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.

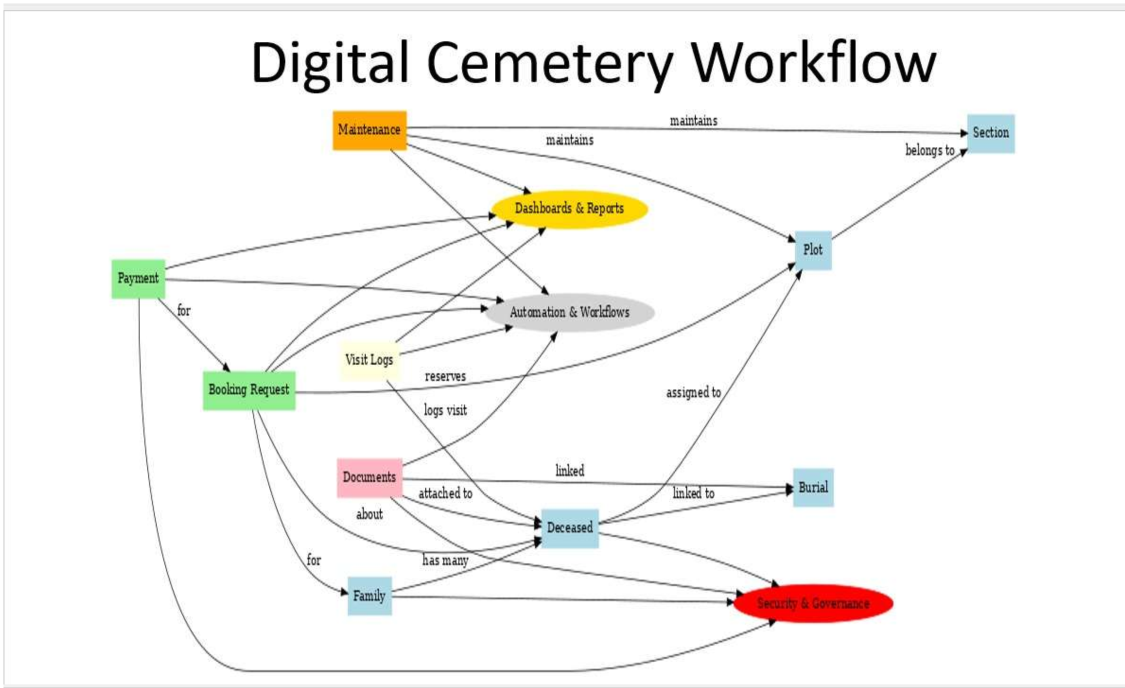
Flows: Automate family tree mapping on relation creation.

