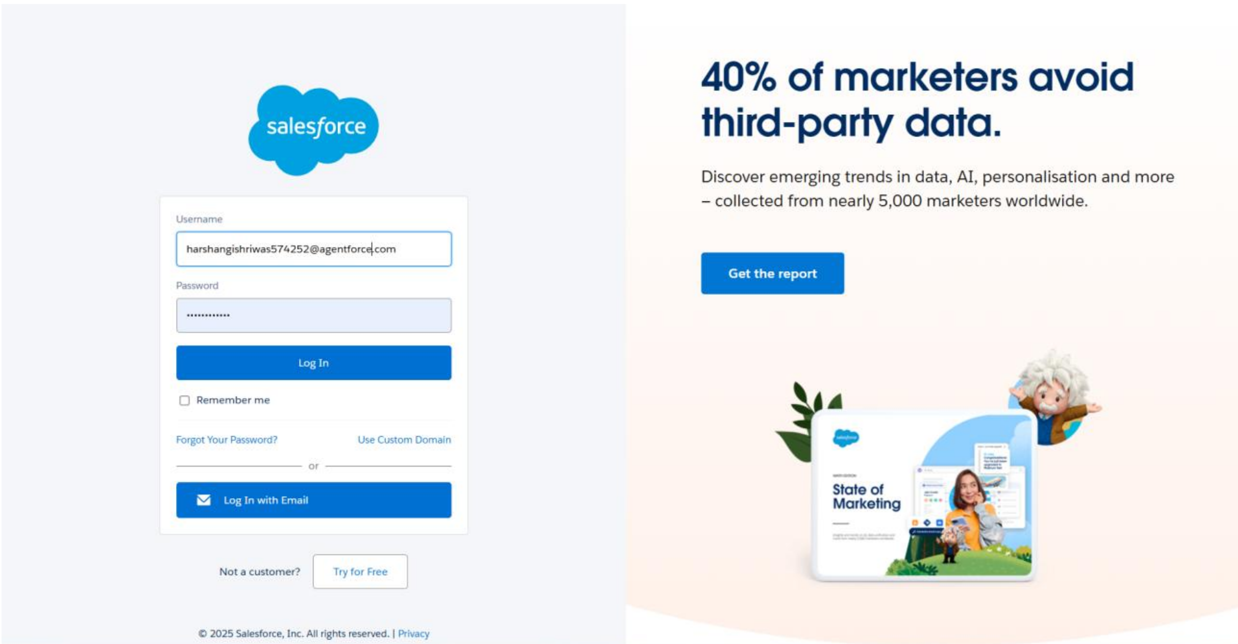
Phase 2 : Org SetUp and configuration

1.Salesforce Edition :

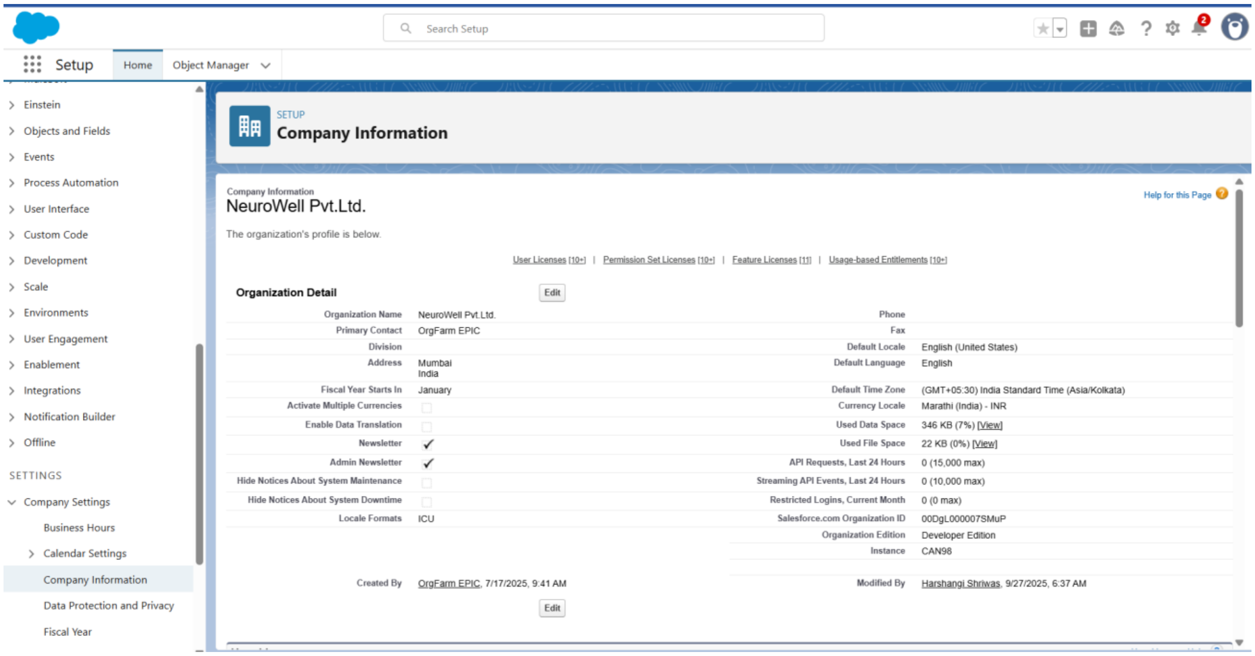
Salesforce offers multiple editions such as Essentials, Professional, Enterprise, Unlimited, and Developer. For this project, we are using the Developer Edition because it is free, provides all major features for learning and development, and supports configuration and customization.



2. Company Profile Set Up :

We set up the Company Profile to define organization details like Company Name, Default Locale, Currency, Language, and Time Zone.

