

Recipe & Meal Planning Manager

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Phase 2: Org Setup & Configuration

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Salesforce Editions:

-I have downloaded the CLI.

-I created a new org for my project and connected it with my org.

```
PS C:\Users\BAVANA VIGNA> sf org login web -d -a MyOrg
```

```
>>
```

Successfully authorized visf org list7955@agentforce.com with org ID 00Dfj000008n8O1EAI

-Opened my created org to do my work

```
PS C:\Users\BAVANA VIGNA> sf org open -o MyOrg
```

```
>>
```

Opening org 00Dfj000008n8O1EAI as user vigna.bavana07955@agentforce.com

Waiting to resolve the Lightning Experience-enabled custom domain..... done

```
PS C:\Users\BAVANA VIGNA>
```

- Company Profile Setup

The screenshot shows the Salesforce Setup interface. On the left, there's a sidebar with a search bar and a list of settings categories: Company Settings, Calendar Settings, Data Protection and Privacy, Fiscal Year, Holidays, Language Settings, and My Domain. The 'Company Settings' category is expanded, showing 'Business Hours', 'Public Calendars and Resources', and 'Company Information'. The 'Company Information' link is selected. The main content area is titled 'Company Information' and contains a table of organization details. The table has two columns: 'Organization Detail' and 'Edit'. The details include Organization Name (Maharaj Vijayaram Gajapathi Raj College), Primary Contact (OrgFarm EPIC), Division, Address, Fiscal Year Starts In (January), Activate Multiple Currencies (unchecked), Enable Data Translation (unchecked), Newsletter (checked), Admin Newsletter (checked), Hide Notices About System Maintenance (unchecked), Hide Notices About System Downtime (unchecked), Locale Formats (ICU), Phone, Fax, Default Locale (English (United States)), Default Language (English), Default Time Zone ((GMT-07:00) Pacific Daylight Time (America/Los_Angeles)), Currency Locale (English (United States) - USD), Used Data Space (342 KB (7%) [View]), Used File Space (17 KB (0%) [View]), API Requests, Last 24 Hours (47 (15,000 max)), Streaming API Events, Last 24 Hours (0 (10,000 max)), Restricted Logins, Current Month (0 (0 max)), Salesforce.com Organization ID (00D9000008n8O1), Organization Edition (Developer Edition), and Instance (USA1044). At the bottom, it shows 'Created By: OrgFarm EPIC, 9/19/2025, 4:01 AM' and 'Modified By: OrgFarm EPIC, 9/23/2025, 10:55 PM'.

- Business Hours & Holidays
- Fiscal Year Settings

These are all done here.

- User Setup & Licenses
- Profiles
- Roles
- Permission Sets

For my project i need to two roles they are Admin and End-User
Here is the admin role setup

roles

Users

Roles

Feature Settings

Sales

Contact Roles on Contracts

Contact Roles on Opportunities

Service

Case Teams

Case Team Roles

Contact Roles on Cases

Didn't find what you're looking for?
Try using Global Search.

Search Setup

SetupHomeObject Manager

roles

Setup Roles

Role End-User

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: Maharaj Vijayaram Gajapathi Raj College > Admin > End-User

Siblings: SVP Sales & Marketing, SVP Customer Service & Support, CFO, SVP Human Resources, COO

Users in End-User Role 0

Role Detail

Label	End-User	Role Name	End_User
This role reports to	Admin	Role Name as displayed on reports	can access their own Meal plans, recipes, Ingredients
Modified By	vigna.bavana, 9/23/2025, 11:15 PM	Sharing Groups	Role, Role and Internal Subordinates
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases		

