Recipe & Meal Planning Manager

CONTENT TO DO:

Phase 2: Org Setup & Configuration

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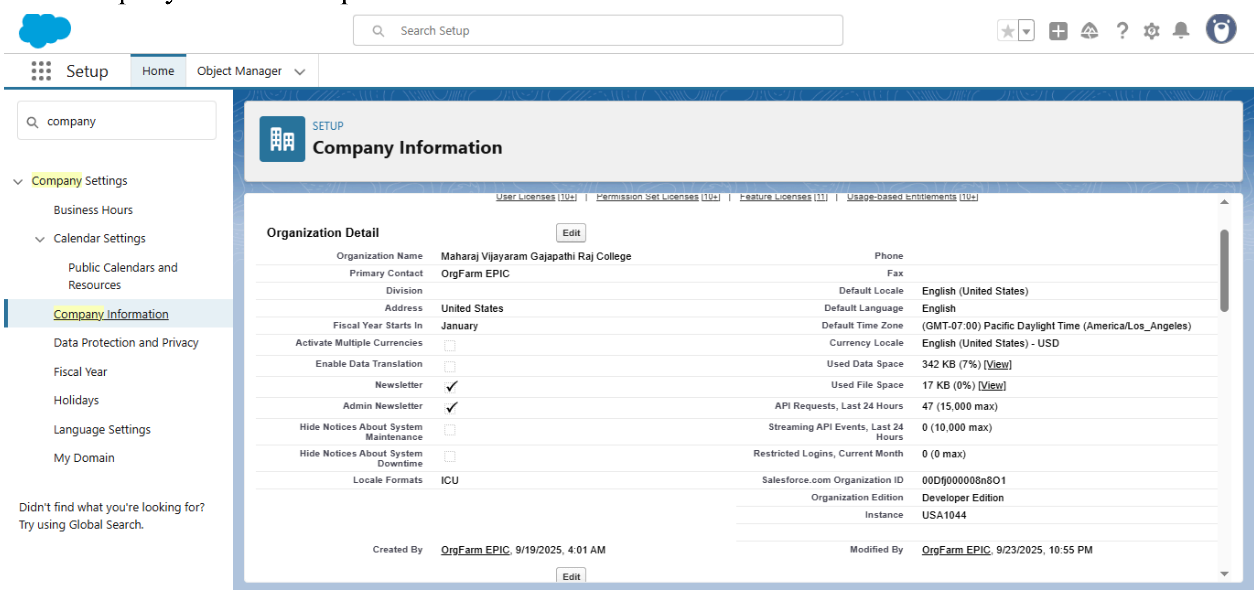
Salesforce Editions:
-I have downloaded the CLI.
-I created a new org for my project and connected it with my org.

