Phase 2: Org Setup & Configuration – ReliefConnect *(Disaster Relief & Resource Management System)*

0. Preliminaries

1. Sign up / log into **Salesforce Developer Edition** (https://developer.salesforce.com).
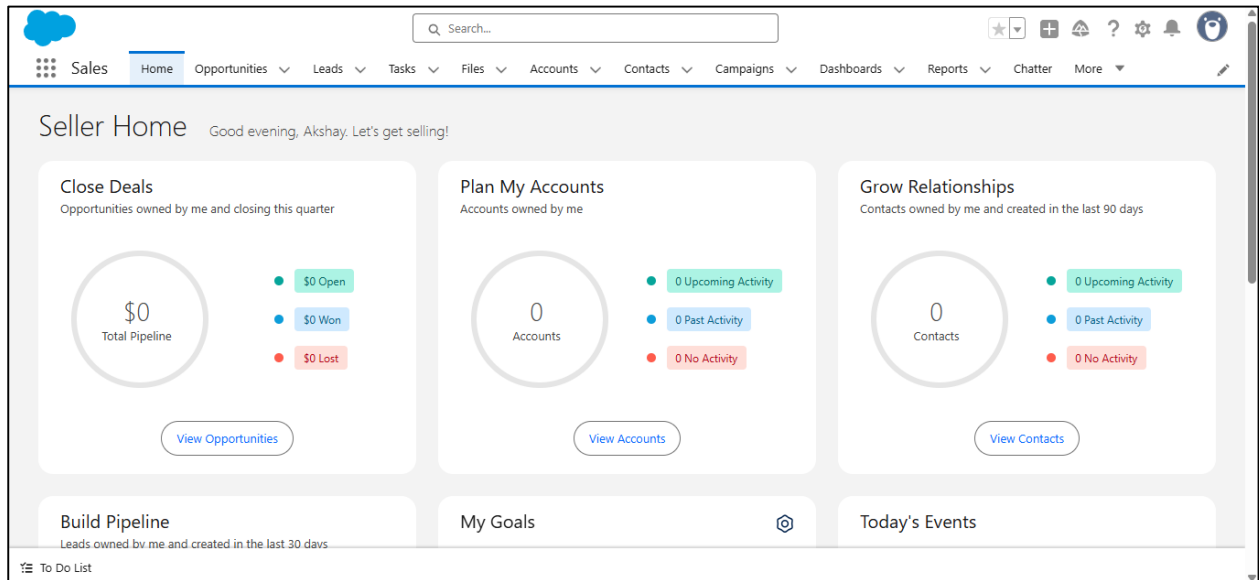

Figure 1 Developer Org home

1. Company Profile (Company Information)

1. Setup → Quick Find: Company Information → Open.
2. Edit → set Organization Name = **ReliefConnect**
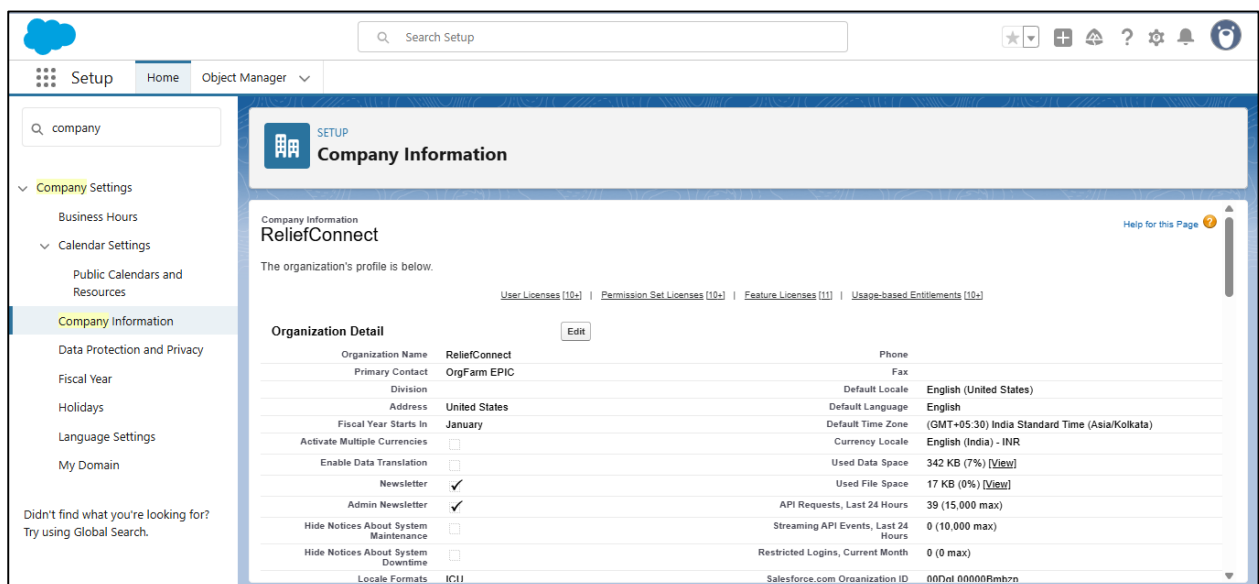   o Set Default Time Zone = Asia/Kolkata, Default Currency = INR. → Save.

