DIGITAL CEMETERY AND ANCESTERY TRACKER

PHASE 1: Problem Understanding and Industry Analysis

GOAL: UNDERSTAND WHAT WE'RE BUILDING AND WHY.

→ Requirement Gathering – Digital Cemetery & Ancestry Tracker
    1. Stakeholders
    Families – Maintain ancestry and grave records.
    Cemetery Authorities – Manage cemetery details and occupancy.
    System Admins/Developers – Configure and maintain the platform.
→ Functional Requirements
1. Cemetery Management - Create and manage cemetery records with location and capacity.

   2. Grave Management - Assign graves to cemeteries. Link each grave to a person.

    Auto-generate QR codes for graves.

   3. Person Management - Maintain details: Name, DOB, DOD, Gender, Biography, Photo.

    Define parent-child relationships for family tree. Attach media files (photos, notes).

   4. Family Tree Visualization - Auto-map family connections. Interactive view to explore ancestry.

   5. QR Code Integration - Scan QR to view person and grave details.

    Display family tree via Salesforce.

   6. Reports & Dashboards - Family history timelines. Grave occupancy reports per cemetery.

    Demographic insights (lifespan, generational data).

→ Non-Functional Requirements

   Security: Family data must be private and access-controlled.

   Scalability: Support thousands of graves and family records.

   Performance: QR scan and data fetch in under 3 seconds.

   Usability: Mobile-friendly interface for grave scanning.

→ Salesforce-Specific Requirements

   Custom Objects: Cemetery, Grave, Person, Family Tree.

   Flows: Automate family tree mapping on relation creation.

   Integration: QR code generator and external APIs.

   LWC Components: Family tree visualization.

   Reports/Dashboards: Standard Salesforce analytics.

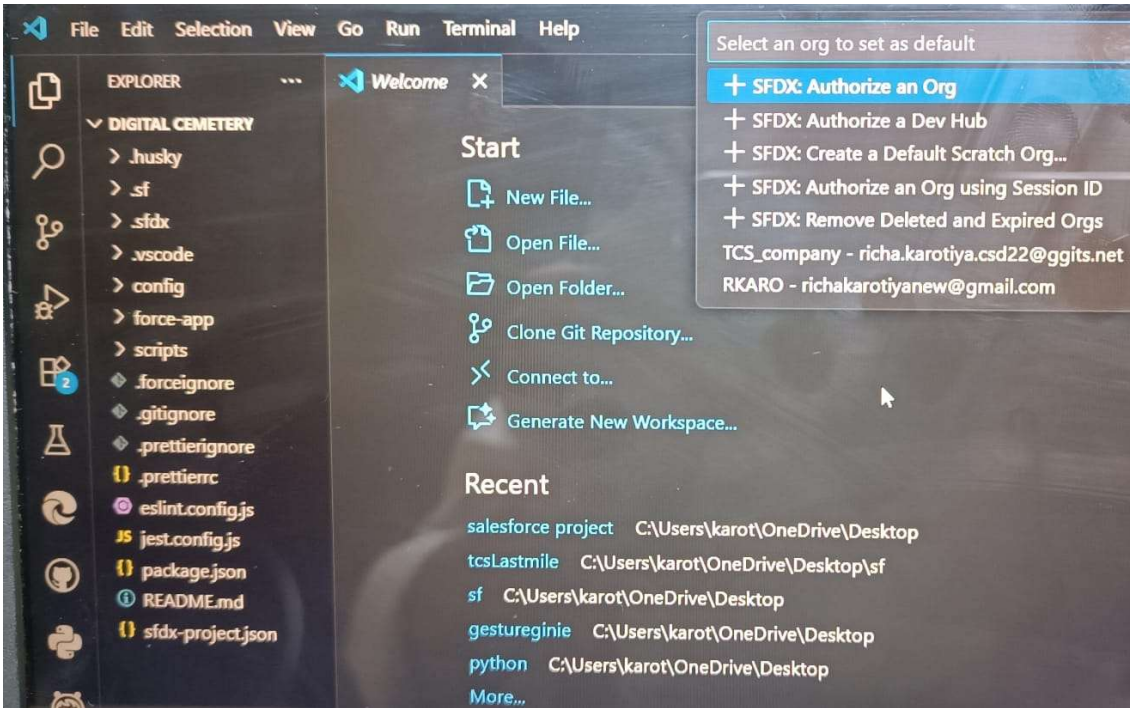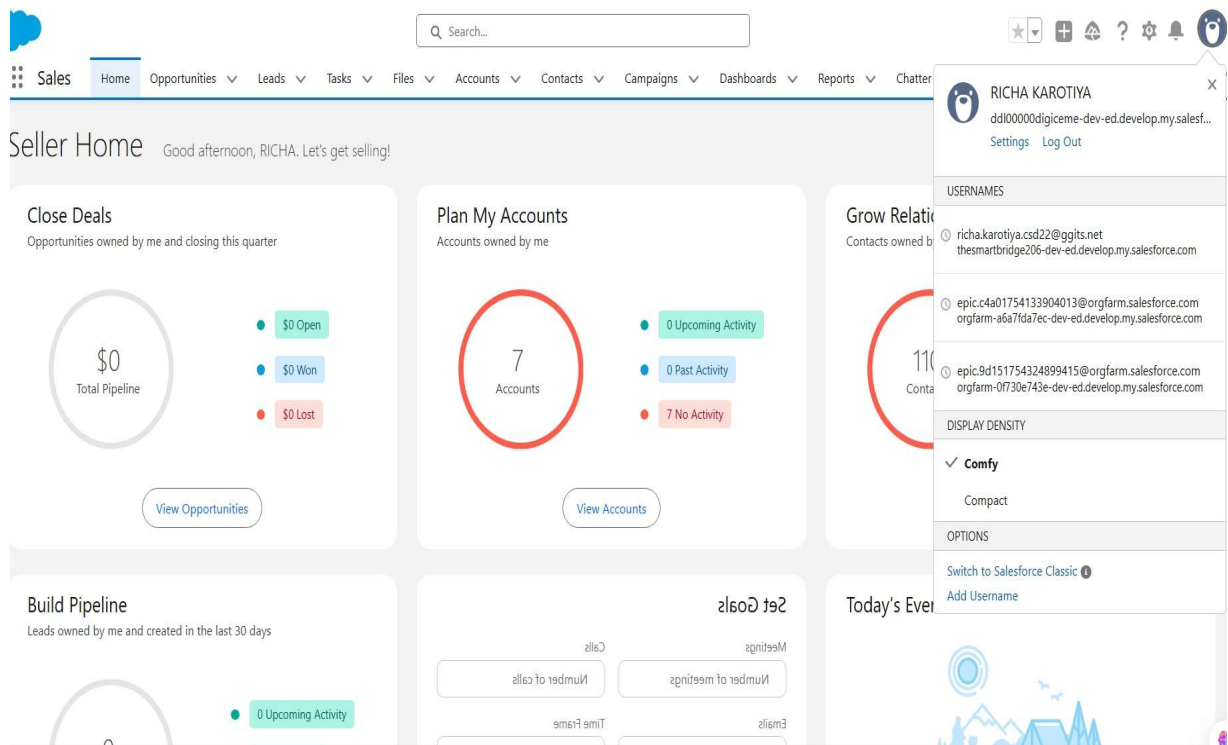   Sharing Rules: Restrict access to family-specific data