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

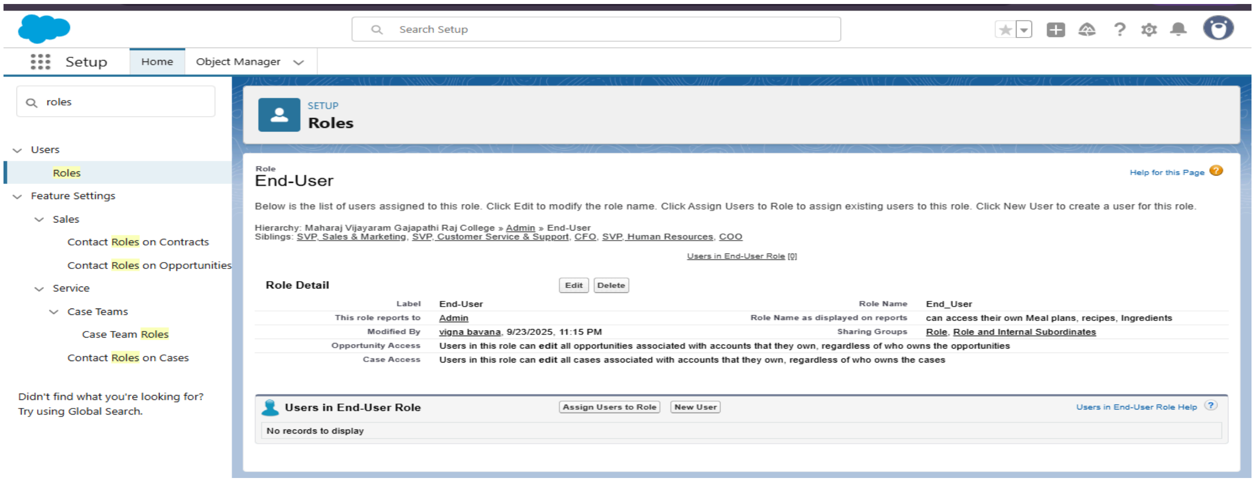


- Business Hours & Holidays
- Fiscal Year Settings

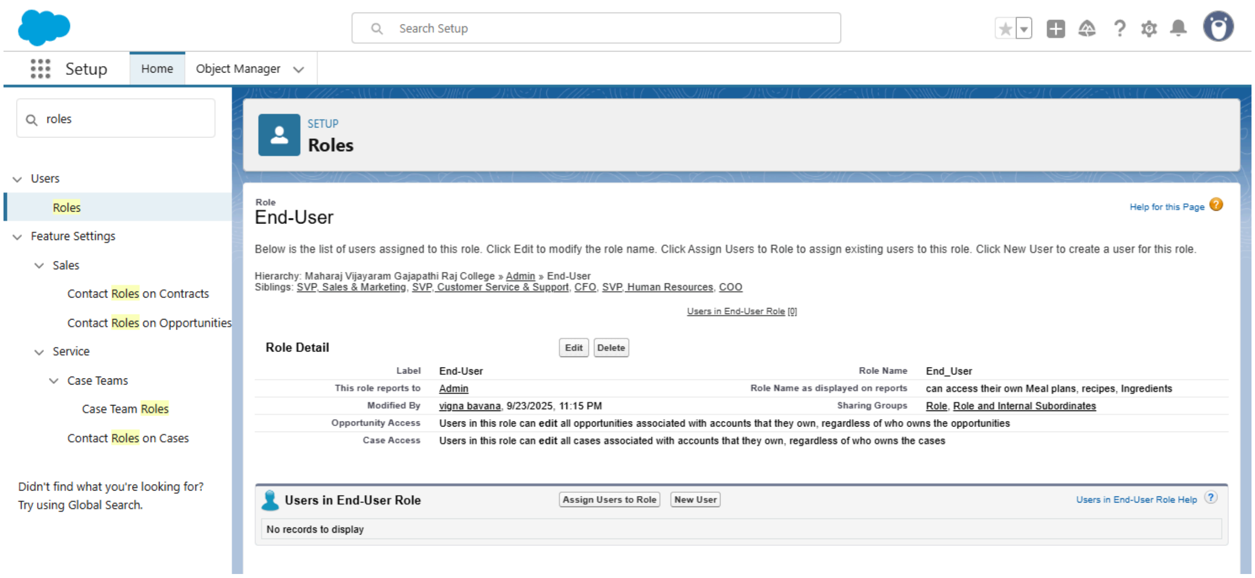
These are all done here.

- 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

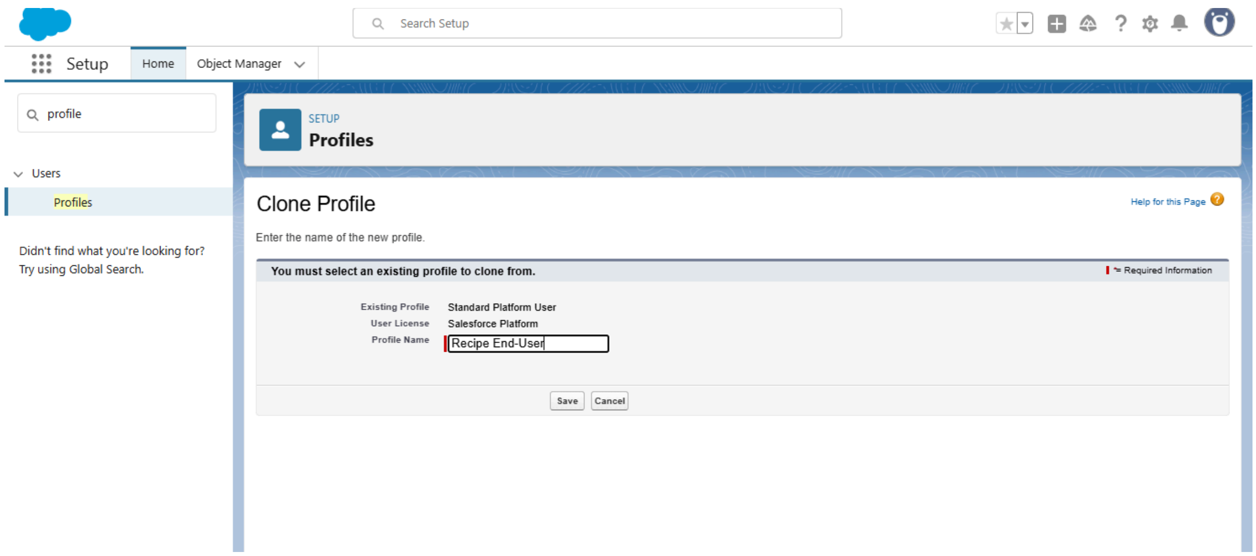


Here is the End-User roles setup



Role creation is done.

