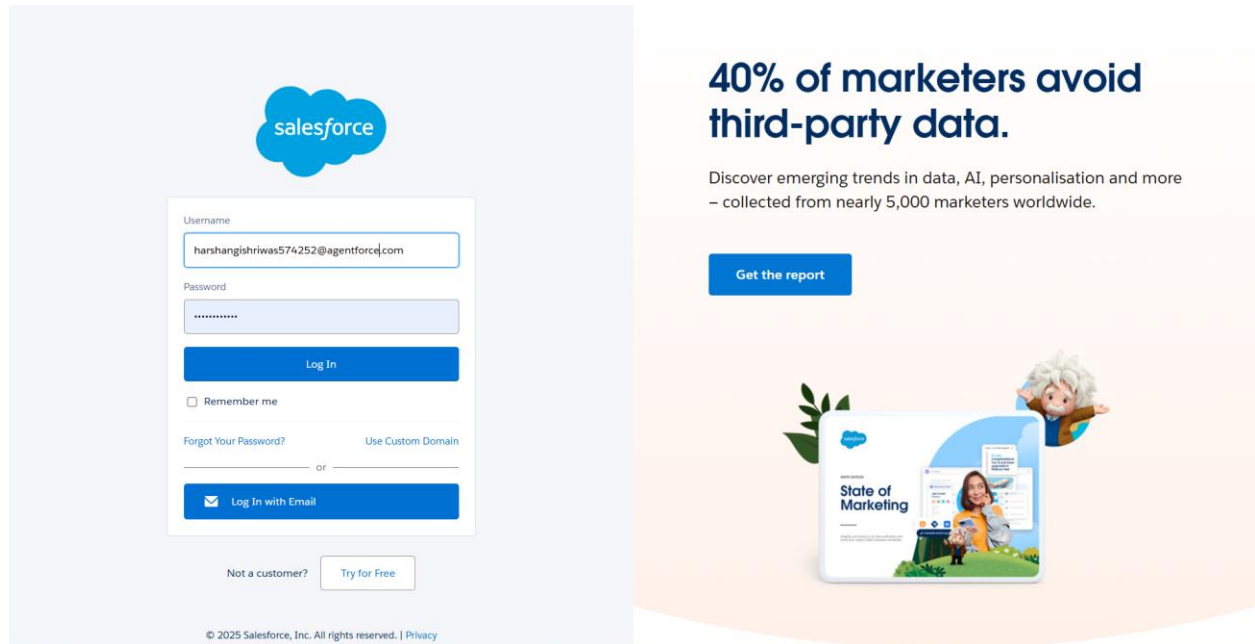


## Phase 2 : Org SetUp and configuration

### 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

The screenshot shows the Salesforce Setup interface. On the left, a navigation menu lists various setup areas like Einstein, Objects and Fields, Events, Process Automation, User Interface, Custom Code, Development, Scale, Environments, User Engagement, Enablement, Integrations, Notification Builder, and Offline. Under the 'SETTINGS' section, 'Company Settings' is expanded, showing 'Business Hours', 'Calendar Settings', 'Company Information' (selected), 'Data Protection and Privacy', and 'Fiscal Year'. The main content area is titled 'Company Information' for 'NeuroWell Pvt.Ltd.'. It displays the organization's profile and provides links to 'User Licenses (130)', 'Permission Set Licenses (130)', 'Feature Licenses (11)', and 'Usage-based Entitlements (130)'. The 'Organization Detail' section includes fields for Organization Name, Primary Contact, Division, Address, Fiscal Year Starts In, Activate Multiple Currencies, Enable Data Translation, Newsletter, Admin Newsletter, Hide Notices About System Maintenance, Hide Notices About System Downtime, and Locale Formats. The 'Phone' section includes fields for Phone, Fax, Default Locale, Default Language, Default Time Zone, Currency Locale, Used Data Space, Used File Space, API Requests, Last 24 Hours, Streaming API Events, Last 24 Hours, Restricted Logins, Current Month, Salesforce.com Organization ID, Organization Edition, and Instance. The 'Created By' and 'Modified By' fields are also visible.

