

Phase 2: Org Setup & Configuration

This phase covers the complete setup and configuration of the proper environment setup, security, data modeling readiness, and prepares the organization for future development, automation, and deployment.

Step 1: Salesforce Editions

We are using Salesforce Developer Edition as our working environment. This edition provides the necessary licenses, features, and tools to build and test our Helping Hands Foundation project without production costs.

Step 2: Company Profile Setup

Configured Company Profile with organization details such as Company Name (Helping Hands Foundation), Locale, Default Language, Time Zone, and Currency to ensure consistency across the org.

The screenshot shows the 'Company Information' setup page in Salesforce. The page title is 'Company Information' with a sub-header 'Helping Hands Foundation'. Below the title, it states 'The organization's profile is below.' and provides links for 'User Licenses (10+)', 'Permission Set Licenses (10+)', 'Feature Licenses (11)', and 'Usage-based Entitlements (10+)'. An 'Edit' button is visible next to the 'Organization Detail' section. The page is divided into two columns of settings.

Organization Detail	
Organization Name	Helping Hands Foundation
Primary Contact	OrgFarm EPIC
Division	
Address	Telangana India
Fiscal Year Starts In	January
Activate Multiple Currencies	<input type="checkbox"/>
Enable Data Translation	<input type="checkbox"/>
Newsletter	<input checked="" type="checkbox"/>
Admin Newsletter	<input checked="" type="checkbox"/>
Hide Notices About System Maintenance	<input type="checkbox"/>
Hide Notices About System Downtime	<input type="checkbox"/>
Locale Formats	ICU
Phone	
Fax	
Default Locale	English (India)
Default Language	English
Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Currency Locale	Telugu (India) - INR
Used Data Space	402 KB (8%) [View]
Used File Space	31 KB (0%) [View]
API Requests, Last 24 Hours	0 (15,000 max)
Streaming API Events, Last 24 Hours	0 (10,000 max)
Restricted Logins, Current Month	0 (0 max)
Salesforce.com Organization ID	00DgK000007YDV7
Organization Edition	Developer Edition
Instance	CAN96

Step 3: Business Hours & Holidays

Defined standard business hours (Mon-Fri, 9 AM – 6 PM) and added holidays (Independence Day, Republic Day, New Year, etc.) to support service-level agreements and volunteer scheduling.

The screenshot shows the 'Business Hours' setup page for 'Helping Hands Foundation'. The page title is 'Organization Business Hours'. Below the title, there is a brief instruction: '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 main section is 'Business Hours Detail', which includes a table for 'Business Hours' and a section for 'Holidays'. The 'Business Hours' table shows the following data:

Business Hours Name	HelpingHands Standard Hours	Time Zone
Business Hours	Sunday 24 Hours Monday 9:00 am to 6:00 pm Tuesday 9:00 am to 6:00 pm Wednesday 9:00 am to 6:00 pm Thursday 9:00 am to 6:00 pm Friday 9:00 am to 6:00 pm Saturday 24 Hours	(GMT+05:30) India Standard Time (Asia/Kolkata)

Below the table, there is a section for 'Holidays' with a table showing the following data:

Holiday Name	Description	Date and Time
Republic Day		26/01/2026 All Day

The page also includes a 'Back To Top' link and a note: 'Always show me more records per related list'.

Step 4: Fiscal Year Settings

Enabled a Standard Fiscal Year setup aligned with the calendar year (Jan – Dec). This ensures proper reporting of donations, expenses, and volunteer funding cycles.

The screenshot shows the 'Fiscal Year' setup page for 'Helping Hands Foundation'. The page title is 'Organization Fiscal Year Edit: Helping Hands Foundation'. Below the title, there is a brief instruction: 'To specify the fiscal year type for your organization, choose one of the options below.' The main section is 'Fiscal Year Information', which includes a warning message: 'Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing this change.' The 'Fiscal Year Information' section has two radio buttons: 'Standard Fiscal Year' (selected) and 'Custom Fiscal Year'. Below the radio buttons, there is a 'Change Fiscal Year Period' section with the following data:

Name	Helping Hands Foundation
Fiscal Year Start Month	January
Fiscal Year is Based On	<input checked="" type="radio"/> The ending month <input type="radio"/> The starting month

The page also includes a 'Back To Top' link and a note: 'Always show me more records per related list'.