Figure 2 Company info with org name, timezone, currency.

2. Business Hours & Holidays

1. Setup → Quick Find: **Business Hours** → New Business Hours.
   - Label: Emergency Operations (24x7) → Set Mon–Sun 12:00 AM–12:00 AM → Save.
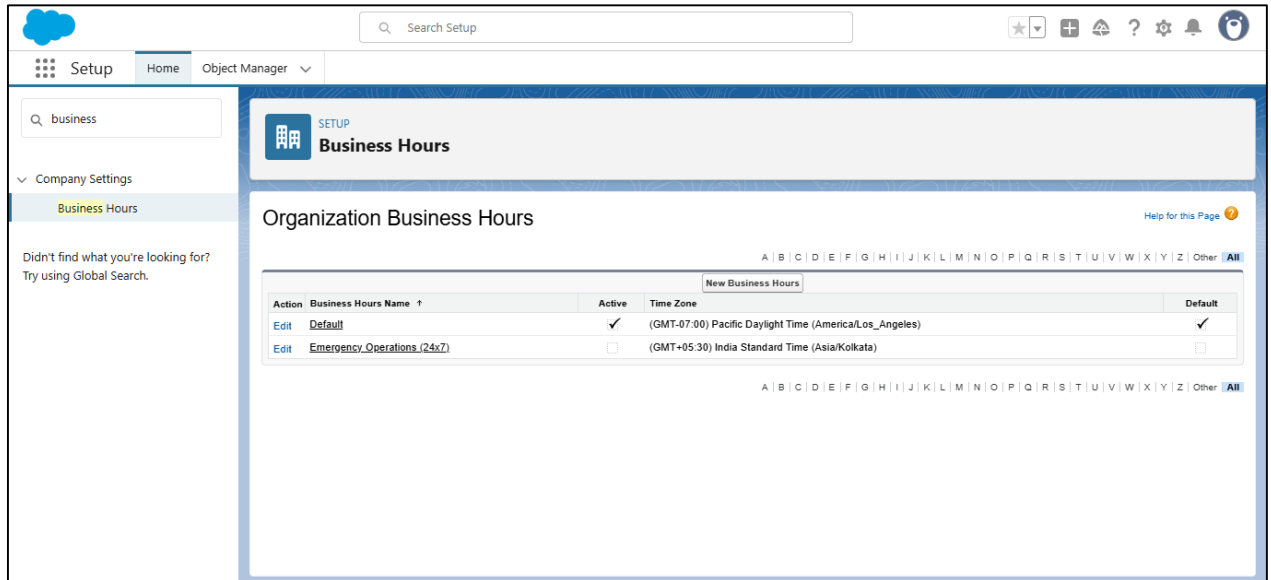