### 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

The screenshot shows the Salesforce Setup interface for 'Business Hours'. The left navigation menu is the same as the previous screenshot, but 'Business Hours' is now selected under 'Company Settings'. The main content area is titled 'Business Hours' and contains the 'Organization Business Hours' section. This section includes a description: 'Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate. If you enter blank business hours for a day, that means your organization does not operate on that day.' The 'Business Hours Edit' section has two steps. Step 1, 'Business Hours Name', shows the name 'NeuroWell Standard Hours' and a checkbox for 'Use these business hours as the default'. Step 2, 'Time Zone', shows the selected time zone as '(GMT+05:30) India Standard Time (Asia/Kolkata)'. Step 3, 'Business Hours', shows a table with columns for the day of the week, start time, end time, and a checkbox for '24 hours'. The table is populated with the following data:

Day	Start Time	End Time	24 hours
Sunday			<input type="checkbox"/>
Monday	9:00 AM	6:00 PM	<input type="checkbox"/>
Tuesday	9:00 AM	6:00 PM	<input type="checkbox"/>
Wednesday	9:00 AM	6:00 PM	<input type="checkbox"/>
Thursday	9:00 AM	6:00 PM	<input type="checkbox"/>
Friday	9:00 AM	6:00 PM	<input type="checkbox"/>
Saturday	9:00 AM	6:00 PM	<input type="checkbox"/>

The screenshot shows the 'Holidays' setup page. The left sidebar has a search bar with 'Holid' and a 'Company Settings' dropdown with 'Holidays' selected. The main content area is titled 'Holidays' and 'Holiday Detail'. It includes a description: 'Holidays are dates and times at which business hours are suspended. Enter the dates and times at which to suspend business hours and escalation rules associated with business hours.' The form fields are: 'Holiday Name' (Diwali), 'Description' (empty), 'Date' (10/20/2025), 'Time' (from to), 'All Day' (checked), and 'Recurring Holiday' (unchecked). There are 'Save' and 'Cancel' buttons at the top and bottom of the form.

#### 4. Fiscal Year Settings :

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

The screenshot shows the 'Fiscal Year' setup page. The left sidebar has a search bar with 'Fis' and a 'Company Settings' dropdown with 'Fiscal Year' selected. The main content area is titled 'Fiscal Year' and 'Organization Fiscal Year Edit: NeuroWell Pvt.Ltd.'. It includes a description: 'To specify the fiscal year type for your organization, choose one of the options below.' The form has two radio buttons: 'Standard Fiscal Year' (selected) and 'Custom Fiscal Year'. Below the radio buttons is a 'Change Fiscal Year Period' form with fields: 'Name' (NeuroWell Pvt.Ltd.), 'Fiscal Year Start Month' (January), and 'Fiscal Year is Based On' (The ending month). There are 'Save' and 'Cancel' buttons at the top and bottom of the form.

