

# Phase 2: Org Setup & Configuration

## 1. Salesforce Editions

- Used Developer Edition Developer Org (free dev org).
- Offers full Salesforce platform capabilities for healthcare system development.

## 2. Company Profile Setup

- Navigate to Company Settings.
- Add company info and set timezone to Indian Standard Time (IST).
- Set currency to INR for local healthcare operations.

## 3. Business Hours & Holidays

- Define 24/7 working hours (12:00 AM – 11:59 PM daily).
- Healthcare operations don't follow traditional business hours.

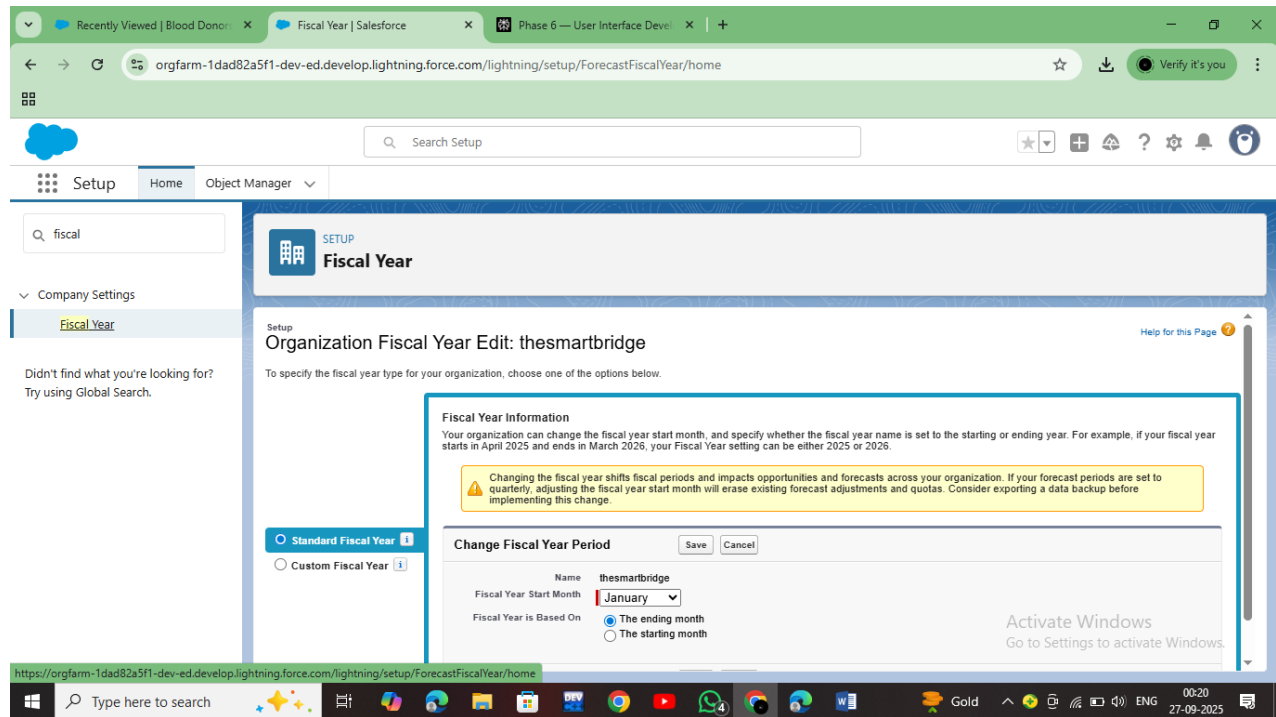
The screenshot shows the Salesforce Business Hours setup page in a web browser. The browser's address bar displays the URL: `orgfarm-1dad82a5f1-dev-ed.develop.lightning.force.com/lightning/setup/BusinessHours/page?address=%2F01mgL0000040Fb3`. The Salesforce interface includes a top navigation bar with 'Setup', 'Home', and 'Object Manager' tabs. A search bar on the left contains the text 'busi'. The main content area is titled 'Organization Business Hours' and contains the following information:

- Business Hours Detail**: A table showing the business hours for the 'bloodDonation' organization. The table has columns for 'Business Hours Name', 'Time Zone', and 'Default Business Hours'. The 'Default Business Hours' column is checked.
- Time Zone**: (GMT+05:30) India Standard Time (Asia/Kolkata)
- Default Business Hours**: ☒
- Business Hours**: A table showing the hours for each day of the week.
- Active**: ☒
- Created By**: Jyotsna Sakinala 9/22/2025, 11:24 AM
- Last Modified By**: Jyotsna Sakinala 9/22/2025, 11:24 AM

The bottom of the screen shows a Windows taskbar with various application icons and a system tray displaying the date and time as 00:15 on 27-09-2025.

## 4. Fiscal Year Settings

- Use Standard fiscal year (January to December).
- Suitable for healthcare reporting and blood drive planning.



## 5. User Setup & Licenses

- Admin: System Administrator with Salesforce license.
- Blood Bank Staff, Hospital Staff, Volunteer Coordinator: Salesforce Platform license.

## 6. Profiles

- Admin: System Administrator profile.
- All Staff: Standard User profiles initially.
- Future Plan: Minimum Access profiles with Permission Sets for improved security.