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

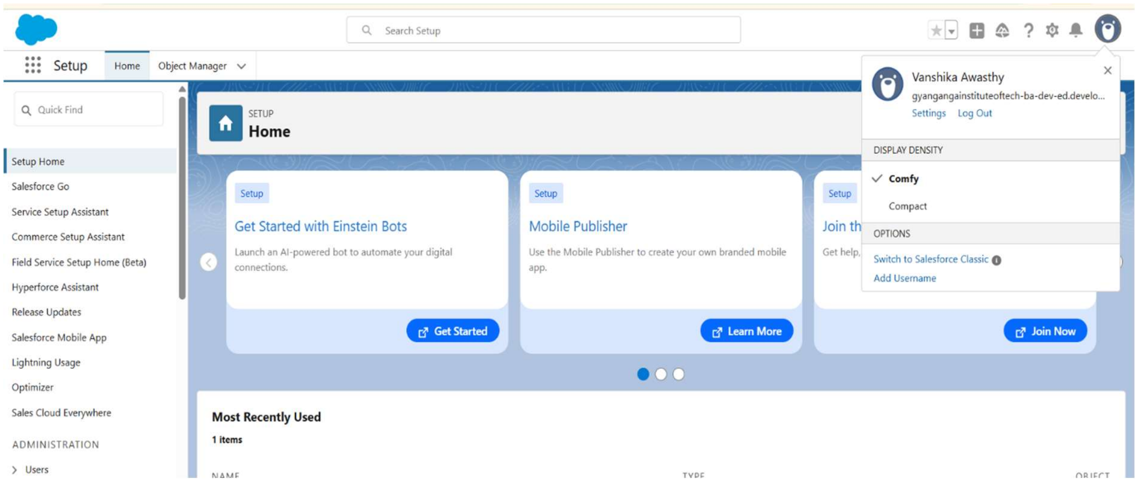


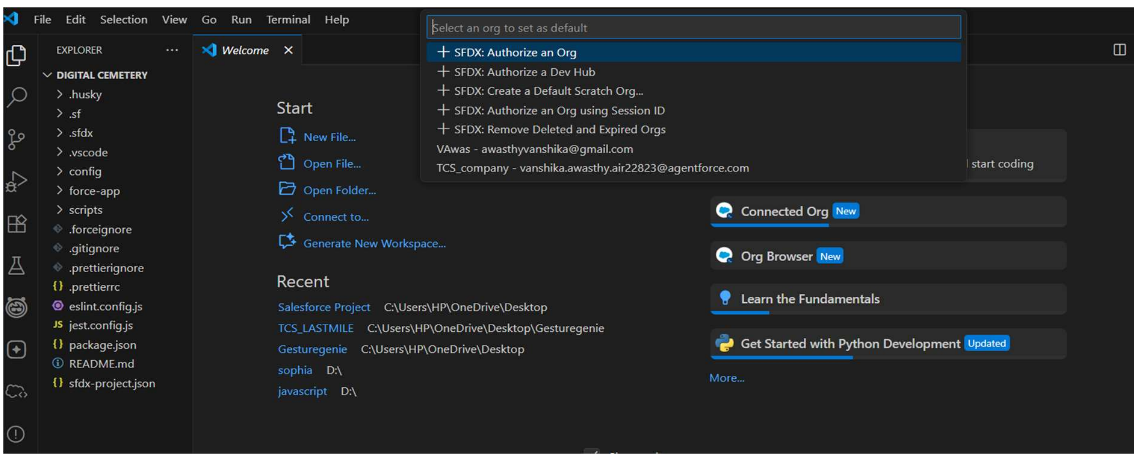
PHASE 2: ORG Setup and Configuration

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

1. Salesforce Edition

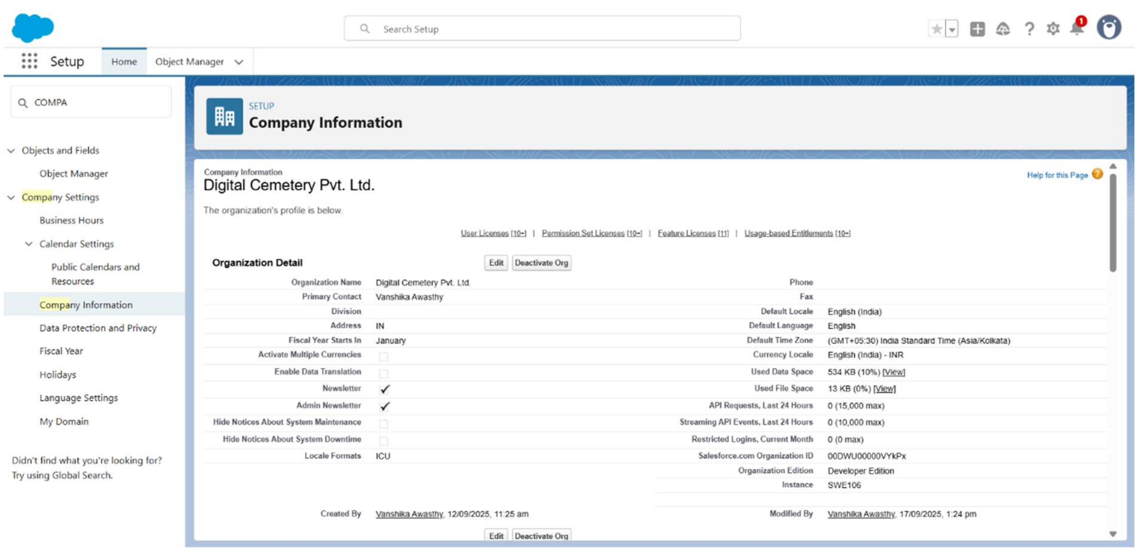
Use Developer Edition (Free Dev Org) for design, testing, and prototyping.





