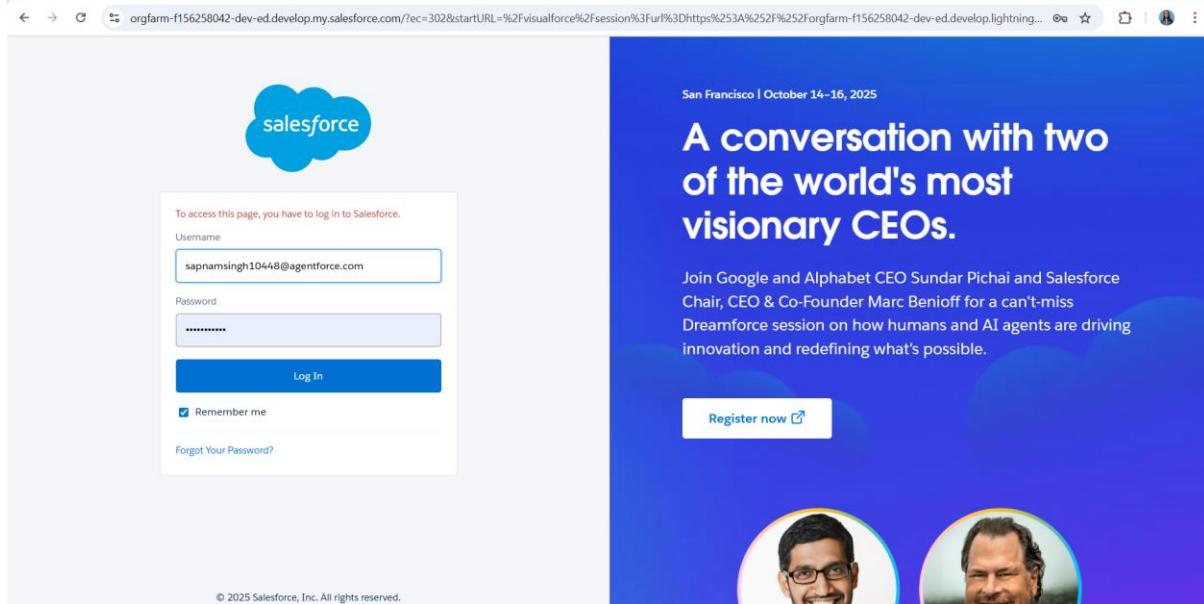


👉 Phase 2: Org Setup & Configuration

1. Salesforce Edition

- Used **Salesforce Developer Edition** (free org) for project implementation.



- Provides access to **custom objects, flows, dashboards, and reports** required for the Personal Health Tracker.

2. Company Profile Setup

- Set **Company Information** with project-specific details.
 - Company Name: *Personal Health Tracker*
 - Default Currency: INR (₹)
 - Default Locale: English (India)
 - Time Zone: (GMT+05:30) Asia/Kolkata

Company Information

Personal Health Tracker

Organization Detail

Organization Name	Personal Health Tracker	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division	India	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	<input checked="" type="checkbox"/>	Corporate Currency	U.S. Dollar
Enable Data Translation	<input type="checkbox"/>	Used Data Space	457 KB (9%) View
Newsletter	<input checked="" type="checkbox"/>	Used File Space	36 KB (0%) View
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00Dgk0000007ZMJS
		Organization Edition	Developer Edition
		Instance	CAN95

Created By: OrgFarm EPIC, 7/17/2025, 7:18 AM Modified By: Sapna Singh, 9/21/2025, 1:18 AM

3. Business Hours & Holidays

- Defined business hours as **24/7** since personal health tracking is continuous.
- Added **public holidays (optional)** to simulate wellness reminders not being sent during non-active days.

Business Hours

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

Business Hours Edit

Step 1. Business Hours Name

Business Hours Name: Save Cancel * Required Information

Active:

Step 2. Time Zone

Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)

Step 3. Business Hours

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

Save Cancel

The screenshot shows the Salesforce Setup interface for 'Holidays'. A single record is displayed:

- Holiday Name:** Personal Health Tracker Maintenance Day
- Description:** None
- Date and Time:** 10/5/2025 All Day
- Recurring Holiday:** Occurs on the 1st Sunday of every 1 month(s) effective 10/5/2025
- Created By:** Saona Siegbh 9/21/2025, 1:29 AM
- Last Modified By:** Saona Siegbh 9/21/2025, 1:29 AM

Below the main record, there is a section for 'Business Hours' which currently shows 'No records to display'.

