LifeLineX Project – Phase 2: Org Setup & Configuration

Project: LifeLineX – Organ Transport Coordination Platform

Phase 2
The goal of Phase 2 is to **set up the Salesforce environment** for LifeLineX, including company settings, users, roles, profiles, permission sets, and security policies, so that later phases (object creation, automation, reporting) can be implemented smoothly.

Phase 2 Implementation Steps

Step 1: Login to Salesforce

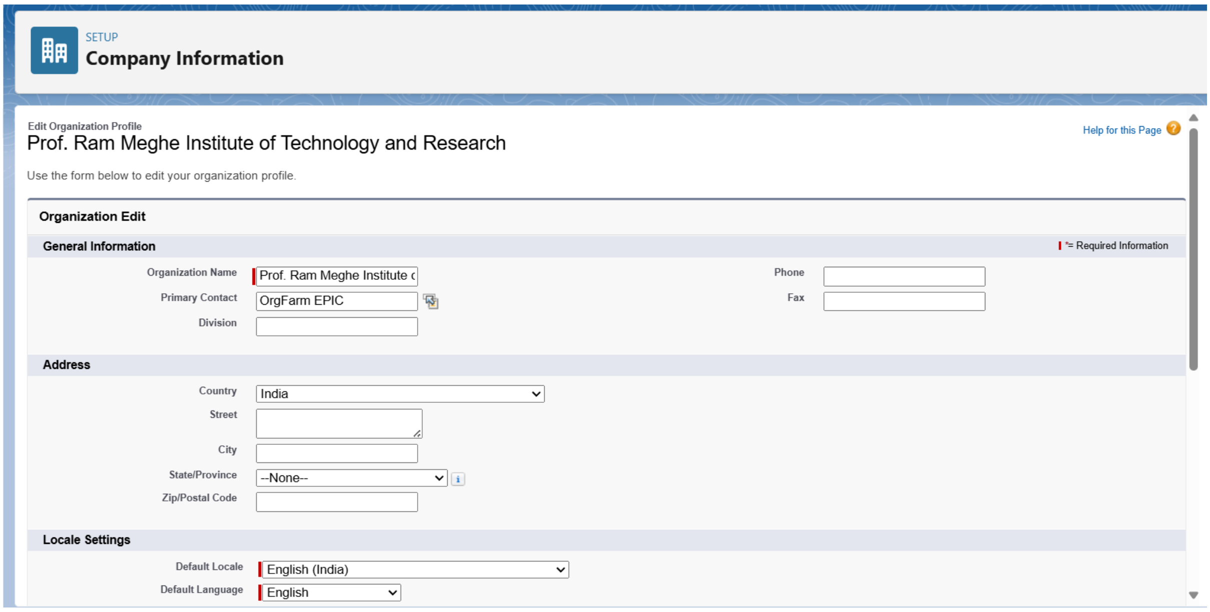
1. Go to Salesforce Developer → Login → Developer Edition.
2. Enter your username/password.
3. Open **Lightning Home Page**.

