile".

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit Del ...	B2B Reordering Portal Buyer Profile	External Apps Login	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Buyer Profile	Salesforce	<input checked="" type="checkbox"/>

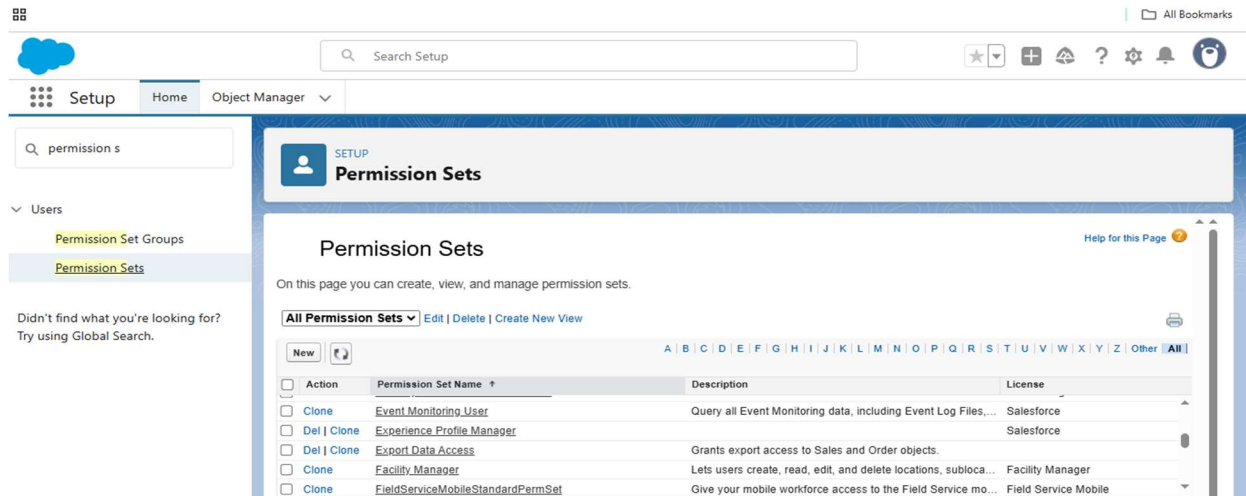


The screenshot shows the Salesforce Setup interface for Profiles. The left sidebar contains navigation links: Setup Home, Salesforce Go, Service Setup Assistant, Commerce Setup Assistant, Field Service Setup Home (Beta), Hyperforce Assistant, Release Updates, Salesforce Mobile App, Lightning Usage, and Optimizer. The main content area is titled "Profiles" and includes a "Quick Find" search bar. Below the title, there are tabs for "All Profiles", "Edit", "Delete", and "Create New View". A table lists existing profiles with columns for Action, Profile Name, User License, and Custom. The table includes profiles like "Gold Partner User", "High Volume Customer Portal", "Identity User", "Logistics partner profile", and "Marketing User".

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Clone	Gold Partner User	Gold Partner	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	High Volume Customer Portal	High Volume Customer Portal	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	High Volume Customer Portal User	High Volume Customer Portal	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Identity User	Identity	<input type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Logistics partner profile	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Marketing User	Salesforce	<input type="checkbox"/>

