Phase 2: Org Setup & Configuration

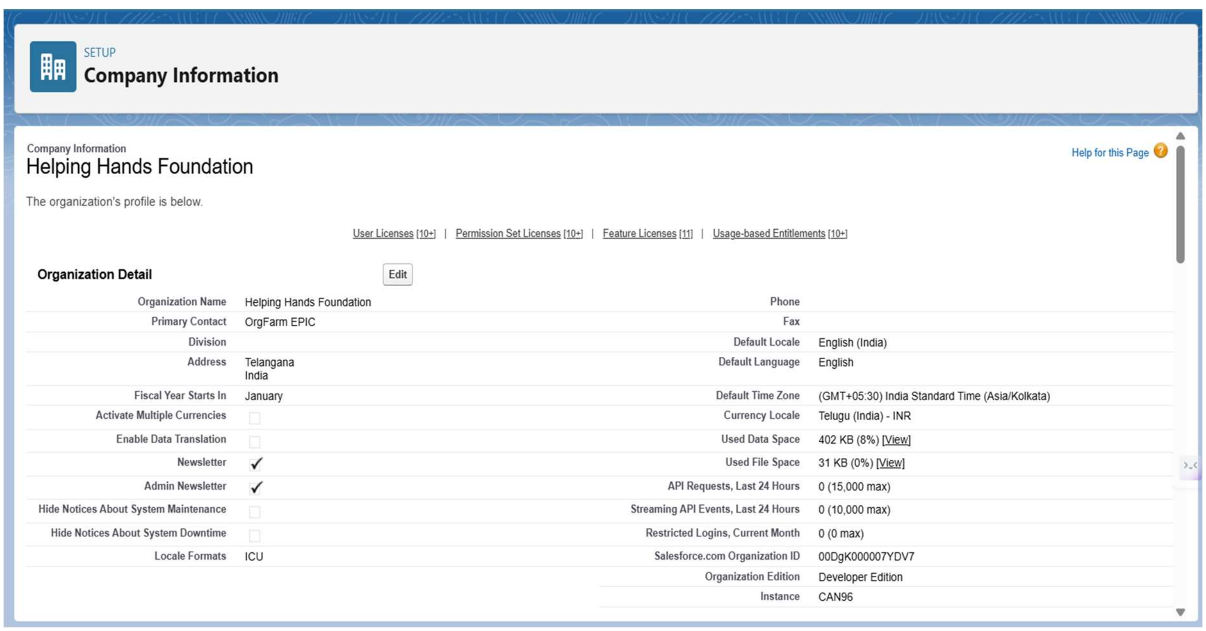
This phase covers the complete setup and configuration of the proper environment setup, security, data modeling readiness, and prepares the organization for future development, automation, and deployment.

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.