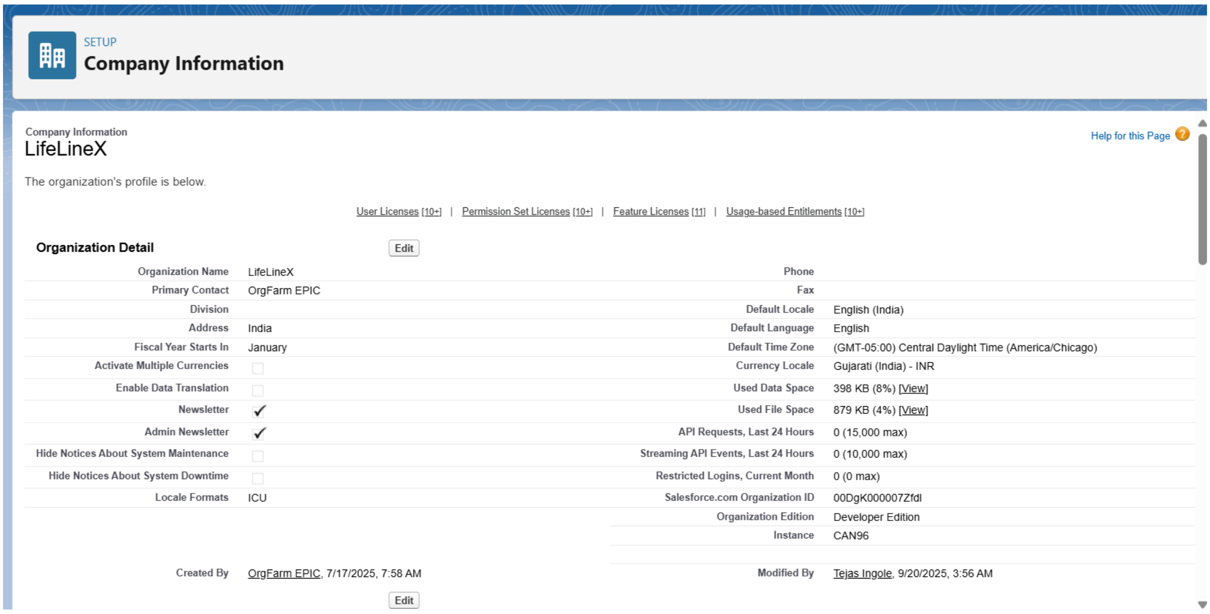
Step 2: Open Setup

1. Click **Gear Icon ( ) → Setup**.
2. You are now in **Salesforce Setup**.

Step 3: Company Information

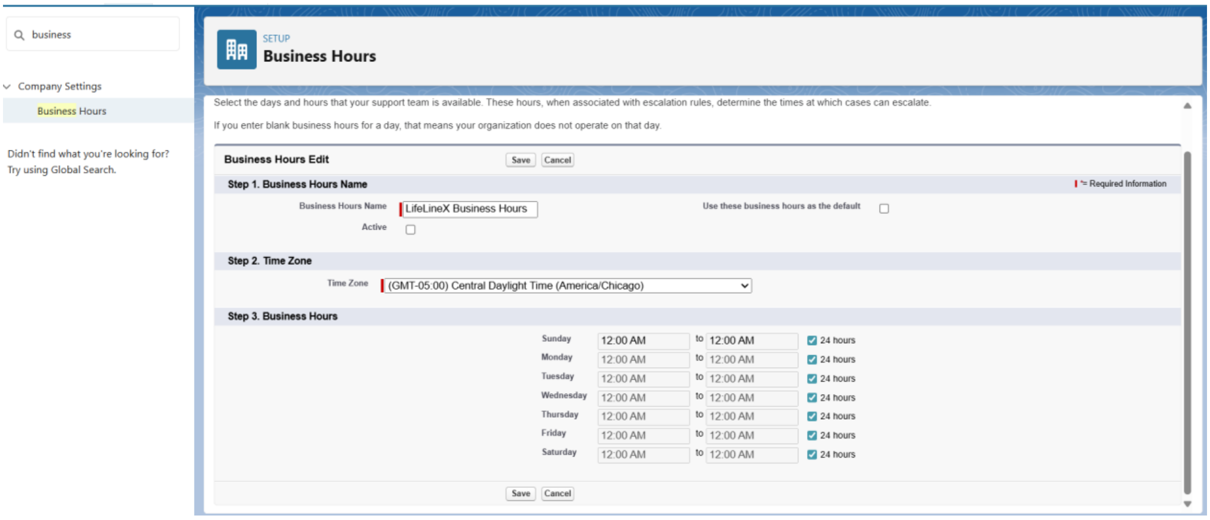
1. Quick Find → **Company Information** → click it.
2. Check Organization Name : LifeLineX
3. Click **Edit**:
   - Default Time Zone → (GMT-05:00) Central Daylight Time (America/Chicago) (e.g., GMT+5:30)
   - Default Currency → INR or USD
   - Default Language → English
4. Click **Save**