Step 5: User Setup & Licenses

Created project-specific users and assigned appropriate licenses and profiles:

- CEO: System Administrator License
- CFO: Salesforce Platform License
- Financial Officer: System Administrator License
- Donation Manager: Salesforce Platform License
- Volunteer Coordinator: Salesforce Platform License

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d9k000007ydv7uao.yy02n1s0ysak@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit Login	Coordinator_Volunteer	vcoord	vc.volunteer@ngo.org	Volunteer Coordinator	✓	Volunteer Coordinator Profile
<input type="checkbox"/> Edit	Kovi_Venkata Likith Sai	sai	salikith511187@agentforce.com		✓	System Administrator
<input type="checkbox"/> Edit Login	Manager_Donation	dmanag	dman.manager@ngo.org	Donation Manager	✓	Donation Manager Profile
<input type="checkbox"/> Edit Login	Officer_Finance	foffice	fo.officer@ngo.org	Financial Officer	✓	System Administrator
<input type="checkbox"/> Edit	User_Integration	integ	integration@00d9k000007ydv7uao.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d9k000007ydv7uao.com		✓	Analytics Cloud Security User

Step 6: Profiles

Profiles define baseline access. Created custom profiles for Donation Manager and Volunteer Coordinator with object-level and field-level access tailored to their roles.

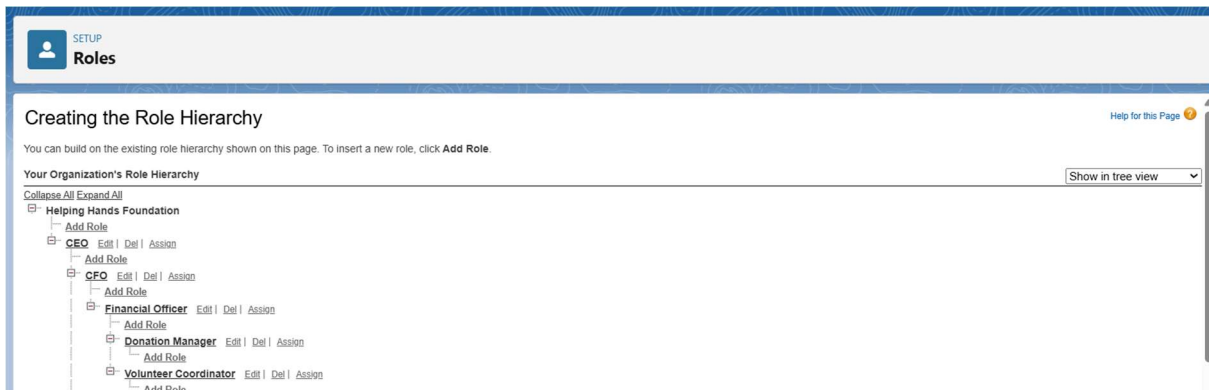
Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Del ...	Volunteer Coordinator Profile	Salesforce Platform	✓

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Del ...	Donation Manager Profile	Salesforce Platform	✓