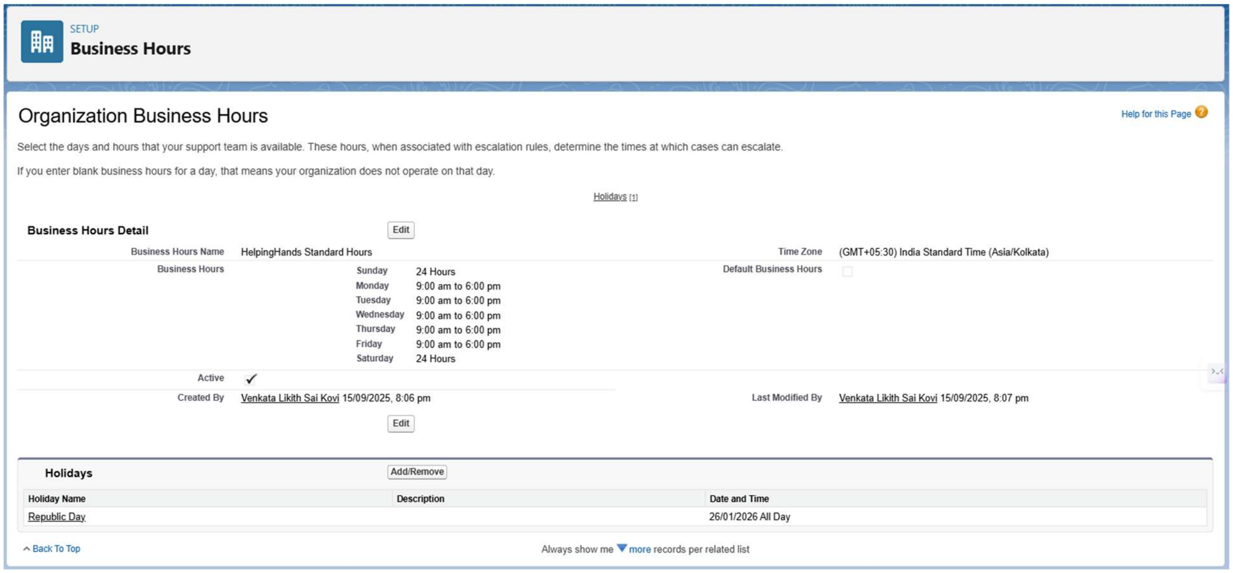
Step 2: Company Profile Setup

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.



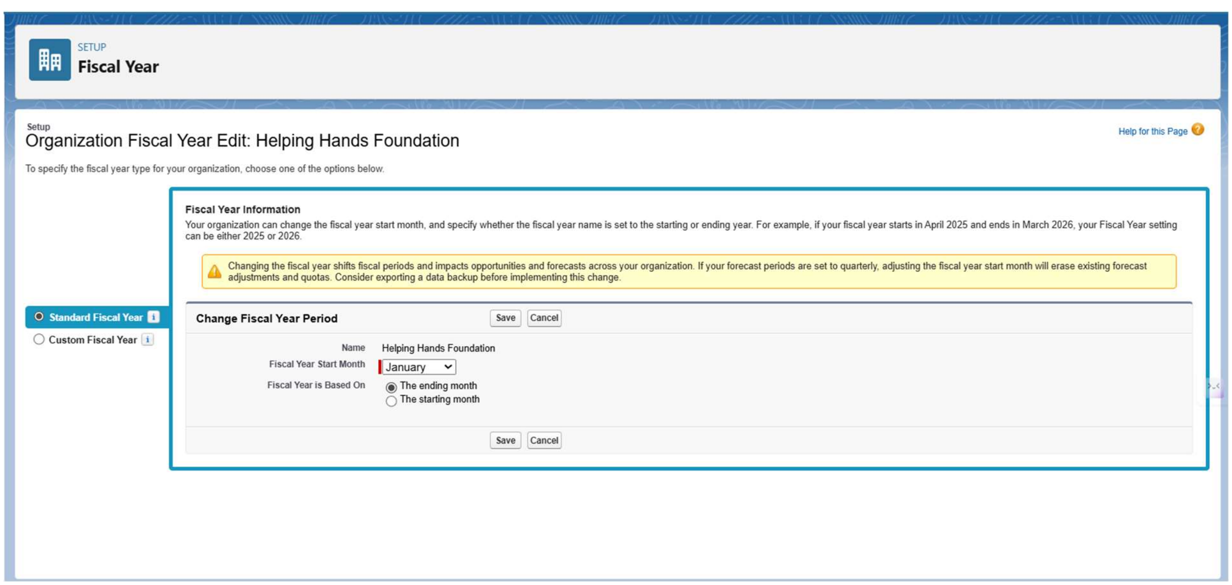
Step 3: Business Hours & Holidays

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.