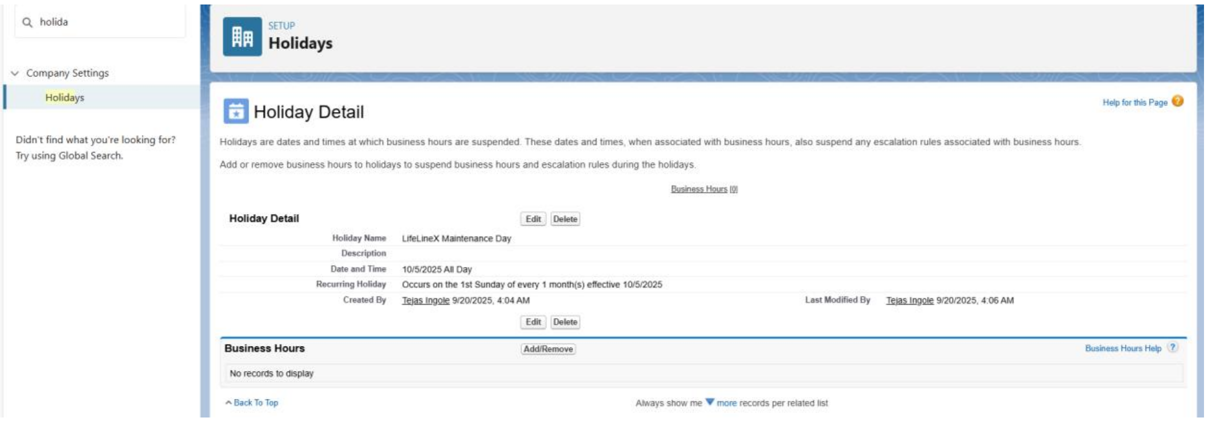
Step 4: Business Hours

1. Setup → Quick Find → **Business Hours** → click **New Business Hours**.
2. Fill the form:
   - Name: LifeLineX Business Hours
   - Time Zone: your local timezone
   - Days & Hours: 24/7
3. Click **Save**



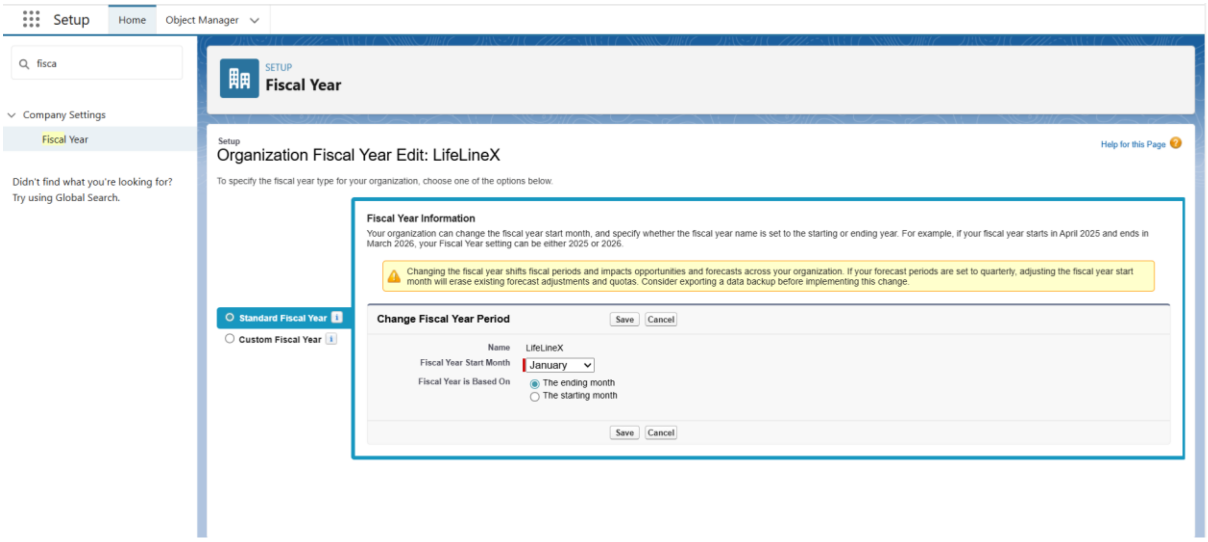
Step 5: Holidays

1. Setup → Quick Find → **Holidays** → click **New Holiday**.
2. Fill fields:
   - Holiday Name: Maintenance Day (example)
   - Date → select
3. Click **Save**



Step 6: Fiscal Year

1. Setup → Quick Find → **Fiscal Year** → click **Fiscal Year Settings**.
2. Select **Standard Fiscal Year** → Click **Save**