2. Company Profile Setup

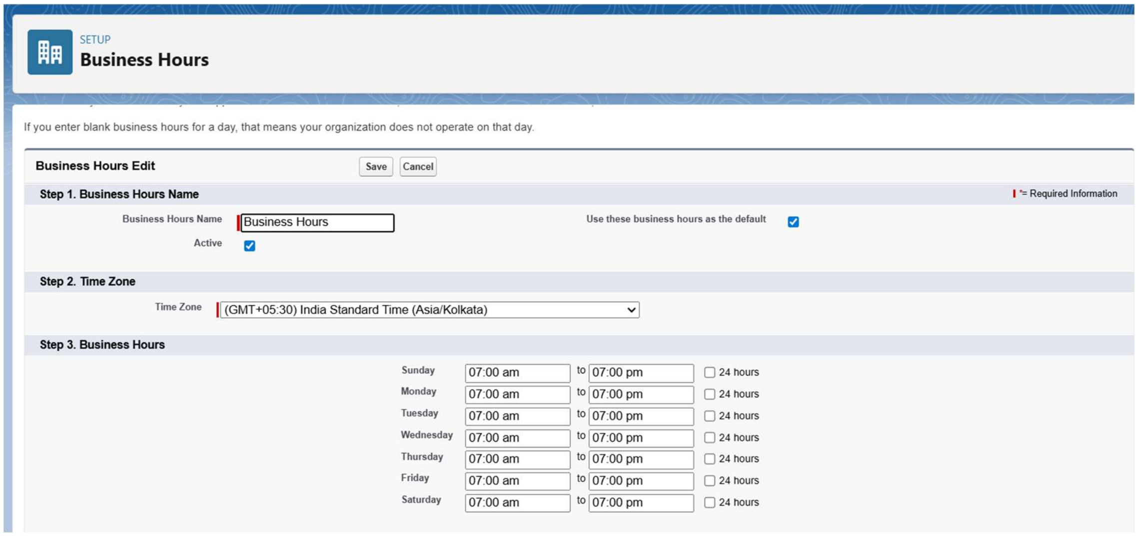
Configure Company Information (Cemetery Authority / Management Org name, Address, Local Time Zone).



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

3. Business Hours & Holidays

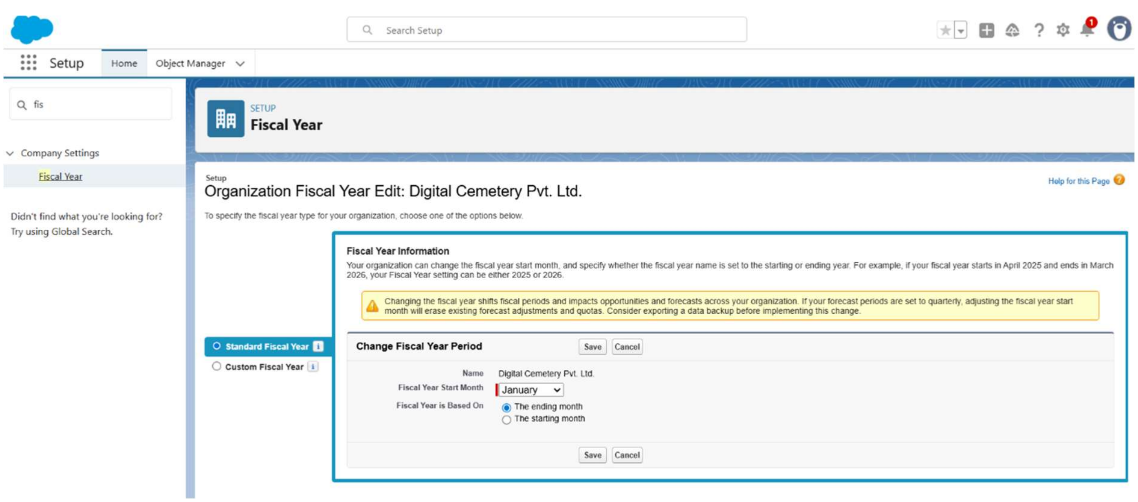
Define working hours: 07:00 AM – 07:00 PM (Mon–Sun).



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:

Admin (system setup & control).

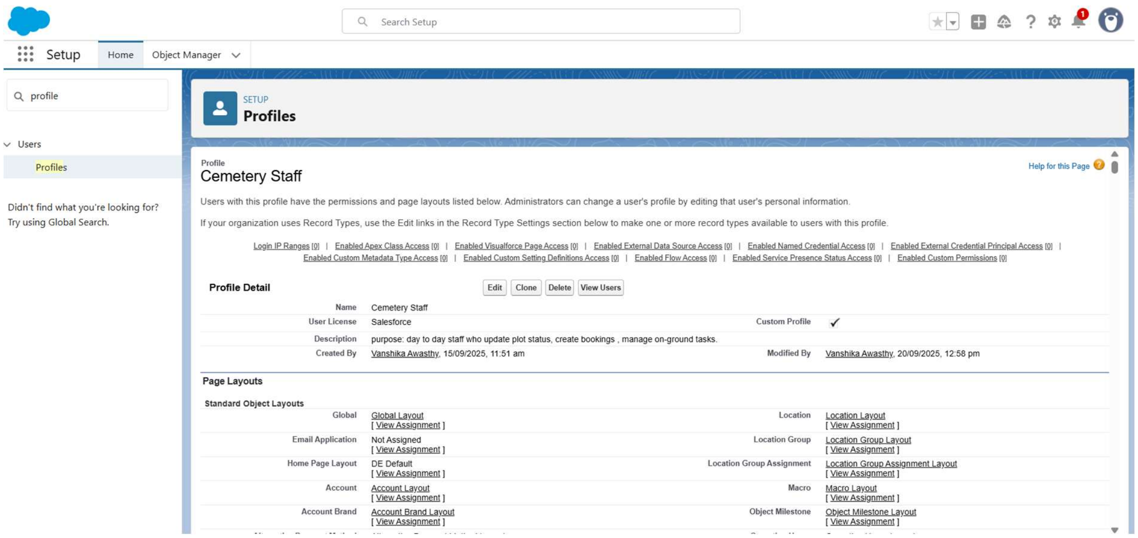
Cemetery Manager (approves burial plot requests, oversees reports).

