

Project: Disaster Relief Resource Management CRM (ReliefConnect)

PHASE 2: Org Setup & Configuration

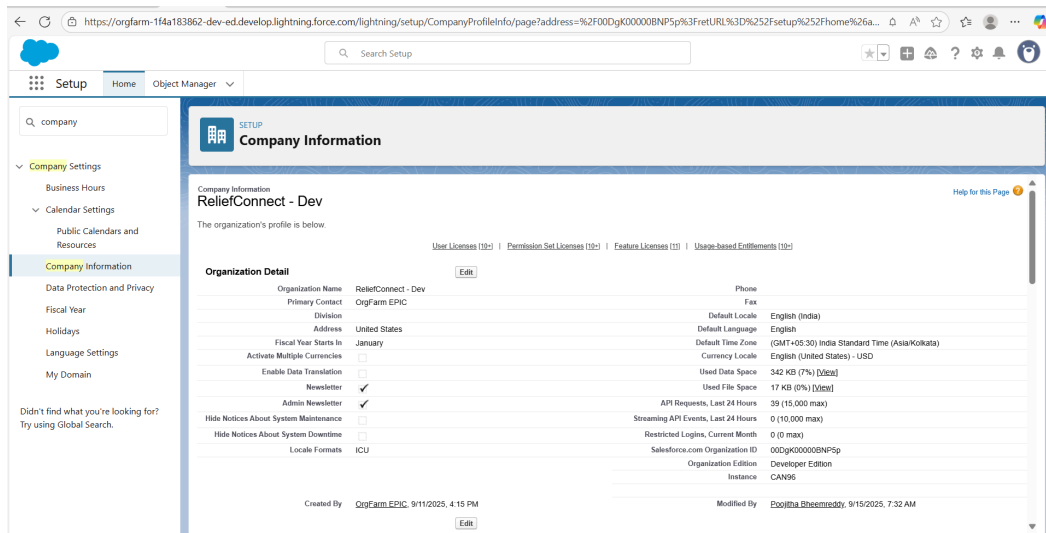
Salesforce Editions

For the development and implementation of the ReliefConnect project, a **Salesforce Developer Edition** org was established. This provides a full-featured environment for building and testing the application at no cost.

Company Profile Setup

Basic organization details were configured to reflect the project's identity and operational context. This is the primary identifying information for the Salesforce instance.

- **Path:** Setup → Company Information → Edit
- **Name:** ReliefConnect - Dev
- **Default Locale:** English (India) - Controls the format for dates, times, and numbers.
- **Default Language:** English - The default UI language for all new users.
- **Default Time Zone:** GMT+05:30 Asia/Kolkata - Ensures all timestamps align with Indian Standard Time.
- **Corporate Currency:** Indian Rupee (INR)



The screenshot shows the Salesforce Setup page for Company Information. The left sidebar contains a search bar and a list of setup categories: Company Settings, Calendar Settings, Public Calendars and Resources, Company Information (selected), Data Protection and Privacy, Fiscal Year, Holidays, Language Settings, and My Domain. The main content area is titled "Company Information" and shows the organization's profile for "ReliefConnect - Dev". The profile details are as follows:

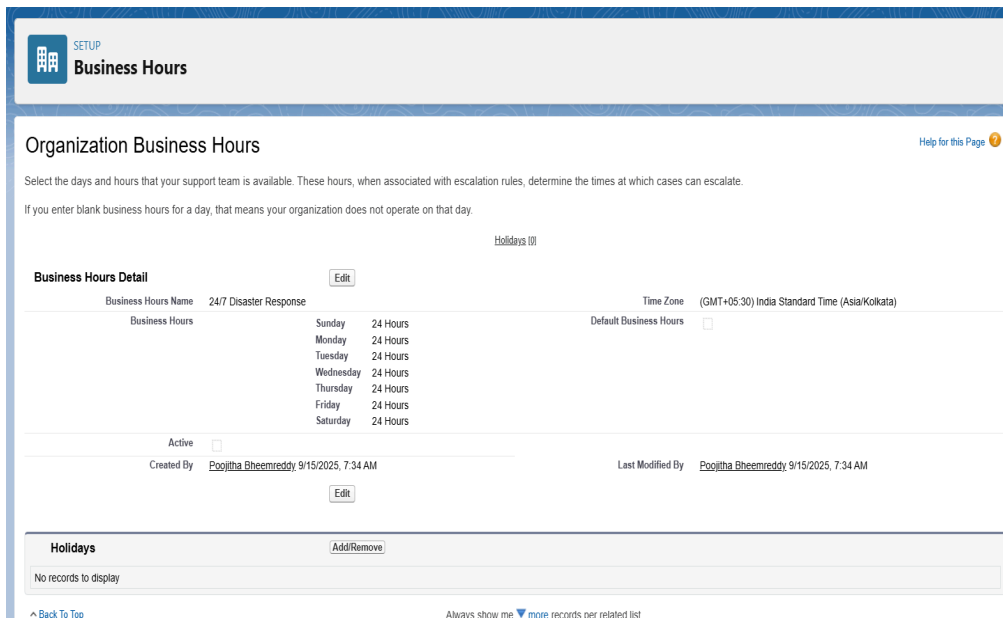
Organization Detail		Phone
Organization Name	ReliefConnect - Dev	
Primary Contact	Org/Team EPIC	Fax
Division		Default Locale
Address	United States	English (India)
Fiscal Year Starts In	January	Default Language
Activate Multiple Currencies	<input type="checkbox"/>	(GMT+05:30) India Standard Time (Asia/Kolkata)
Enable Data Translation	<input type="checkbox"/>	Default Time Zone
Newsletter	<input checked="" type="checkbox"/>	Currency Locale
Admin Newsletter	<input checked="" type="checkbox"/>	English (United States) - USD
Hide Notices About System Maintenance	<input type="checkbox"/>	Used Data Space
Hide Notices About System Downtime	<input type="checkbox"/>	342 KB (7%) [Info]
Locale Formats	ICU	Used File Space
		17 KB (0%) [Info]
		API Requests, Last 24 Hours
		29 (15,000 max)
		Streaming API Events, Last 24 Hours
		0 (10,000 max)
		Restricted Logins, Current Month
		0 (0 max)
		Salesforce.com Organization ID
		00000000000000000000000000000000
		Organization Edition
		Developer Edition
		Instance
		CAN95

