Punjab Relief Connect CRM

Phase 2 – Org Setup & Configuration

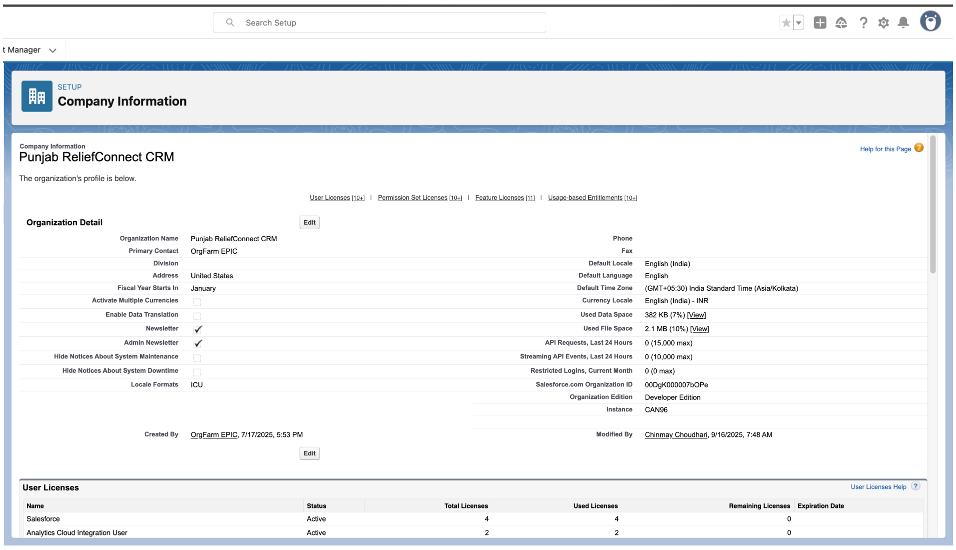
1. Salesforce Edition

- 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:

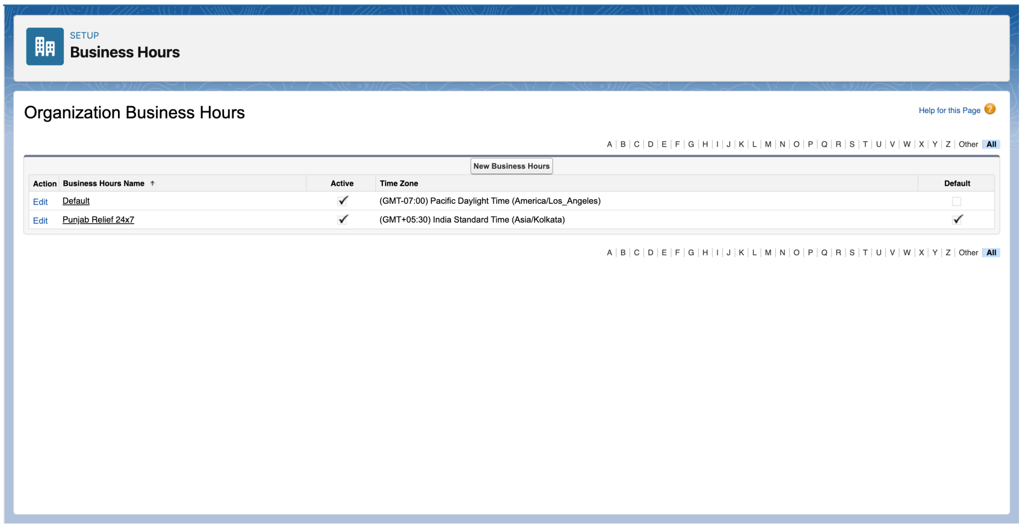
- Company Name: Punjab Relief Connect CRM
- Default Locale: **English (India)**
- Currency: **INR (₹)**
- Time Zone: **(GMT+05:30) India Standard Time**



3. Business Hours & Holidays

Navigate: Setup → Business Hours → Create "Standard Business Hours"

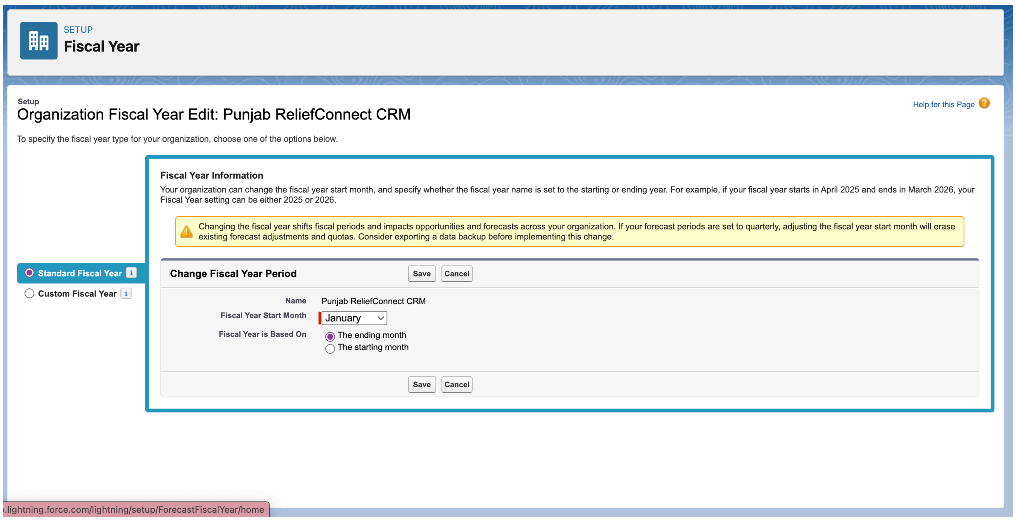
- Open: **Mon–Sun (24/7 disaster response)**
- No holidays for emergency operations