Figure 3 Business Hours
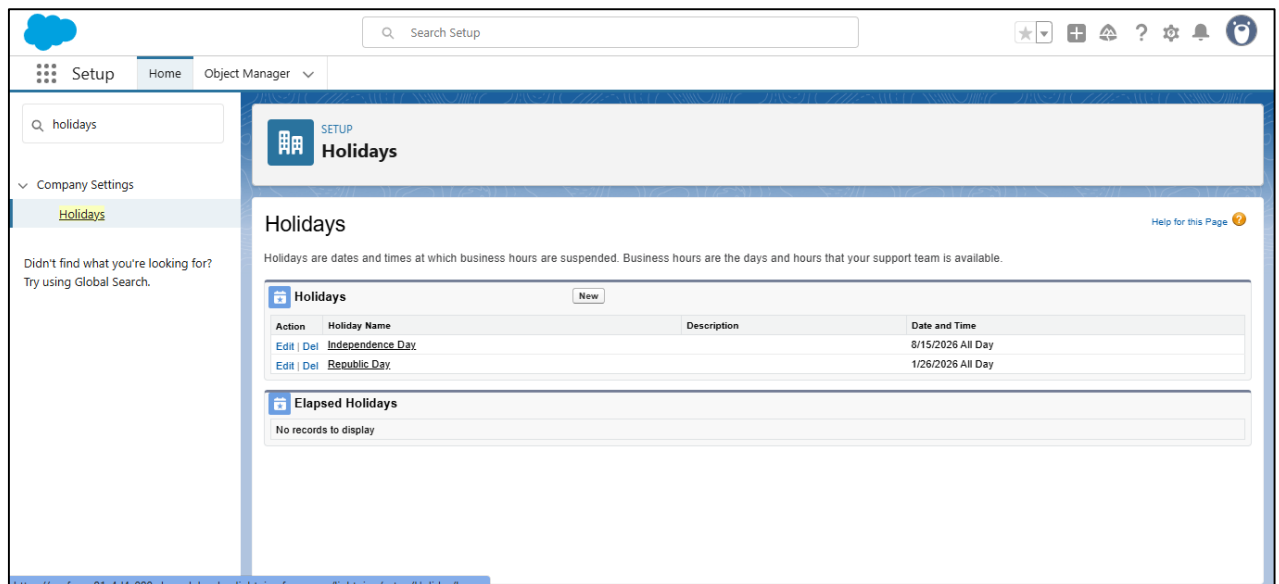
Setup → Quick Find: **Holidays** → New Holiday.

Figure 4 Holidays

3. Fiscal Year

1. Setup → Quick Find: **Fiscal Year** → Verified default fiscal year (Standard). set **April-March**.
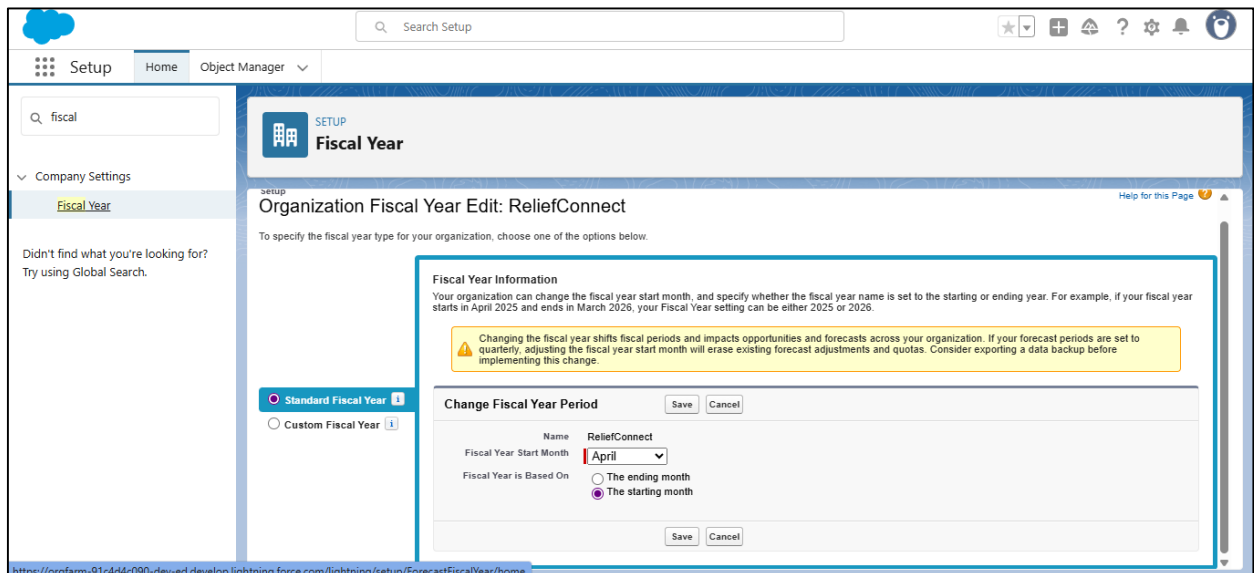

