

Smart Volunteer Collaboration Network



Company Profile Setup

Configured basic org details under **Setup → Company Information → Edit**:

- **Name:** Smart Volunteer Collaboration Network – Dev
- **Time Zone:** GMT+05:30 (Asia/Kolkata)
- **Locale:** English (India)
- **Language:** English
- **Currency:** INR (can add USD later for international NGOs)

The screenshot shows the Salesforce Setup interface for 'Company Information'. The page title is 'Company Information' under the 'SETUP' tab. The organization's name is listed as 'Smart Volunteer Collaboration Network'. The 'Organization Detail' section contains various configuration fields such as Organization Name, Primary Contact, Division, Address, Fiscal Year Starts In, Enable Data Translation, Newsletter, Admin Newsletter, Hide Notices About System Maintenance, Hide Notices About System Downtime, Locale Formats, Phone, Fax, Default Locale, Default Language, Default Time Zone, Currency Locale, Used Data Space, Used File Space, API Requests, Last 24 Hours, Streaming API Events, Last 24 Hours, Restricted Logins, Current Month, Salesforce.com Organization ID, Organization Edition, and Instance. The 'Created By' field shows 'Sneha Yadav' and the 'Modified By' field shows 'Sneha Yadav'. Navigation links on the left include 'Company Settings', 'Business Hours', 'Calendar Settings', 'Public Calendars and Resources', and 'Company Information'. A global search bar at the top is set to 'company'.

Business Hours Setup

Configured NGO working hours for volunteer management & SLA tracking:

- **Path:** Setup → Business Hours → New
- **Name:** NGO Working Hours
- **Time Zone:** GMT+05:30 (Asia/Kolkata)
- **Working Hours:** Mon–Fri, 9:00 AM–6:00 PM (Saturday/Sunday closed)
- **Save:** Marked as default

The screenshot shows the Salesforce Setup page for 'Business Hours'. The left sidebar has a search bar with 'business' typed in and a 'Company Settings' section with 'Business Hours' selected. The main content area is titled 'Business Hours' and shows 'Organization Business Hours'. It lists two entries: 'Default' (Active, Pacific Daylight Time) and 'NGO Working Hours' (Active, India Standard Time). A 'New Business Hours' button is at the top right. Navigation links for letters A-Z and a 'Help for this Page' link are at the bottom.

Holidays Setup

Configured NGO holidays to prevent scheduling conflicts:

- **Path:** Setup → Holidays → New

- **Name:** Republic Day

- **Date:** 26 Jan

- **Recurring:** Yes

- **Save:**

- **Path:** Setup → Holidays → New

- **Name:** Independence Day

- **Date:** 15 Aug

- **Recurring:** Yes

- **Save:**

- **Path:** Setup → Holidays → New

- **Name:** Gandhi Jayanti

- **Date:** 2 Oct

- **Recurring:** Yes

- **Save:**

- **Path:** Setup → Holidays → New

- **Name:** Christmas

- **Date:** 25 Dec

- **Recurring:** Yes

- **Save:**

The screenshot shows the Salesforce Setup interface under the 'Holidays' section. The page title is 'Holidays'. It displays a table of predefined holidays with columns for Action, Holiday Name, Description, and Date and Time. The listed holidays include Christmas Day, Gandhi Jayanti, Independence Day, New Year's Day, and Republic Day, each with its corresponding date and time.

Action	Holiday Name	Description	Date and Time
Edit Del	Christmas Day		25/12/2025 All Day
Edit Del	Gandhi Jayanti		02/10/2025 All Day
Edit Del	Independence Day		15/08/2026, 12:00 am – 11:59 pm
Edit Del	New Year's Day		01/01/2026 All Day
Edit Del	Republic Day		26/01/2026 All Day

Fiscal Year Setup

Defined fiscal year for reporting volunteer hours and event participation:

- **Path:** Setup → Fiscal Year
- **Type:** Standard Fiscal Year (Jan–Dec)
- **Configuration:** Starting month – January
- **Save:** Applied for reporting

The screenshot shows the Salesforce Setup interface under the 'Fiscal Year' section. The page title is 'Organization Fiscal Year Edit: Smart Volunteer Collaboration Network'. It displays a 'Fiscal Year Information' section with a note about changing the fiscal year start month. Below it is a 'Change Fiscal Year Period' form. The form shows the organization's name as 'Smart Volunteer Collaboration Network', the 'Fiscal Year Start Month' as 'January', and the 'Fiscal Year is Based On' option selected as 'The starting month'.

User Setup & Licenses

- **Path:** Setup → Users
- Verified test users created with Salesforce Platform or Salesforce license:

- Admin (NGO Staff)
- Volunteer Coordinator
- Volunteer

Profiles Setup

1. Navigate to Profiles

1.1 Path: Setup → Profiles

2. Clone Standard Profile

2.1 Action: Clone a standard profile → **Volunteer Profile**

3. Configure Object Settings

3.1 Volunteers → Create / Read / Edit

3.2 Events → Read / Create / Edit

Action	Profile Name	User License	Status
Edit Del ...	Volunteer External Profile	Salesforce	Custom
Edit Del ...	Volunteer Profile	Salesforce	Custom

Roles

1. Set Up Roles

1.1 Create top-level role: **NGO Admin**

1.2 Create role reporting to NGO Admin: **Volunteer Coordinator**

1.3 Create role reporting to Volunteer Coordinator: **Volunteer**

```

graph TD
    CE[Corporate Executive] --> S[Smart Volunteer Corporation Network]
    S --> CEO[CEO]
    S --> MM[Marketing Manager]
    S --> VC[Volunteer Coordinator]
    S --> V[Volunteer]
    style S fill:#ccc,stroke:#000
    style CEO fill:#ccc,stroke:#000
    style MM fill:#ccc,stroke:#000
    style VC fill:#ccc,stroke:#000
    style V fill:#ccc,stroke:#000
  
```

Permission Sets

- **Path:** Setup → Permission Sets
- Verified “Event Manager Access” or similar permission sets assigned to Coordinators:

OWD (Org-Wide Defaults)

- **Path:** Setup → Sharing Settings
- **Verified:** Objects set to appropriate privacy:
 - Volunteers → Private
 - Events → Public Read Only (or Read/Write for Coordinators)

Sharing Rules

- **Path:** Setup → Sharing Settings → Sharing Rules
- Checked sharing rules exist, e.g.: Volunteer records owned by region X shared with Volunteer Coordinator in region X

Login Access Policies

- **Path:** Setup → Login Access Policies
- Verified Administrators Can Log in as Any User enabled



Dev Org Setup

- Connected the development org using Salesforce CLI and VS Code
- Confirmed that all metadata (Profiles, Roles, Permission Sets, Objects) is deployed successfully

Deployment Basics

Verified deployments ran successfully using CLI commands (sf dx force:source:retrieve and sf dx force:source:deploy).