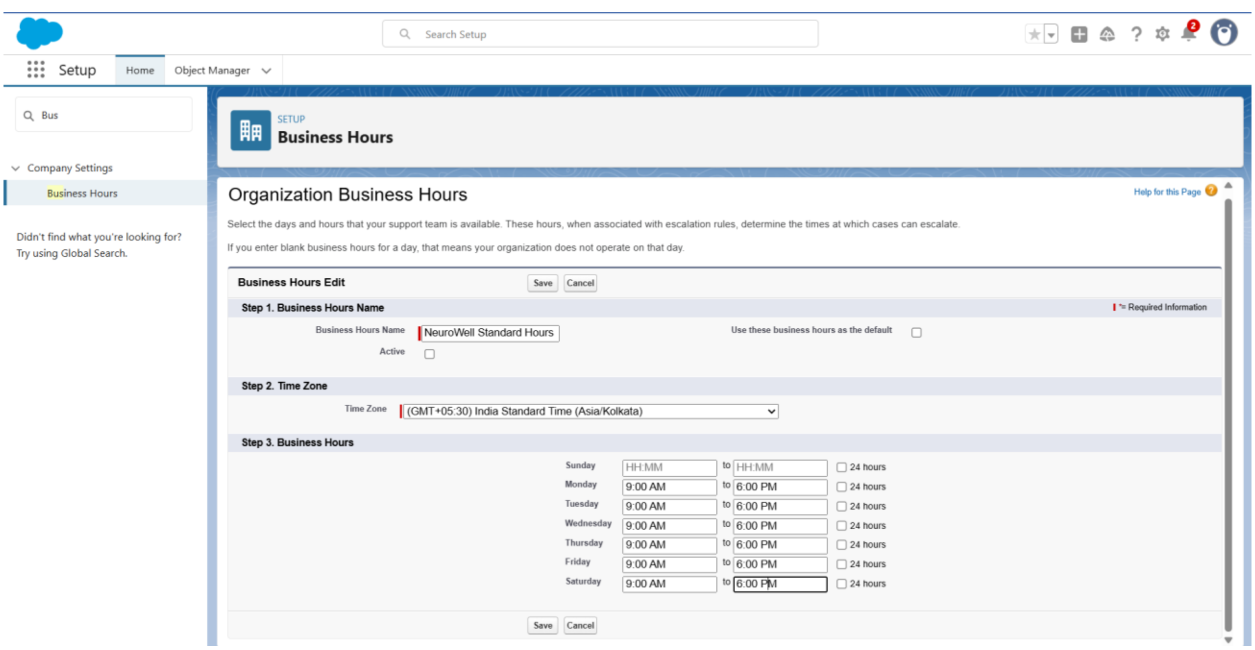
- Company Name: *NeuroWell Pvt. Ltd.*
- Default Locale: English (United States)
- Currency: INR
- Time Zone: (GMT+05:30) India Standard Time

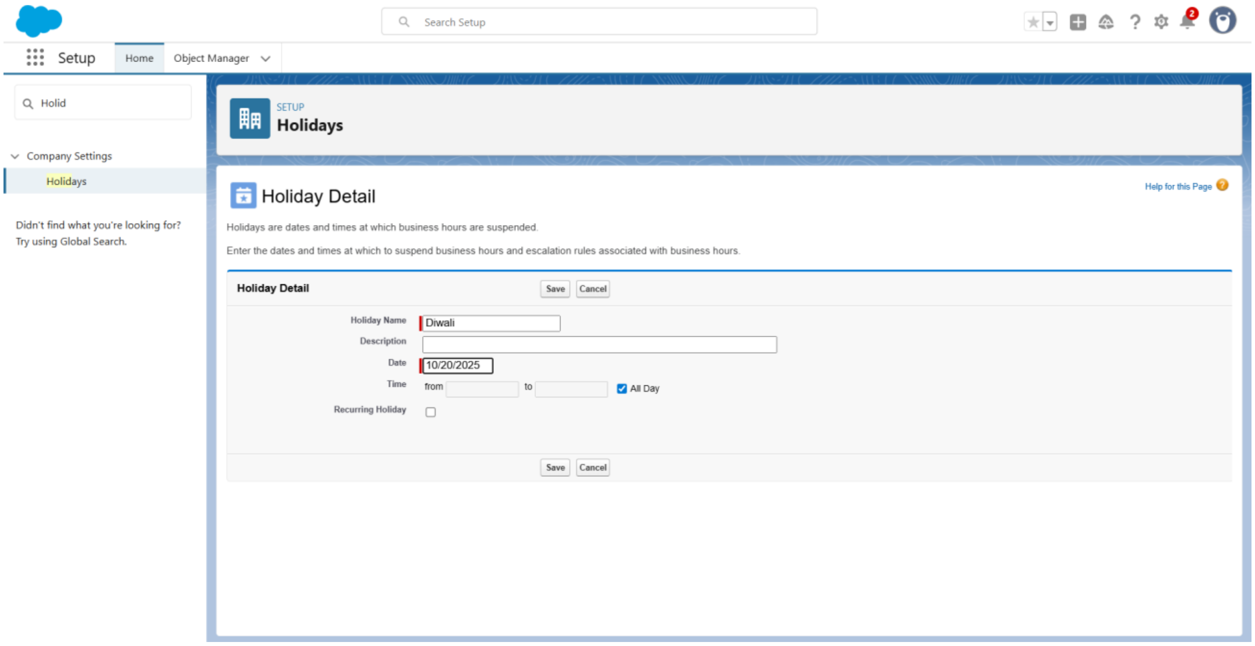


3. Business Hours And Holidays :

Business Hours define when the support team is available, and Holidays specify days when business is closed.