Figure 5 Fiscal Year

4. Create Sample Users & Assign Licenses

1. Setup → Quick Find: **Users** → Users → New User. Create three users:
   - Relief Head — relief.head@demo.com — Profile: System Administrator
   - Regional Coordinator — coordinator@demo.com — Profile: Standard User
   - Volunteer — volunteers@demo.com — Profile: Standard User
2. Fill First/Last name, Username (unique), Email, License = Salesforce or Platform if available. Save
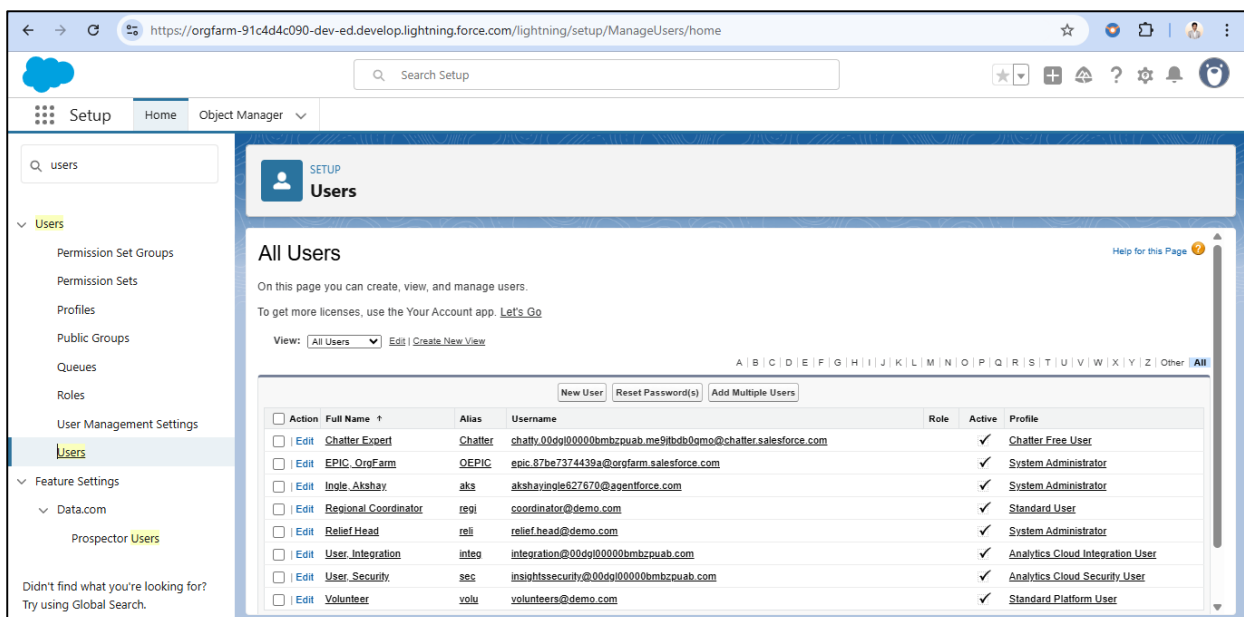