Step 7: Roles

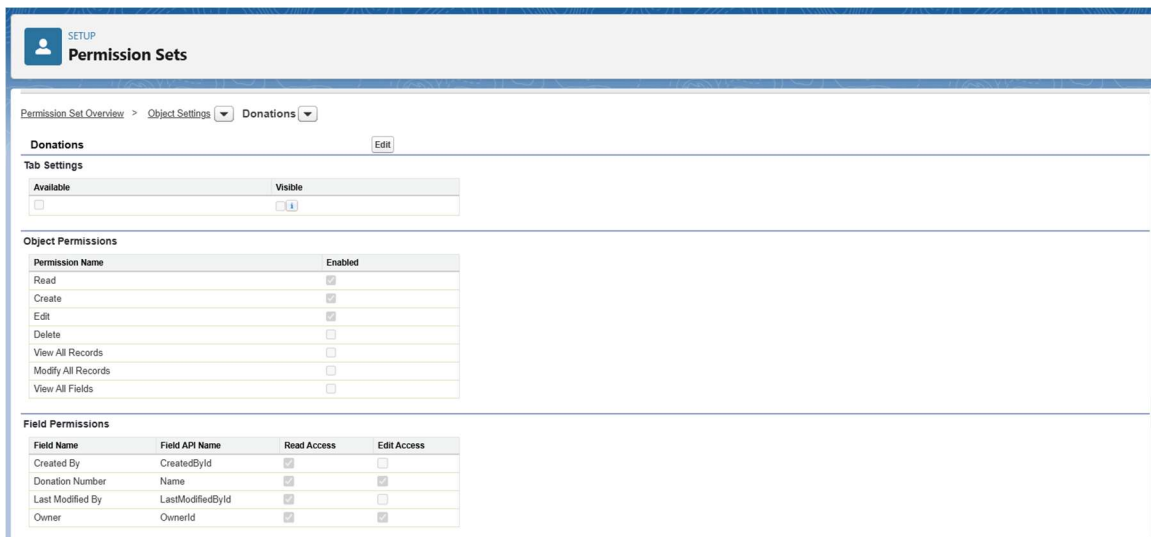
Set up the role hierarchy to mirror the organization:

- CEO
 - ↳ CFO
 - ↳ Financial Officer
 - ↳ Donation Manager
 - ↳ Volunteer Coordinator



Step 8: Permission Sets

Created additional permission sets for users requiring extra access beyond their profiles, e.g., 'Edit Access and Read/Write/Edit Access' for generating advanced reports.



Step 9: Organization-Wide Defaults (OWD)

Configured OWD:

- Donations: Private (only owner & above roles can see)
- Volunteers: Private (restricted by default)
- Accounts/Contacts: Controlled by Parent
- Other standard objects: Default Salesforce settings

Sharing Settings			
This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to Background Jobs to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.			
Manage sharing settings for: All Objects			
Disable External Sharing Model			
Default Sharing Settings			
Organization-Wide Defaults			
Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Donation	Private	Private	✓
Event	Public Read/Write	Private	✓
Mentor	Public Read/Write	Private	✓
Student	Public Read/Write	Public Read/Write	✓
Volunteer	Private	Private	✓

Step 10: Sharing Rules

Created Sharing Rules to support collaboration:

- Donation Sharing Rule: Records owned by Volunteer Coordinators are shared with Donation Managers Access (Read-Only).
- Volunteer Sharing Rule: Volunteer records owned by Volunteer Coordinators are shared with all Volunteer Coordinators (Read/Write).

SETUP Sharing Settings			
No sharing rules specified.			
Work Type Group Sharing Rules			
No sharing rules specified.			
Donation Sharing Rules			
Action	Criteria	Shared With	Access Level
Edit Del	Owner in Role and Internal Subordinates: Volunteer Coordinator	Role: Donation Manager	Read Only
Event Sharing Rules			
No sharing rules specified.			
Volunteer Sharing Rules			
Action	Criteria	Shared With	Access Level
Edit Del	Owner in Role and Internal Subordinates: Volunteer Coordinator	Role and Internal Subordinates: Volunteer Coordinator	Read/Write

Step 11: Login Access Policies

Enabled administrators to log in as any user for troubleshooting. This allows quick issue resolution and ensures smooth testing during the project.

The screenshot shows the 'Login Access Policies' setup page in Salesforce. The page title is 'Login Access Policies' with a 'SETUP' icon. Below the title, it says 'Control which support organizations your users can grant login access to.' There are 'Save' and 'Cancel' buttons. The main section is 'Manage Support Options'. It has a 'Setting' section with 'Enabled' status and a checkbox for 'Administrators Can Log In as Any User' which is checked. Below this is a table with columns: 'Support Organization', 'Packages', 'Available to Users', and 'Available to Administrators Only'. The first row shows 'Salesforce.com Support' with a radio button selected under 'Available to Users' and an unselected radio button under 'Available to Administrators Only'. There are 'Save' and 'Cancel' buttons at the bottom.