#### 5. User SetUp and Licences :

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

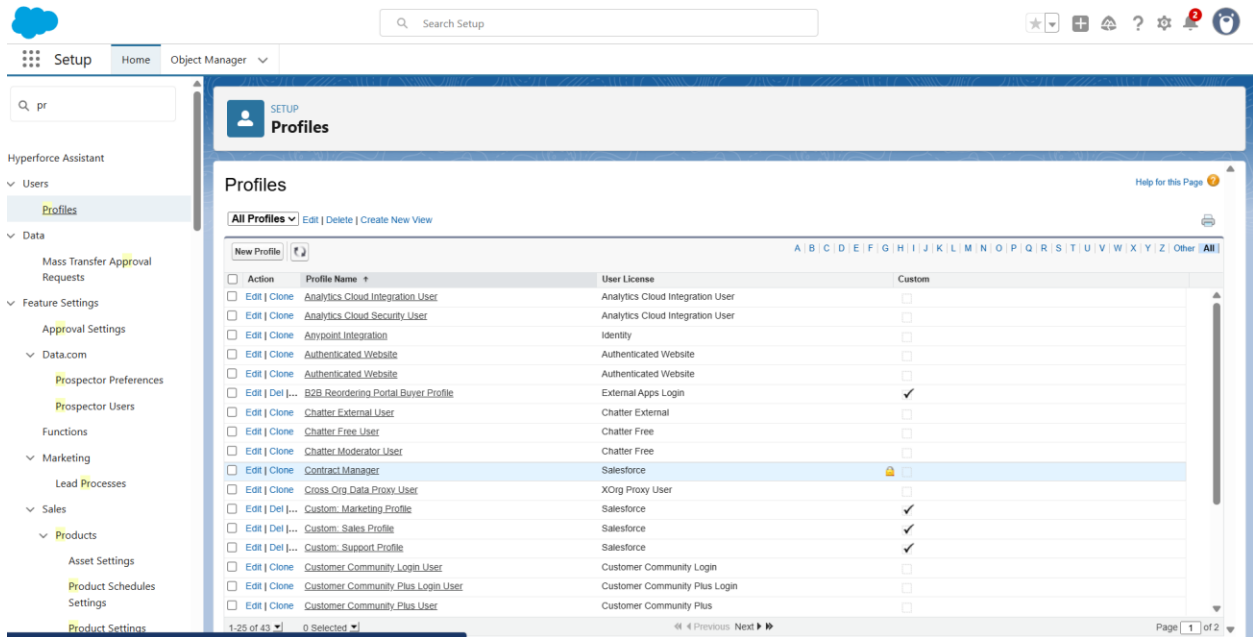
The screenshot shows the Salesforce Setup interface. On the left sidebar, the navigation menu includes 'Setup', 'Home', and 'Object Manager'. The main content area displays the 'Users' management page for the user 'mona sharma'. At the top, there are tabs for 'User Detail', 'Sharing', 'Reset Password', 'Login', 'Freeze', and 'View Summary'. Below these tabs, the user's information is presented in two columns:

Name	mona sharma	Role	
Alias	mshar	User License	Salesforce Platform
Email	<a href="#">monasharma1@gmail.com</a> [Verify]	Profile	Standard Platform User
Username	hf1@neurowell.com	Active	<input checked="" type="checkbox"/>
Nickname	User17589811090116056604 [i]	Marketing User	<input type="checkbox"/>
Title	admin	Offline User	<input type="checkbox"/>
Company	NeuroWell Pvt Ltd.	Knowledge User	<input type="checkbox"/>
Department	HR	Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<a href="#">View</a>
Delegated Approver		Data.com User Type	[i]
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> [i]
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> [i]
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> [i]
App Registration: One-Time Password Authenticator	[i]	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> [i]
App Registration: Salesforce	[i]	Salesforce CRM Content User	<input checked="" type="checkbox"/>

At the bottom of the page, there is a footer message: "Didn't find what you're looking for? Try using Global Search."