Digital Cemetery Workflow

PHASE 2: ORG Setup and Configuration

GOAL: PREPARE SALESFORCE ENVIRONMENT

1. Salesforce Edition

Use Developer Edition (Free Dev Org) for design, testing, and prototyping.

2. Company Profile Setup

Configure Company Information (Cemetery Authority / Management Org name, Address, Local Time Zone).

Set currency as INR/USD (based on project requirement, e.g., booking plots, service charges).

SETUP
Company Information

Company Information
Digital Cemetery Pvt.Ltd.

The organization's profile is below.

User Licenses [10+] | Permission Set Licenses [10+] | Feature Licenses [11] | Usage-based Entitlements [10+]

Organization Detail   Edit   Deactivate Org

Organization Name	Digital Cemetery Pvt.Ltd.	Phone	7999017864
Primary Contact	RICHA KAROTIYA	Fax	
Division		Default Locale	English (India)
Address	India	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	☐	Currency Locale	English (India) - INR
Enable Data Translation	☐	Used Data Space	530 KB (10%) [View]
Newsletter	✓	Used File Space	13 KB (0%) [View]
Admin Newsletter	✓	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Maintenance	☐	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	☐	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00DdL00000cShgr
		Organization Edition	Developer Edition
		Instance	IND134
Created By	RICHA KAROTIYA, 12/09/2025, 11:14 am	Modified By	RICHA KAROTIYA, 17/09/2025, 1:23 pm

Edit   Deactivate Org

3. Business Hours & Holidays

Define working hours: 9:00 AM – 6:00 PM (Mon–Sat).

Add public/religious holidays (no burial approvals or service processing on those days).

SETUP
Business Hours

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.