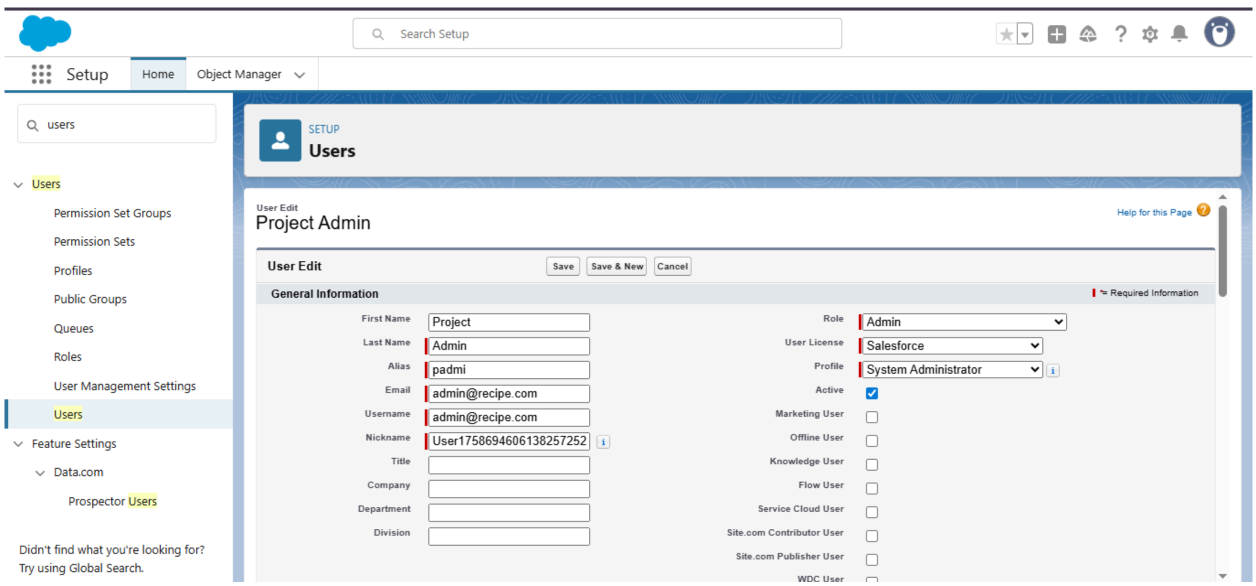
Now we need to setup profiles



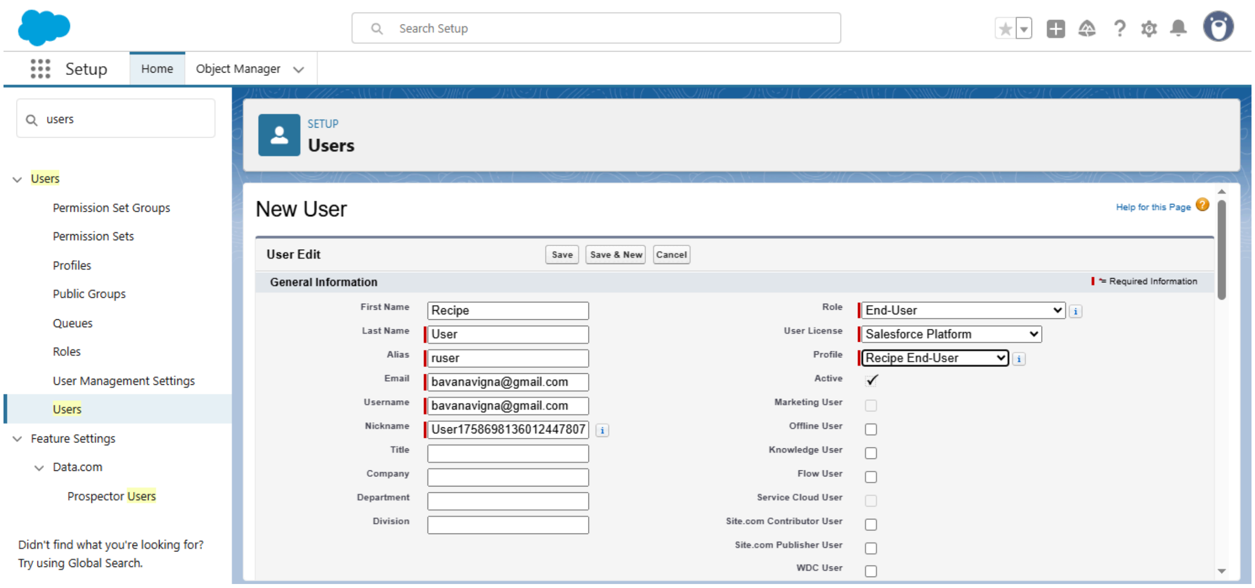
Here admin profile is already created and end-user profile is created now

Users creation:

-creating for Admin



-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.