Users in End-User Role

Assign Users to RoleNew User

Users in End-User Role Help

No records to display

Here is the End-User roles setup

roles

Users

Roles

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Users in End-User Role

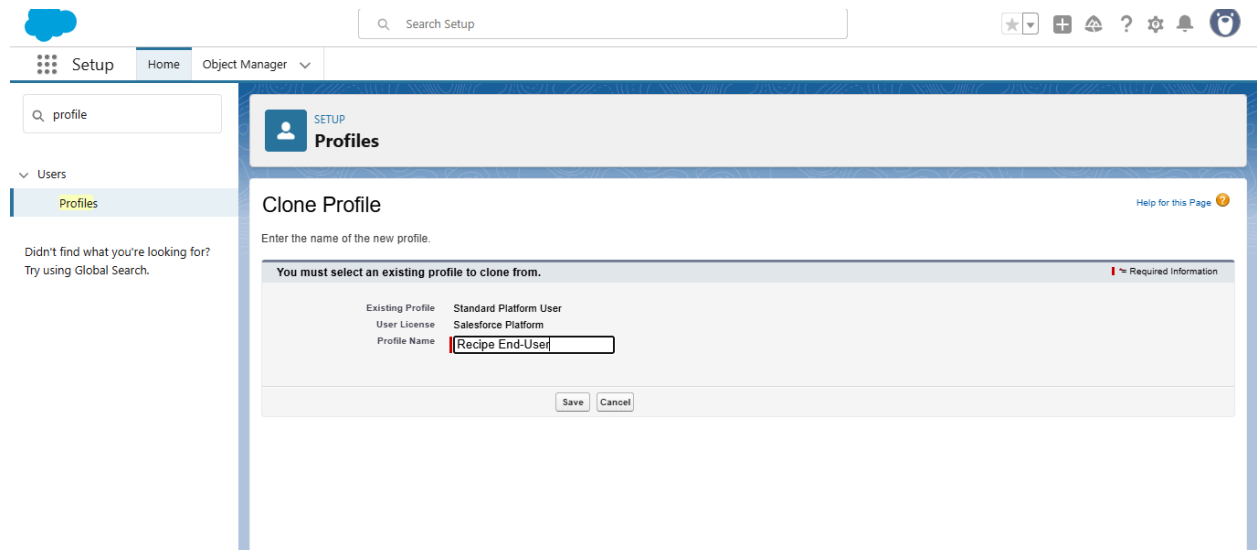
Assign Users to RoleNew User

Users in End-User Role Help

No records to display

Role creation is done.

Now we need to setup profiles



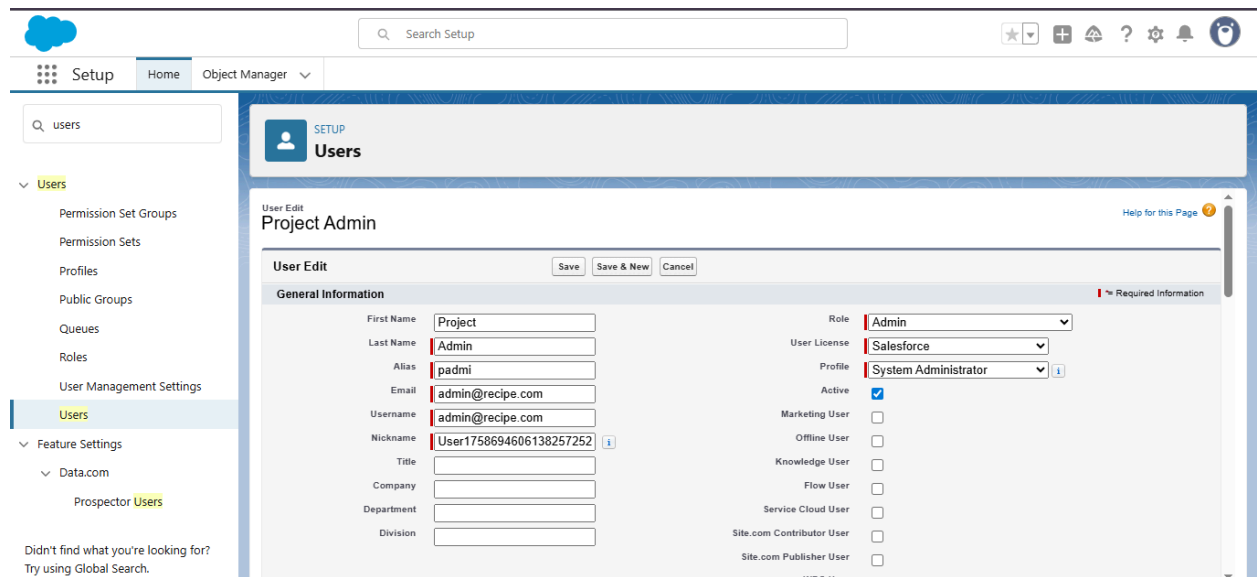
The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'profile' and a list of items under 'Users', with 'Profiles' highlighted. The main content area is titled 'Clone Profile' and prompts the user to 'Enter the name of the new profile.' Below this, a message states 'You must select an existing profile to clone from.' A table lists existing profiles: 'Standard Platform User', 'Salesforce Platform', and 'Recipe End-User' (which is selected). At the bottom are 'Save' and 'Cancel' buttons.