Step 4: Fiscal Year Settings

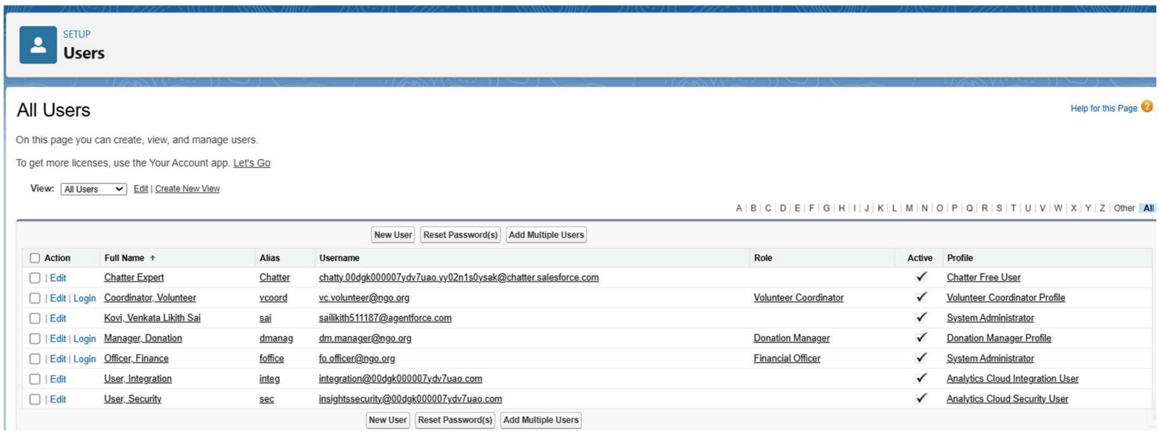
Enabled a Standard Fiscal Year setup aligned with the calendar year (Jan – Dec). This ensures proper reporting of donations, expenses, and volunteer funding cycles.



Step 5: User Setup & Licenses

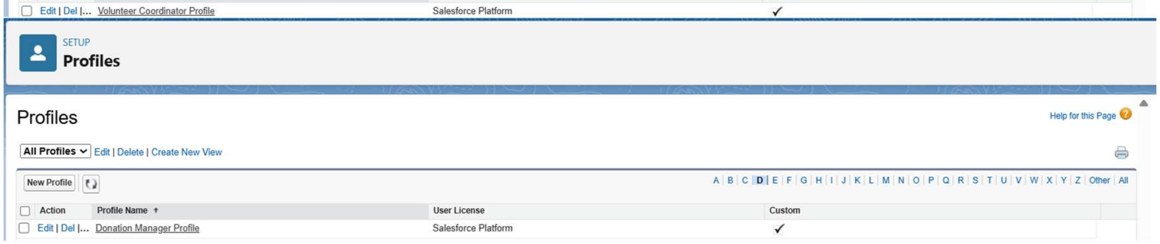
Created project-specific users and assigned appropriate licenses and profiles:

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



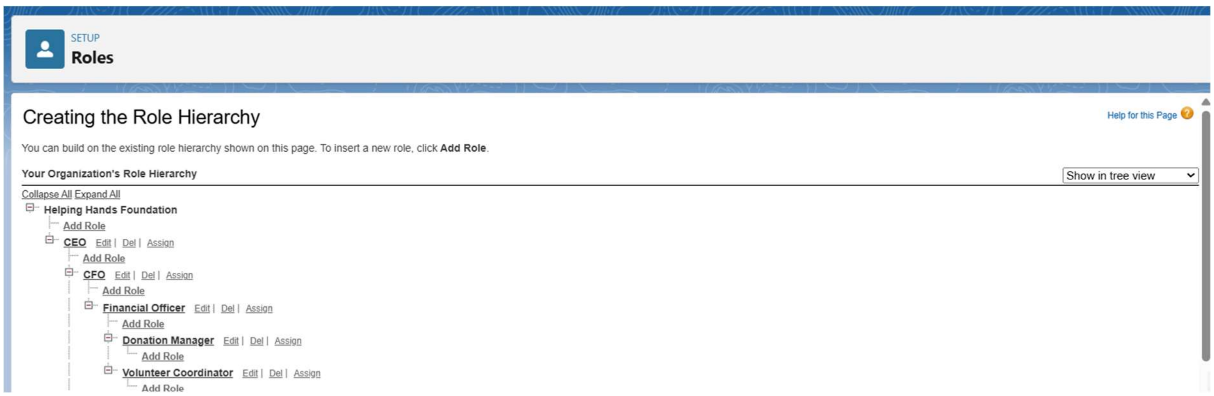
Step 6: Profiles

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



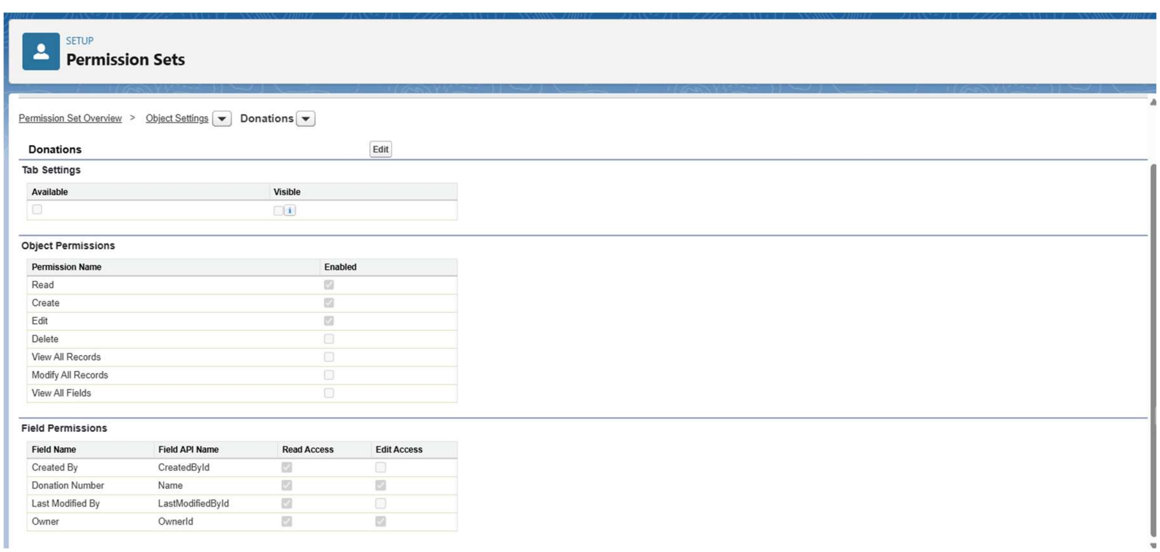
Step 7: Roles

Set up the role hierarchy to mirror the organization:
- CEO
  ↳ CFO
    ↳ Financial Officer
      ↳ Donation Manager
        ↳ Volunteer Coordinator



Step 8: Permission Sets

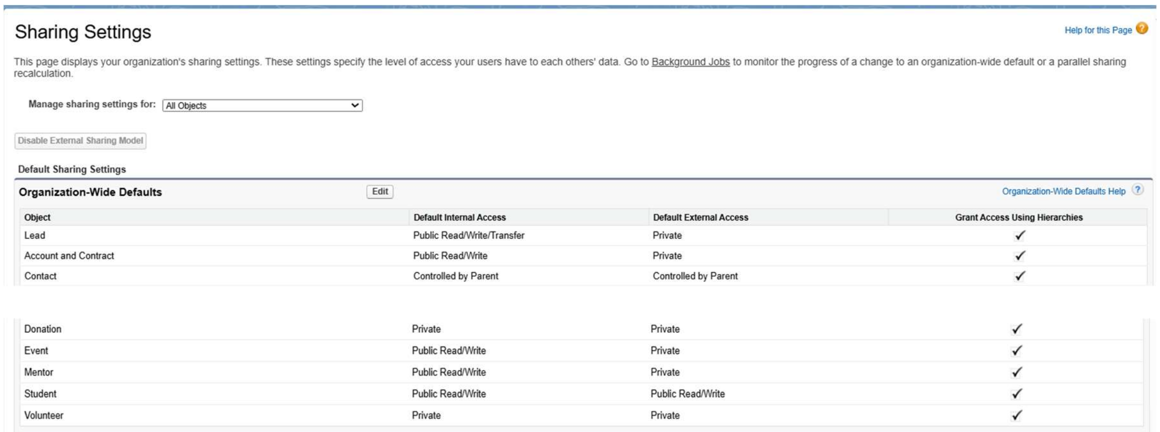
Created additional permission sets for users requiring extra access beyond their profiles, e.g., 'Edit Access and Read/Write/Edit Access' for generating advanced reports.