4. Fiscal Year Settings

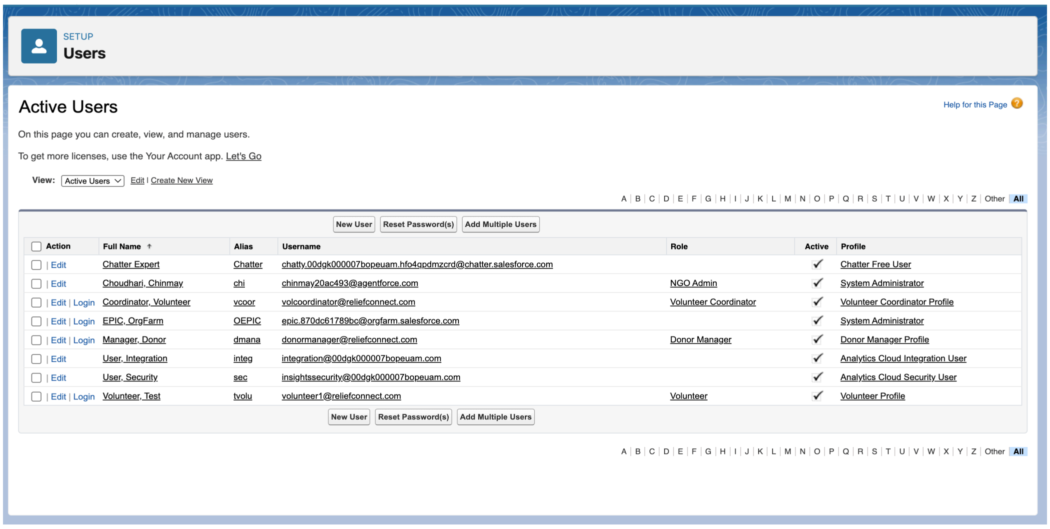
Navigate: Setup → Fiscal Year → Enable Standard Fiscal Year

- Choose: **January – December**



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



6. Profiles

Volunteer Profile (Cloned from Standard User)

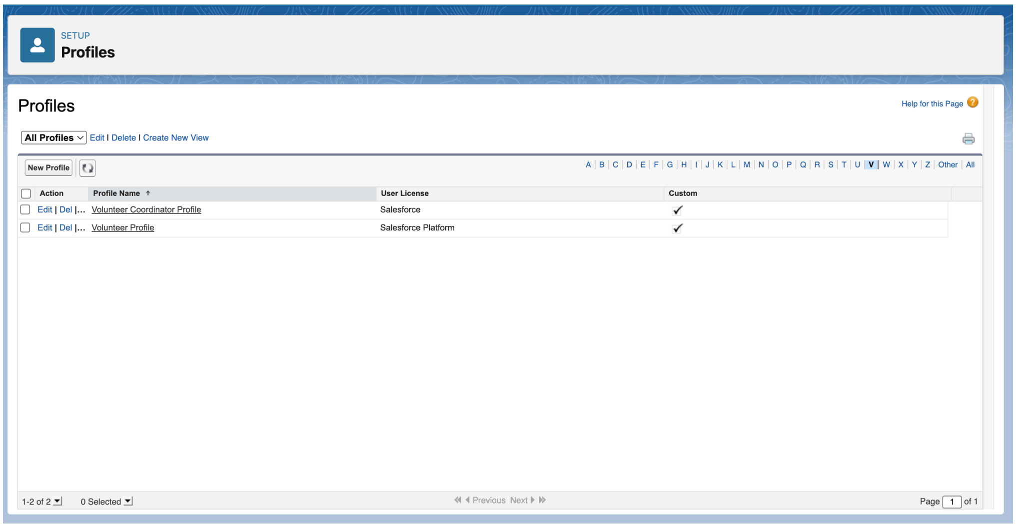
- Permissions: View/Update assigned **Relief Requests**, read **Donor & Donation data**
- Cannot delete records or modify system settings

