

DIGITAL CEMETERY AND ANCESTRY 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.

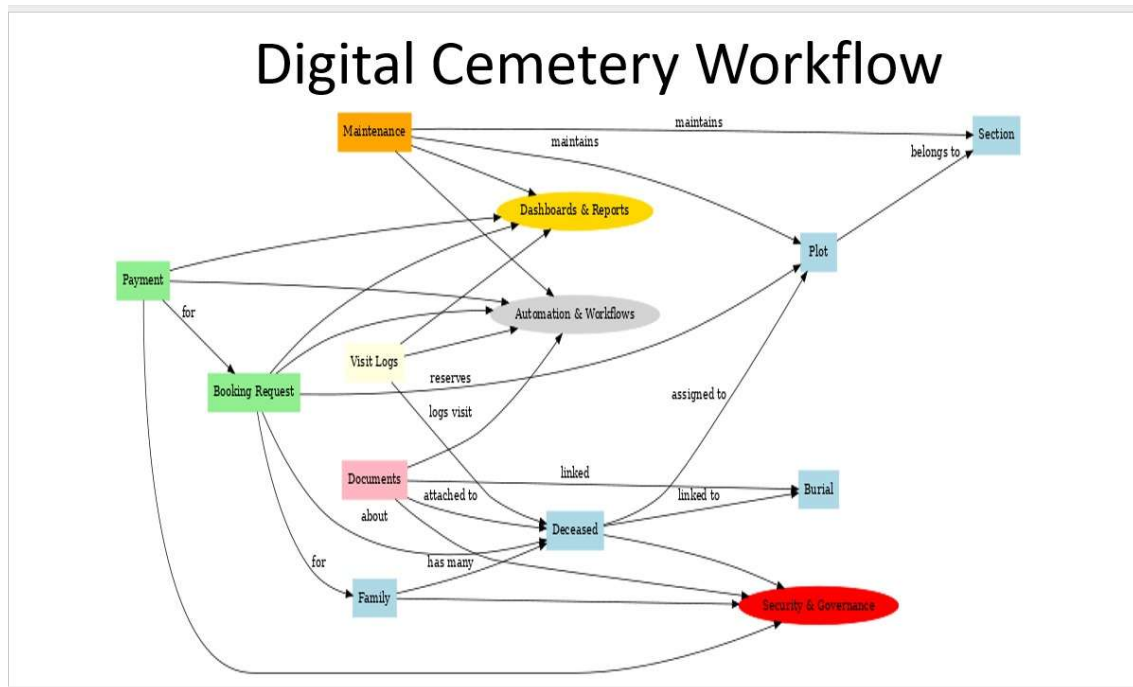
Flows: Automate family tree mapping on relation creation.

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

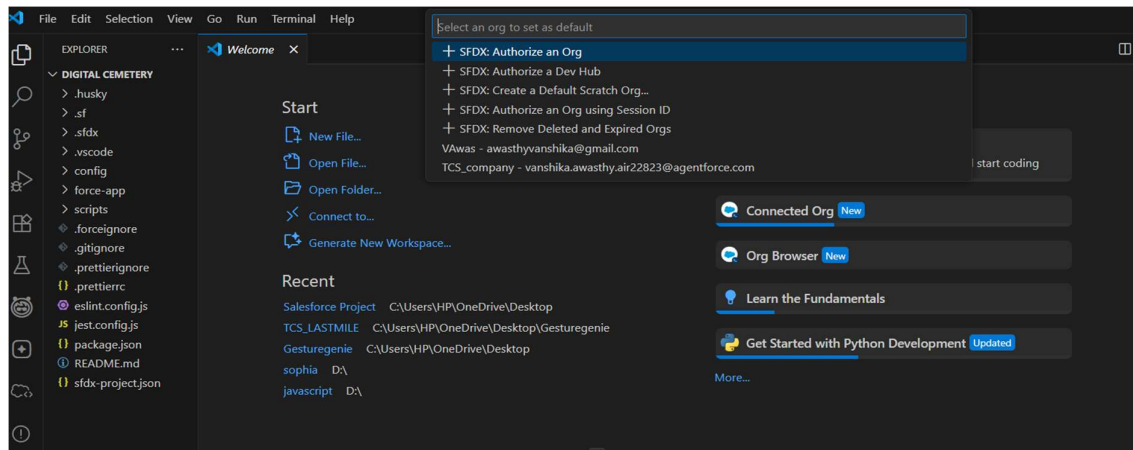
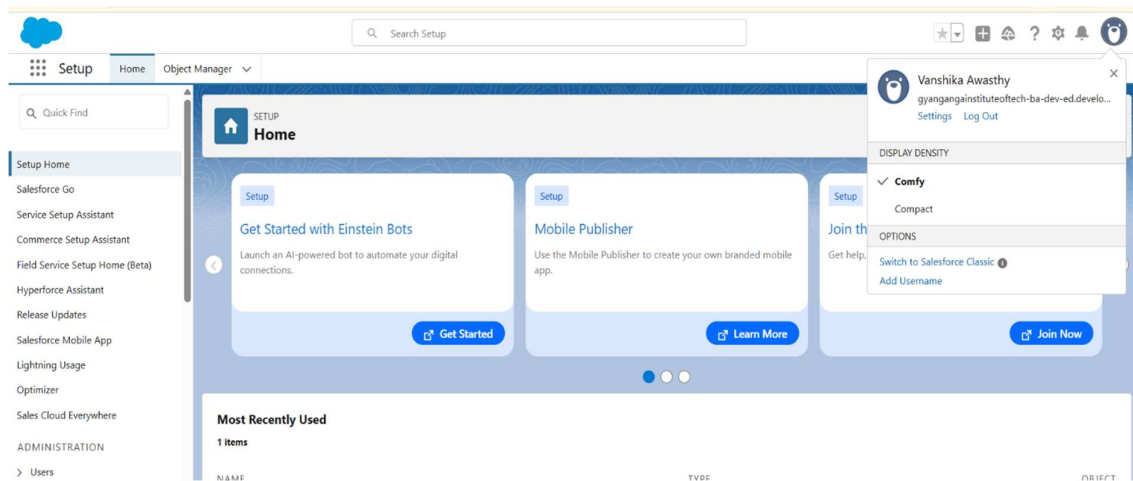


