# Phase 2: Org Setup & Configuration

1. Salesforce Edition Selection & Justification

1.1 Recommended Edition: Enterprise Edition

Justification for Care4Paw:

- Advanced Workflow & Process Builder → For adoption approval workflows, pet intake, and medical updates.
- Advanced Sharing & Security → Needed for sensitive medical and adopter data.
- API Access → For integration with payment gateways (donations, adoption fees).
- Custom Report Types → Required for pet adoption reports, vet activity, donation tracking.
- Sandboxes → Critical for testing workflows and event setups.
- Storage → Sufficient for pet medical history, adopter records, and event tracking.
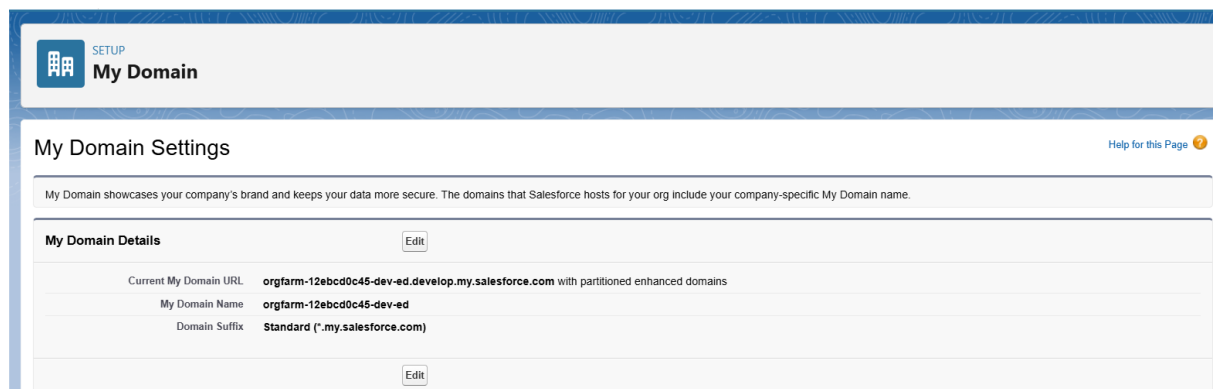
2. Company Profile Setup

- Navigate: Setup → Company Information → Company Information
- Company Name: *Care4Paw Shelter*
- Default Language: English
- Default Locale: English (India)
- Default Time Zone: India Standard Time (Asia/Kolkata)

Care4Paws Shelter

The organization's profile is below.

User Licenses [10+] | Permission Set Licenses [10+] | Feature Licenses [11] | Usage-based Entitlements [10+]

Organization Detail   Edit

Organization Name	Care4Paws Shelter	Phone	
Primary Contact	Himanshu Vinchurkar	Fax	
Division		Default Locale	English (India)
Address	Amravati 444607 Maharashtra India	Default Language	English
Fiscal Year Starts In	Custom Fiscal Year	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	☐	Currency Locale	Kannada (India) - INR
Enable Data Translation	☐	Used Data Space	486 KB (9%) [View]
Newsletter	✓	Used File Space	321 KB (2%) [View]
Admin Newsletter	✓	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Maintenance	☐	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	☐	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00DgL000007fRkz
		Organization Edition	Developer Edition
		Instance	CAN98
Created By	OrgFarm EPIC, 7/21/2025, 8:51 PM	Modified By	Himanshu Vinchurkar, 9/25/2025, 7:48 AM

Edit

3. Business Hours & Holiday Configuration

- Navigate: **Setup → Business Hours**

Primary Shelter Hours

- Monday–Saturday: 9:00 AM – 6:00 PM
- Sunday: Closed

Emergency Vet Support Hours

- 24/7 (for critical medical care)

Holiday Configuration

- Setup → Business Hours → Holidays
- Examples:
  - Diwali (All Day)
  - Independence Day (All Day)
  - Christmas (All Day)

Organization-Wide Email Addresses

An org-wide email address allows each user in a user profile to send email using this address. All messages use the same display name and email address. You can also designate an org-wide email address for unmonitored mailboxes that require a verified address.

