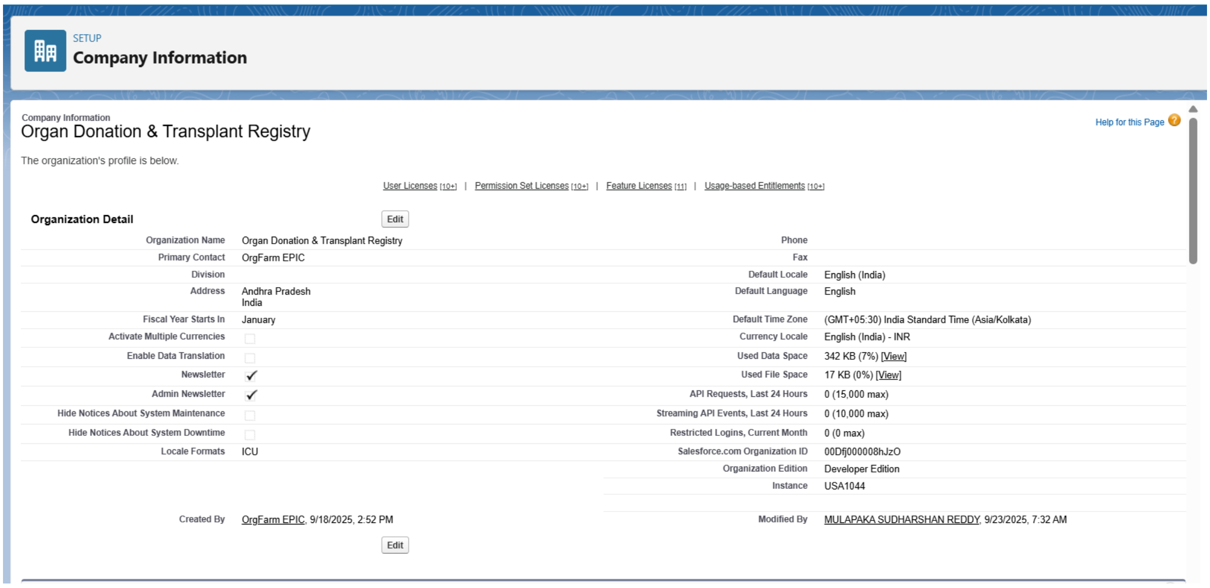
PHASE 2

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

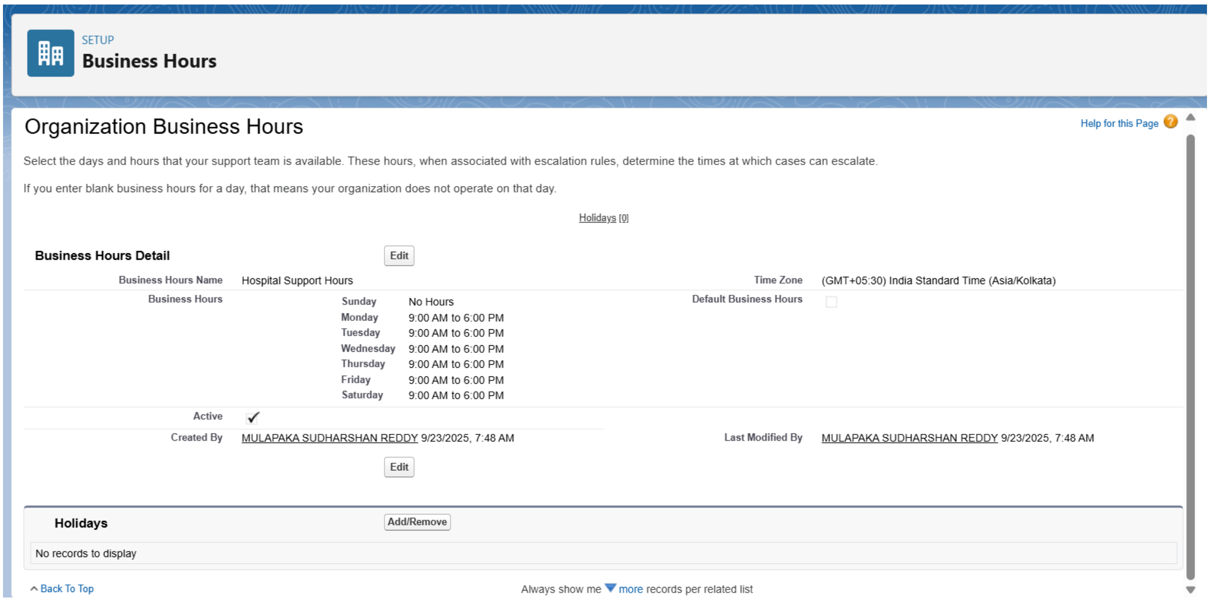


Business Hours & Holidays

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

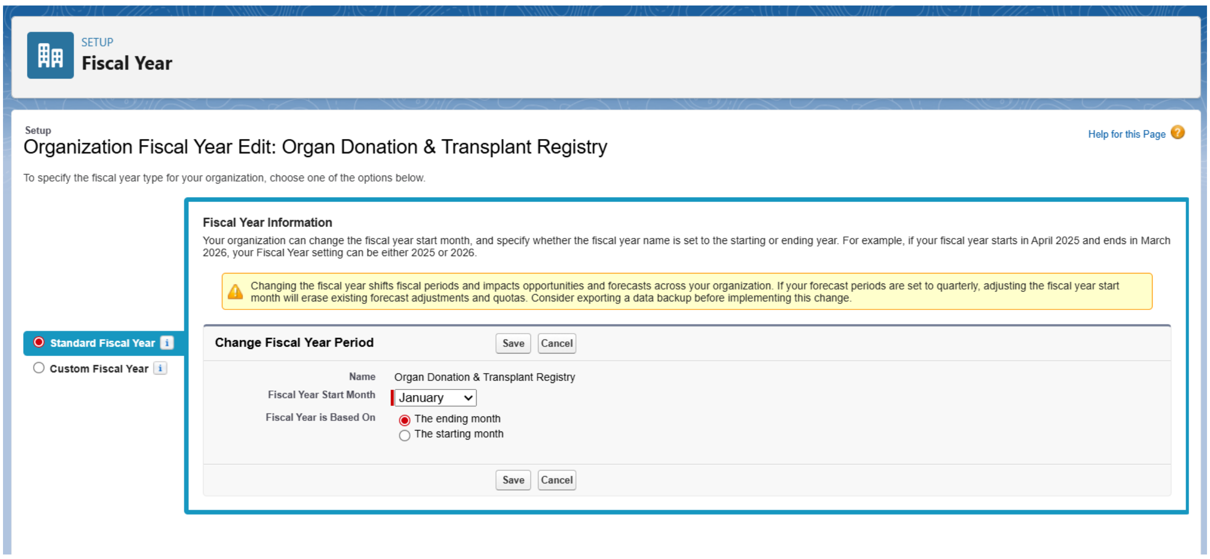
- Holidays: None



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.