PHASE 2: ORG Setup and Configuration

Goal: Prepare Salesforce Environment for better usage of our app.

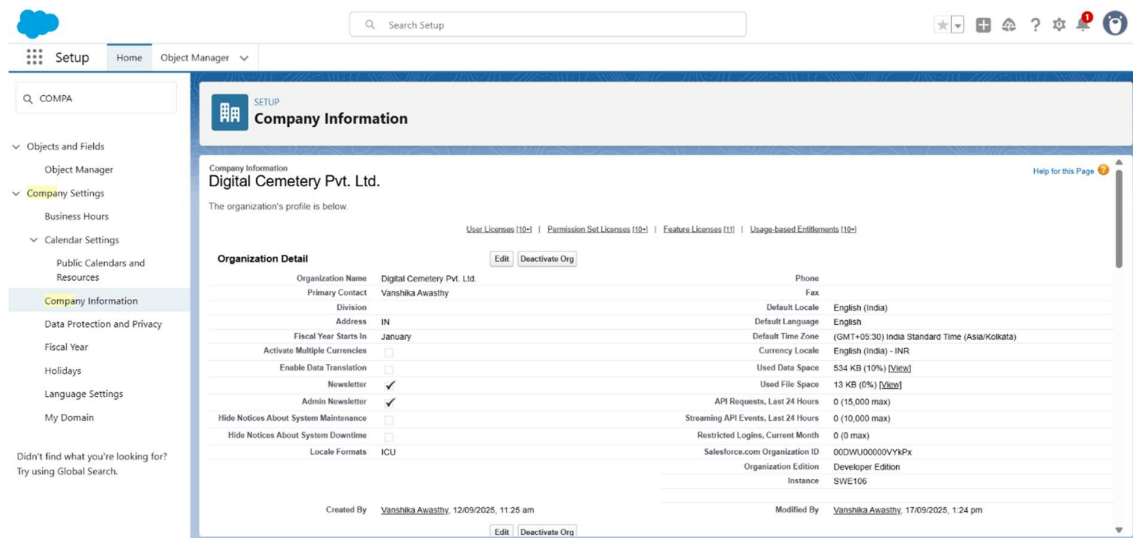
1. Salesforce Edition

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).

3. Business Hours & Holidays

Define working hours: 07:00 AM – 07:00 PM (Mon–Sun).

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 Business Hours Use these business hours as the default ☒

Active ☒

Step 2. Time Zone

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

Step 3. Business Hours

Sunday	07:00 am	to	07:00 pm	<input type="checkbox"/> 24 hours
Monday	07:00 am	to	07:00 pm	<input type="checkbox"/> 24 hours
Tuesday	07:00 am	to	07:00 pm	<input type="checkbox"/> 24 hours
Wednesday	07:00 am	to	07:00 pm	<input type="checkbox"/> 24 hours
Thursday	07:00 am	to	07:00 pm	<input type="checkbox"/> 24 hours
Friday	07:00 am	to	07:00 pm	<input type="checkbox"/> 24 hours
Saturday	07:00 am	to	07:00 pm	<input type="checkbox"/> 24 hours

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.