Figure 6 Sample Users

5. Role Hierarchy

1. Setup → Quick Find: **Roles** → Click **Set Up Roles** → Expand and **Add Role**:
   o Top Role: Relief Head
   o Child under Relief Head: Regional Coordinator
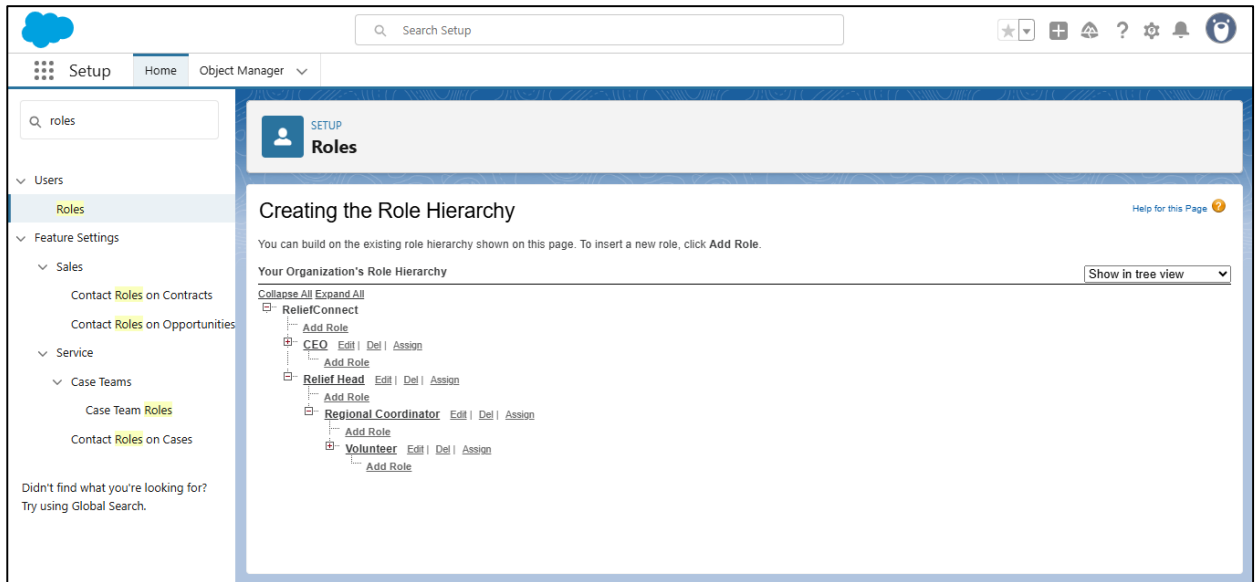   o Child under Regional Coordinator: Volunteer
2. Save.

Figure 7 Role hierarchy tree (Relief Head > Coordinator > Volunteer).

6. Profiles (clone & edit)

1. Setup → Quick Find: **Profiles** → Open Standard User → Click **Clone** → Name: Coordinator Profile.
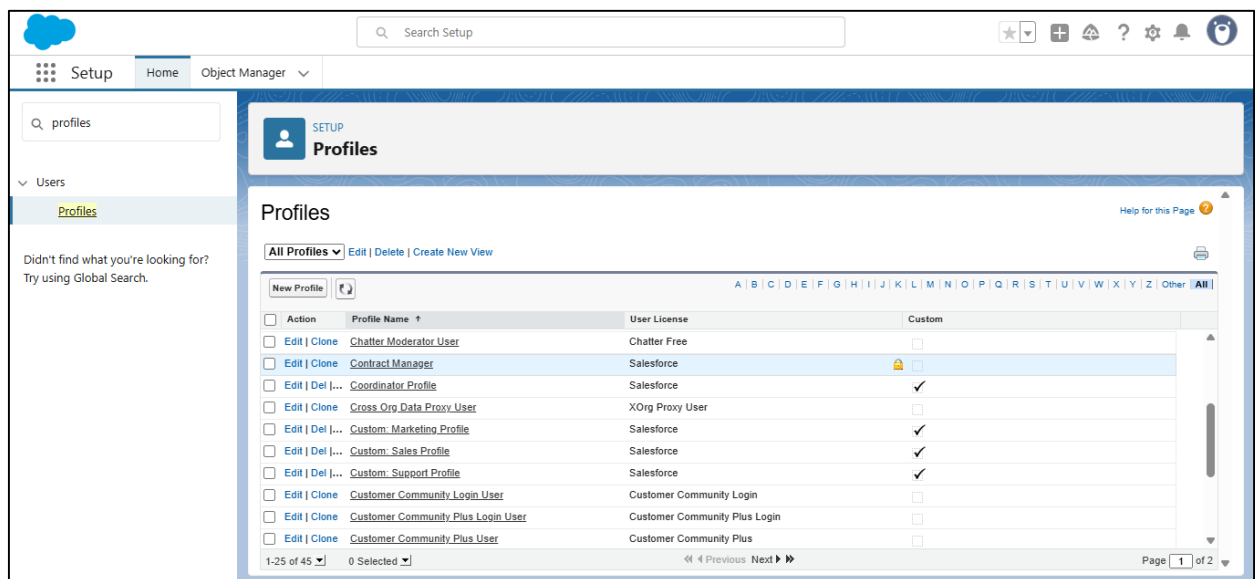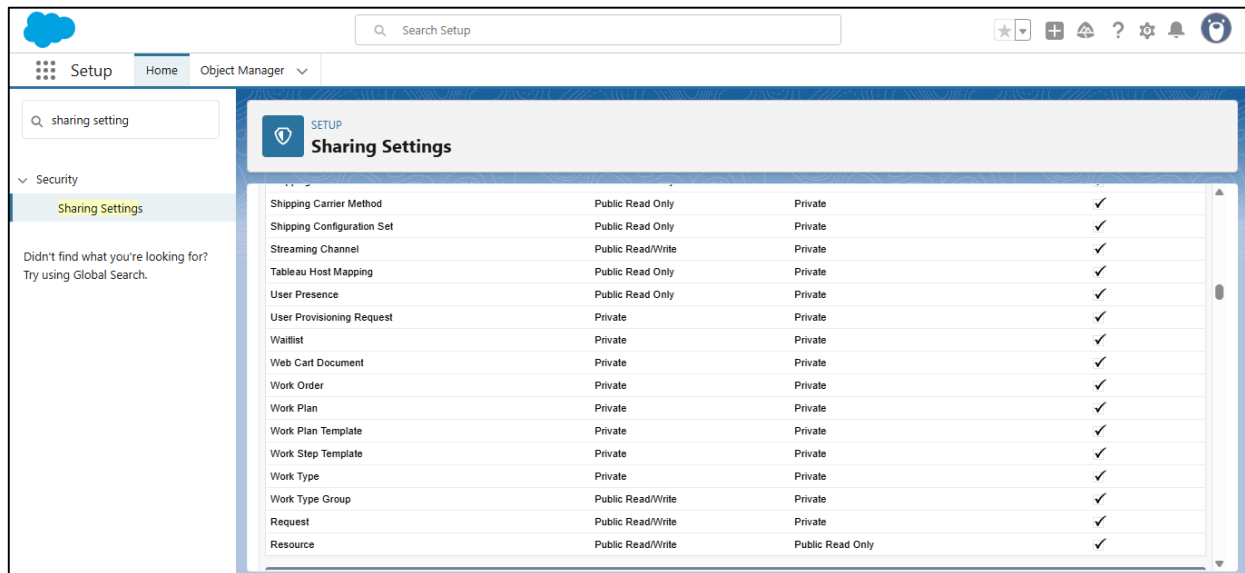2. Clone another profile → Volunteer Profile

