

Punjab Relief Connect CRM

Phase 2 – Org Setup & Configuration

1. Salesforce Edition

- Use a **Salesforce Developer Edition (Free)** org for this project.
- A Developer Org provides **Nonprofit / Sales Cloud features** needed: **Donors, Donations, Volunteers, Relief Requests, Reports, and Dashboards**.
- In a real organization, a **Sandbox** would be used for development/testing, with configurations deployed to Production.

2. Company Profile Setup

Navigate: Setup → Company Information

Configure the following:

- Company Name: Punjab Relief Connect CRM
- Default Locale: **English (India)**
- Currency: **INR (₹)**
- Time Zone: **(GMT+05:30) India Standard Time**

The screenshot shows the 'Company Information' setup page for the organization 'Punjab ReliefConnect CRM'. The page includes sections for 'Organization Detail' (Primary Contact: OnFarm EPIC, Division: United States, Fiscal Year Starts In: January, etc.), 'Phone' (Default Locale: English (India), Default Language: English, Default Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata), etc.), 'User Licenses' (Status: Active, Total Licenses: 4, Used Licenses: 4, Remaining Licenses: 0, Expiration Date: 9/16/2025, 7:48 AM), and 'Salesforce.com Organization ID' (00DgK00000hCOPe). The bottom of the page shows the user was created by 'OnFarm EPIC' on 9/17/2025 at 5:53 PM and modified by 'Chinmay Choudhuri' on 9/16/2025 at 7:48 AM.

3. Business Hours & Holidays

Navigate: Setup → Business Hours → Create “Standard Business Hours”

- Open: **Mon–Sun (24/7 disaster response)**
- No holidays for emergency operations

The screenshot shows the 'Business Hours' setup page under 'SETUP'. It lists two entries:

- Default:** Pacific Daylight Time (America/Los_Angeles) - Active, checked as Default.
- Punjab_Relief_24x7:** India Standard Time (Asia/Kolkata) - Active, checked.

4. Fiscal Year Settings

Navigate: Setup → Fiscal Year → Enable Standard Fiscal Year

- Choose: **January – December**

The screenshot shows the 'Organization Fiscal Year Edit' page under 'Setup'. It has the following sections:

- Standard Fiscal Year:** Selected (radio button).
- Change Fiscal Year Period:** A modal dialog with fields:
 - Name: Punjab ReliefConnect CRM
 - Fiscal Year Start Month: January (selected dropdown value).
 - Fiscal Year Is Based On:
 - The ending month
 - The starting month

5. User Setup & Licenses

- Create at least four users:
 - **Admin** – full system access
 - **Volunteer Coordinator** – manages volunteers and relief requests
 - **Donor Manager** – manages donors and donations
 - **Volunteer** – receives assignments for relief requests
- Assign **Salesforce license** with appropriate baseline profiles

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

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

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

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty00de000007bopneum.hf04spdmnz@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Choudhari, Chinmay	chi	chinmay20ac493a@genforce.com	NGO Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Coordinator, Volunteer	voor	voicoordinator@reliefconnect.com	Volunteer Coordinator	<input checked="" type="checkbox"/>	Volunteer Coordinator Profile
<input type="checkbox"/>	EPIC_OrgFarm	OEPI	oeic.870ddc1789e@orgfarm.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Manager, Donor	dmana	donormanager@reliefconnect.com	Donor Manager	<input checked="" type="checkbox"/>	Donor Manager Profile
<input type="checkbox"/>	User_Integration	integ	integration@000gk000007bopneum.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@000gk000007bopneum.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input type="checkbox"/>	Volunteer_Test	tvolu	volunteer1@reliefconnect.com	Volunteer	<input checked="" type="checkbox"/>	Volunteer Profile

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

6. Profiles

Volunteer Profile (Cloned from Standard User)

- Permissions: View/Update assigned **Relief Requests**, read **Donor & Donation data**
- Cannot delete records or modify system settings

Donor Manager Profile (Cloned from Standard User)

- Permissions: Create/Edit/Delete **Donor & Donation records**
- Access to **Reports and Dashboards** for donor analytics

Admin Profile

- Full system access: all objects, records, and settings

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

Action	Profile Name	User License	Custom
<input type="checkbox"/>	Volunteer Coordinator Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Volunteer_Profile	Salesforce Platform	<input checked="" type="checkbox"/>

Help for this Page [?](#)

New Profile [F](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

1-2 of 2 [Selected](#)

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7. Roles (Role Hierarchy)

Navigate: Setup → Roles → Set Up Roles

- Create:

- **NGO Admin** (Top Role)
- **Coordinator** (Child Role under Admin)
- **Field Volunteer** (Child Role under Coordinator)

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

Punjab ReliefConnect CRM

- + Add Role
- + **CEO** Edit | Del | Assign
- + Add Role
- + **NGO Admin** Edit | Del | Assign
- + Add Role
- + **Donor Manager** Edit | Del | Assign
- + Add Role
- + **Volunteer Coordinator** Edit | Del | Assign
- + Add Role
- + **Volunteer** Edit | Del | Assign
- + Add Role

8. Permission Sets

- Example: “**Access Donations**” Permission Set
- Add permissions:
 - View & Edit Donations
 - View Donor Information
- Assign this Permission Set to Donor Managers who need reporting access

Permission Sets

On this page you can create, view, and manage permission sets.