Setup

Organization Fiscal Year Edit: Digital Cemetery Pvt. Ltd. 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 Digital Cemetery Pvt. Ltd.

Fiscal Year Start Month January

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

Save Cancel

5. User Setup & Licenses

Create users:

Admin (system setup & control).

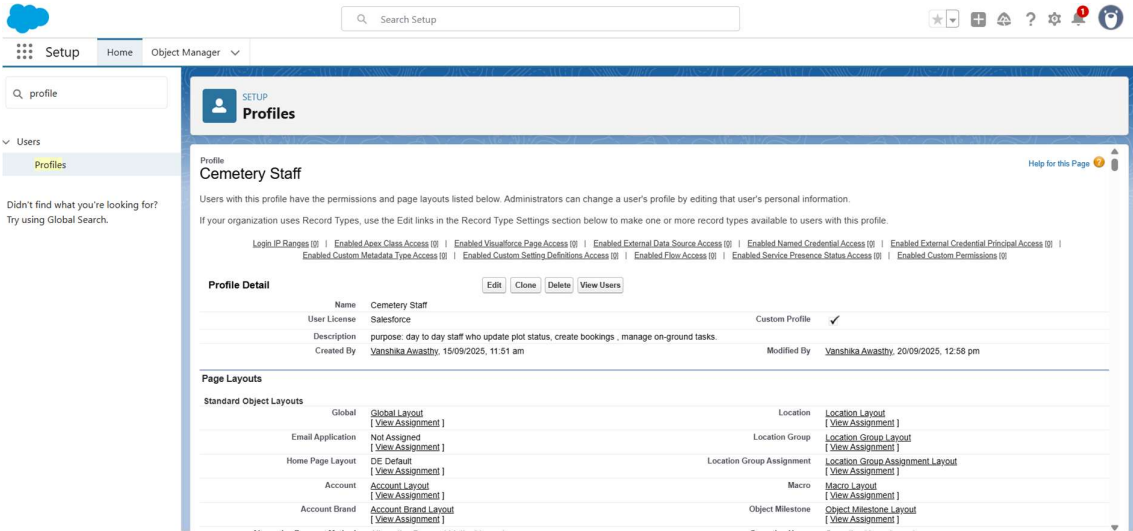
Cemetery Manager (approves burial plot requests, oversees reports).

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

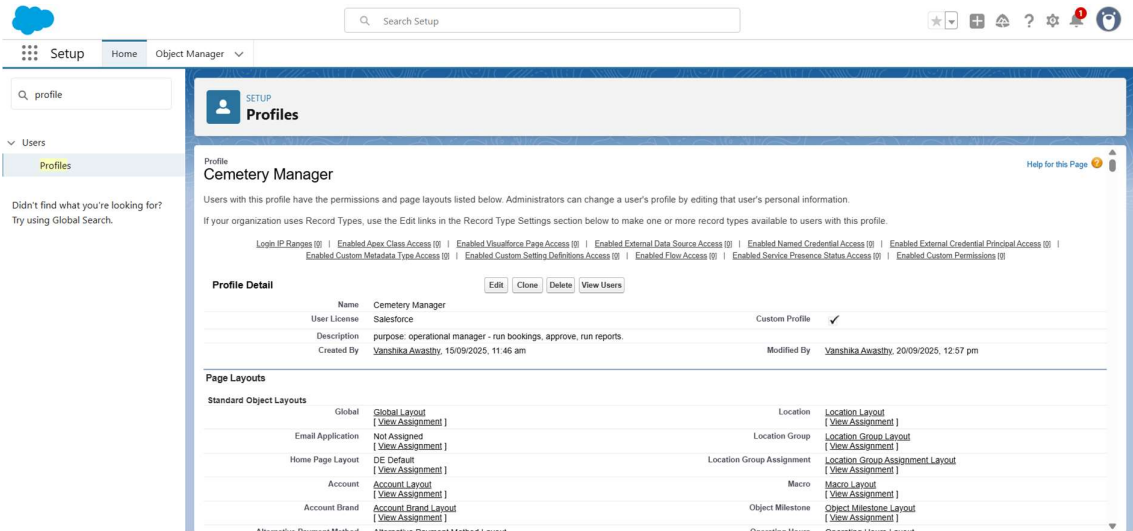
Customer Service (assist families, track issues, schedule services).

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.



Customer Service: Limited to case management, record viewing.

7. Roles

Hierarchy: Cemetery Manager → Cemetery Staff → Customer Service.