Figure 8 Coordinator Profile object permissions

7. Organization-Wide Defaults (OWD)

1. Setup → Quick Find: **Sharing Settings** → Edit.
2. Set defaults:
   - **Requests** → Private
   - **Resources** → Public Read Only
   - **Volunteer** → Private
3. Save.

Figure 9 OWD table showing Requests private, Resources public read only

8. Sharing Rules

1. Setup → Quick Find: **Sharing Settings** → Scroll to object Requests → Click **New** under Sharing Rules.
2. Create a rule:

   - Rule Type: **Owner based**
   - Owned By: Regional Coordinator (or Owner = Volunteer) → Share with: Role: Regional Coordinator or a Public Group.
   - Access Level: Read/Write. → Save.

9. Login Access Policies, IP Ranges & Login Hours

1. Setup → Quick Find: **Login Access Policies** → Enable **Administrators Can Log in as Any User**
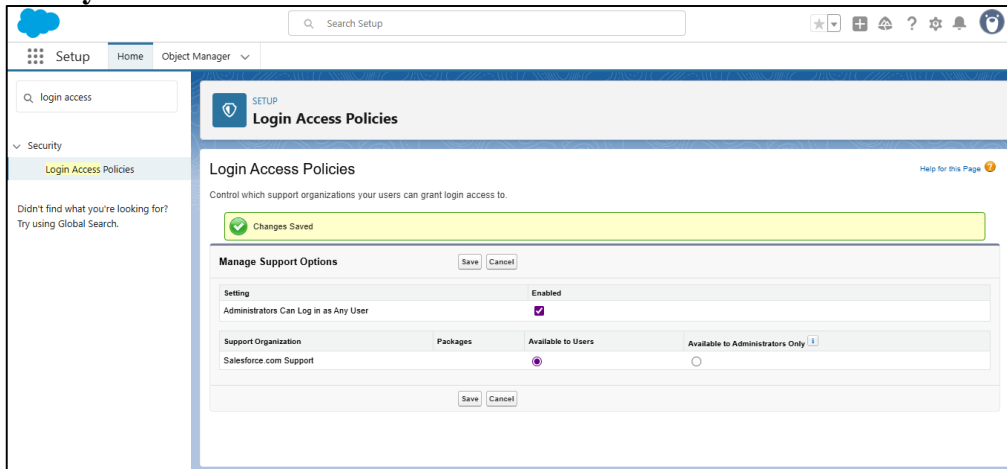