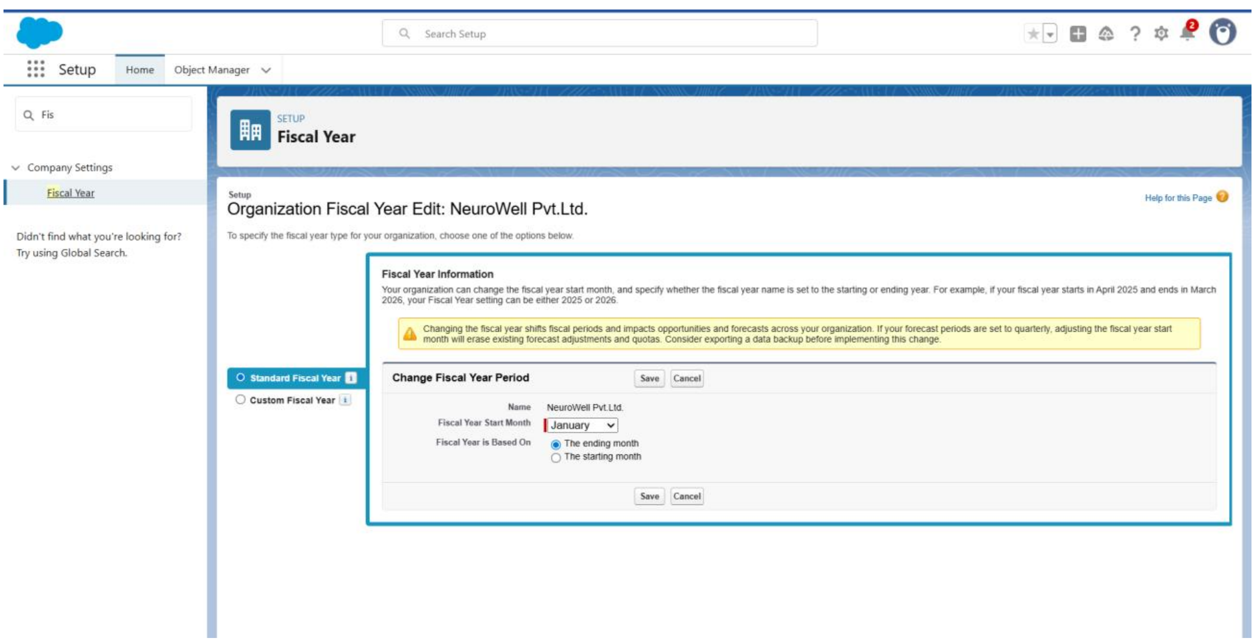
- Business Hours: 9:00 AM – 6:00 PM (Monday–Saturday)
- Holidays: Diwali





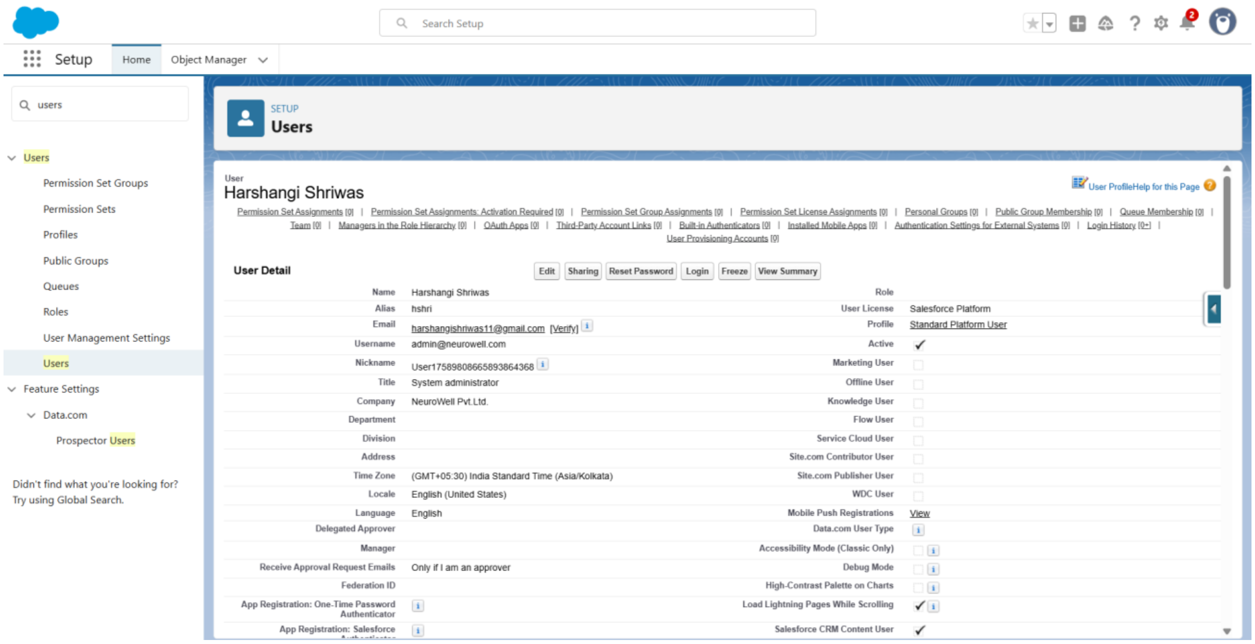
4. Fiscal Year Settings :

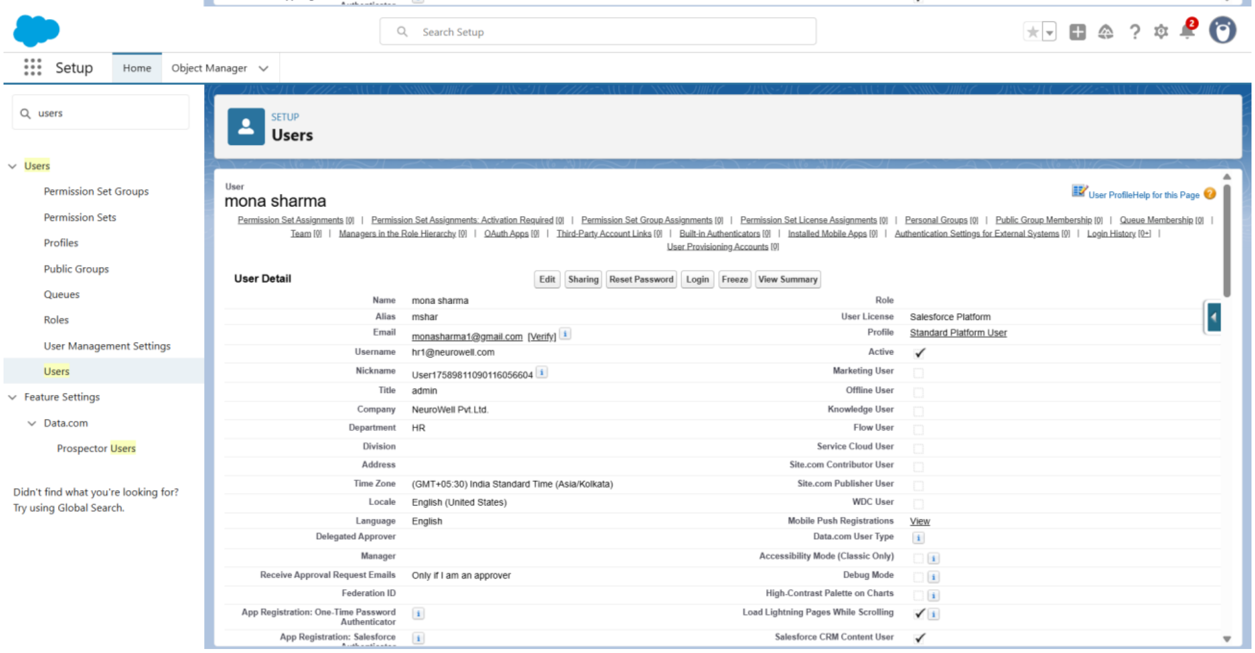
Fiscal Year settings are important for financial tracking and reporting. For our project, we use the Standard Fiscal Year:



5. User SetUp and Licences :

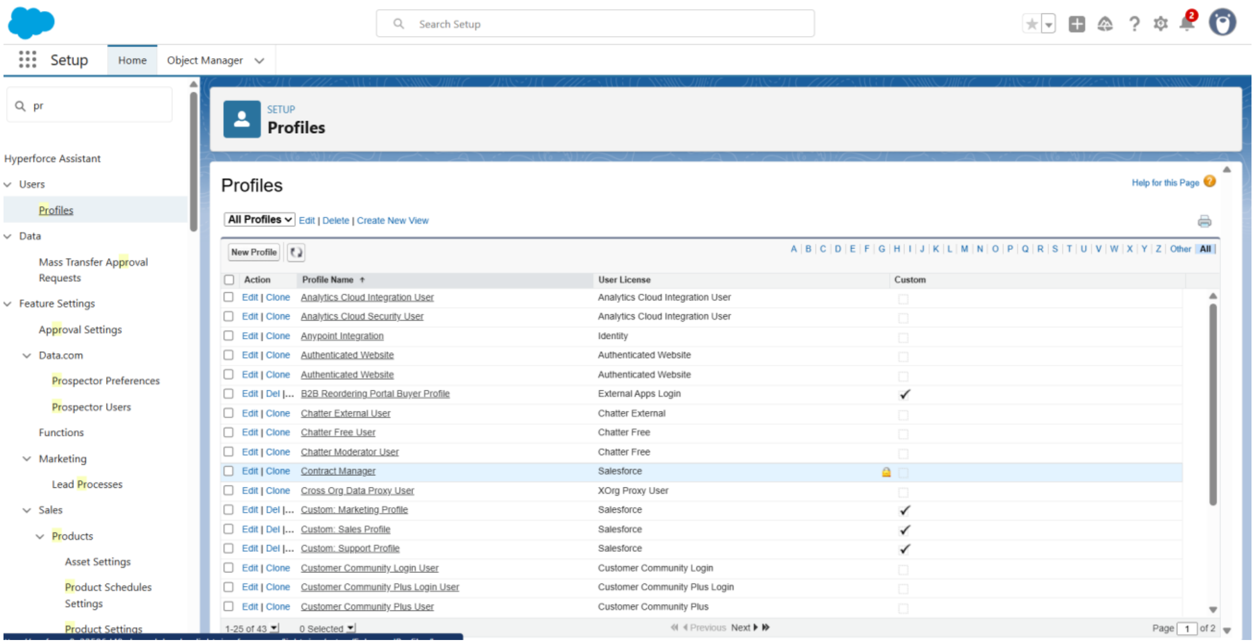
We created multiple users to simulate a real organization, assigning them different licenses.





6. Profiles :

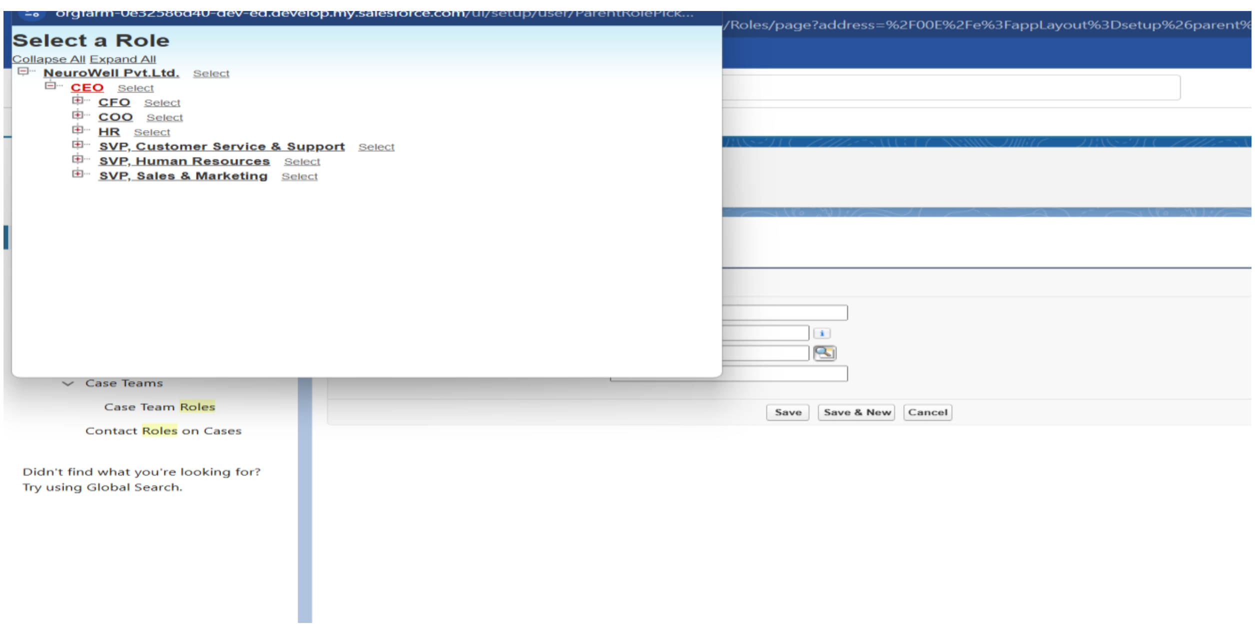
Profiles control what users can do in Salesforce (permissions, objects, fields).