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

Help for this Page

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

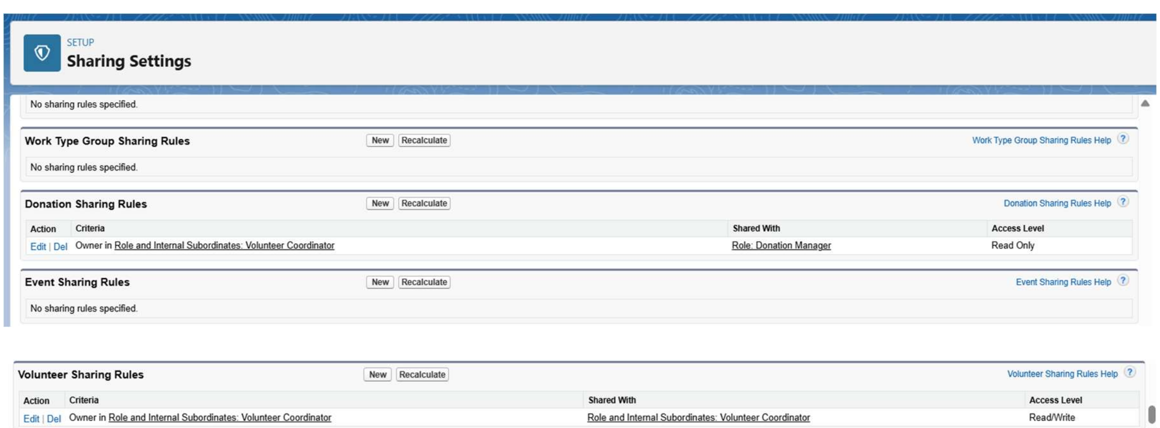
Organization-Wide Defaults Edit Organization-Wide Defaults Help

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 (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 New Recalculate Work Type Group Sharing Rules Help

No sharing rules specified.

Donation Sharing Rules New Recalculate Donation Sharing Rules Help

Action	Criteria	Shared With	Access Level
Edit | Del	Owner in Role and Internal Subordinates: Volunteer Coordinator	Role: Donation Manager	Read Only

Event Sharing Rules New Recalculate Event Sharing Rules Help

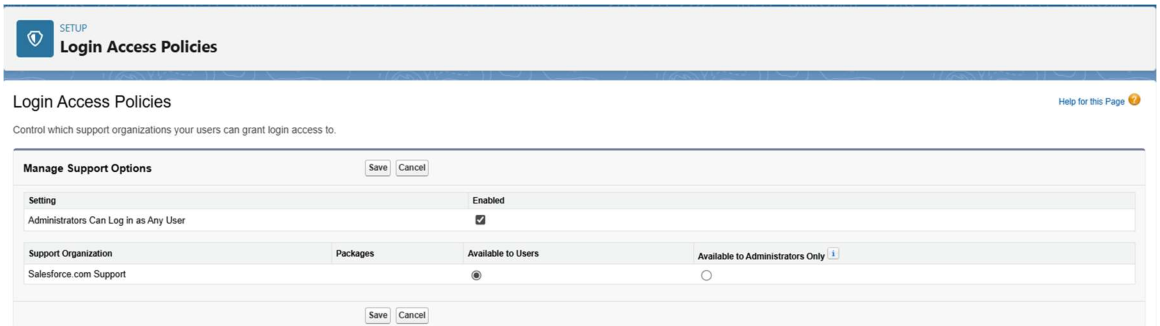
No sharing rules specified.

Volunteer Sharing Rules New Recalculate Volunteer Sharing Rules Help

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

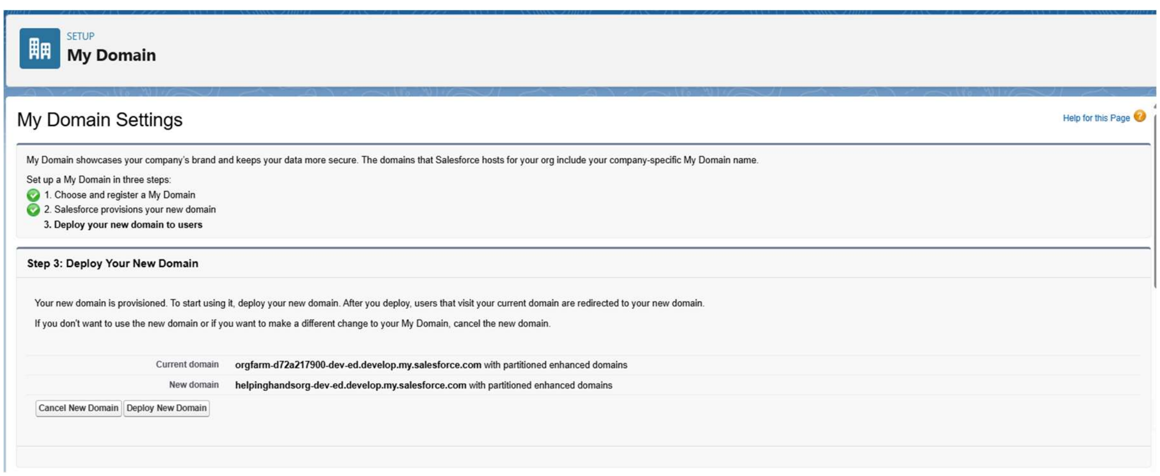
Enabled administrators to log in as any user for troubleshooting. This allows quick issue resolution and ensures smooth testing during the project.



