

# **SAHAYA – Disaster Response Management System**

## **Phase 2 : Org Setup & Configuration**

### **1. Introduction:**

This phase involved setting up the foundation of our Salesforce org for the SAHAYA Disaster Response Management System. We configured basic settings, users, and security to prepare for building the application.

### **2. Objectives:**

- Setup a Salesforce Developer Edition org named Sahaya\_Disaster\_Response.
- Create sample users: Disaster Manager, Field Coordinator, and Medical Volunteer.
- Establish a security framework using Profiles and Roles.
- Configure settings for 24/7 emergency operations.

### **3. Configuration Steps:**

#### **Step 1 — Company Profile**

1. Updated the organization name to reflect our project.
2. Action: Setup → Company Information → Updated Organization Name to Sahaya\_Disaster\_Response.

Object Manager ▾

Search Setup

SETUP

## Company Information

The organization's profile is below.

[User Licenses \(10+\)](#) | 
 [Permission Set Licenses \(10+\)](#) | 
 [Feature Licenses \(11\)](#) | 
 [Usage-based Entitlements \(10+\)](#)

### Organization Detail

[Edit](#)

Organization Name	Sahaya_Disaster_Response	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (India)
Address	Kakinada 533003 Andhra Pradesh India	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	342 KB (7%) <a href="#">[View]</a>
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) <a href="#">[View]</a>
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	39 (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	00DgK00000C11pZ
		Organization Edition	Developer Edition
		Instance	CAN96

Created By  
[OrgFarm EPIC](#), 9/19/2025, 8:23 AM

Modified By  
[Tejasri Vasamsetti](#), 9/24/2025, 3:30 AM

[Edit](#)

### Fig.1 Company Profile

## Step 2 — Business Hours & Holidays

1. Created business hours for round-the-clock disaster operations.
2. Action: Setup → Business Hours → Created "24/7 Disaster Operations" and set it as default.



**Users**

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: **All Users** | [Edit](#) | [Create New View](#)

Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	Chatter Expert	Chatter	chatty_00dgk00000c11ozuar.cbxu5pb5kj@chatter.salesforce.com		✓	Chatter Free User
<a href="#">Edit</a>	Coordinator Field	Coordina	coordinator@sahaya.com	Field Operations	✓	Standard Platform User
<a href="#">Edit</a>	EPIC OrgFarm	QEPIC	epic_b58cead8a2a@orgfarm.salesforce.com		✓	System Administrator
<a href="#">Edit</a>	Manager Disaster	manager	tejasji.manager@agentforce.com	Command Center	✓	Standard Platform User
<a href="#">Edit</a>	User Integration	integ	integration@00dgk00000c11ozuar.com		✓	Analytics Cloud Integration User
<a href="#">Edit</a>	User Security	sec	insightssecurity@00dgk00000c11ozuar.com		✓	Analytics Cloud Security User
<a href="#">Edit</a>	Vasamsetti Tejasji	vas	vasamsettejasji2004125@agentforce.com		✓	System Administrator
<a href="#">Edit</a>	Volunteer Medical	Volunteer	volunteer@sahaya.com	Medical Volunteers	✓	Standard Platform User

**Fig.3 Users List**

## Step 4 — Profiles

1. Created custom profiles by cloning the Standard Platform User profile.
2. Action: Setup → Profiles → Cloned "Standard Platform User" to create:
  - Disaster Manager
  - Field Coordinator
  - Medical Volunteer

**Profiles**

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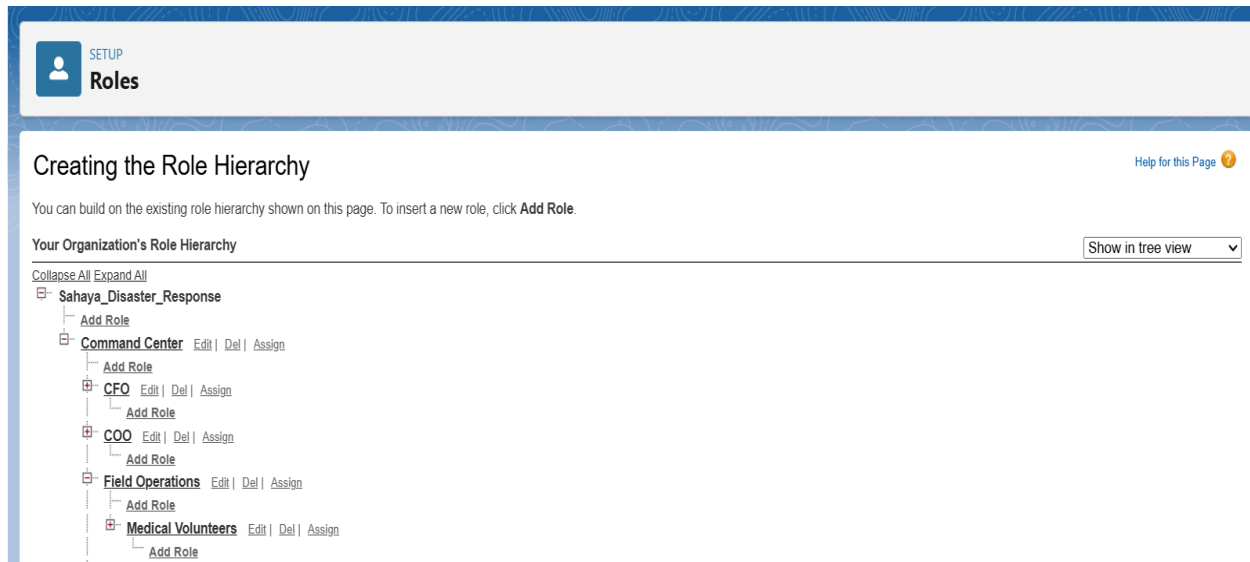
View: **All Profiles** | [Edit](#) | [Delete](#) | [Create New View](#)