## 6. Profiles :

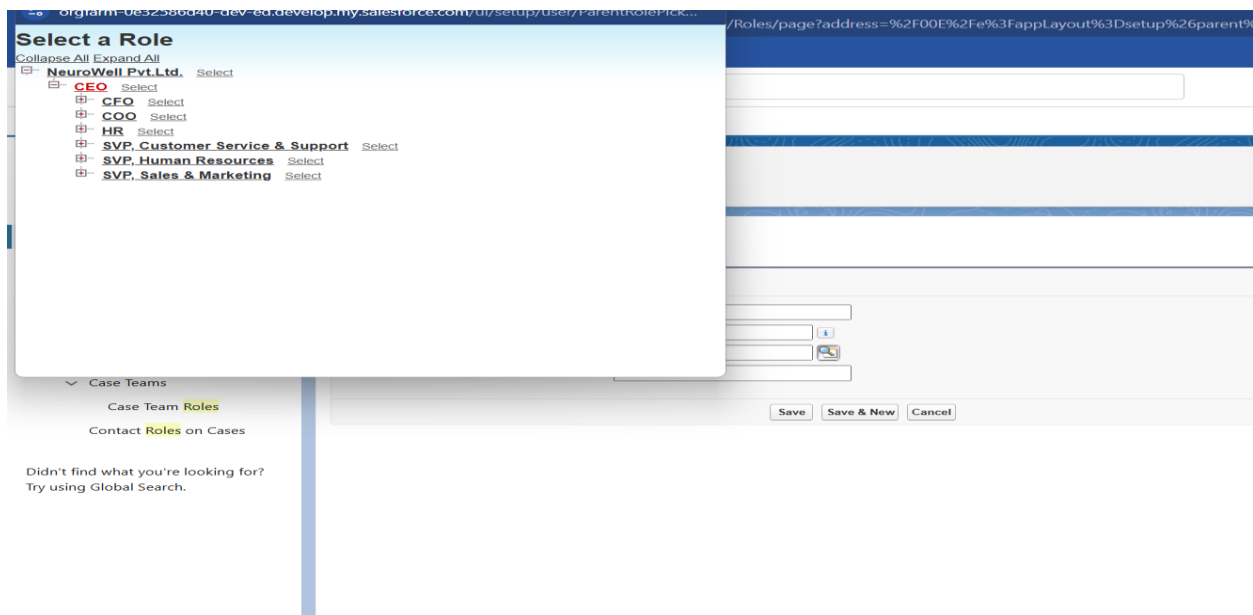
Profiles control what users can do in Salesforce (permissions, objects, fields).



## 7. Roles :

Roles define hierarchy and record visibility. We set up:

- **CEO → HR → Counselor → Patient**

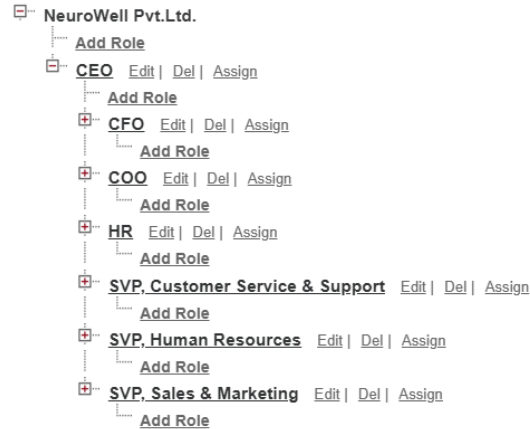


## Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

### Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)



## 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

The screenshot shows the Salesforce Setup page for Permission Sets. The left sidebar contains a navigation menu with options like Setup, Home, Object Manager, and various setup areas. The main content area is titled 'Permission Sets' and shows the 'Create' form. The form has two main sections: 'Enter permission set information' and 'Select the type of users who will use this permission set'.

**Enter permission set information**

Label	survey access
API Name	survey_access
Description	level access to wellness survey object


**Select the type of users who will use this permission set**

Who will use this permission set?

-Choose "-None-" if you plan to assign this permission set to multiple users with different user and permission set licenses.  
-Choose a specific user license if you want users with only one license type to use this permission set.  
-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Not sure what a permission set license is? [Learn more here.](#)

License: [-None-]



SETUP

Permission Sets

Permission Set

Create

Save

Cancel

Enter permission set information

Label

report viewer

API Name

report\_viewer

Description

system Permission

Session Activation Required

☐

Select the type of users who will use this permission set

Who will use this permission set?

-Choose '-None--' if you plan to assign this permission set to multiple users with different user and permission set licenses.

-Choose a specific user license if you want users with only one license type to use this permission set.

-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Not sure what a permission set license is? [Learn more here.](#)

License

--None--


Save

Cancel

## 9. OWD:

OWD settings ensure data privacy for sensitive mental wellness data.