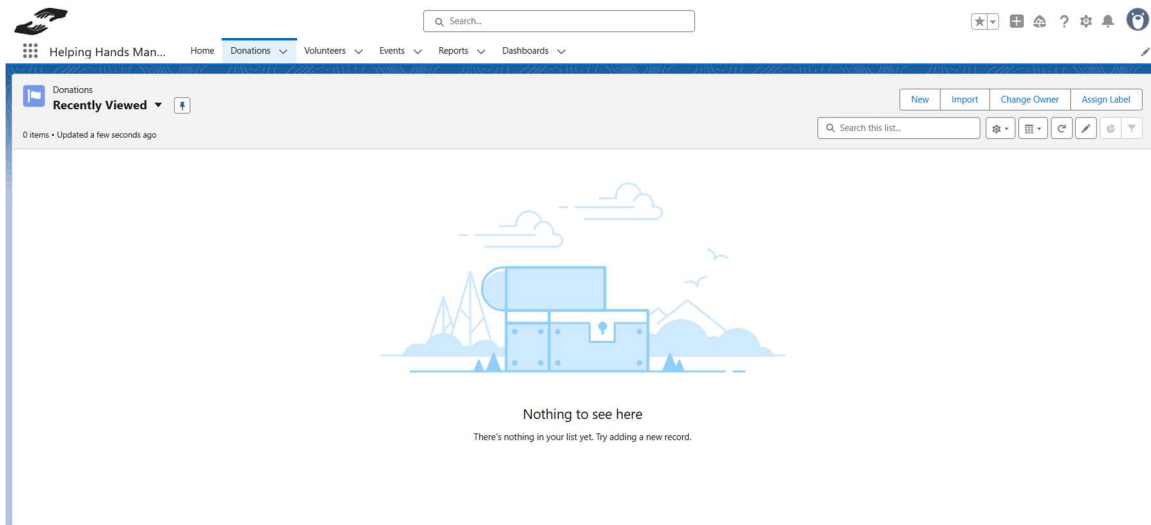
Step 12: Development Org Setup

Confirmed the Developer Org setup and enabled

My Domain :**(helpinghandsorg-dev-ed.develop.my.salesforce.com)**.

The screenshot shows the 'My Domain' setup page in Salesforce. The page title is 'My Domain' with a 'SETUP' icon. Below the title, it says 'My Domain showcases your company's brand and keeps your data more secure. The domains that Salesforce hosts for your org include your company-specific My Domain name.' It lists three steps: 1. Choose and register a My Domain (checked), 2. Salesforce provisions your new domain (checked), and 3. Deploy your new domain to users. The main section is 'Step 3: Deploy Your New Domain'. It says 'Your new domain is provisioned. To start using it, deploy your new domain. After you deploy, users that visit your current domain are redirected to your new domain. If you don't want to use the new domain or if you want to make a different change to your My Domain, cancel the new domain.' Below this, it shows 'Current domain' as 'orgfarm-d7za217900-dev-ed.develop.my.salesforce.com with partitioned enhanced domains' and 'New domain' as 'helpinghandsorg-dev-ed.develop.my.salesforce.com with partitioned enhanced domains'. There are 'Cancel New Domain' and 'Deploy New Domain' buttons.