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

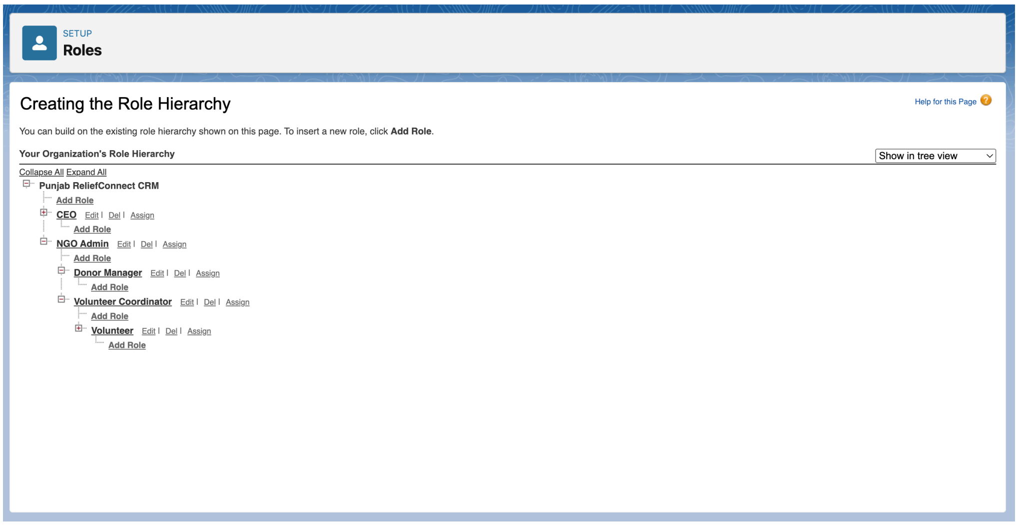


7. Roles (Role Hierarchy)

Navigate: Setup → Roles → Set Up Roles

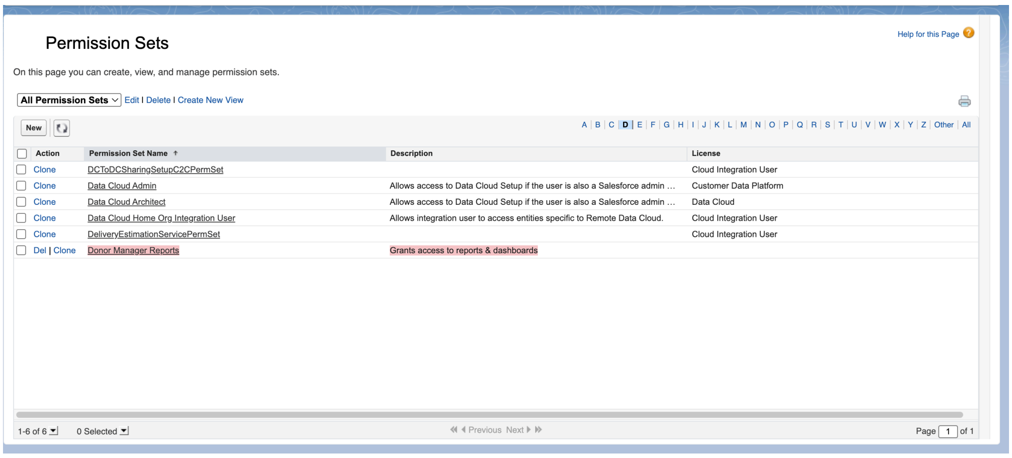
- Create:

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



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

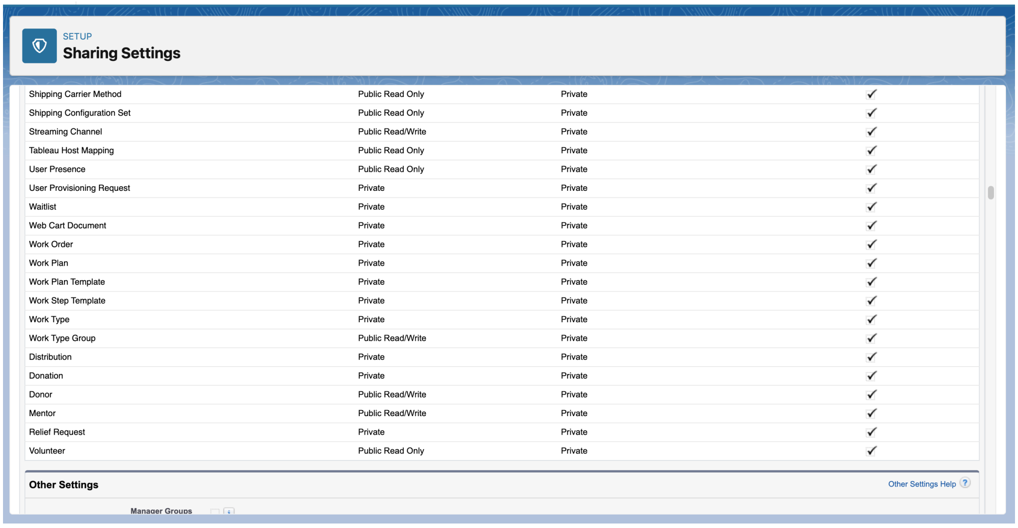


9. Org-Wide Defaults (OWD)

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)



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.