

## PHASE 2

### Company Profile Setup

Basic org details are configured under **Setup → Company Information → Edit** to establish the foundational settings for the ***Organ Donation & Transplant Registry*** org.

- **Name:** Organ Donation & Transplant Registry
- **Time Zone:** GMT+05:30 Asia/Kolkata
- **Locale:** English (India)
- **Language:** English
- **Currency:** INR

The screenshot shows the 'Company Information' page in Salesforce Setup. The page title is 'Organ Donation & Transplant Registry'. Below the title, it says 'The organization's profile is below.' There are links for 'User Licenses (10)', 'Permission Set Licenses (10)', 'Feature Licenses (1)', and 'Usage-based Entitlements (10)'. The 'Organization Detail' section is expanded, showing various settings. The 'Organization Name' is 'Organ Donation & Transplant Registry'. The 'Primary Contact' is 'OrgFarm EPIC'. The 'Division' is 'Andhra Pradesh'. The 'Address' is 'India'. The 'Fiscal Year Starts In' is 'January'. The 'Default Time Zone' is '(GMT+05:30) India Standard Time (Asia/Kolkata)'. The 'Currency Locale' is 'English (India) - INR'. The 'Used Data Space' is '342 KB (7%)'. The 'Used File Space' is '17 KB (0%)'. The 'API Requests, Last 24 Hours' is '0 (15,000 max)'. The 'Streaming API Events, Last 24 Hours' is '0 (10,000 max)'. The 'Restricted Logins, Current Month' is '0 (0 max)'. The 'Salesforce.com Organization ID' is '00D6000000hzcO'. The 'Organization Edition' is 'Developer Edition'. The 'Instance' is 'USA1044'. The 'Created By' is 'OrgFarm EPIC' on '9/18/2025, 2:52 PM'. The 'Modified By' is 'MULAPAKA SUDHARSHAN REDDY' on '9/23/2025, 7:32 AM'. There are 'Edit' buttons for the 'Organization Detail' and 'Created By' fields.

Organization Detail	
Organization Name	Organ Donation & Transplant Registry
Primary Contact	OrgFarm EPIC
Division	Andhra Pradesh
Address	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	English (India) - INR
Used Data Space	342 KB (7%) <a href="#">View</a>
Used File Space	17 KB (0%) <a href="#">View</a>
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	00D6000000hzcO
Organization Edition	Developer Edition
Instance	USA1044
Created By	OrgFarm EPIC, 9/18/2025, 2:52 PM
Modified By	MULAPAKA SUDHARSHAN REDDY, 9/23/2025, 7:32 AM

### Business Hours & Holidays

Business hours define when the support team is available to handle operations in the ***Organ Donation & Transplant Registry***.

- **Business Hours Name:** Hospital Support Hours
- **Time Zone:** GMT+05:30 India Standard Time (Asia/Kolkata)
- **Hours:**
  - Sunday: Closed
  - Monday – Saturday: 9:00 AM – 6:00 PM
- **Default Business Hours:** Not Checked
- **Active:** Checked

- Holidays: None

SETUP

Business Hours

Organization Business Hours

Help for this Page

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.

Holidays

Business Hours Detail

Edit

Business Hours Name	Hospital Support Hours	Time Zone
Business Hours	<div><div>Sunday</div><div>No Hours</div></div> <div><div>Monday</div><div>9:00 AM to 6:00 PM</div></div> <div><div>Tuesday</div><div>9:00 AM to 6:00 PM</div></div> <div><div>Wednesday</div><div>9:00 AM to 6:00 PM</div></div> <div><div>Thursday</div><div>9:00 AM to 6:00 PM</div></div> <div><div>Friday</div><div>9:00 AM to 6:00 PM</div></div> <div><div>Saturday</div><div>9:00 AM to 6:00 PM</div></div>	

Default Business Hours

☐

| Active | ☒ | (GMT+05:30) India Standard Time (Asia/Kolkata) |
| Created By | MULAPAKA SUDHARSHAN REDDY 9/23/2025, 7:48 AM | Last Modified By MULAPAKA SUDHARSHAN REDDY 9/23/2025, 7:48 AM |

Edit

Holidays

Add/Remove

No records to display

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Always show me more records per related list

## Fiscal Year Settings

For the *Organ Donation & Transplant Registry* project, the standard Salesforce fiscal year was retained.

- Type: Standard Fiscal Year
- Start Month: January
- End Month: December
- Fiscal Year Label: Ending month (e.g., FY 2025 for Jan–Dec 2025)
- Reason: Keeps reporting and forecasting simple and aligned with default Salesforce standards.

SETUP

Fiscal Year

Setup

Help for this Page

Organization Fiscal Year Edit: Organ Donation & Transplant Registry

To specify the fiscal year type for your organization, choose one of the options below.

Standard Fiscal Year

Custom Fiscal Year

Fiscal Year Information

Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example, if your fiscal year starts in April 2025 and ends in March 2026, your Fiscal Year setting can be either 2025 or 2026.

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.