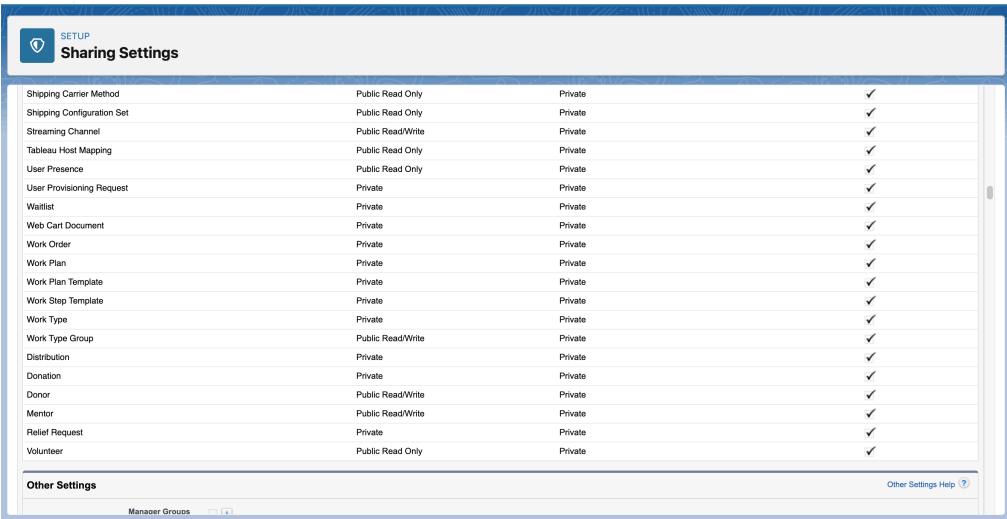
Action	Permission Set Name	Description	License
<input type="checkbox"/>	DCToDSharingSetupC2CPermSet	Allows access to Data Cloud Setup if the user is also a Salesforce admin ...	Cloud Integration User
<input type="checkbox"/>	Data Cloud Admin	Allows access to Data Cloud Setup if the user is also a Salesforce admin ...	Customer Data Platform
<input type="checkbox"/>	Data Cloud Architect	Allows access to Data Cloud Setup if the user is also a Salesforce admin ...	Data Cloud
<input type="checkbox"/>	Data Cloud Home Org Integration User	Allows integration user to access entities specific to Remote Data Cloud.	Cloud Integration User
<input type="checkbox"/>	DeliveryEstimationServicePermSet	Grants access to reports & dashboards	Cloud Integration User
<input type="checkbox"/> Del Clone	Donor Manager Reports		

9. Org-Wide Defaults (OWD)

Navigate: Setup → Sharing Settings → Edit Defaults

- Donations: **Private** (only owner & role hierarchy can view)
- Donors: **Public Read Only** (all users can view, but only Donor Manager can edit)

- Volunteers: **Private** (can see only assigned requests)



The screenshot shows the 'Sharing Settings' page in the Salesforce Setup. It lists various objects and their sharing permissions. Most objects are set to 'Private'. A few specific objects like 'Donor' and 'Mentor' have 'Public Read/Write' permissions.

Shipping Carrier Method	Public Read Only	Private	✓
Shipping Configuration Set	Public Read Only	Private	✓
Streaming Channel	Public Read/Write	Private	✓
Tableau Host Mapping	Public Read Only	Private	✓
User Presence	Public Read Only	Private	✓
User Provisioning Request	Private	Private	✓
Waitlist	Private	Private	✓
Web Cart Document	Private	Private	✓
Work Order	Private	Private	✓
Work Plan	Private	Private	✓
Work Plan Template	Private	Private	✓
Work Step Template	Private	Private	✓
Work Type	Private	Private	✓
Work Type Group	Public Read/Write	Private	✓
Distribution	Private	Private	✓
Donation	Private	Private	✓
Donor	Public Read/Write	Private	✓
Mentor	Public Read/Write	Private	✓
Relief Request	Private	Private	✓
Volunteer	Public Read Only	Private	✓

10. Login Access Policies

- Restrict login access to **trusted locations / IP ranges** if needed

Phase 2 Conclusion

Phase 2 ensures that the **Salesforce org is securely configured** with proper **users, profiles, roles, permissions, and access policies**, enabling safe and controlled operations for disaster relief management.