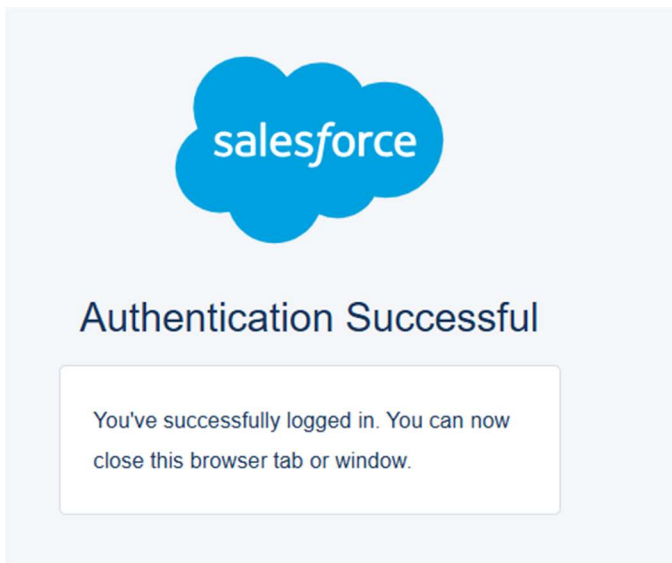
Created a dedicated app 'Helping Hands Management' for testing all project configurations and customizations.



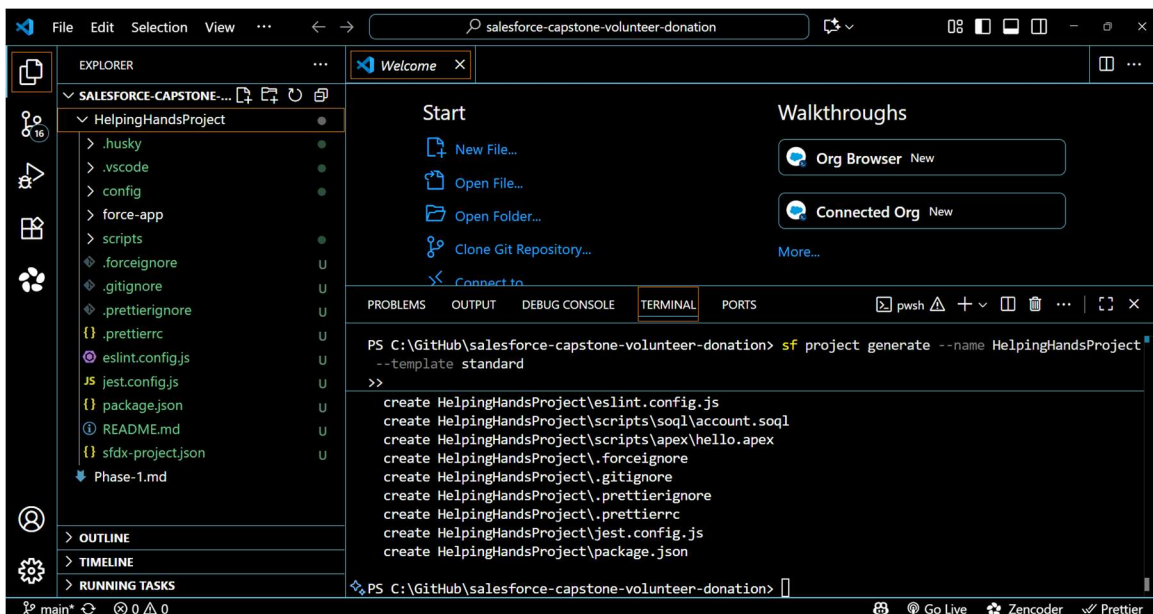
Step 13: Deployment Basics

Deployment options:

- Change Sets: For Admin-driven migration (not available in Developer Edition).
- Salesforce DX (SFDX): Setup VS Code with Salesforce CLI, connect Dev Org, retrieve and deploy metadata to another org.



```
PS C:\Users\HP\OneDrive\Documents\GitHub\salesforce-capstone-volunteer-donation> sfdx force:auth:web:login -a DevOrg
>>
Successfully authorized sailikith511187@agentforce.com with org ID 00DgK000007YDV7UA0
PS C:\Users\HP\OneDrive\Documents\GitHub\salesforce-capstone-volunteer-donation>
```



For this project, deployment will be demonstrated using SFDX and a secondary Developer Org as Production simulation.