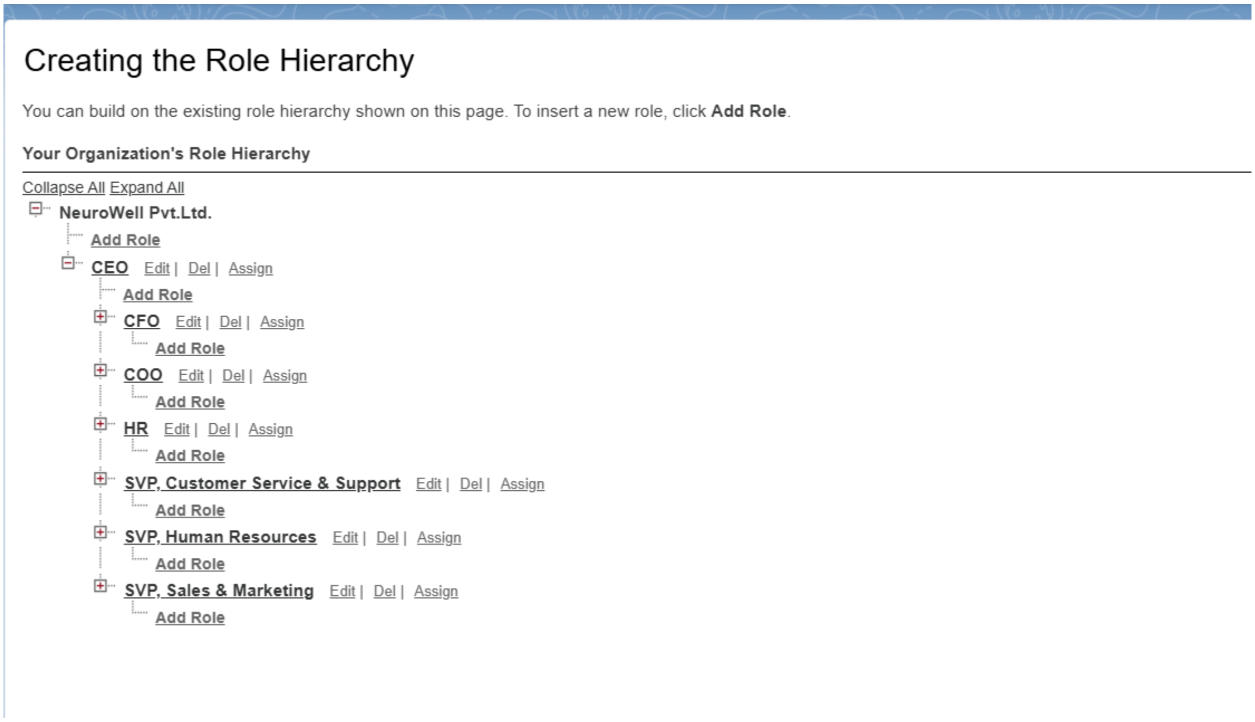


7. Roles :

Roles define hierarchy and record visibility. We set up:

- **CEO → HR → Counselor → Patient**

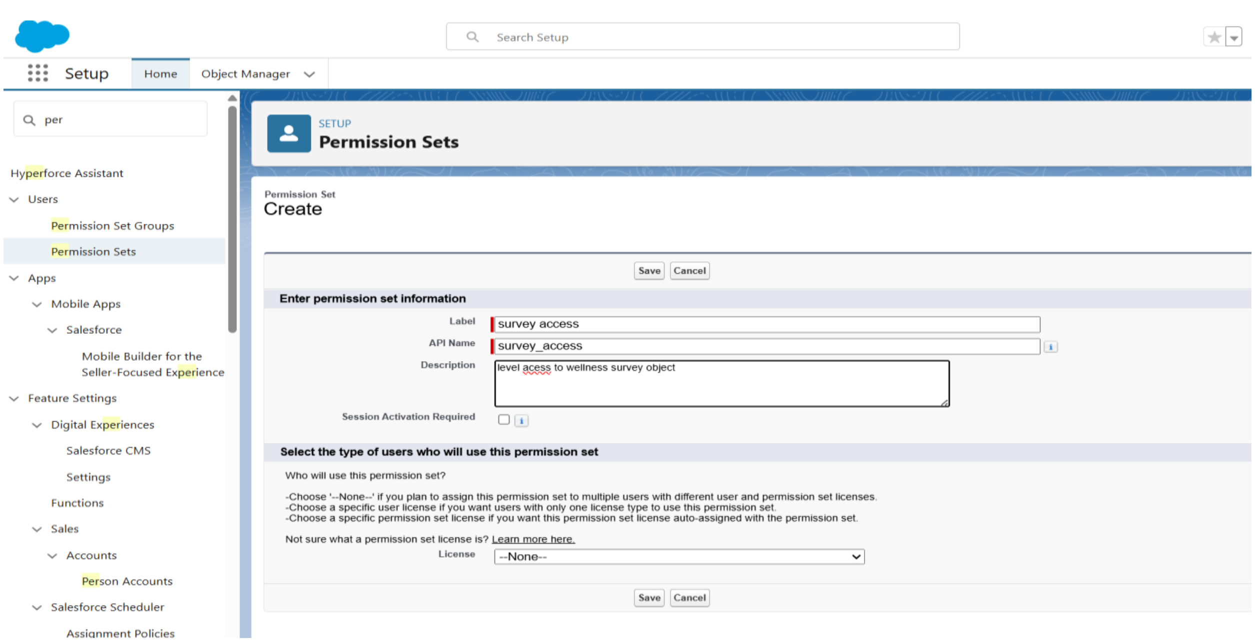


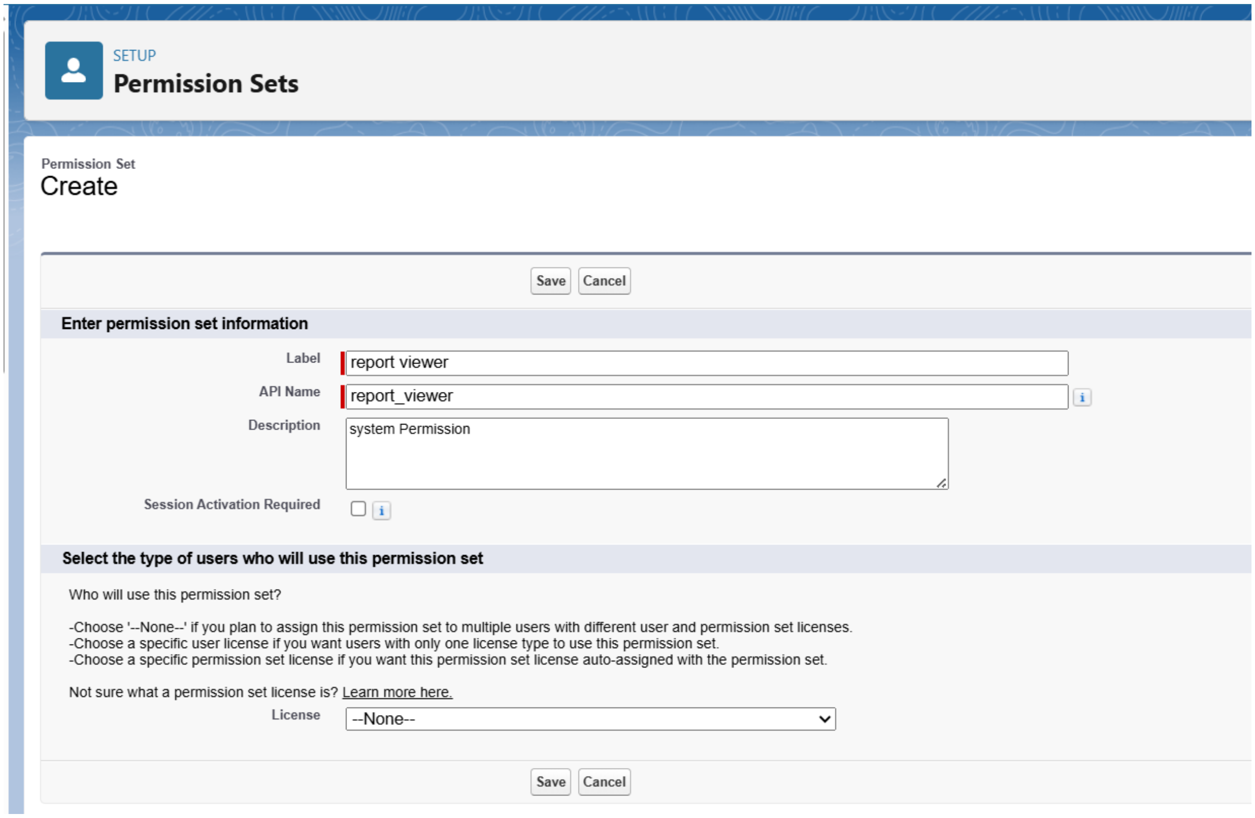


8. Permission sets:

Permission Sets give additional access without changing the user's profile.

- Example: "Survey Access" permission set → Allows a Counselor to access dashboards even if not part of their profile

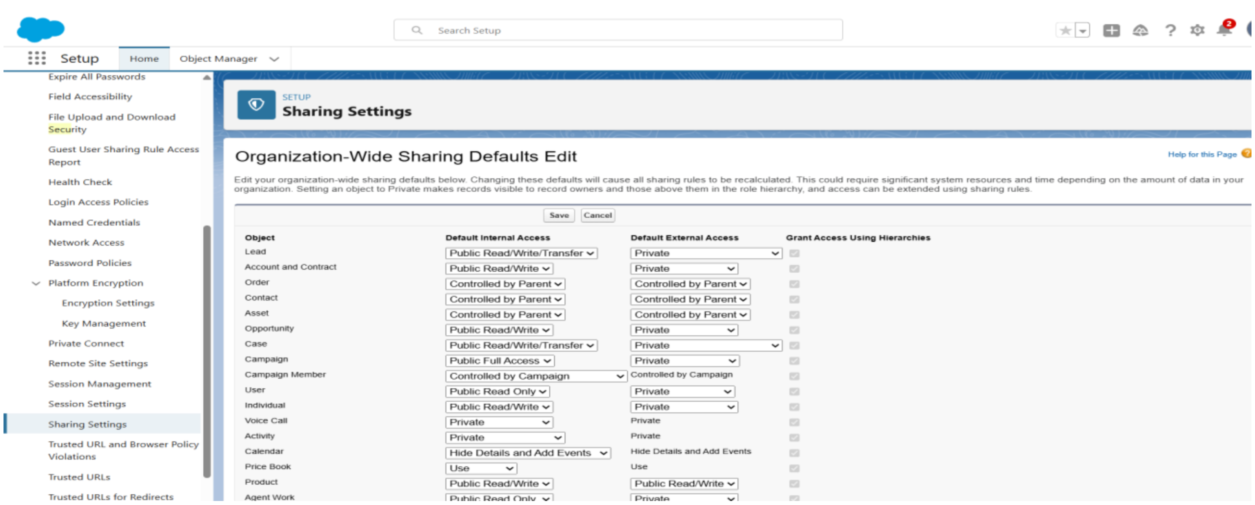




9. OWD:

OWD settings ensure data privacy for sensitive mental wellness data.

