

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

### **◆ Salesforce Editions**

- The Student/Developer Edition is used to build the Community Health & Donation Tracking system. It offers core CRM features like custom objects for Patients, Donations, and Campaigns, plus automation via Flows. Though limited compared to Enterprise, it allows sufficient customization, reports, and dashboards to demonstrate nonprofit healthcare impact.

### **◆ Company Profile Setup**

- The company profile defines organization settings for the nonprofit healthcare initiative. It stores details like organization name, primary contact, default time zone, and currency for donation tracking. Configuring this ensures all patient records, donation amounts, and campaign activities align with consistent organizational metadata and reporting standards across the project.

### **◆ Business Hours & Holidays**

- Business hours define when healthcare workers and volunteers are active. Holidays identify days when campaigns or donation services pause. For example, clinic working hours can be set for reporting response times. Configuring this helps align donor service, patient care follow-ups, and automated communication with actual operational availability.

orgfarm-a146079b6f-dev-ed.develop.lightning.force.com/lightning/setup/businessHours/page?address=%2F01m%2Fe%3FretURL%3D%2F01m

Setup Home Object Manager

Q busi

Company Settings  
Business Hours

Didn't find what you're looking for?  
Try using Global Search.

### Business Hours

If you enter blank business hours for a day, that means your organization does not operate on that day.

**Business Hours Edit** Save Cancel

**Step 1. Business Hours Name** \* Required Information

Business Hours Name  Use these business hours as the default ☐

Active ☒

**Step 2. Time Zone**

Time Zone

**Step 3. Business Hours**

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

Save Cancel

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## ◆ Fiscal Year Settings

- Fiscal year settings standardize how donations and patient program outcomes are tracked financially. A custom fiscal year can be defined if nonprofit funding cycles differ from the calendar year. Aligning fiscal periods helps report total donations, resource allocation, and healthcare program performance in meaningful time-bound comparisons for stakeholders.

orgfarm-a146079b6f-dev-ed.develop.lightning.force.com/lightning/setup/forecastFiscalYear/home

Setup Home Object Manager

Q fis

Company Settings  
Fiscal Year

Didn't find what you're looking for?  
Try using Global Search.

### Fiscal Year

Setup Organization Fiscal Year Edit: CareConnect 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.

**Change Fiscal Year Period** Save Cancel

Name CareConnect

Fiscal Year Start Month

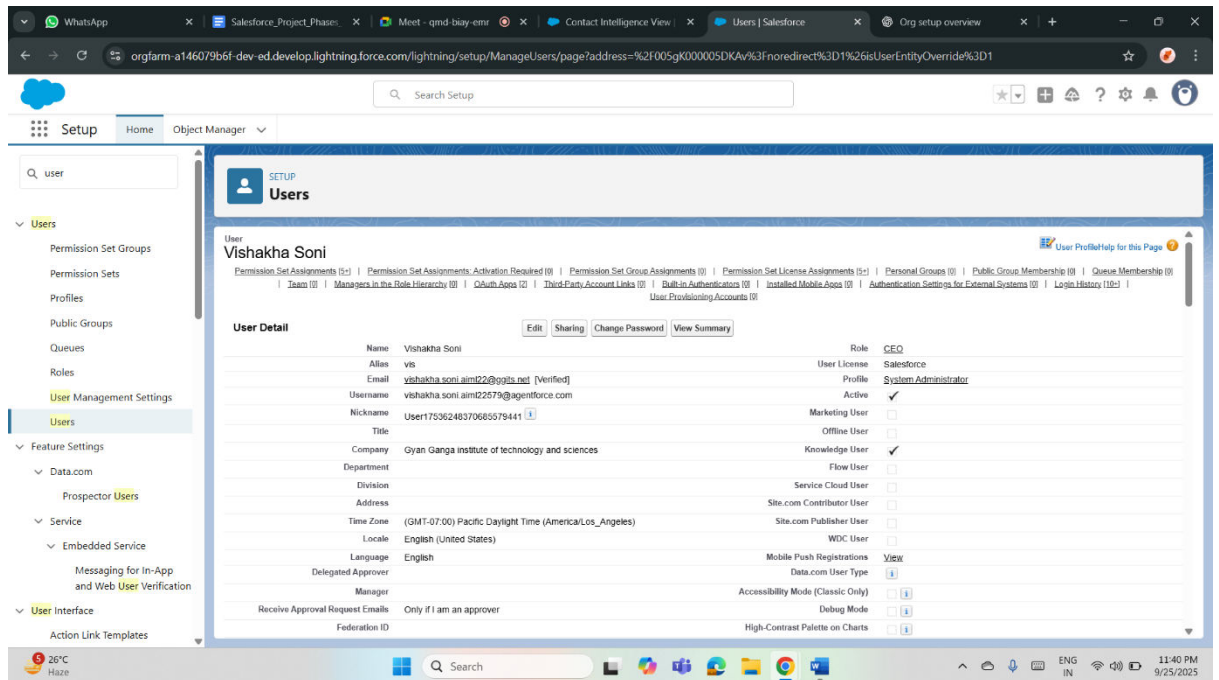
Fiscal Year is Based On ☒ The ending month ☐ The starting month