- Client Records: Private
- Counseling Sessions: Private



Setup

Home

Object Manager

Search Setup

Star

Share

Cloud

Help

Settings

Notifications

Expire All Passwords

Field Accessibility

File Upload and Download

Security

Guest User Sharing Rule Access

Report

Health Check

Login Access Policies

Named Credentials

Network Access

Password Policies

Platform Encryption

Encryption Settings

Key Management

Private Connect

Remote Site Settings

Session Management

Session Settings

Sharing Settings

Trusted URL and Browser Policy

Violations

Trusted URLs

Trusted URLs for Redirects

SETUP

Sharing Settings

Organization-Wide Sharing Defaults Edit

Help for this Page

Save

Cancel

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	<input checked="" type="checkbox"/>
Account and Contract	Public Read/Write	Private	<input checked="" type="checkbox"/>
Order	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Contact	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Asset	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Opportunity	Public Read/Write	Private	<input checked="" type="checkbox"/>
Case	Public Read/Write/Transfer	Private	<input checked="" type="checkbox"/>
Campaign	Public Full Access	Private	<input checked="" type="checkbox"/>
Campaign Member	Controlled by Campaign	Controlled by Campaign	<input checked="" type="checkbox"/>
User	Public Read Only	Private	<input checked="" type="checkbox"/>
Individual	Public Read/Write	Private	<input checked="" type="checkbox"/>
Voice Call	Private	Private	<input checked="" type="checkbox"/>
Activity	Private	Private	<input checked="" type="checkbox"/>
Calendar	Hide Details and Add Events	Hide Details and Add Events	<input checked="" type="checkbox"/>
Price Book	Use	Use	<input checked="" type="checkbox"/>
Product	Public Read/Write	Public Read/Write	<input checked="" type="checkbox"/>
Agent Work	Public Read Only	Private	<input checked="" type="checkbox"/>

## 10. Sharing Rules :

Sharing rules extend access where required.

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

The screenshot shows the 'Sharing Settings' configuration page. The left sidebar contains a navigation menu with options like 'Setup', 'Home', 'Object Manager', 'Expire All Passwords', 'Field Accessibility', 'File Upload and Download', 'Security', 'Guest User Sharing Rule Access Report', 'Health Check', 'Login Access Policies', 'Named Credentials', 'Network Access', 'Password Policies', 'Platform Encryption', 'Encryption Settings', 'Key Management', 'Private Connect', 'Remote Site Settings', 'Session Management', 'Session Settings', 'Sharing Settings', 'Trusted URL and Browser Policy Violations', and 'Trusted URLs'. The main content area is titled 'Sharing Settings' and includes a 'Setup' button and a 'Help for this Page' link. Below the title, there is a 'User Sharing Rule' section with a description: 'Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users. Note: "Roles and subordinates" includes all users in a role, and the roles below that role. You can use sharing rules only to grant wider access to data, not to restrict access.' The configuration steps are as follows: Step 1: Rule Name (Label: patients, Rule Name: patients, Description: share patients to their assigned counselor); Step 2: Select your rule type (Rule Type: Based on group membership); Step 3: Select which users to be shared (Users who are members of: Roles, counselor); Step 4: Select the users to share with (Share with: Roles and Internal Subordinates, HR); Step 5: Select the level of access for the users (User Access: Read Only).

Setup Home Object Manager

Expire All Passwords  
Field Accessibility  
File Upload and Download  
Security  
Guest User Sharing Rule Access Report  
Health Check  
Login Access Policies  
Named Credentials  
Network Access  
Password Policies  
Platform Encryption  
Encryption Settings  
Key Management  
Private Connect  
Remote Site Settings  
Session Management  
Session Settings  
Sharing Settings  
Trusted URL and Browser Policy Violations  
Trusted URLs

SETUP  
Sharing Settings

Setup  
User Sharing Rule

Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.  
Note: "Roles and subordinates" includes all users in a role, and the roles below that role.  
You can use sharing rules only to grant wider access to data, not to restrict access.