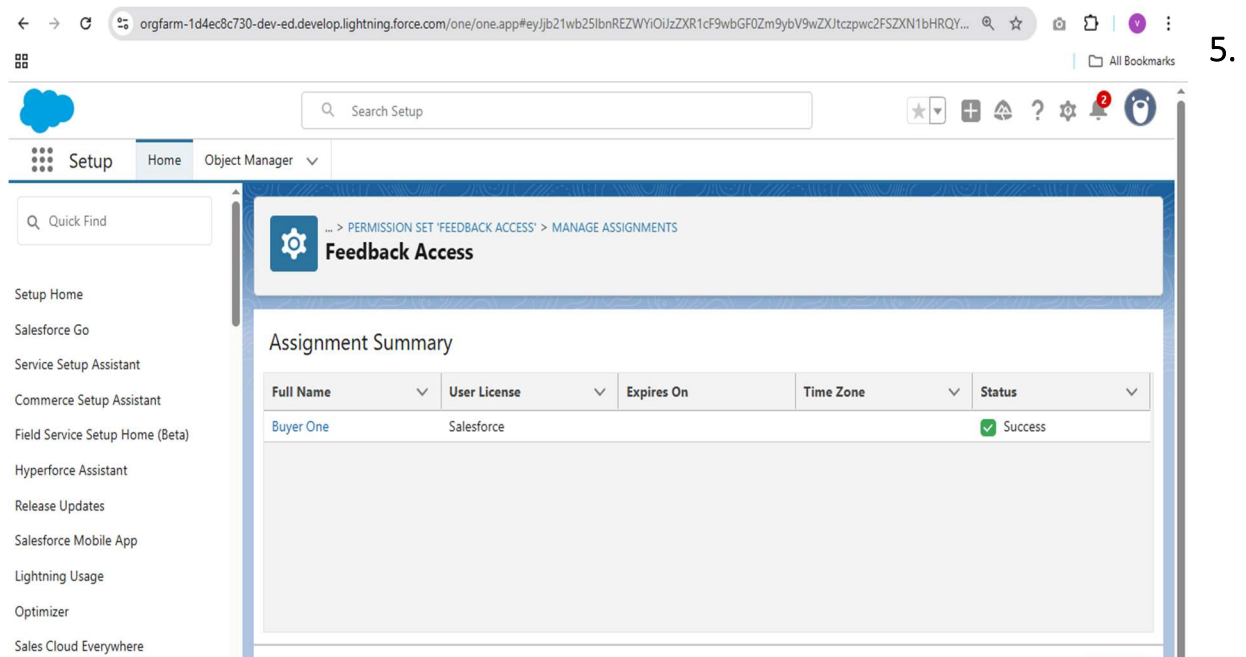
4. Permission Sets

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



The screenshot shows the Salesforce Setup interface for the 'Permission Sets' section. The left sidebar contains a search bar with 'permission s' and a list of links including 'Users', 'Permission Set Groups', and 'Permission Sets'. The main content area is titled 'Permission Sets' and includes a sub-header 'On this page you can create, view, and manage permission sets.' Below this is a table of permission sets.

Action	Permission Set Name	Description	License
Clone	Event Monitoring User	Query all Event Monitoring data, including Event Log Files,...	Salesforce
Del Clone	Experience Profile Manager		Salesforce
Del Clone	Export Data Access	Grants export access to Sales and Order objects.	
Clone	Facility Manager	Lets users create, read, edit, and delete locations, subloca...	Facility Manager
Clone	FieldServiceMobileStandardPermSet	Give your mobile workforce access to the Field Service mo...	Field Service Mobile

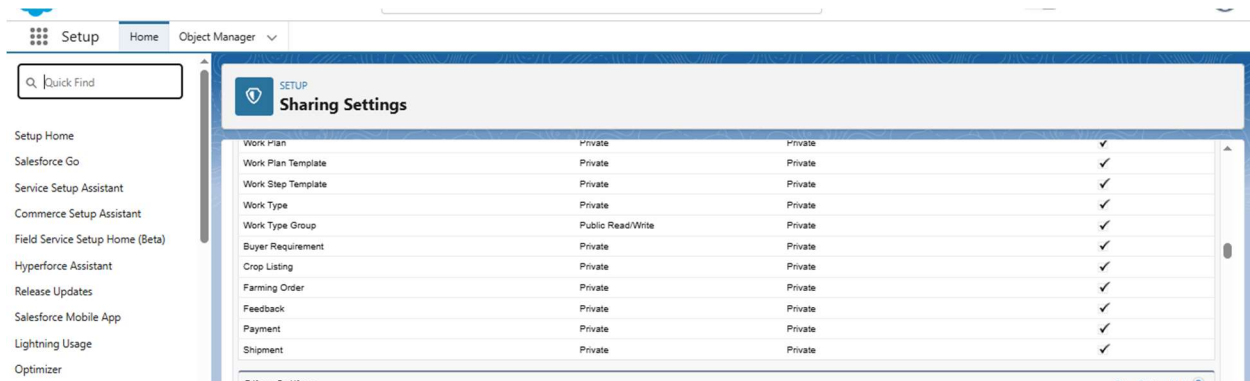


The screenshot shows the Salesforce Setup interface for the 'Feedback Access' section. The left sidebar contains a search bar with 'Quick Find' and a list of links including 'Setup Home', 'Salesforce Go', 'Service Setup Assistant', 'Commerce Setup Assistant', 'Field Service Setup Home (Beta)', 'Hyperforce Assistant', 'Release Updates', 'Salesforce Mobile App', 'Lightning Usage', 'Optimizer', and 'Sales Cloud Everywhere'. The main content area is titled 'Feedback Access' and includes a sub-header 'Assignment Summary'. Below this is a table of assignments.