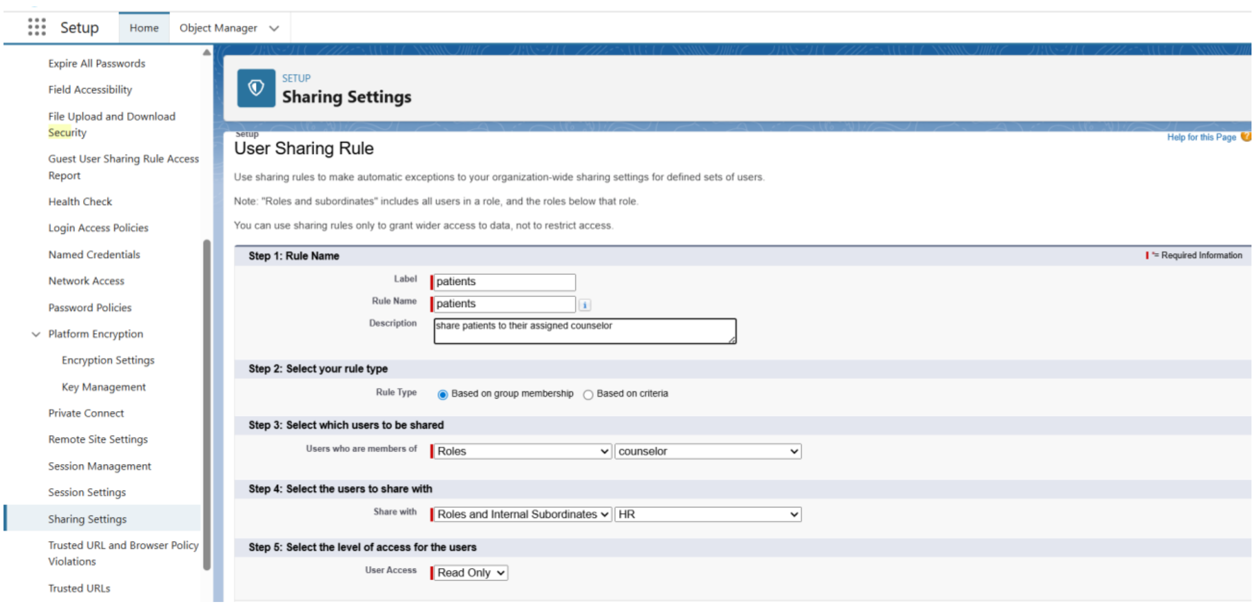
- Client Records: Private
- Counseling Sessions: Private

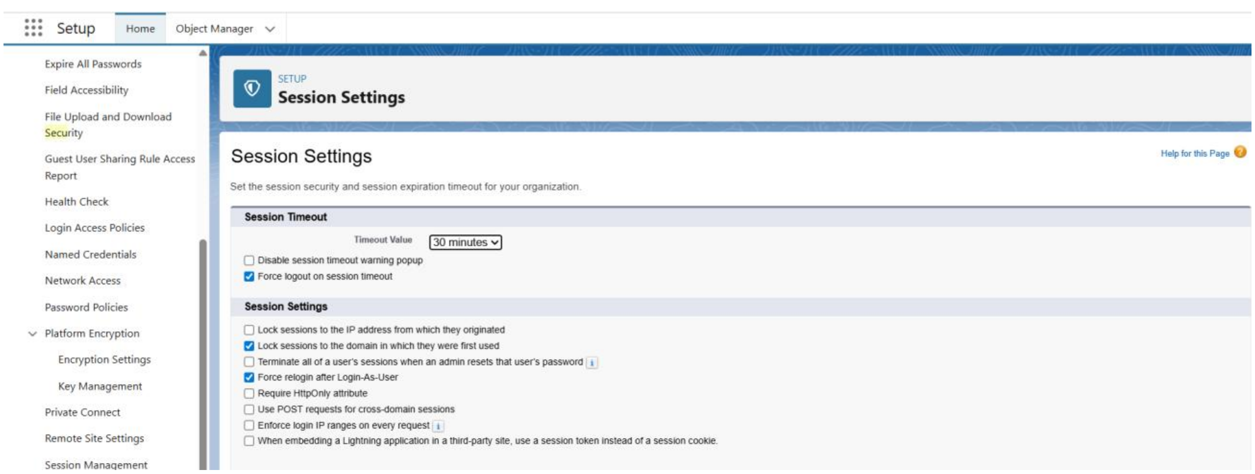


10. Sharing Rules :

Sharing rules extend access where required.

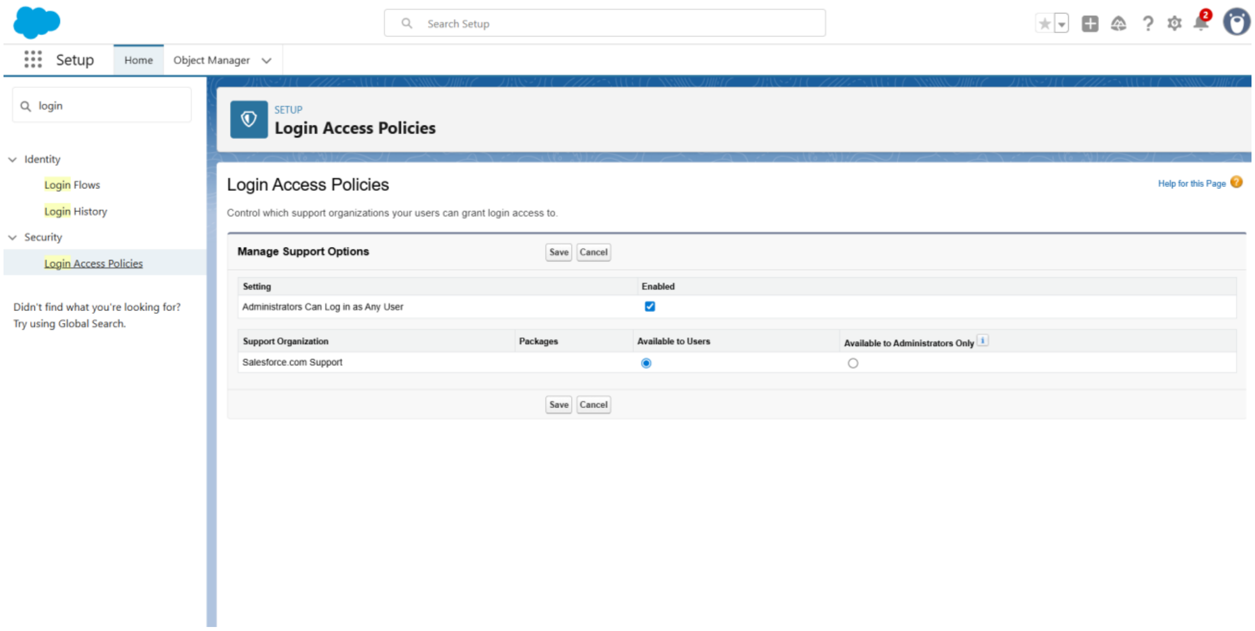
- Example: Counselors in the same department can view each other's patient session records.