Created By: Org/Team EPIC, 9/11/2025, 4:15 PM
Modified By: Poojitha Rameshreddy, 9/15/2025, 7:32 AM

Business Hours & Holidays

To ensure that service level agreements (SLAs) and escalation rules for urgent **Relief_Case__c** records are managed effectively, business hours are set to reflect the 24/7 nature of disaster response.

- **Path:** Setup → Business Hours → New
- **Name:** 24/7 Disaster Response
- **Time Zone:** GMT+05:30 Asia/Kolkata
- **Working Hours:** Monday to Sunday, 12:00 AM to 12:00 AM. This ensures that case age and escalations are calculated continuously.
- **Holidays:** Initially left blank, as relief operations do not stop for public holidays.



Organization 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 Detail

Business Hours Name	24/7 Disaster Response	Time Zone
Business Hours	Sunday 24 Hours Monday 24 Hours Tuesday 24 Hours Wednesday 24 Hours Thursday 24 Hours Friday 24 Hours Saturday 24 Hours	(GMT+05:30) India Standard Time (Asia/Kolkata)

Default Business Hours ☐

Active ☐

Created By Poojitha Bheemreddy 9/15/2025, 7:34 AM

Last Modified By Poojitha Bheemreddy 9/15/2025, 7:34 AM

Holidays

No records to display

Fiscal Year Settings

The fiscal year is defined to structure reporting, dashboards, and forecasting around annual operational cycles.

- **Path:** Setup → Fiscal Year
- **Type:** Standard Fiscal Year. This follows the Gregorian calendar.
- **Start Month:** January. A standard Jan-Dec cycle is sufficient for tracking annual trends.

SETUP
Fiscal Year

Setup
Organization Fiscal Year Edit: ReliefConnect - Dev [Help for this Page](#)

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

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.

☒ Standard Fiscal Year **1**
☐ Custom Fiscal Year **1**

Change Fiscal Year Period Save Cancel

Name: ReliefConnect - Dev
Fiscal Year Start Month: **January**
Fiscal Year is Based On:
☒ The ending month
☐ The starting month
Save Cancel

User Setup (Profiles, Roles, Permission Sets)

Users, profiles, roles, and permission sets were created to model the access hierarchy required for the different stakeholders in the relief operation.

Profiles

Custom profiles were cloned from standard profiles to provide baseline permissions tailored to each user group.

- **Field Volunteer Profile:** For frontline volunteers creating and updating relief cases.
- **NGO Coordinator Profile:** For staff managing resource allocation and case fulfillment.
- **Govt Agency Admin Profile:** For officials needing high-level dashboard visibility and reporting.

Roles

A role hierarchy was defined to control data visibility and reporting roll-ups, mirroring the operational command structure.

- **Top-Level Role:** National Command Center
- **Child Roles:**
 - State Coordinator

