

## Phase 2: Org Setup & Configuration

### Step 1: Setup Developer Org

1. Go to <https://developer.salesforce.com/signup>
2. Create a free Developer Edition org.
3. Verify your email and login.

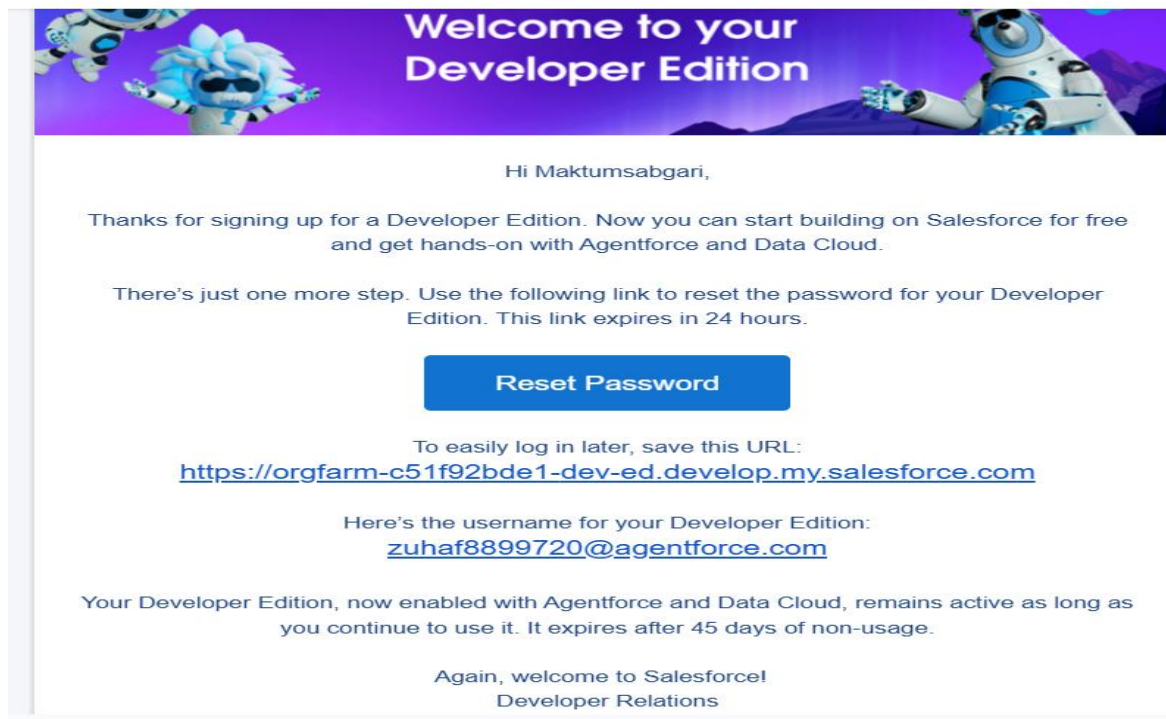


Fig 1: Developer Org

### Step 2: Setup Company Profile

1. Navigate: Setup → Company Information.
2. Update:
  - Org Name =Codesphere Institute Of Technology
  - Currency=English(INR)

- Set Default Time Zone, Fiscal Year.

**SETUP**  
**Company Information**

**Organization Detail** [Edit](#)

Organization Name	CodeSphere Institute Of Technology	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (United States)
Address	India	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	352 KB (7%) <a href="#">View</a>
Newsletter	<input checked="" type="checkbox"/>	Used File Space	119 KB (1%) <a href="#">View</a>
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	00DgL000000BY8ph
		Organization Edition	Developer Edition
		Instance	CAN98

Created By [OrgFarm EPIC](#), 9/12/2025, 10:59 PM

Modified By [Maktumsabgari Juha Fathima](#), 9/18/2025, 10:15 AM

- Fig 2: Company profile

### 3. Configure Business Hours:

- Path: Setup → Business Hours.
- Example: Mon–Fri, 9AM – 4 PM.

### 4. Configure Holidays:

- Example: 26 Jan, 15 Aug (exam blackout dates).

## Step 3: Create Custom Profiles

### 1. Navigate: Setup → Profiles.

### 2. Clone Standard Profiles into:

- Faculty Profile → for HOD, Teachers.
- Accounts Profile → for Accountant.
- Student Profile → for Students
- Faculty → Manage Courses, Student.
- Accounts → Manage Fee Payments, Reports.
- Students → Read-only access on their own record.

**SETUP Profiles**

### Faculty Profile

Set the permissions and page layouts for this profile.

**Profile Edit** Save Save & New Cancel

Name

User License  Custom Profile ☒

Description

**Custom App Settings** Required Information

	Visible	Default		Visible	Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>	My Service Journey (standard__MSJApp)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>	Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Approvals (standard__Approvals)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
Automation (standard__FlowsApp)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales Cloud Mobile	<input checked="" type="checkbox"/>	<input type="radio"/>

Fig 3: Creation of profiles

## Step 4: Define Roles

1. Navigate: Setup → Roles → Set Up Roles → Expand All.
2. Create hierarchy:
  - Principal (Top level).
  - HOD (reports to Principal).
  - Teacher (reports to HOD).
  - Accountant (reports to Principal).
  - Student(lowest level).