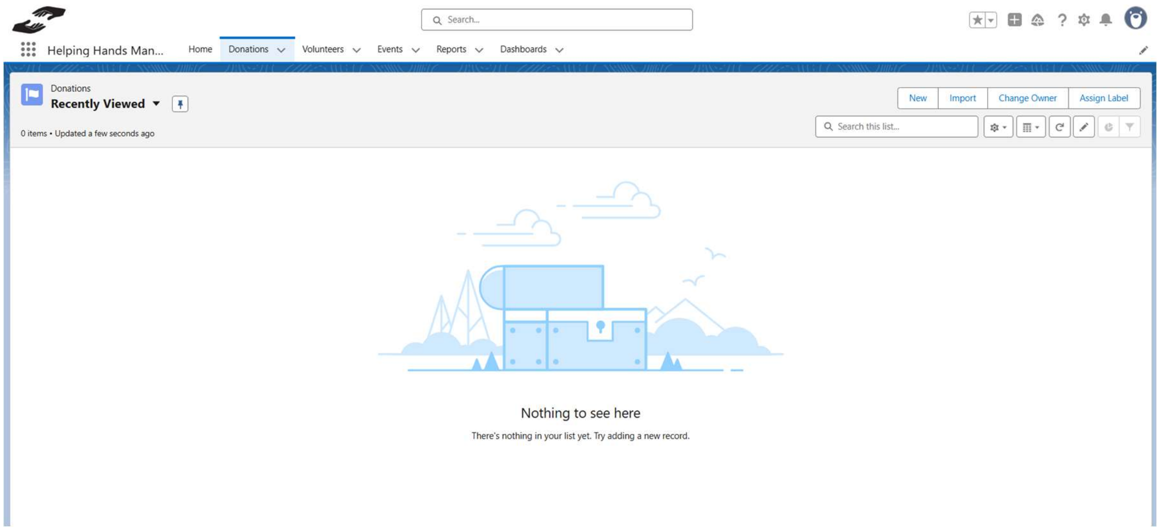
Step 12: Development Org Setup

Confirmed the Developer Org setup and enabled

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



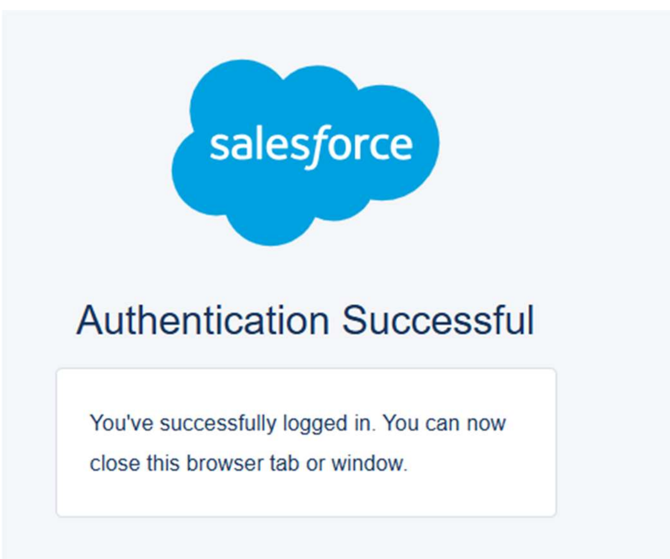
Created a dedicated app 'Helping Hands Management' for testing all project configurations and customizations.