Save Cancel

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## ◆ User Setup & Licenses

- Different user accounts are created for admins, healthcare staff, and student developers. Licenses define access levels—full for admins, limited for staff. This ensures the right people manage donations, patient records, and campaigns. User setup allows role-based collaboration, while licenses ensure system functionality is used appropriately within edition limits.



## ◆ Profiles

- Profiles control what each user can do within the system. For example, healthcare staff may edit Patient records but only view Donations. Donor-facing profiles might access dashboards without editing rights. Custom profiles ensure sensitive health and donation data is protected while allowing efficient management of records relevant to each role.

The screenshot shows the Salesforce Setup page for Profiles. The page is titled 'Profiles' and includes a search bar and navigation tabs. The main content area displays a table of profiles with columns for Action, Profile Name, User License, and Custom. The 'Custom' column has checkboxes for various permissions. The 'All Profiles' dropdown is selected. The page is titled 'Profiles' and includes a search bar and navigation tabs.

Action	Profile Name	User License	Custom
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Clone</a>	Custom - Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Clone</a>	Custom - Sales Profile	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Clone</a>	Custom - Support Profile	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Clone</a>	Customer Community Login User	Customer Community Login	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Clone</a>	Customer Community Plus Login User	Customer Community Plus Login	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Clone</a>	Customer Community Plus User	Customer Community Plus	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Clone</a>	Customer Community User	Customer Community	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Clone</a>	Customer Portal Manager Custom	Customer Portal Manager Custom	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Clone</a>	Customer Portal Manager Standard	Customer Portal Manager Standard	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Clone</a>	Donor Manager	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Clone</a>	Einstein Agent User	Einstein Agent	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Clone</a>	External Apps Login User	External Apps Login	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Clone</a>	External Identity User	External Identity	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Clone</a>	Force.com - App Subscription User	Force.com - App Subscription	<input type="checkbox"/>

## ◆ Roles

- Roles define data visibility in the health and donation system. A hierarchical structure allows managers to view all data while staff only access their records. Example: Program Manager sees all patient treatments and donations; volunteers see only patients they served. Roles ensure controlled data visibility with accountability.