Change Fiscal Year Period

Save Cancel

Name	Organ Donation & Transplant Registry
Fiscal Year Start Month	January
Fiscal Year is Based On	<div><div><input checked="" type="radio"/> The ending month</div><div><input type="radio"/> The starting month</div></div>

Save Cancel

## User Setup (Profiles, Roles, Permission Sets, Users)

### Roles (Hierarchy)

1. Go to Setup → Quick Find → Roles → Set Up Roles.
2. Click Add Role to create the top-level role:
  - Label: Head of Hospital
  - Role Name: Head\_of\_Hospital
  - Reports To: CEO (or leave top-level if no CEO)
  - Role Name as displayed on reports: Head of Hospital
  - Click Save
3. Create child roles:

Role Label	Role Name	Reports To
Doctor	Doctor	Head of Hospital
Coordinator/Nurse	Coordinator_Nurse	Doctor
Lab Technician	Lab_Technician	Head of Hospital
Read-Only Staff	Read_Only_Staff	Head of Hospital

4. After creating all roles, the hierarchy will look like this:

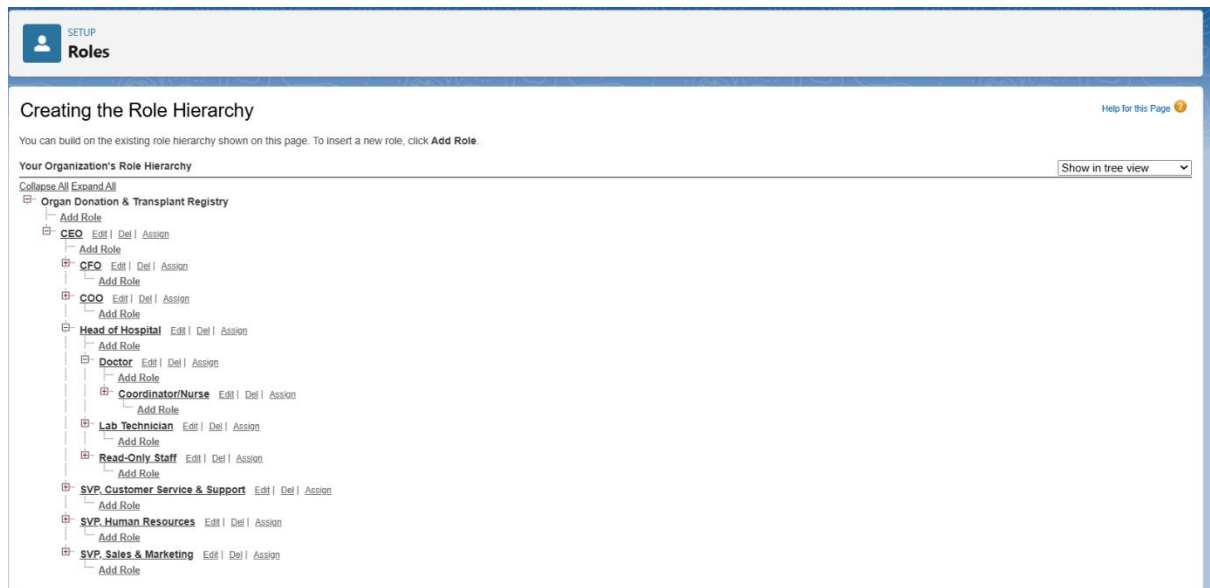
Head of Hospital

├─ Doctor

| └─ Coordinator/Nurse

├─ Lab Technician

└─ Read-Only Staff



## Profiles

1. Go to **Setup** → **Users** → **Profiles** → **New Profile (or clone standard)**.
2. Create these profiles:
  - Doctor
  - Coordinator
  - Lab Technician
  - Read-Only Staff
  - System Administrator
3. Assign appropriate **object permissions** later when objects are created.

## Users

1. Navigate to **Setup** → **Users** → **New User**.
2. Create users as follows:

Name	Role	Profile	License
John Doe	Doctor	Doctor Profile	Salesforce
Jane Smith	Coordinator	Coordinator Profile	Salesforce Platform
Mike Brown	Lab Technician	Lab Technician Profile	Salesforce Platform
Lucy Green	Read-Only	Read-Only Profile	Salesforce Platform

3. Check **Active**, assign **Username and Email**, then click **Save**.

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## Permission Sets

1. Go to **Setup** → **Permission Sets** → **New**.
2. Create **Organ Match Manager**:
  - System Permissions: Run Flows
  - Object Permissions: Match Record → Create, Read, Edit, Delete
3. Create **Reports Access**:
  - System Permissions: Run Reports, Create/Customize Reports, View Dashboards
4. Assign these permission sets to users based on roles.

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## Organization-Wide Defaults & Sharing Rules

1. Go to **Setup** → **Security** → **Sharing Settings**.
2. Set **OWD (Default Access)**:
  - Donor, Recipient, Organ → Private
  - Match Record → Controlled by Parent
3. Create **Sharing Rules** to give doctors/coordinators access as needed.

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## Login Policies

1. Navigate to **Setup** → **Security** → **Session Settings**.
2. Enable **Admin login access** for troubleshooting.
3. Keep **Session Timeout** as default (e.g., 2 hours).