Holidays [0]

Business Hours Detail   Edit

Business Hours Name	Buisness Hours	Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Business Hours	Sunday 7:00 am to 7:00 pm	Default Business Hours	✓
	Monday 7:00 am to 7:00 pm		
	Tuesday 7:00 am to 7:00 pm		
	Wednesday 7:00 am to 7:00 pm		
	Thursday 7:00 am to 7:00 pm		
	Friday 7:00 am to 7:00 pm		
	Saturday 7:00 am to 7:00 pm		
Active	✓		
Created By	RICHA KAROTIYA 12/09/2025, 11:14 am	Last Modified By	RICHA KAROTIYA 15/09/2025, 11:26 am

Edit

Holidays	Add/Remove
No records to display	

⌃ Back To Top   Always show me ▼ more records per related list

Important Note:
The Digital Cemetery application does not include holiday settings, as cemeteries are places of eternal remembrance and remain open throughout the year. Grief and love do not follow a calendar, and this approach ensures that families and loved ones can visit, honour, and feel connected to those who have passed at any time, without limitations.

4. Fiscal Year Settings

Standard fiscal year (Jan–Dec) → required for revenue, maintenance, and operations reporting.

5. User Setup & Licenses

Create users:

Cemetery Manager (approves burial plot requests, oversees reports).

Cemetery Staff / Agents (handle records, manage plot bookings).

Customer Service (assist families, track issues, schedule services).

6. Profiles

Cemetery Staff: Can create/update burial records, but restricted from sharing rules and admin settings.

Cemetery Manager: Full access to approvals, dashboards, reports.

SETUP
Profiles

Profile
Cemetery Manager

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges [0] | Enabled Apex Class Access [0] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] | Enabled External Credential P
Enabled Custom Metadata Type Access [0] | Enabled Custom Setting Definitions Access [0] | Enabled Flow Access [0] | Enabled Service Presence Status Access [0] | Enabled Custom Permission

Profile Detail   Edit | Clone | Delete | View Users

Name	Cemetery Manager		
User License	Salesforce	Custom Profile	✓
Description	Operational Manager - run bookings, approve and run reports		
Created By	RICHA KAROTIYA, 15/09/2025, 11:46 am	Modified By	RICHA KAROTIYA, 19/09/2025, 12:44 pm

Page Layouts

Custom Object Permissions

	Basic Access				Data Administration				Basic Access				Data Administration		
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields		Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Albums	☐	☐	☐	☐	☐	☐	☐	Families	✓	✓	✓	✓	✓	✓	✓
AppLogs	☐	☐	☐	☐	☐	☐	☐	Maintenance Tasks	✓	✓	✓	✓	✓	✓	✓
Artists	☐	☐	☐	☐	☐	☐	☐	Payments	✓	✓	✓	✓	✓	✓	✓
Booking Requests	✓	✓	✓	✓	✓	✓	✓	Plots	✓	✓	✓	✓	✓	✓	✓
Burials	✓	✓	✓	✓	✓	✓	✓	Sections	✓	✓	✓	✓	✓	✓	✓
Deceaseds	✓	✓	✓	✓	✓	✓	✓	Songs	☐	☐	☐	☐	☐	☐	☐
Documents	✓	✓	✓	✓	✓	✓	✓	Visit Logs	✓	✓	✓	✓	✓	✓	✓

Customer Service: Limited to case management, record viewing.

7. Roles

Hierarchy: Cemetery Manager → Cemetery Staff → Customer Service.

Ensures record visibility up to higher levels.

SETUP
Roles

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To i

Your Organization's Role Hierarchy

Collapse All Expand All

Digital Cemetery Pvt.Ltd.
- Add Role
  - **Cemetery Manager** Edit | Del | Assign
    - Add Role
      - **Cemetery Staff** Edit | Del | Assign
        - Add Role

8. Permission Sets

Assign additional permissions (e.g., access to Reports, Dashboards, or Maintenance Logs) without modifying base profiles.

9. Org-Wide Defaults (OWD)

Burial Plot Object: Public Read Only (so all staff can view but not edit).

Burial Record / Service Request: Private (only owner + manager can view/edit sensitive family information).

10. Sharing Rules

Define rules if access needs to be expanded:

Example: Share plot availability data with all clerical staff.

Example: Share service case records with Customer Service team.

11. Login Access Policies

Restrict login hours for clerical staff (9 AM – 6 PM).

Restrict login IP ranges (only office/station computers).

SETUP
Login Access Policies

Login Access Policies

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

Manage Support Options   [Save] [Cancel]

Setting	Enabled
Administrators Can Log in as Any User	☑

Support Organization	Packages	Available to Users
Salesforce.com Support		◉
Trailhead Security Support	Trailhead Security	Not Available ⓘ

[Save] [Cancel]

12. Dev Org Setup

Use this Developer Org as sandbox for building & testing workflows, approvals, and data models.

13. Sandbox Usage

For enterprise deployments: Sandbox → Testing → Production.

14. Deployment Basics

Use Change Sets for admin-friendly deployments.

For developers: VS Code + Salesforce CLI (SFDX) for metadata and Apex deployments.