- District Manager
 - NGO Lead
 - Field Volunteer

Users

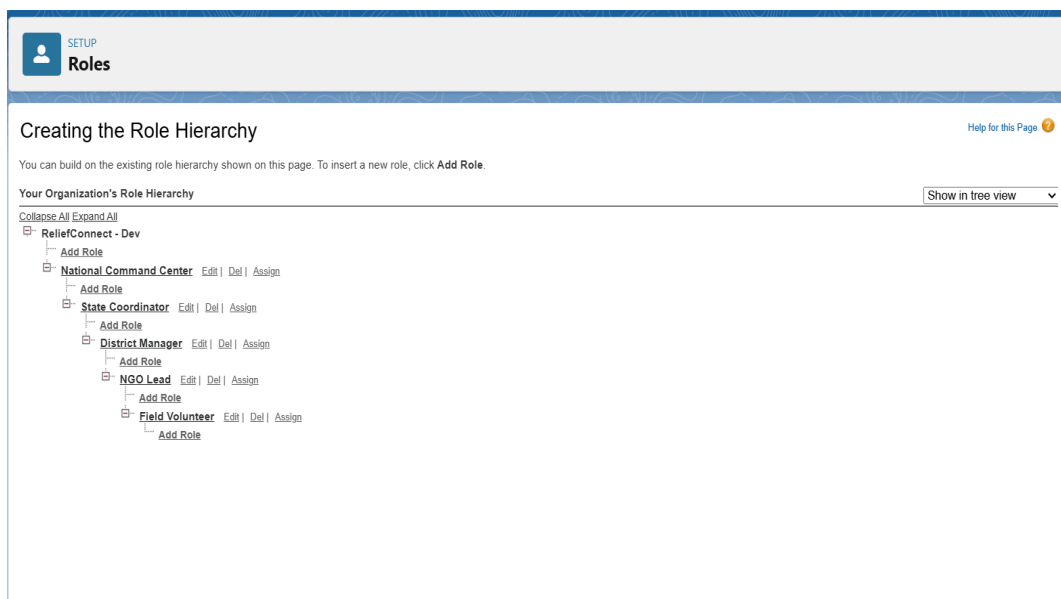
Sample users were created and assigned the appropriate profiles and roles.

- **volunteer1** → Profile: Field Volunteer, Role: Field Volunteer
- **ngo_coord1** → Profile: NGO Coordinator, Role: NGO Lead
- **govt_admin1** → Profile: Govt Agency Admin, Role: National Command Center

Permission Sets

Permission sets will grant additional permissions without changing a user's profile.

- **Case Dispatch & Escalation PS**
- **Reporting & Analytics PS**



OWD & Sharing Rules

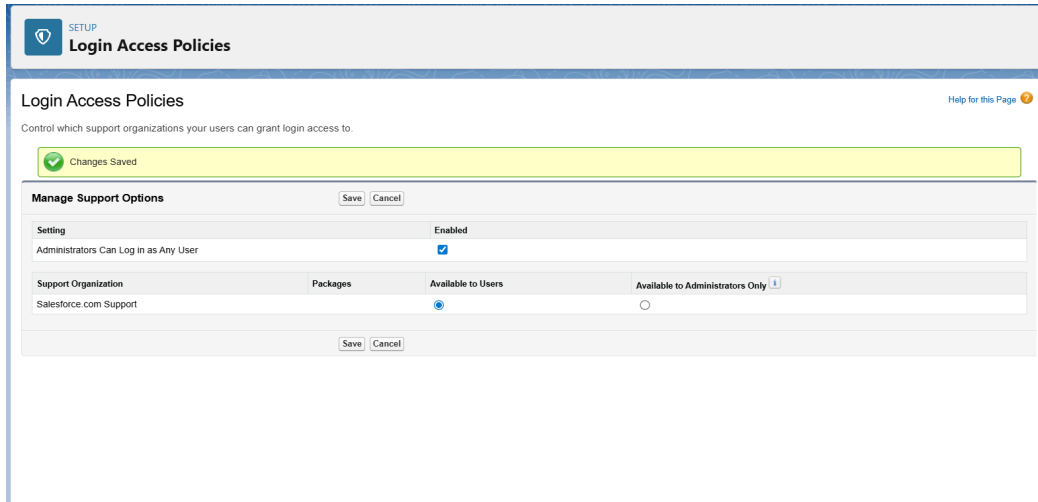
These settings will be configured in **Phase 3** after the custom objects are created.

- **OWD Strategy:** **Relief_Case__c** will be set to **Private** to protect victim privacy.
- **Sharing Rules Strategy:** Criteria-based rules will share records with relevant teams based on location (**District__c**) or need (**Case_Category__c**).

Login Access Policies

This policy allows administrators to log in as any user for troubleshooting and support.

- **Setting:** The "Administrators Can Log in as Any User" setting is **Enabled**.



SETUP Login Access Policies

Login Access Policies

Control which support organizations your users can grant login access to.

Changes Saved

Manage Support Options

Setting	Enabled
Administrators Can Log in as Any User	<input checked="" type="checkbox"/>

Support Organization	Packages	Available to Users	Available to Administrators Only
Salesforce.com Support		<input checked="" type="radio"/>	<input type="radio"/>

Dev Org Setup & Tools

A modern development lifecycle was established using the following tools:

- **Salesforce Developer Edition Org:** A new org to serve as the source of truth.
- **Version Control:** A **GitHub Repository** to store all metadata and code.
- **IDE:** **Visual Studio Code (VS Code)** with the **Salesforce Extension Pack**.

Sandbox Usage & Deployment Basics

A clear strategy for environment management was defined for smooth release cycles.

- **Sandbox Strategy:**
 - **Developer Sandbox:** For new features and bug fixes.
 - **Partial Copy Sandbox:** For User Acceptance Testing (UAT).
 - **Full Sandbox:** For final performance testing and training.
- **Deployment Strategy:**
 - **SFDX (Salesforce CLI):** The primary method for deploying metadata.
 - **Change Sets:** To be used for smaller, simpler deployments if needed.