Step 1: Rule Name

Label: patients  
Rule Name: patients  
Description: share patients to their assigned counselor

Step 2: Select your rule type

Rule Type: ☒ Based on group membership ☐ Based on criteria

Step 3: Select which users to be shared

Users who are members of: Roles counselor

Step 4: Select the users to share with

Share with: Roles and Internal Subordinates HR

Step 5: Select the level of access for the users

User Access: Read Only

SETUP  
Session Settings

Session Settings

Set the session security and session expiration timeout for your organization.

Session Timeout

Timeout Value: 30 minutes

☐ Disable session timeout warning popup  
☒ Force logout on session timeout

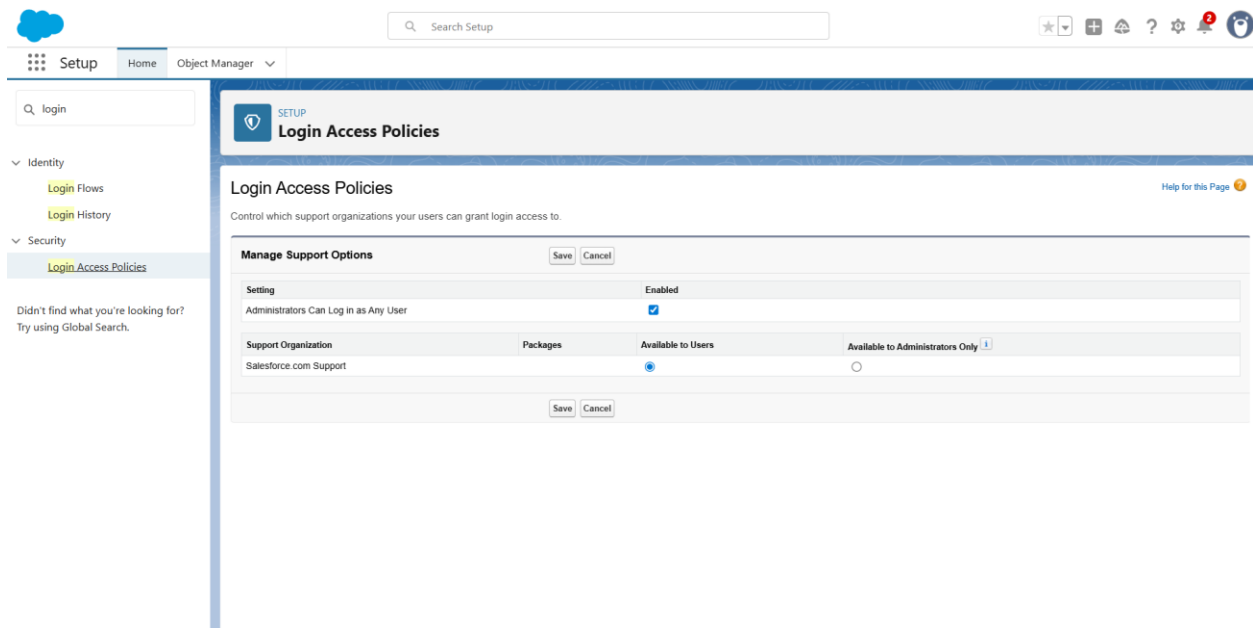
Session Settings

☐ 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.

