

Phase 2: Org Setup & Configuration

This foundational phase involved preparing the Salesforce environment to ensure a secure, structured, and scalable platform for the Pet Adoption Management application. Each step was critical in building the technical backbone of the project.

Step-by-Step Process:

1. **Developer Org Setup:** The first step was to establish a dedicated and isolated environment for development. A new Salesforce Developer Edition org was created to serve as a free, full-featured sandbox, ensuring that the development process would not interfere with any live production data.
2. **Pet Adoption App Creation:** A new Lightning App named "Pet Adoption Management" was created. This app acts as the primary container for all the custom objects, tabs, and pages, providing a dedicated and branded user interface for shelter staff and volunteers.
3. **Role Hierarchy Configuration:** To model the shelter's organizational structure and control data visibility, a role hierarchy was established. Two primary roles were created: Admin for full access and control, and Volunteer reporting to the Admin, ensuring managers could see the records owned by their team members.
4. **Profile and Permission Set Configuration:** To manage user permissions, a custom profile named Volunteer was created by cloning a standard profile. This profile was designed to give volunteers the specific permissions they need to perform their duties. Additionally, an "Adoption Approver" permission set was created to grant extra permissions to specific users without changing their entire profile, allowing for a flexible and secure access control model.

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https://orgfarm-d5e61804f8-dev-ed.develop.lightning.force.com/lightning/setup/Roles/home

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SETUP

Roles

Creating the Role Hierarchy

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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

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