11. Login Access Policies :

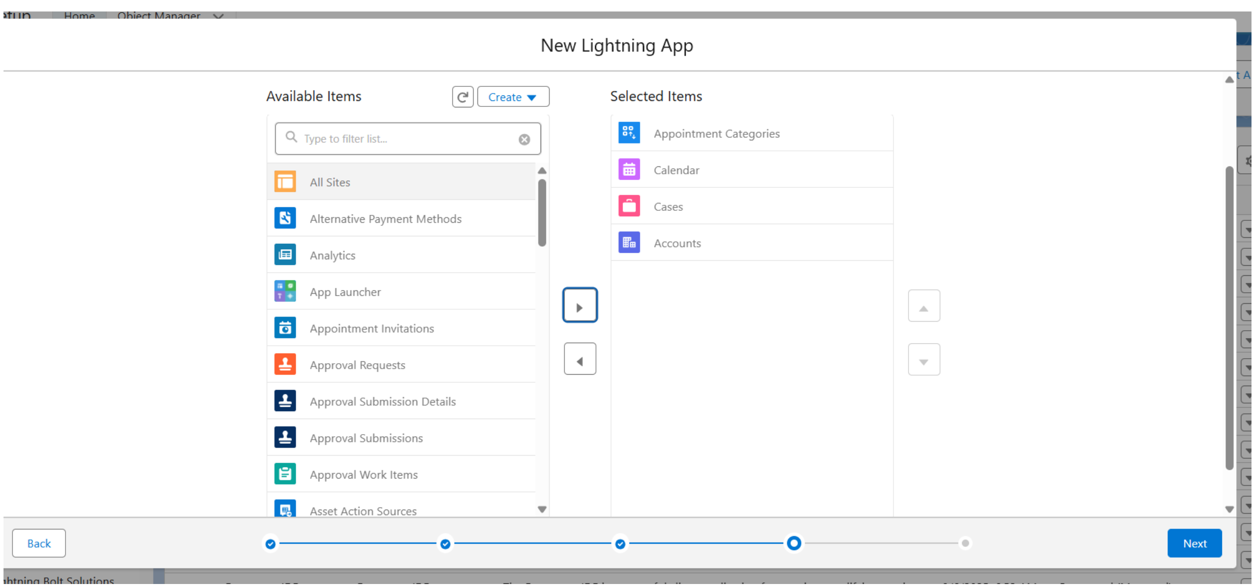
Enabling Login Access allows Admins to log in as users for troubleshooting issues. This is useful for testing counselor/client accounts.

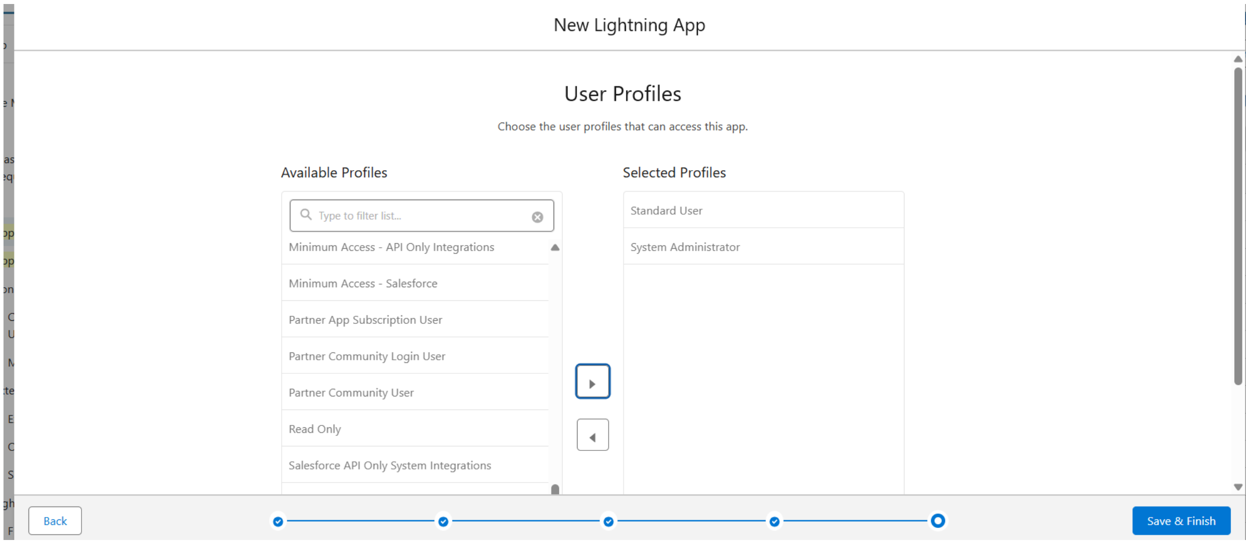


12.Dev Org SetUp :

We created a free Salesforce Developer Edition Org for NeuroWell:

- Org Name: *NeuroWell CRM*
- Purpose: Development, configuration, and testing of project modules





13. Sandbox usage :

Since Developer Edition does not support Sandboxes, we are using a single Developer Org for configuration and VS Code with GitHub for version control instead of Sandboxes.

14. Deployment basics :

We simulated deployment by pushing our project metadata and documentation to GitHub. This repository acts as our deployment medium for review and version control.