## 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.

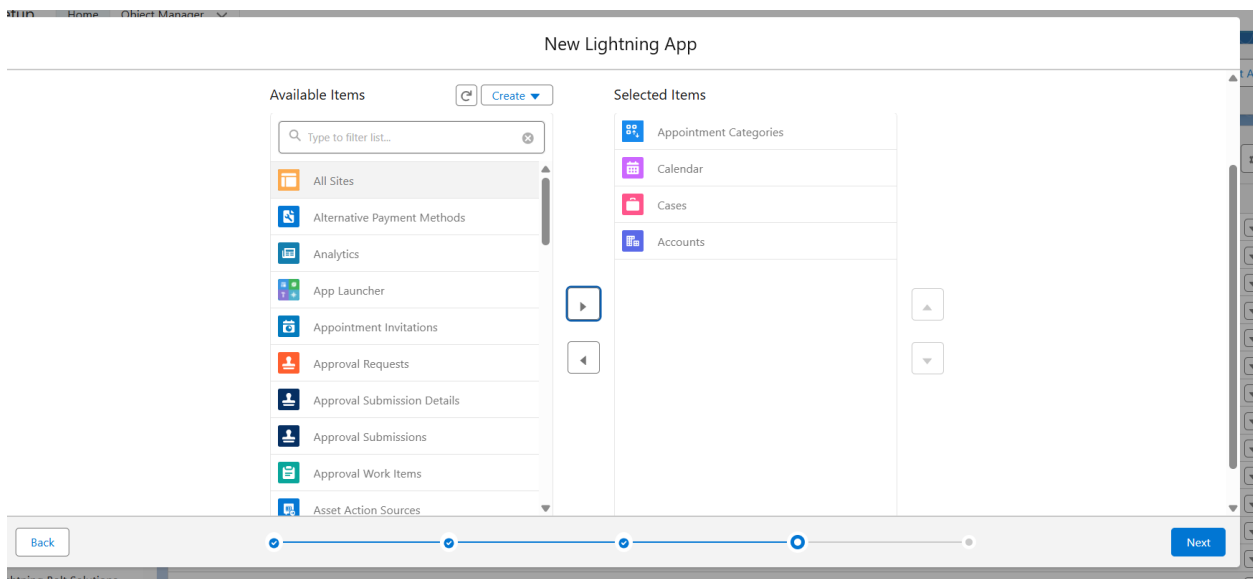


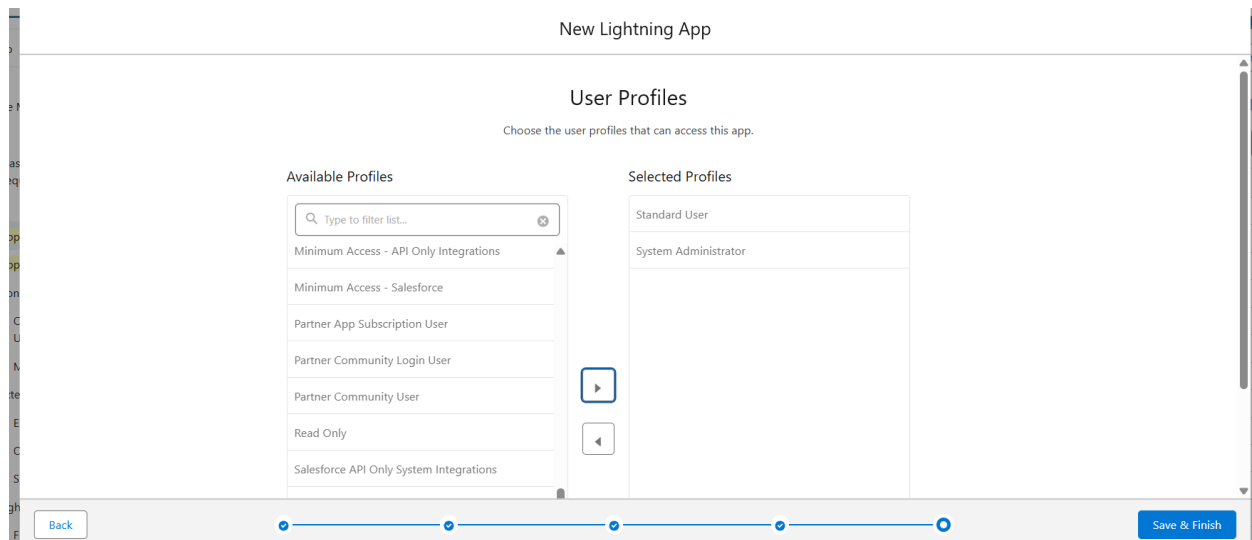


## 12.Dev Org SetUp :

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.