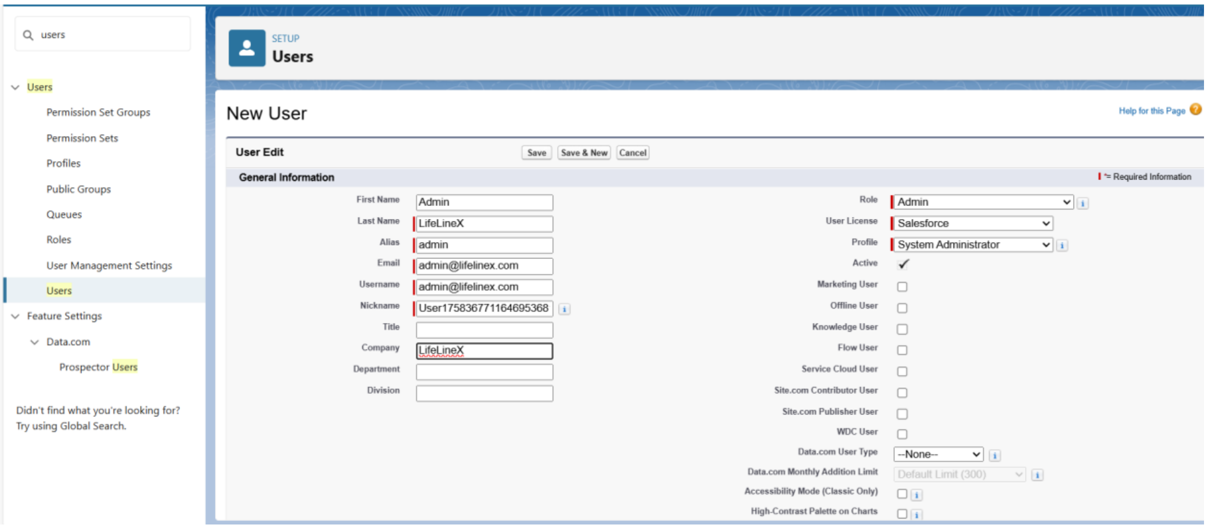
Step 7: Create Users

1. Setup → Quick Find → **Users** → click **New User**
2. Fill details:

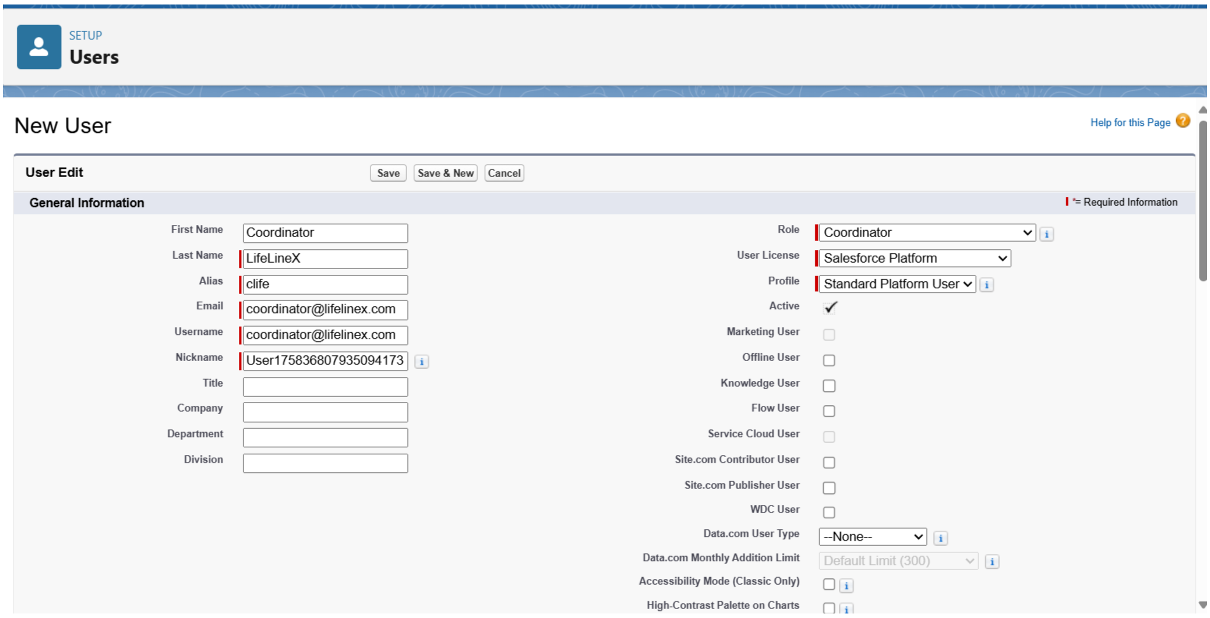
User	Profile	Role	Notes
Admin	System Administrator	Admin	Full access
Coordinator	Standard Platform	Coordinator	Assign transport cases
Courier	Standard Platform	Courier	Handles transport cases
Doctor	Standard Platform	Doctor	Receives alerts