## 7. Roles

- Role hierarchy:
  - Admin at top.

- Blood Bank Staff, Hospital Staff, Volunteer Coordinator below.
- Admin has access to all records; lateral roles maintain privacy boundary.

## 8. Permission Sets

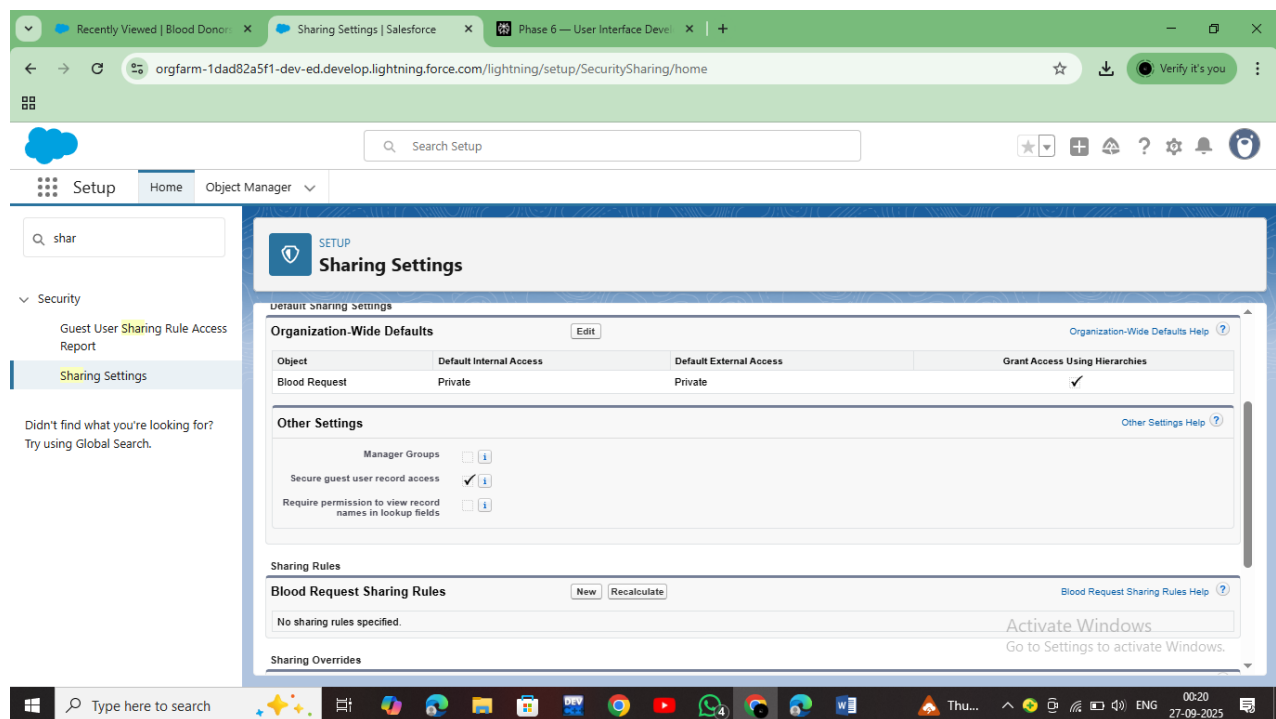
- Plan to assign specific permissions for custom objects and system functions via Permission Sets.

## 9. Organization-Wide Defaults (OWD)

- Blood Donor: Private (protect sensitive info).
- Blood Request: Private (confidential medical requests).
- Blood Inventory: Public Read Only (visibility to all staff).
- Hospital Request: Private (confidential external communication).

## 10. Sharing Rules

- “Blood Bank Staff Full Access”: Read/Write access to all donor records.
- Role hierarchy automatically grants Admin access to all subordinate records.



The screenshot shows the Salesforce Setup interface for the 'Sharing Settings' page. The browser address bar indicates the URL: `orgfarm-1dad82a5f1-dev-ed.develop.lightning.force.com/lightning/setup/SecuritySharing/home`. The page title is 'Sharing Settings' under the 'Setup' menu.

**Organization-Wide Defaults**

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Blood Request	Private	Private	✓

**Other Settings**

- Manager Groups: ☐ ⓘ
- Secure guest user record access: ☒ ⓘ
- Require permission to view record names in lookup fields: ☐ ⓘ

**Sharing Rules**

**Blood Request Sharing Rules** New Recalculate Blood Request Sharing Rules Help

No sharing rules specified. Activate Windows  
Go to Settings to activate Windows.

**Sharing Overrides**

## **11. Login Access Policies**

- Session timeout: 2 hours (development friendly).
- Password policies: No expiration, no complexity (ease for testing).
- IP restrictions: None, allowing access from anywhere.

## **12. Dev Org Setup**

- Developer Edition with full platform access confirmed.
- Custom objects, workflows, automation configured.

## **13. Sandbox Usage**

- Not available in Developer Edition.
- All development done directly in developer environment.

## **14. Deployment Basics**

- Setup and development directly in Developer Org.
- Future plans to use Change Sets for production deployment.