Phase 2: Org Setup & Configuration

In this phase, we set up the Salesforce organization with company details, user access controls, roles, permissions, and basic deployment setup. This ensures a strong foundation for building our Volunteer & Donation Management System.

# 1. Salesforce Editions

For this project, we are using the Salesforce Developer Edition. It provides full functionality of Enterprise Edition with free licensing for development and learning.

# 2. Company Profile Setup

Company Name: Helping Hands Foundation  
Default Locale: English (India)  
Currency: INR  
Timezone: Asia/Kolkata

# 3. Business Hours & Holidays

Business Hours: Monday to Friday, 9 AM to 6 PM  
Defined Holidays: National holidays added (example: Republic Day, Independence Day).

# 4. Fiscal Year Settings

Standard Fiscal Year: January to December.

# 5. User Setup & Licenses

Users created for key stakeholders:  
- Admin (System Administrator license)  
- Volunteer Coordinator (Standard User license)  
- Finance Officer (Standard User license)  
- Volunteers (Chatter Free licenses for limited access)

# 6. Profiles

Profiles control access to objects, fields, and permissions.  
- System Administrator Profile → Full Access  
- Standard User Profile → Coordinators & Finance Officers  
- Custom Profile: Volunteer User Profile with restricted access.

# 7. Roles

Roles define data visibility in hierarchy:  
- Executive Director (top)  
 ↳ Volunteer Coordinator  
 ↳ Finance Officer  
 ↳ Volunteers

# 8. Permission Sets

Permission sets used to grant extra access without modifying profiles:  
- Reporting Access (for users who need additional report permissions).

# 9. Org-Wide Defaults (OWD)

Set default record access levels:  
- Volunteer\_\_c → Private  
- Donation\_\_c → Private  
- Task\_\_c → Controlled by Parent

# 10. Sharing Rules

Created sharing rules to extend access:  
- Coordinators can see all Volunteer records.  
- Finance Officer can see all Donations.

# 11. Login Access Policies

Set policies to ensure security:  
- Password policies defined (minimum 8 chars, expiry 90 days).  
- Login hours restricted for volunteers (9 AM to 9 PM).

# 12. Dev Org Setup

Developer Org was used as the primary environment for development and testing.

# 13. Sandbox Usage

Although Developer Edition does not provide multiple sandboxes, the concept is documented: Sandboxes are used for testing before production deployment.

# 14. Deployment Basics

Deployment approaches considered:  
- Change Sets for metadata migration.  
- GitHub version control for documentation.  
- SFDX and VS Code for advanced deployment in future phases.