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

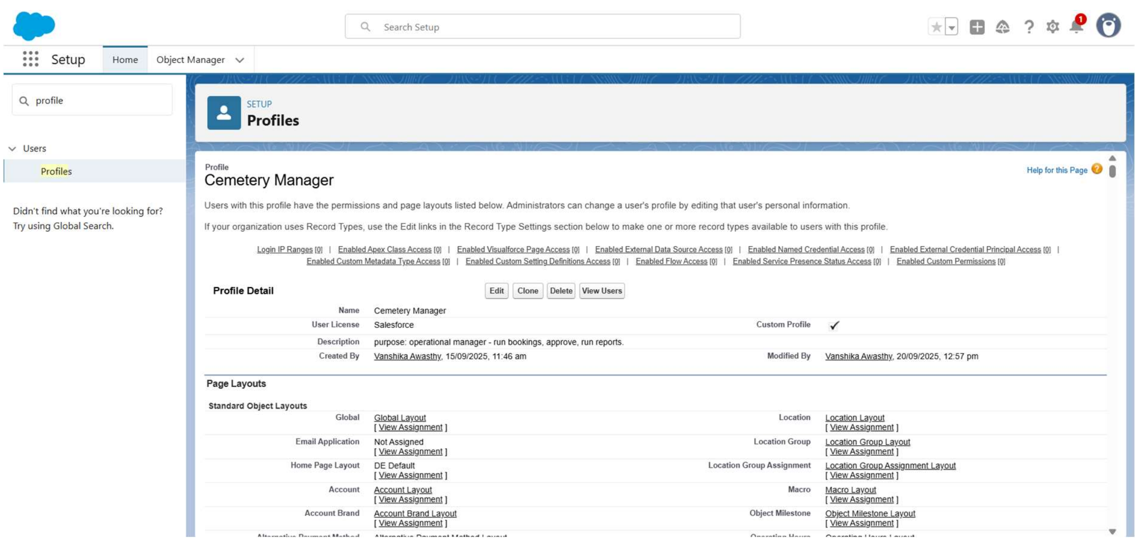
Customer Service (assist families, track issues, schedule services).

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.