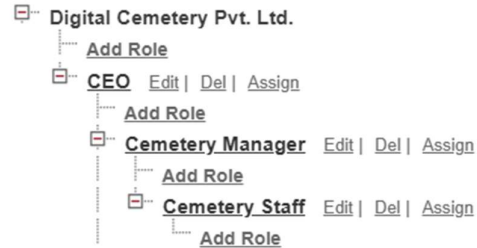
Ensures record visibility up to higher levels.

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

[Collapse All](#) [Expand All](#)



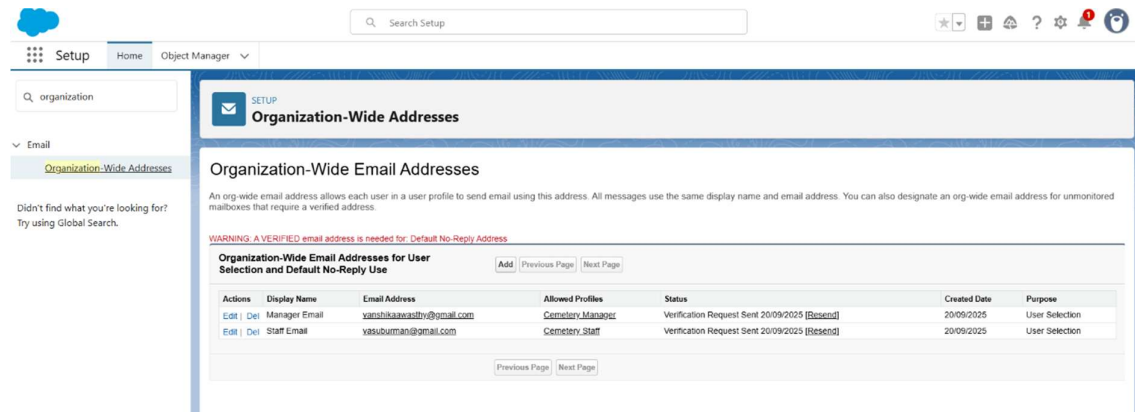
8. Permission Sets

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).



The screenshot shows the 'Organization-Wide Addresses' setup page. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar shows 'Email' and 'Organization-Wide Addresses'. The main content area has a search bar and a warning: 'WARNING: A VERIFIED email address is needed for: Default No-Reply Address'. Below this is a table titled 'Organization-Wide Email Addresses for User Selection and Default No-Reply Use'.

Actions	Display Name	Email Address	Allowed Profiles	Status	Created Date	Purpose
Edit Del	Manager Email	yashikaavashy@gmail.com	Cemetery Manager	Verification Request Sent 20/09/2025 Resend	20/09/2025	User Selection
Edit Del	Staff Email	yashubuman@gmail.com	Cemetery Staff	Verification Request Sent 20/09/2025 Resend	20/09/2025	User Selection

10. Sharing Rules

Define rules if access needs to be expanded:

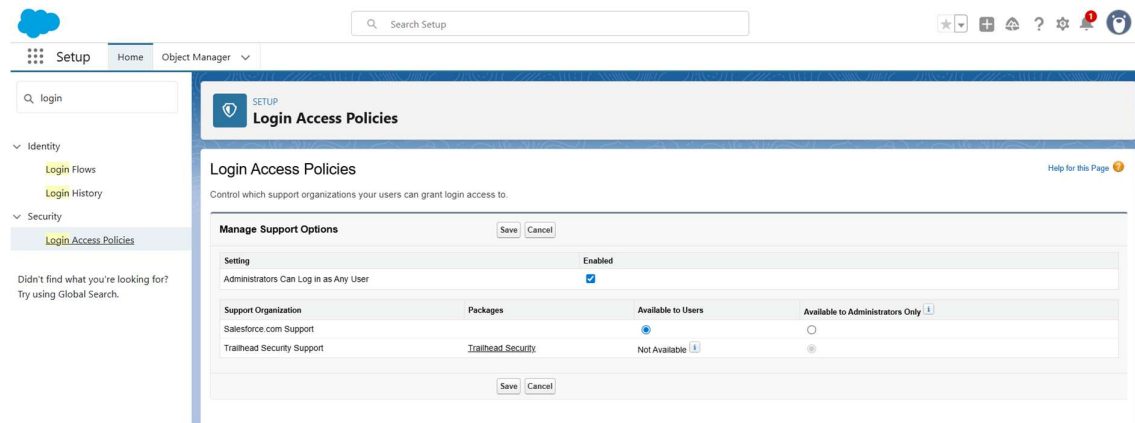
Example: Share plot availability data with all clerical staff.

Example: Share service case records with Customer Service team.

11. Login Access Policies

Restrict login hours for clerical staff (7AM – 7PM).

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



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.