Full Name	User License	Expires On	Time Zone	Status
Buyer One	Salesforce			Success

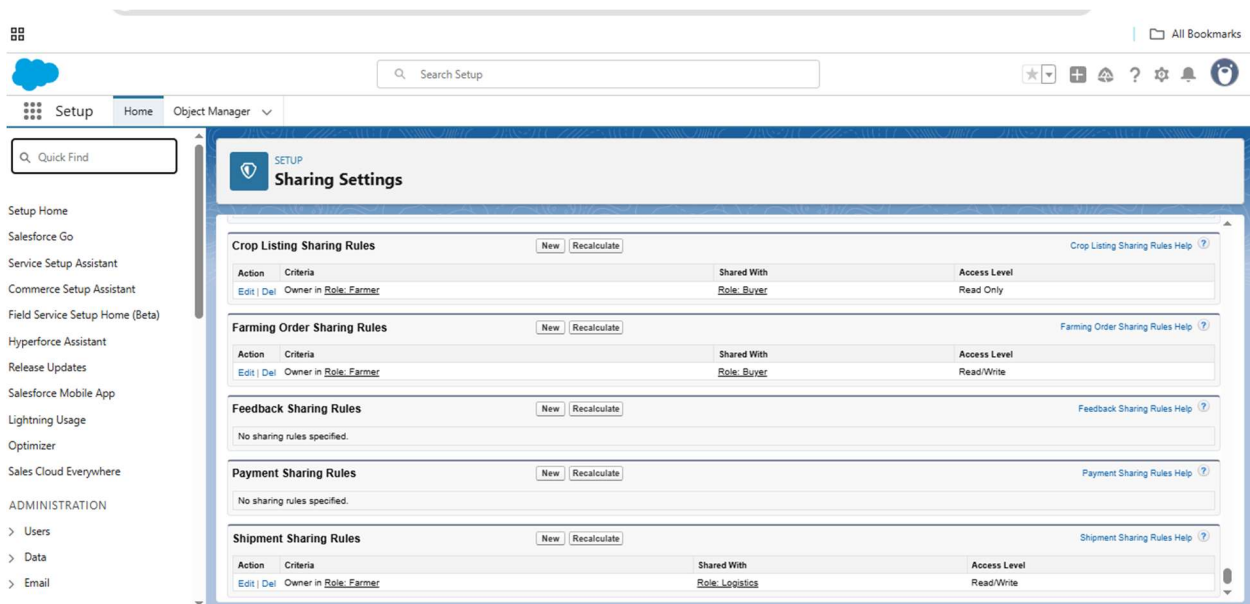
5.Org-Wide Defaults (OWD)

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.

Public Groups

A public group is a set of users. It can contain individual users, other groups, the users in a particular role or territory, or the users in a role or territory plus all of the users below that role or territory in the hierarchy.

View: [All](#) | [Edit](#) | [Create New View](#)

Action	Label ↑	Group Name	Created By	Created Date
Edit Del	All Buyers	All Buyers	Vijhnassi Makkenna	9/22/2025, 8:56 PM
Edit Del	All Farmers	All Farmers	Vijhnassi Makkenna	9/22/2025, 8:56 PM
Edit Del	All Logistics	All Logistics	Vijhnassi Makkenna	9/22/2025, 8:57 PM
Edit Del	Support Team	Support Team	Vijhnassi Makkenna	9/23/2025, 5:59 AM

8. Queues

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

Queues

Queues allow groups of users to manage a shared workload more effectively. A queue is a location where records can be routed to await processing by a group member. The records remain in the queue until a user accepts them for processing or they are transferred to another queue. You can specify the set of objects that are supported by each queue, as well as the set of users that are allowed to retrieve records from the queue.

View: [All](#) | [Edit](#) | [Create New View](#)

Action	Label ↑	Queue Name	Queue Email	Supported Objects	Modified By	Last Modified Date
Edit Del	Support Queue	Support Queue		Case	Vijhnassi Makkenna	9/23/2025, 6:03 AM

9. Password & Session Policies

Security was enhanced by enforcing strong password rules, session timeout (2 hrs), and HTTPS-only logins.

← → ↻ orgfarm-1d4ec8c730-dev-ed.develop.lightning.force.com/lightning/setup/SecurityPolicies/home ☆ 📁 All Bookmarks

🔍 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

Required Information

Password Policies

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

← → ↻ orgfarm-1d4ec8c730-dev-ed.develop.lightning.force.com/lightning/setup/SecuritySession/home ☆ 📁 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

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.