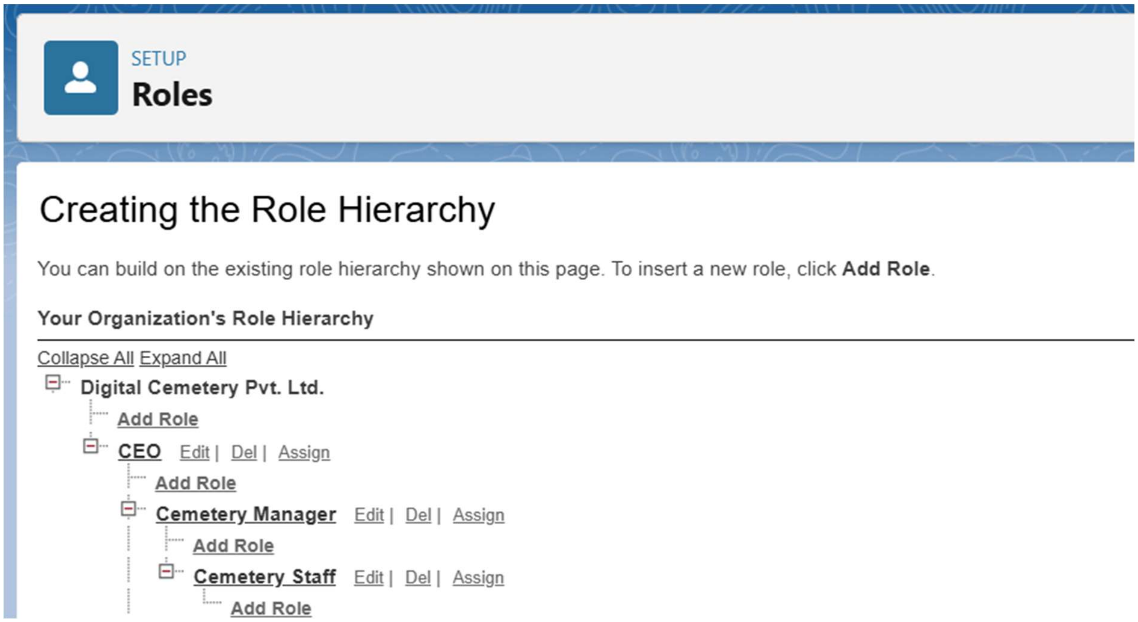


Customer Service: Limited to case management, record viewing.

7. Roles

Hierarchy: Cemetery Manager → Cemetery Staff → Customer Service.

Ensures record visibility up to higher levels.



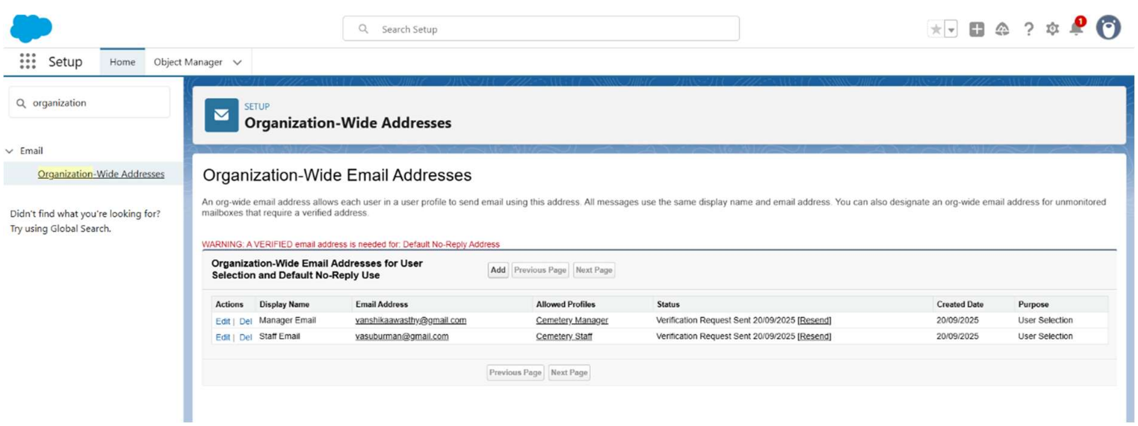
8. Permission Sets

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:

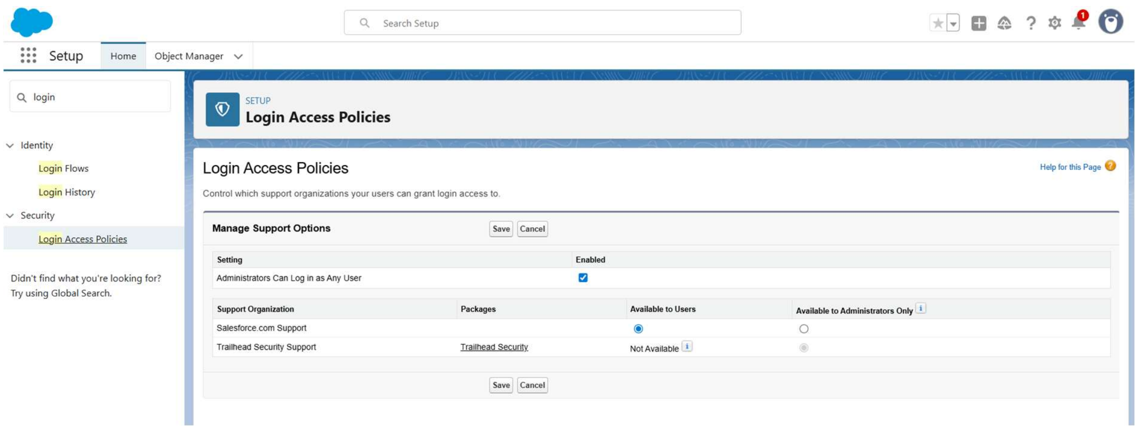
Example: Share plot availability data with all clerical staff.

Example: Share service case records with Customer Service team.

11. Login Access Policies

Restrict login hours for clerical staff (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.