Existing Profile	User License	Profile Name
Standard Platform User	Salesforce Platform	Recipe End-User

Here admin profile is already created and end-user profile is created now

Users creation:

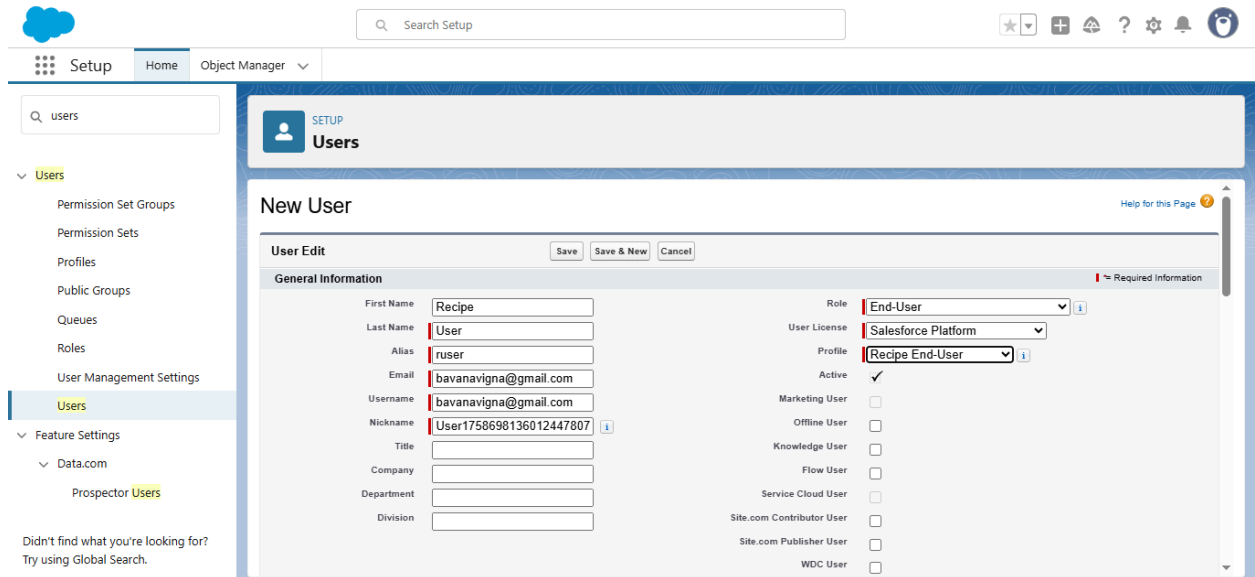
-creating for Admin



The screenshot shows the Salesforce Setup interface for creating a user. The left sidebar has a search bar with 'users' and a list of items under 'Users', with 'Users' highlighted. The main content area is titled 'User Edit' and 'Project Admin'. It contains a 'General Information' section with fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The 'Role' is set to 'Admin', 'User License' is 'Salesforce', and 'Profile' is 'System Administrator'. There are 'Save', 'Save & New', and 'Cancel' buttons at the top.

Field	Value
First Name	Project
Last Name	Admin
Alias	padmi
Email	admin@recipe.com
Username	admin@recipe.com
Nickname	User1758694606138257252
Title	
Company	
Department	
Division	
Role	Admin
User License	Salesforce
Profile	System Administrator
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>

-creating for End-User



- I need to create custom objects for my projects they are
 - Recipe
 - Meal Plan
 - Shopping List
 - Ingredients
- After creating custom objects we need to adjust the page layouts, fields and relations.

Org-Wide Defaults (OWD):

- Went to **Setup** → **Sharing Settings**.
- For each object created in the project (Recipe, Meal Plan, Ingredients, Shopping List), I set the **Default Internal Access** to **Private** so that users can see only their own records.
- Saved the changes.
- This ensures that end users cannot see other users' records by default, maintaining data security.

Sharing Rules:

- Currently, no additional sharing rules are required because all objects are set to **Private**.

- If needed in future, we can create rules to share records with certain roles or groups.

Login Access Policies:

- Configured under **Setup** → **Login Access Policies**.
- Enabled admin login access for troubleshooting and testing purposes.
- This allows administrators to log in as users (End-User) to verify permissions and record visibility.

Dev Org Setup:

- Verified that the **developer org** is fully configured and connected to Salesforce CLI.
- Confirmed that all required objects, fields, page layouts, profiles, and roles are created.

Sandbox Usage:

- Not applicable for this project, as all development is done directly in the production org.

Deployment Basics:

- Since Sandbox is not used, deployment of changes (custom objects, page layouts, profiles, fields, and automation) will be done directly in the org.
- Future deployments can be done using **Change Sets** or Salesforce CLI for migration between orgs if needed.