Figure 10 Login Access Policies

2. Setup → Profiles → open Volunteer Profile → Login Hours → Edit → Set 08:00–22:00 for allowed days → Save.
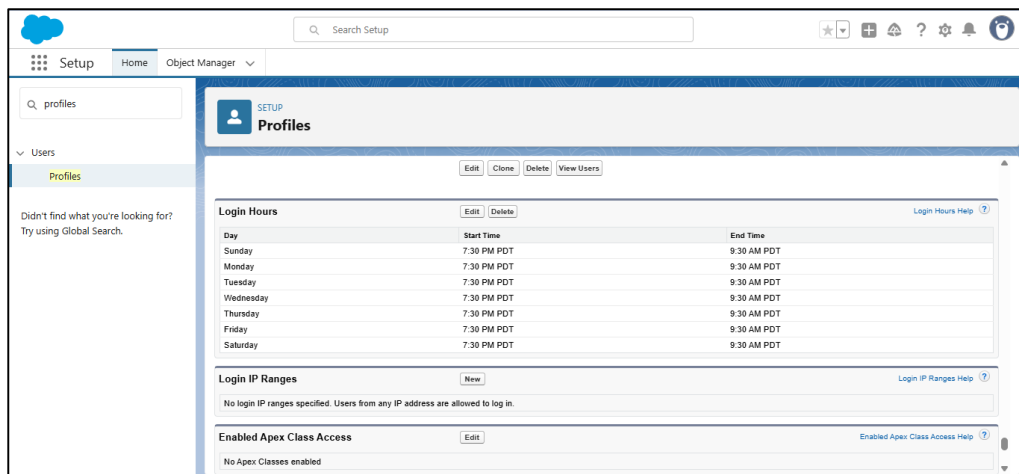

Figure 11 Login Hours

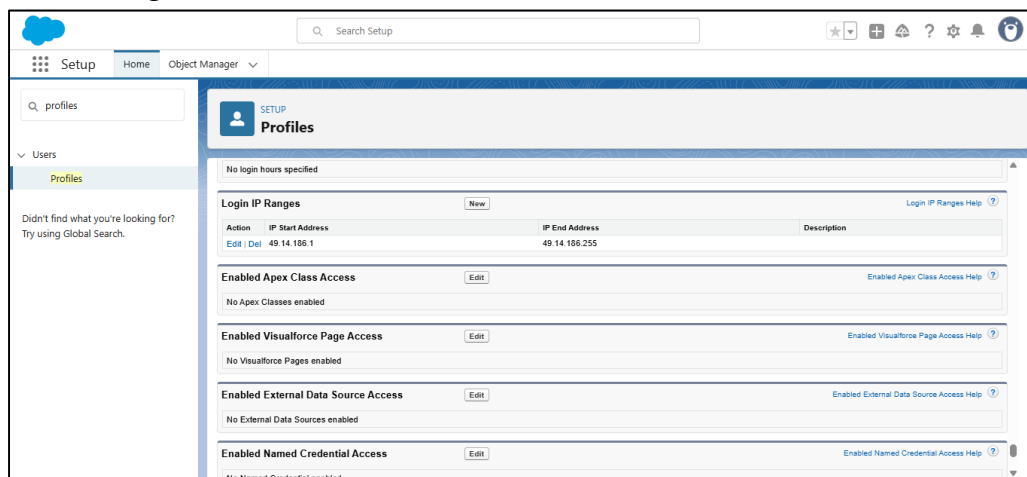3. Setup → Profiles → open Coordinator Profile → Login IP Ranges → Add IP ranges to restrict logins → Save.

