

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**:
 - o Default Time Zone → (GMT-05:00) Central Daylight Time (America/Chicago) (e.g., GMT+5:30)
 - o Default Currency → INR or USD
 - o Default Language → English
4. Click **Save**

The screenshot shows the 'Edit Organization Profile' screen in the Salesforce Setup. The title bar says 'SETUP' and 'Company Information'. The main section is titled 'Organization Edit' under 'General Information'. It shows fields for 'Organization Name' (Prof. Ram Meghe Institute of Technology and Research), 'Primary Contact' (OrgFarm EPIC), and 'Division'. Below this is the 'Address' section with fields for 'Country' (India), 'Street', 'City', 'State/Province' (None), and 'Zip/Postal Code'. At the bottom is the 'Locale Settings' section with 'Default Locale' (English (India)) and 'Default Language' (English). A note at the top right indicates 'I = Required Information'.

SETUP

Company Information

Company Information
LifeLineX

The organization's profile is below.

User Licenses (10+) | Permission Set Licenses (10+) | Feature Licenses (11) | Usage-based Entitlements (10+)

Organization Detail

Organization Name	LifeLineX	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (India)
Address	India	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT-05:00) Central Daylight Time (America/Chicago)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	Gujarati (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	398 KB (8%) [View]
Newsletter	<input checked="" type="checkbox"/>	Used File Space	879 KB (4%) [View]
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00DgK000007Zfdl
		Organization Edition	Developer Edition
		Instance	CAN96

Created By [OrgFarm EPIC](#), 7/17/2025, 7:58 AM Modified By [Tejas Ingole](#), 9/20/2025, 3:56 AM

[Edit](#)

Step 4: Business Hours

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

SETUP

Business Hours

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.

Business Hours Edit

Step 1. Business Hours Name

Business Hours Name: Save Cancel Required Information

Active:

Step 2. Time Zone

Time Zone: Save Cancel

Step 3. Business Hours

	Sunday	12:00 AM	to	12:00 AM	<input checked="" type="checkbox"/> 24 hours
Monday	12:00 AM	to	12:00 AM	<input checked="" type="checkbox"/> 24 hours	
Tuesday	12:00 AM	to	12:00 AM	<input checked="" type="checkbox"/> 24 hours	
Wednesday	12:00 AM	to	12:00 AM	<input checked="" type="checkbox"/> 24 hours	
Thursday	12:00 AM	to	12:00 AM	<input checked="" type="checkbox"/> 24 hours	
Friday	12:00 AM	to	12:00 AM	<input checked="" type="checkbox"/> 24 hours	
Saturday	12:00 AM	to	12:00 AM	<input checked="" type="checkbox"/> 24 hours	

Save Cancel

Step 5: Holidays

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

The screenshot shows the 'Holidays' setup page. A specific holiday record is selected: 'LifeLineX Maintenance Day'. The details include the holiday name, date (10/5/2025 All Day), and recurrence ('Occurs on the 1st Sunday of every 1 month(s) effective 10/5/2025'). The record was created by 'Tejas.Ingole' on 9/20/2025, 4:04 AM, and last modified by 'Tejas.Ingole' on 9/20/2025, 4:06 AM.

Step 6: Fiscal Year

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

The screenshot shows the 'Fiscal Year' setup page. The 'Standard Fiscal Year' option is selected. A modal window titled 'Change Fiscal Year Period' is open, showing the fiscal year start month as 'January'. A warning message in the modal states: '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.'

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

The screenshot shows the Salesforce Admin interface for creating a new user. The left sidebar is titled 'Users' and includes sections for Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Feature Settings. The 'Users' section is currently selected. The main area is titled 'New User' and contains a 'User Edit' form. The 'General Information' tab is active, showing fields for First Name (Admin), Last Name (LifeLineX), Alias (admin), Email (admin@lifelinex.com), Username (admin@lifelinex.com), Nickname (User175836771164695368), Title (empty), Company (LifeLineX), Department (empty), and Division (empty). On the right, there are dropdown menus for Role (Admin), User License (Salesforce), Profile (System Administrator), and Active (checked). Other optional checkboxes include Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type (None), Data.com Monthly Addition Limit (Default Limit (300)), Accessibility Mode (Classic Only), and High-Contrast Palette on Charts.

Coordinator

The screenshot shows the Salesforce Coordinator interface for creating a new user. The left sidebar is identical to the Admin interface. The main area is titled 'New User' and contains a 'User Edit' form. The 'General Information' tab is active, showing fields for First Name (Coordinator), Last Name (LifeLineX), Alias (clife), Email (coordinator@lifelinex.com), Username (coordinator@lifelinex.com), Nickname (User175836807935094173), Title (empty), Company (empty), Department (empty), and Division (empty). On the right, there are dropdown menus for Role (Coordinator), User License (Salesforce Platform), Profile (Standard Platform User), and Active (checked). Other optional checkboxes and settings are identical to the Admin screenshot.

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:
 - o Admin (top)
 - o Coordinator → reports to Admin
 - o Doctor → reports to Coordinator
 - o Courier → reports to Coordinator
3. Click **Save**

The screenshot shows the Salesforce Setup Roles page. The left sidebar has a search bar and navigation sections for Users, Feature Settings, Sales, Service, and Case Teams. The main area is titled "Creating the Role Hierarchy" and contains a tree view of roles under "Your Organization's Role Hierarchy". The tree structure is as follows:

- LifeLineX
 - Add Role
- Admin
 - Edit | Del | Assign
 - Add Role
- Coordinator
 - Edit | Del | Assign
 - Add Role
- Courier
 - Edit | Del | Assign
 - Add Role
- Doctor
 - Edit | Del | Assign
 - Add Role
- CEO
 - Edit | Del | Assign
 - Add Role

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.