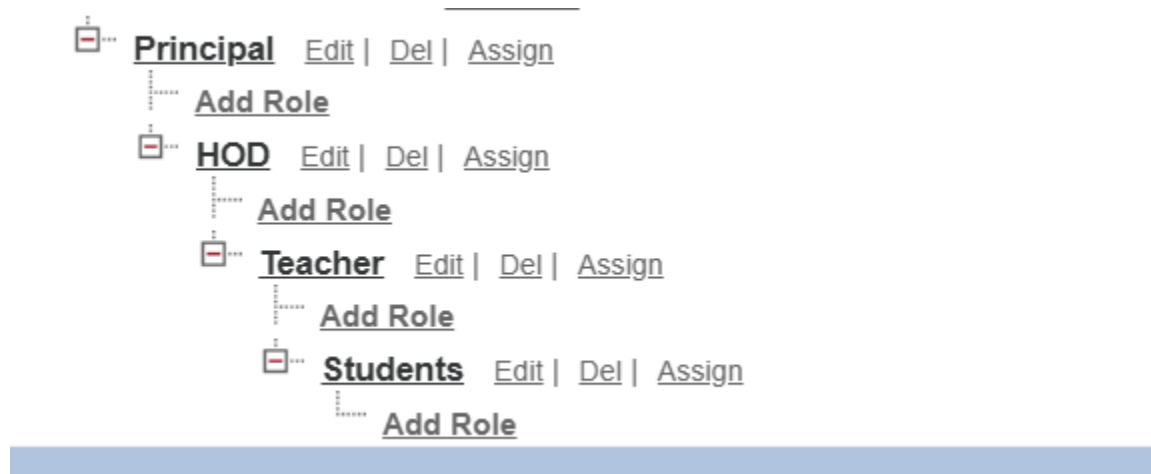


Fig 4: Hierarchy of Roles

## Step 5: Create Users

1. Navigate: Setup → Users → New User.
2. Assign details:
  - User License = Salesforce (for staff).
  - Profile = Faculty, Accounts, System Admin, etc.
  - Role = Principal, Teacher, Accountant, Student.
3. Create sample test users: Principal, Teacher.

Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	Begum Shahida	sbegu	shahid@email.com	Teacher	✓	Faculty Profile
<a href="#">Edit</a>	Chatter Expert	Chatter	chatty.00d9l00000by8phuad.4k2d3kv4bpxa@chatter.salesforce.com		✓	Chatter Free User
<a href="#">Edit</a>	EPIC QrgFarm	QEPIG	epic.67b5b17f44a4@orgfarm.salesforce.com		✓	System Administrator
<a href="#">Edit</a>	Juha Fathima Maktumsabgari	zuh	zuha8899720@agentforce.com		✓	System Administrator
<a href="#">Edit</a>	Maktumsabgari Mahaboob Basha	mmb	basha89@blurgmail.com	Principal	✓	System Administrator
<a href="#">Edit</a>	User Integration	integ	integration@00d9l00000by8phuad.com		✓	Analytics Cloud Integration User
<a href="#">Edit</a>	User Security	sec	insightssecurity@00d9l00000by8phuad.com		✓	Analytics Cloud Security User

Fig 5: Users List

## Step 6: Org-Wide Defaults (OWD) & Sharing

1. Navigate: Setup → Sharing Settings.

2. Set Org-Wide Defaults (OWD):

- Student Object = Private.
- Course/Batch = Public Read Only.

With this setup, my Salesforce Educational Org will have:

- Proper institute branding & working hours.
- Clear role hierarchy (Principal → HOD → Teacher → Student).
- Secure sharing model (Students private, Courses public read).
- Profiles tailored for Faculty, Accounts, and Students.

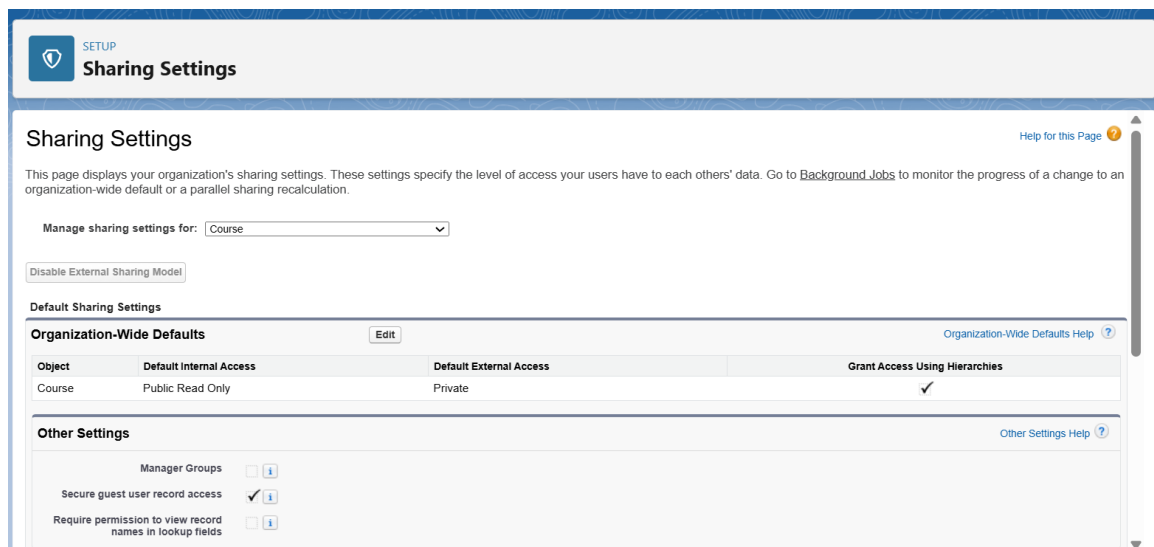


Fig 6: The OWD settings