Organization-Wide Email Addresses for User Selection and Default No-Reply Use   Add   Previous Page   Next Page

Actions	Display Name	Email Address	Allowed Profiles	Status	Created Date	Purpose
Edit | Del	Care4Paws Support	care4paws.ss@gmail.com	All Profiles	Verified	9/26/2025	Default No-Reply Address

Previous Page   Next Page

Organization Business Hours

New Business Hours

Action	Business Hours Name ↑	Active	Time Zone	Default
Edit	Care4Paws Business Hours	✓	(GMT+05:30) India Standard Time (Asia/Kolkata)	☐
Edit	Default	✓	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	✓

Holidays

Holidays are dates and times at which business hours are suspended. Business hours are the days and hours that your support team is available.

Holidays

New

Action	Holiday Name	Description	Date and Time
Edit | Del	Dipawali	Festival of Lights	10/17/2025 All Day
Edit | Del	Independence Day		8/15/2026 All Day
Edit | Del	Republic Day		1/26/2026 All Day
Edit | Del	Veer Savarkar Jayanti	Veer Savarkar Jayanti, celebrated on May 28 each year, marks the birth of Vinayak Damodar Savarkar	5/28/2026 All Day

4. Fiscal Year Settings

- Path: **Setup → Company Information → Fiscal Year**

- Configure Fiscal Year: **April – March** (India standard NGO fiscal cycle).

Impact on Care4Paw:

- Adoption & donation reporting cycles

- Budget planning & fundraising campaigns

- Pet medical and intake cycle alignment

SETUP
Fiscal Year

Fiscal Year

This page allows you to define and edit custom fiscal years, including the names used in reports and forecasts.

Click the New button to define a new fiscal year. Click Edit to edit a previously defined fiscal year.

Custom Fiscal Years

New

Action	Year	FY Start Date	FY End Date	Description
Edit	Apr 2025	4/1/2025	3/31/2026	

Custom Fiscal Year Names

Action	Field Label
Edit | Replace	Quarter Prefix
Edit | Replace	Period Prefix
Edit | Replace	Quarter Name
Edit | Replace	Period Name

5. User Setup & License Management

User Categories:

- **Admin** → Salesforce License (System Administrator profile)

- **Vet** → Salesforce Platform License (Vet Profile)

- **Receptionist** → Salesforce Platform License (Receptionist Profile)

- **Support Agent** → Salesforce Platform License (Support Profile)

- **Adopter (external)** → Experience Cloud License (Community User, for portal)

6. Profile Configuration

System Administrator Profile:

- Reserved for Admin only.

Custom Profiles (cloned from Standard Platform User):

- Vet Profile → Access: Pet (R), Medical Report (CRED)

- Receptionist Profile → Access: Adopter (CRED), Adoption (CRED), Pet (R)

- Support Profile → Access: Pet (R), Adopter (R), Adoption (R)

- Adopter Profile (external) → Access: Own Pets + Own Adoption (Read Only)

Permission Set Strategy:

- Temporary access for campaigns (e.g., volunteers).

- Extra permissions for vets (bulk upload medical reports).

- Least privilege principle.