3. Click **Save** for each user.

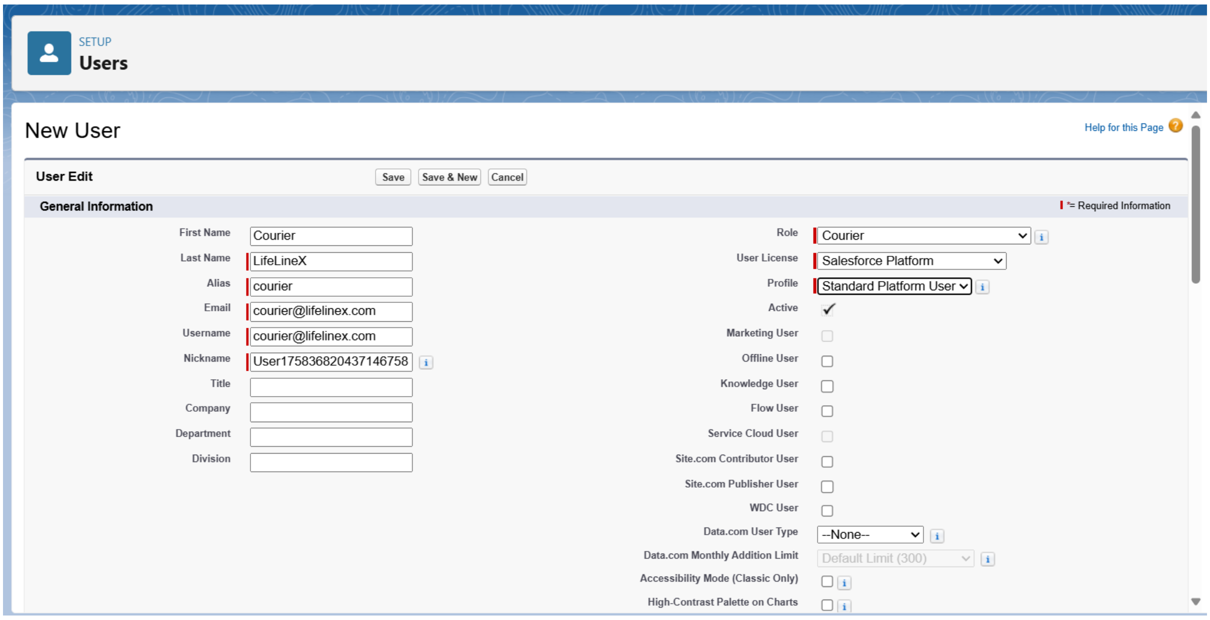
Admin



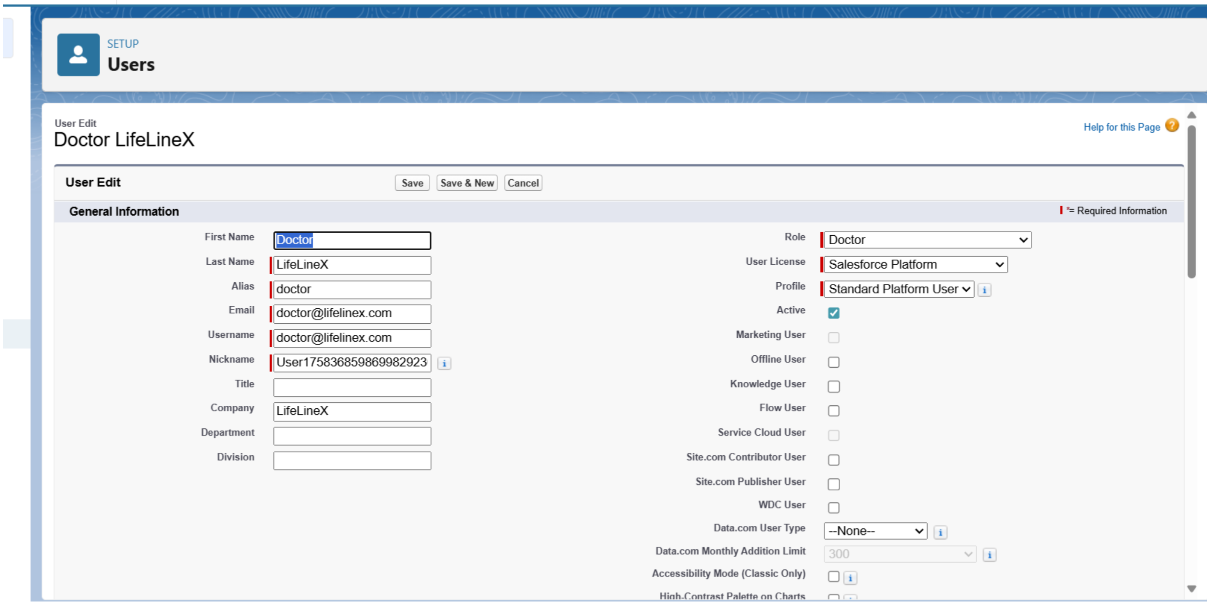
Coordinator



Courier



Doctor



Step 8: Profiles

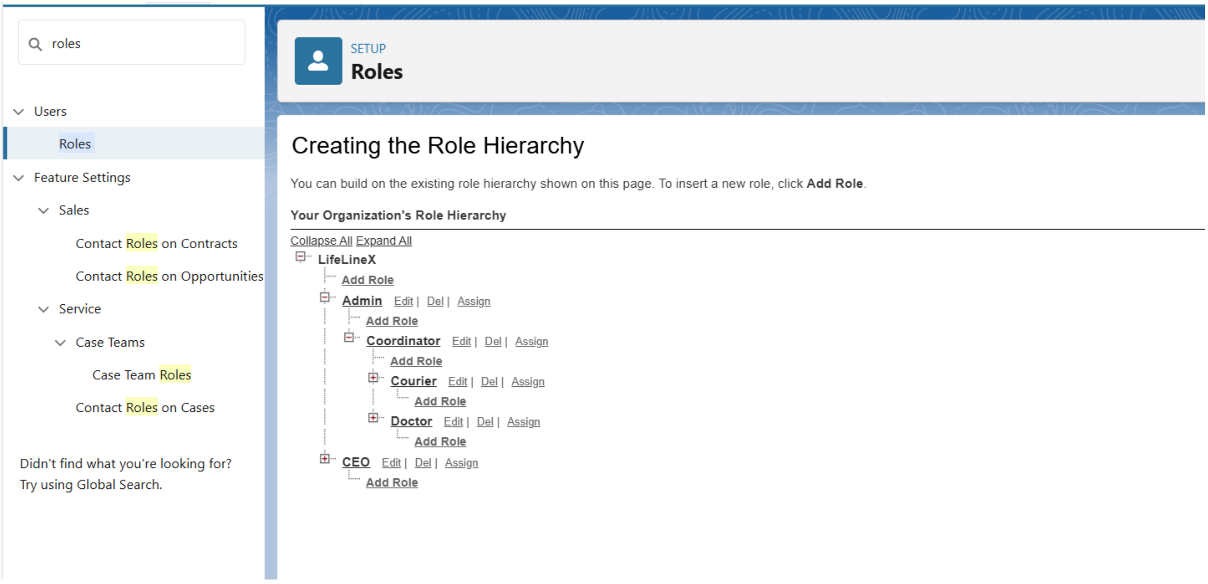
1. Setup → Quick Find → **Profiles**
2. Open each profile → **Object Settings**
3. Configure object permissions:

OBJECT	ADMIN	COORDINATOR	COURIER	DOCTOR
ORGAN	Full	Read/Edit	Read Only	Read Only
TRANSPORT CASE	Full	Read/Edit	Edit Own	Read Only
ALERTS	Full	Read/Edit	Read Only	Read Only

Permissions for **custom objects** will be finalized after objects are created (Phase 3).

Step 9: Roles

1. Setup → Quick Find → **Roles** → click **Set Up Roles**
2. Create hierarchy:
   - Admin (top)
   - Coordinator → reports to Admin
   - Doctor → reports to Coordinator
   - Courier → reports to Coordinator
3. Click **Save**



Step 10: Permission Sets

1. Setup → Quick Find → **Permission Sets** → click **New**
2. Name: Alert Manager
3. Assign object permissions → Edit Alerts
4. Assign users (Admin + Coordinator) → Save

Expected Outcome: Extra permissions granted without changing profiles.

Step 11: Organization-Wide Defaults (OWD)

Note: Cannot configure yet.

- OWD requires custom objects to exist.
- Will be done **after Phase 3 (Data Modeling & Relationships)** once objects like **Organ, Transport Case, Alerts** are created.

Step 12: Sharing Rules

Note: Cannot configure yet.

- Sharing Rules depend on custom objects.
- Will be configured **after Phase 3**, based on roles and object criteria.