4. Fiscal Year Settings

- Retained **Standard Fiscal Year** (January–December).
- Useful for generating **annual health trend reports**.

The screenshot shows the 'Organization Fiscal Year Edit' page for 'Personal Health Tracker'.

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.

Change Fiscal Year Period:

- Name: Personal Health Tracker
- Fiscal Year Start Month: January
- Fiscal Year is Based On:
 - The ending month
 - The starting month

5. User Setup & Licenses

- Created sample users:
 - **End User (Health Tracker User)** → Logs health data.
 - **System Admin** → Manages setup & automation.
- Assigned **Salesforce Platform Licenses** for users logging records.

All Users

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

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

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty_00dgk000007zmjsua4_56vmbh2wh&chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit	EPIC_OrgFarm	OEPI	epic_3e22d3228b@orgfarm.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
Edit	Executive_Eric	eexec	sapnamsingh10@gmail.com	CEO	<input checked="" type="checkbox"/>	System Administrator
Edit	Personal-Health-Tracker_Admin	admin	admin123@pht.com	Admin	<input checked="" type="checkbox"/>	System Administrator
Edit	Personal-Health-Tracker_User	user	user123@pht.com	User	<input checked="" type="checkbox"/>	Standard Platform User
Edit	Singh_Sapna	sap	sapnamsingh10448@agentforce.com		<input checked="" type="checkbox"/>	System Administrator
Edit	User_Integration	integ	integration@00dgk000007zmjsua4.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User_Security	sec	insightssecurity@00gka00007zmjsua4.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

6. Profiles

- **System Administrator Profile** → Full access to configure objects, flows, dashboards.
- **Standard User Profile** → Access to Health Log object, reports, dashboards.
- Customized profiles to restrict unnecessary system objects.

Profile

Admin

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.

Profile Detail			
Name	Admin		
User License	Salesforce		
Description			
Created By	Sapna.Singh, 9/21/2025, 2:50 AM		
Modified By	Sapna.Singh, 9/21/2025, 2:50 AM		
Page Layouts			
Standard Object Layouts			
Global	Global Layout [View Assignment]	Location Group Assignment	Location Group Assignment Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Macro	Macro Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Account	Varies by Record Type [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Opportunity	Opportunity Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Opportunity Product	Opportunity Product Layout [View Assignment]

User Profile Configuration

Profile Detail

Name	User	Custom Profile	
User License	Salesforce	✓	
Description			
Created By	Sapna Singh, 9/21/2025, 2:52 AM	Modified By	Sapna Singh, 9/21/2025, 2:52 AM

Page Layouts

Standard Object Layouts	Location Group Assignment
Global [View Assignment]	[View Assignment]
Email Application Not Assigned [View Assignment]	Macro Layout [View Assignment]
Home Page Layout Home Page Default [View Assignment]	Object Milestone Layout [View Assignment]
Account Vanies by Record Type [View Assignment]	Operating Hours Layout [View Assignment]
Alternative Payment Method Alternative Payment Method Layout [View Assignment]	Opportunity Layout [View Assignment]

7. Roles

- **Top Role:** Admin
- **End User** (Individual logging health data)
- Role hierarchy ensures coaches (if assigned) can view end-user health records.

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

```

Personal Health Tracker
  +-- Admin
    +-- Add Role
  +-- CEO
    +-- Add Role
  +-- User
    +-- Add Role
  
```

8. Permission Sets

- **Created Health Tracker Access Permission Set:**
 - Object Permissions: Read/Write on Health Log.
 - Report & Dashboard access.

- This allowed assigning extra access without changing profiles.

Permission Set
Personal Health Tracker

API Name: Personal_Health_Tracker
Namespace Prefix:
Created By: Sapna Singh, 9/21/2025, 2:55 AM
Last Modified By: Sapna Singh, 9/21/2025, 2:55 AM

Apps

- Assigned Apps
- Assigned Connected Apps
- Object Settings
- App Permissions
- Apex Class Access
- Visualforce Page Access

9. OWD (Org-Wide Defaults)

- Health Log Object:** Private (each user can only see their own logs).
- Reports shared with coaches/admin via role hierarchy or sharing rules.