Profiles

All Profiles | Edit | Delete | Create New View

New Profile   A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Action	Profile Name ↑	User License	Custom
Edit	Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	
Edit	Clone	Analytics Cloud Security User	Analytics Cloud Integration User	
Edit	Clone	Anypoint Integration	Identity	
Edit	Clone	Authenticated Website	Authenticated Website	
Edit	Clone	Authenticated Website	Authenticated Website	
Edit	Del	...	B2B Reordering Portal Buyer Profile	External Apps Login	✓
Edit	Clone	Chatter External User	Chatter External	
Edit	Clone	Chatter Free User	Chatter Free	
Edit	Clone	Chatter Moderator User	Chatter Free	
Edit	Clone	Contract Manager	Salesforce	
Edit	Clone	Cross Org Data Proxy User	XOrg Proxy User	
Edit	Del	...	Custom: Marketing Profile	Salesforce	✓
Edit	Del	...	Custom: Sales Profile	Salesforce	✓
Edit	Del	...	Custom: Support Profile	Salesforce	✓
Edit	Clone	Customer Community Login User	Customer Community Login	
Edit	Clone	Customer Community Plus Login User	Customer Community Plus Login	
Edit	Clone	Customer Community Plus User	Customer Community Plus	
Edit	Clone	Customer Community User	Customer Community	
Edit	Clone	Customer Portal Manager Custom	Customer Portal Manager Custom	
Edit	Clone	Customer Portal Manager Standard	Customer Portal Manager Standard	
Edit	Clone	Einstein Agent User	Einstein Agent	
Edit	Clone	External Apps Login User	External Apps Login	
Edit	Clone	External Identity User	External Identity	
Edit	Clone	Force.com - App Subscription User	Force.com - App Subscription	
Edit	Clone	Force.com - Free User	Force.com - Free	

1-25 of 43 | 0 Selected | ‹‹ ‹ Previous   Next › ››   Page 1 of 2

Profiles

All Profiles | Edit | Delete | Create New View

New Profile   A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Action	Profile Name ↑	User License	Custom
Edit	Clone	Gold Partner User	Gold Partner	
Edit	Clone	High Volume Customer Portal	High Volume Customer Portal	
Edit	Clone	High Volume Customer Portal User	High Volume Customer Portal	
Edit	Clone	Identity User	Identity	
Edit	Clone	Marketing User	Salesforce	
Edit	Clone	Minimum Access - API Only Integrations	Salesforce Integration	
Edit	Clone	Minimum Access - Salesforce	Salesforce	
Edit	Clone	Partner App Subscription User	Partner App Subscription	
Edit	Clone	Partner Community Login User	Partner Community Login	
Edit	Clone	Partner Community User	Partner Community	
Edit	Del	...	Read Only	Salesforce	✓
Edit	Del	...	Salesforce API Only System Integrations	Salesforce Integration	✓
Edit	Clone	Silver Partner User	Silver Partner	
Edit	Clone	Solution Manager	Salesforce	
Edit	Clone	Standard Platform User	Salesforce Platform	
Edit	Clone	Standard User	Salesforce	
Edit	Clone	System Administrator	Salesforce	
Edit	Clone	Work.com Only User	Work.com Only	

7. Role Hierarchy Configuration

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   [Show in tree view ▾]

Collapse All Expand All

- **Care4Paws Shelter**
  - Add Role
  - **Admin**   Edit | Del | Assign
    - Add Role
    - **Operations**   Edit | Del | Assign
      - Add Role
      - **Reception Team**   Edit | Del | Assign
        - Add Role
      - **Veterinary Team**   Edit | Del | Assign
        - Add Role
    - **Supports**   Edit | Del | Assign
      - Add Role
      - **Support Agents**   Edit | Del | Assign
        - Add Role
    - **SVP, Customer Service & Support**   Edit | Del | Assign
      - Add Role
    - **SVP, Sales & Marketing**   Edit | Del | Assign
      - Add Role

8. Organization-Wide Defaults (OWD)

- **Adopter**: Private

- **Adoption**: Private

- **Medical Report**: Private

- **Pet**: Public Read Only

---

9. Sharing Rules Configuration

- **Vet Team** → Share Medical Reports with all users in Vet role.

- **Receptionist Team** → Share Adopters & Adoptions among Receptionist role.

- **Support Agents** → Read-only access to Pet records.

---

10. Login Access Policies

- **Admins** → Access from anywhere.

- **Receptionists & Support Agents** → Restricted to office IP range.

- **Vets** → Allowed after-hours for emergencies.

---

11. Development Environment Setup

- **Full Copy Sandbox** → Production mirror.

- **Partial Copy Sandbox** → For UAT and events testing.

- **Developer Sandbox** → For individual workflow testing.

---

12. Deployment Preparation

- **Major Releases**: Quarterly (start/end of fiscal year).

- **Minor Releases**: Monthly (adoption event features).

- **Hotfixes**: Urgent fixes (e.g., medical workflow errors).