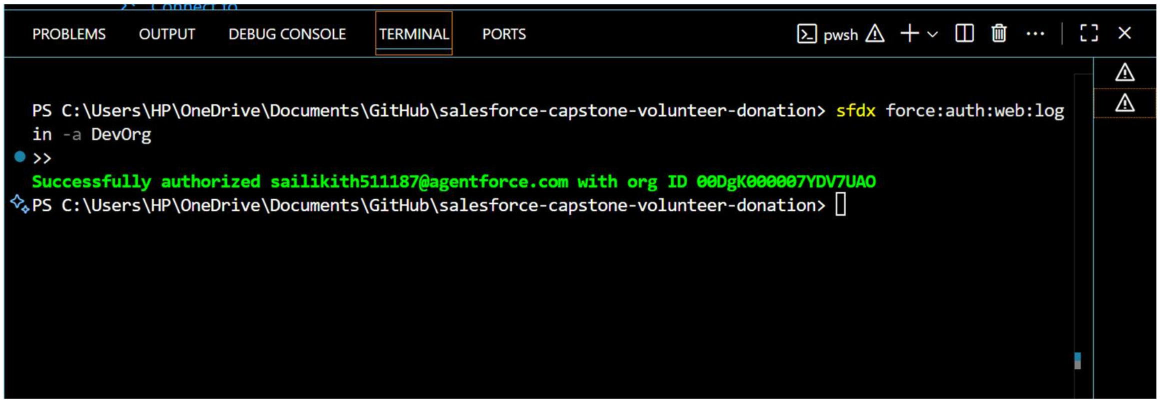


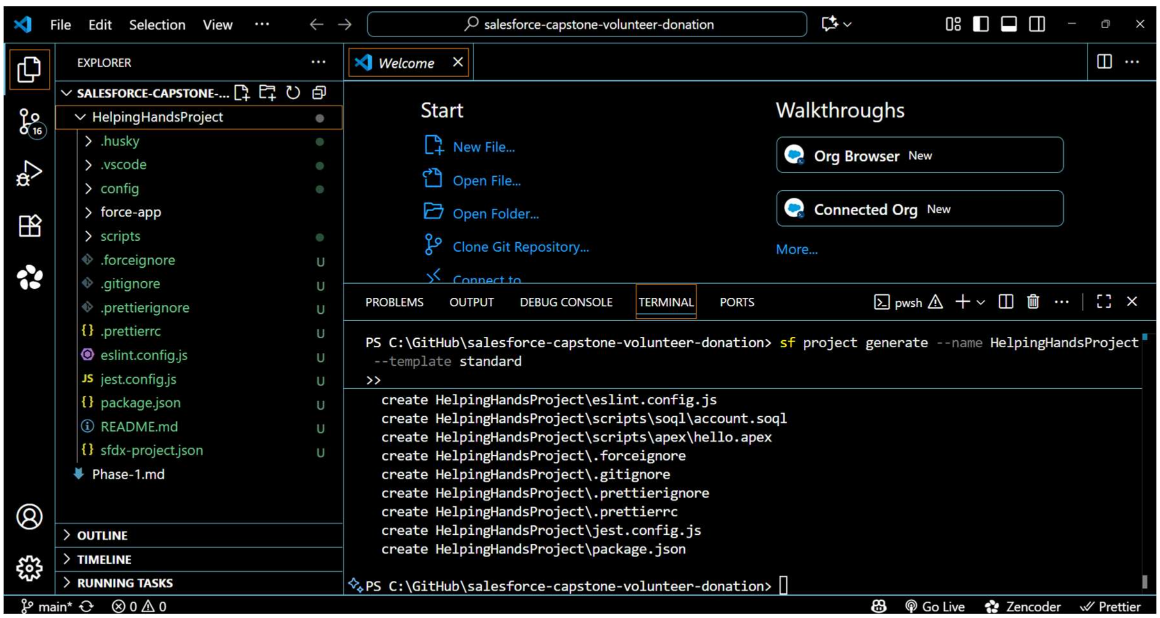
Step 13: Deployment Basics

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.







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