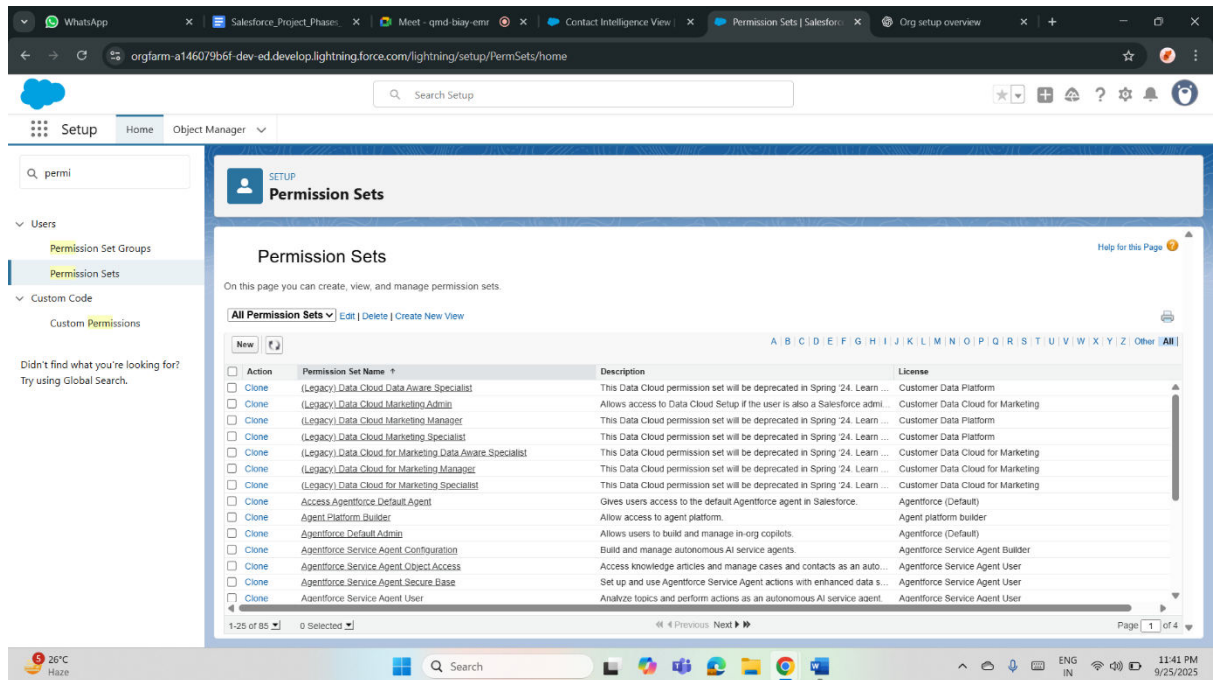
The screenshot shows the Salesforce Setup page for Roles. The page is titled 'Roles' and includes a search bar and navigation tabs. The main content area displays a hierarchical tree view of roles. The 'Your Organization's Role Hierarchy' section is expanded, showing a tree structure starting with 'CareConnect' and branching into various roles like 'CEO', 'CFO', 'COO', 'Program Manager', 'Healthcare Staff', 'Volunteer', 'SVP Customer Service & Support', 'Customer Support International', 'Customer Support North America', 'Installation & Repair Services', 'SVP Human Resources', and 'SVP Sales & Marketing'. Each role has 'Add Role', 'Edit', 'Del', and 'Assign' options.

```

graph TD
    CareConnect[CareConnect] --> CEO[CEO]
    CareConnect --> CFO[CFO]
    CareConnect --> COO[COO]
    CareConnect --> ProgramManager[Program Manager]
    CareConnect --> HealthcareStaff[Healthcare Staff]
    CareConnect --> Volunteer[Volunteer]
    CareConnect --> SVPCustomerService[SVP Customer Service & Support]
    CareConnect --> CustomerSupportInternational[Customer Support International]
    CareConnect --> CustomerSupportNorthAmerica[Customer Support North America]
    CareConnect --> InstallationRepair[Installation & Repair Services]
    CareConnect --> SVPHumanResources[SVP Human Resources]
    CareConnect --> SVPSalesMarketing[SVP Sales & Marketing]
  
```

## ◆ Permission Sets

- Permission sets provide additional access without changing profiles. For example, a healthcare volunteer may need temporary access to enter donation records or view campaign dashboards. Assigning permission sets helps extend privileges flexibly, ensuring project scalability. They also allow selective testing of advanced features without over-permitting basic staff profiles.