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

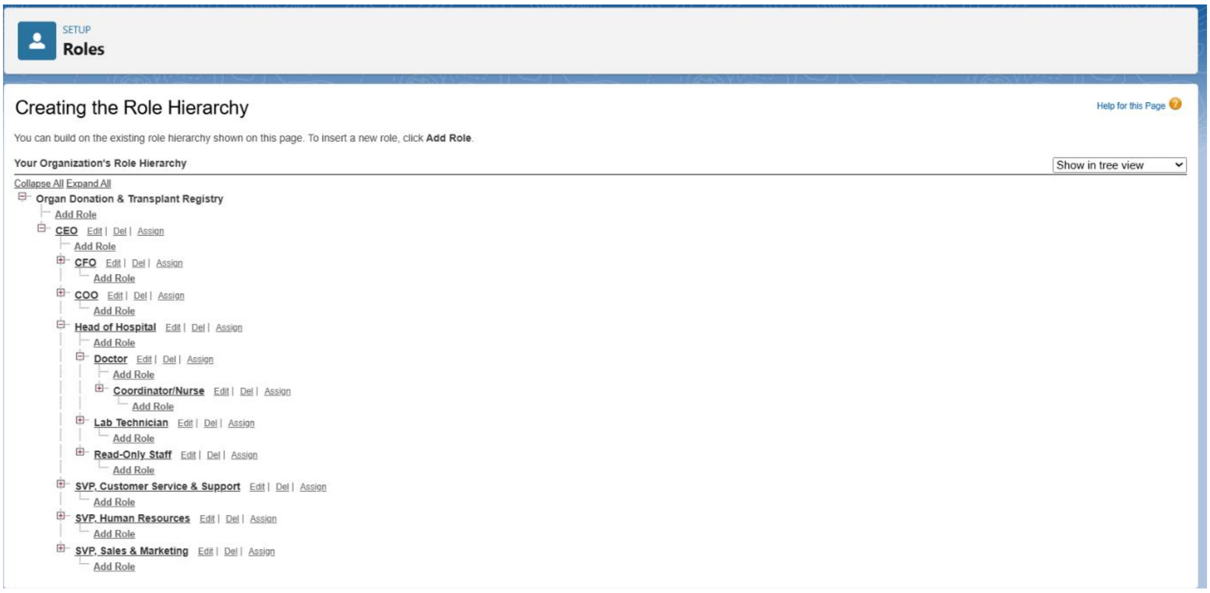
Roles (Hierarchy)

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**.

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.

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.

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).