Action	Profile Name	User License	Custom
<a href="#">Edit</a>   <a href="#">Clone</a>	Silver Partner User	Silver Partner	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   ...	Field Coordinator	Salesforce Platform	✓
<a href="#">Edit</a>   <a href="#">Del</a>   ...	Disaster Manager	Salesforce Platform	✓
<a href="#">Edit</a>   <a href="#">Del</a>   ...	Medical Volunteer	Salesforce Platform	✓
<a href="#">Edit</a>   <a href="#">Clone</a>	Standard Platform User	Salesforce Platform	<input type="checkbox"/>

**Fig.4 Custom Profiles**

## Step 5 — Role Hierarchy

1. Created a role hierarchy to manage data visibility.
2. Action: Setup → Roles → Created hierarchy:
  - Command Center (top level)
  - Field Operations (reports to Command Center)
  - Medical Volunteers (reports to Field Operations)



**Fig.5 Role Hierarchy**

## Step 6 — Assign Profiles and Roles to Users

1. Assigned the appropriate profile and role to each user.
2. Action: Edited each user to assign their specific SAHAYA profile and role.

**SETUP Users**

User Edit  
Disaster Manager

Save Save & New Cancel

**General Information** ⓘ Required Information

First Name Disaster  
Last Name Manager  
Alias manager  
Email tejasri.manager@agentforco  
Username tejasri.manager@agentforco  
Nickname User175871087500631879 ⓘ  
Title  
Company  
Department  
Division

Role Command Center  
User License Salesforce Platform  
Profile Disaster Manager ⓘ  
Active Disaster Manager  
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 300 ⓘ  
Accessibility Mode (Classic Only) ⓘ

**Fig.6 User Profile and Role Assignment**

## Step 7 — Permission Sets

1. Created a permission set for future extended access needs.
2. Action: Setup → Permission Sets → New → Created "Sahaya Extended Access".

**SETUP Permission Sets**

Permission Set  
Sahaya Extended Access

Find Settings... Clone Delete Edit Properties Manage Assignments View Summary

**Permission Set Overview**

Description Permission set for granting extra access to Field Coordinators or Managers beyond their profile.

License  
Session Activation Required  
Permission Set Groups Added To 0

API Name Sahaya\_Extended\_Access  
Namespace Prefix  
Created By Tejasri Vasamsetti, 9/24/2025, 5:19 AM  
Last Modified By Tejasri Vasamsetti, 9/24/2025, 5:19 AM

**Apps**

**Assigned Apps**  
Settings that specify which apps are visible in the app menu

**Assigned Connected Apps**  
Settings that specify which connected apps are visible in the app menu

**Object Settings**  
Permissions to access objects and fields, and settings such as tab availability

**App Permissions**  
Permissions to perform app-specific actions, such as "Manage Call Centers"

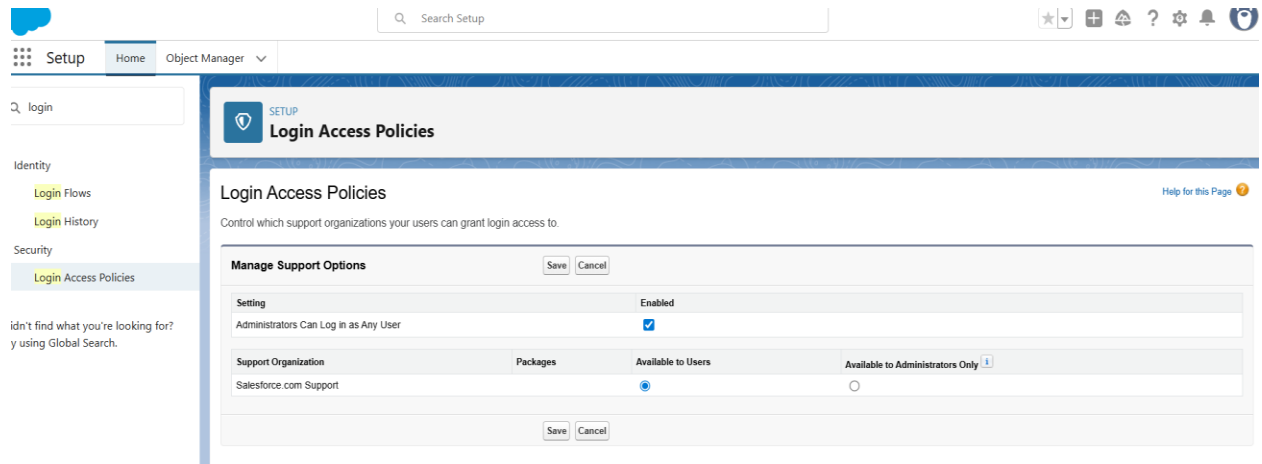
**Apex Class Access**  
Permissions to execute Apex classes

**Visualforce Page Access**  
Permissions to execute Visualforce pages

**Fig.7 Permission Set**

## Step 8 — Login Access Policies

1. Enabled administrators to log in as any user for testing and support.
2. Action: Setup → Login Access Policies → Enabled "Administrators can log in as any user".



**Fig.8 Login Access Policy**

## Step 9 — Sandbox and Deployment Setup

- Using Salesforce Developer Edition as our development environment.
- This serves as our sandbox for building and testing the SAHAYA application.
- Will use Change Sets for deployment to other environments in later phases.