Figure 12 IP Assignment

10. Create Lightning App (ReliefConnect)

1. Setup → Quick Find: **App Manager** → New Lightning App.

   o App Name: ReliefConnect → Branding icon added → Next.

   o Add Nav Items: Requests, Volunteers, Resources, Locations, Reports, Dashboards → Save & Finish.
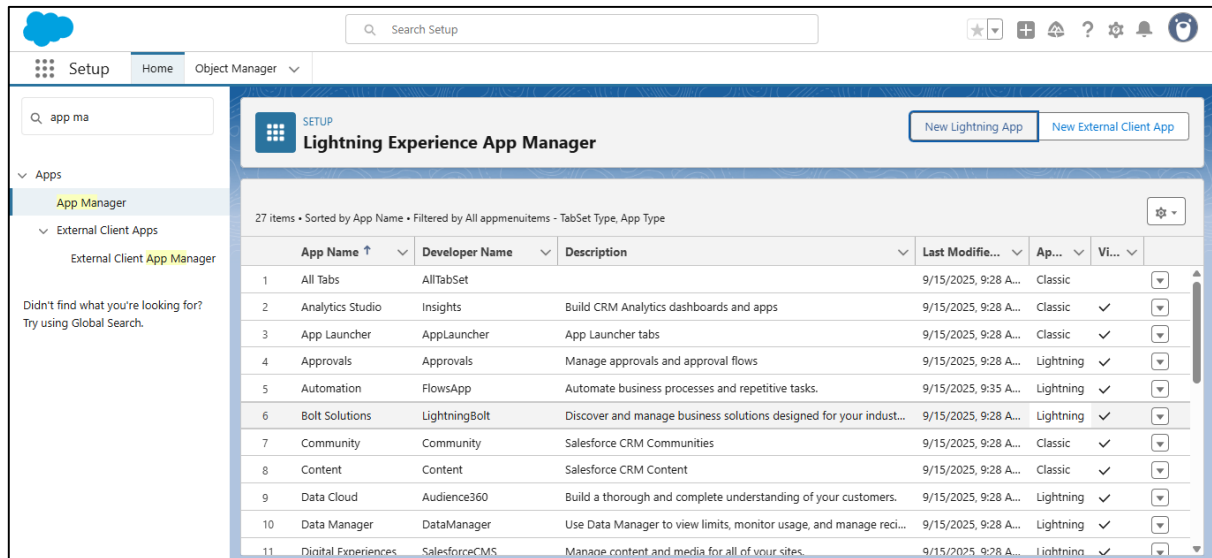

Figure 13 App Manager
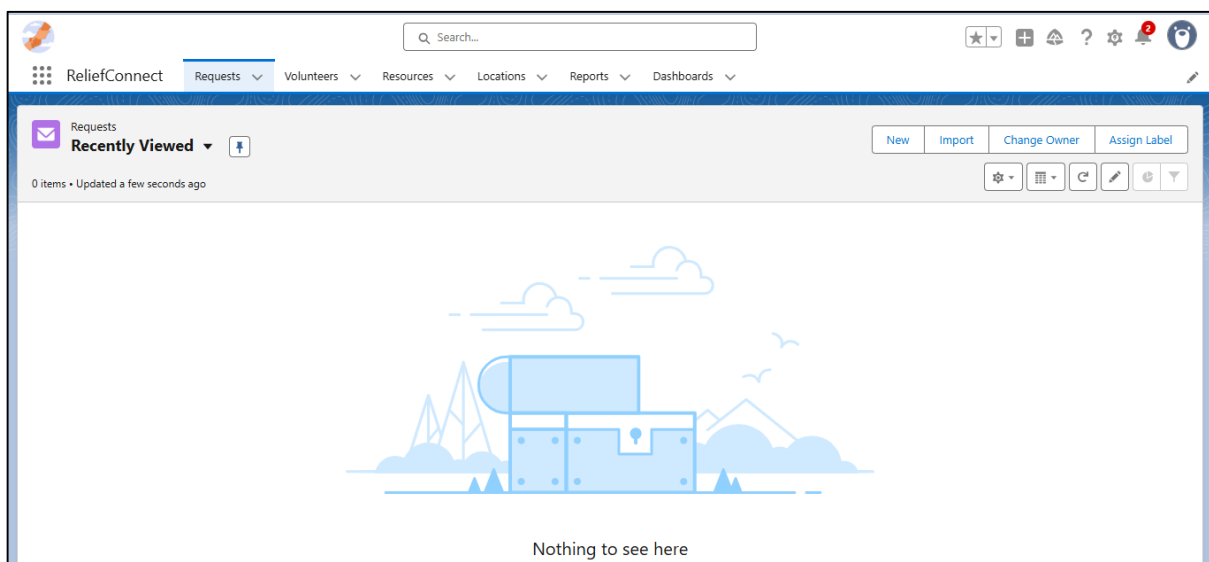
App Launcher → search for ReliefConnect → click →ReliefConnect App is opened

Figure 14 ReliefConnect App