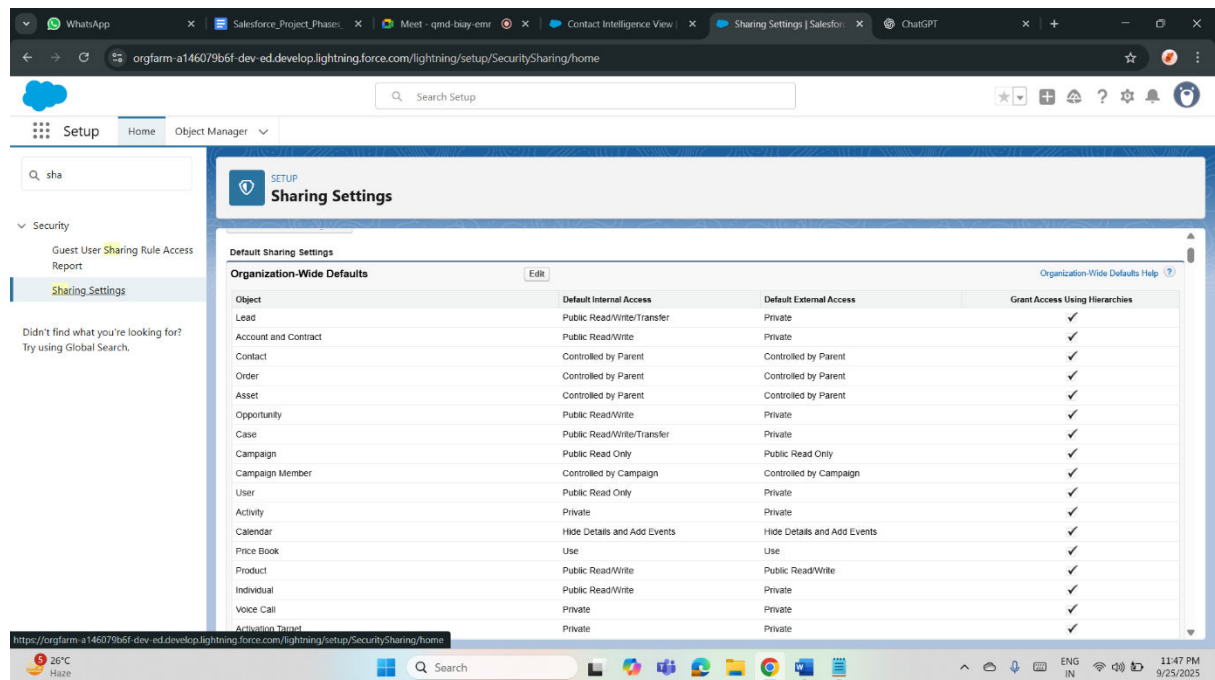
## ◆ OWD (Organization-Wide Defaults)

- OWD defines baseline record access. Patient\_\_c and Donation\_\_c objects can be set as Private to protect sensitive data. Campaigns may be Public Read-Only for broader access. This ensures donor, patient, and program data are secure by default, with visibility extended only through roles and sharing rules where appropriate.

## ◆ Sharing Rules

- Sharing rules grant broader access beyond OWD. Example: a donor manager role can be given Read-Only access to Donation\_\_c, while healthcare managers can see linked Patient records. Campaign

coordinators may share visibility for program outcomes. Sharing rules balance confidentiality with collaboration by extending controlled data visibility across teams.



## ◆ Login Access Policies

- Login access policies define how users and admins securely access the system. Admins can temporarily log in as staff for troubleshooting patient or donation record issues. Configuring secure expiration periods for delegated access maintains data privacy. This ensures compliance, transparency, and smooth support for healthcare program operations.

## ◆ Dev Org Setup

- A Salesforce Developer Org is used to design, test, and validate the Community Health & Donation Tracking system. It includes standard and custom objects, automation via Flows, and dashboards. This environment enables experimentation and configuration of core features before moving into production or presenting the final capstone solution.

## ◆ **Deployment Basics**

- Deployment involves moving configuration from sandbox or developer org to the main environment. For the student project, deployment basics focus on change sets or metadata migration