Sharing Settings

Organization-Wide Sharing Defaults Edit

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	<input checked="" type="checkbox"/>
Account and Contract	Public Read/Write	Private	<input type="checkbox"/>
Order	Controlled by Parent	Controlled by Parent	<input type="checkbox"/>
Contact	Controlled by Parent	Controlled by Parent	<input type="checkbox"/>
Asset	Controlled by Parent	Controlled by Parent	<input type="checkbox"/>
Opportunity	Public Read/Write	Private	<input type="checkbox"/>
Case	Public Read/Write/Transfer	Private	<input type="checkbox"/>
Campaign	Public Full Access	Private	<input type="checkbox"/>
Campaign Member	Controlled by Campaign	Controlled by Campaign	<input type="checkbox"/>
User	Public Read Only	Private	<input type="checkbox"/>
Individual	Public Read/Write	Private	<input type="checkbox"/>
Voice Call	Private	Private	<input type="checkbox"/>
Activity	Private	Private	<input type="checkbox"/>
Calendar	Hide Details and Add Events	Hide Details and Add Events	<input type="checkbox"/>
Price Book	Use	Use	<input type="checkbox"/>

Health Log Private Private

10. Sharing Rules

- Ensured personal data visibility remains controlled.

Sharing Settings

Step 1: Rule Name

Label: User Logs to Admin
Rule Name: User_Logs_to_Admin

Step 2: Select your rule type

Rule Type: Based on record owner

Step 3: Select which records to be shared

Health Log: owned by members of Roles

Step 4: Select the users to share with

Share with: Roles, Admin

Step 5: Select the level of access for the users

Access Level: Read Only

11. Login Access Policies

- Enabled “**Administrators Can Log In As Any User**” for troubleshooting.
- Enabled **IP Relaxation** for testing in Developer Org.

Search Setup

Login Access Policies

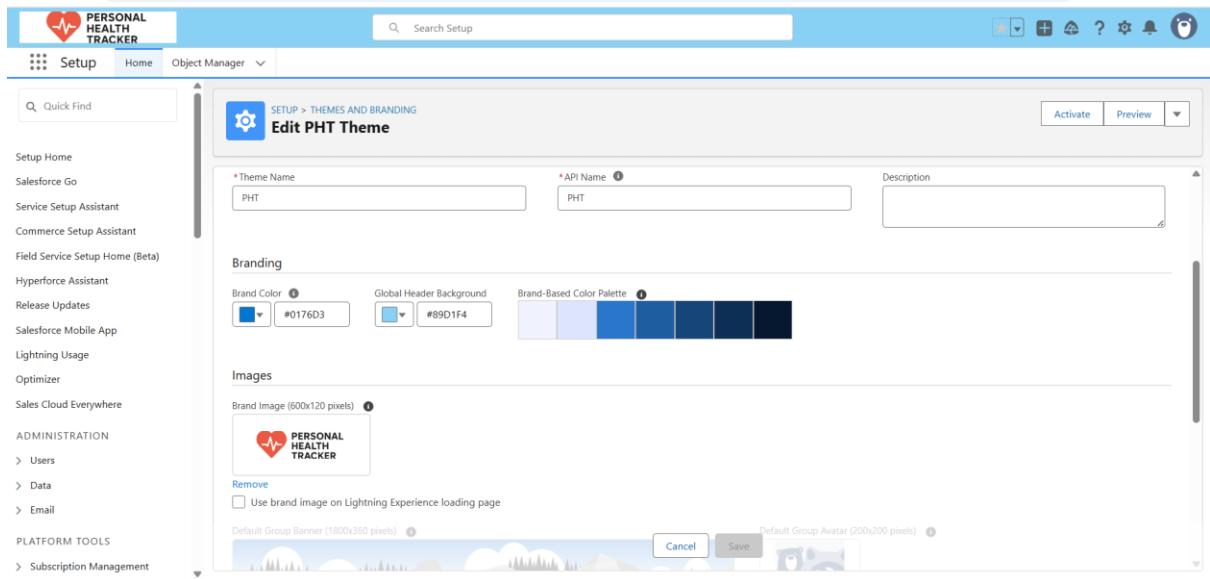
Control which support organizations your users can grant login access to.

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"/>	<input type="radio"/>

12. Developer Org Setup

- Installed **Personal Health Tracker App** (custom app with Health Log tab).
- Configured **Page Layouts, Compact Layouts, and Record Types**.
- Added custom branding (app logo + color).



13. Sandbox Usage

- Since Developer Edition has no Sandboxes, testing was done directly in the **Dev Org**.
- In a real-time setup, a **Developer Sandbox** would be used for testing automation and dashboards before deployment.

14. Deployment Basics

- Used **Change Sets** conceptually (though Dev Org only has 1 environment).
- For this project: Configuration was directly implemented and tested in Developer Org.