

## Phase 2 — Org Setup & Configuration

**Goal:** prepare Salesforce org with users, profiles, permissions for alumni & students.

### Steps

1. **Edition:** Education Cloud (preferred) or Sales Cloud + Community.
2. **Company Profile:** Set timezone, currency (for donations), locale.

SETUP

Company Information

The organization's profile is below.

User Licenses (10+) | Permission Set Licenses (10+) | Feature Licenses (11) | Usage-based Entitlements (10+)

Organization Detail

Edit

Organization Name	Prof. Ram Meghe Institute of Technology and Research	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (United States)
Address	Amravati 444605 Maharashtra India	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	Marathi (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	348 KB (7%) <a href="#">View</a>
Newsletter	<input checked="" type="checkbox"/>	Used File Space	133 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	00DgK000007YA0v
		Organization Edition	Developer Edition
		Instance	CAN95
Created By	OrgFarm EPIC, 7/17/2025, 1:31 PM	Modified By	Kartik Umale, 9/15/2025, 11:23 PM

Edit

### 3. Users & Licenses:

- Admin

SETUP

Users

User

Kartik Umale

[User Profile Help for this Page](#)

Permission Set Assignments (5) | Permission Set Assignments: Activation Required (0) | Permission Set Group Assignments (0) | Permission Set License Assignments (5+) | Personal Groups (0) | Public Group Memberships (0) | Queue Memberships (0) | Team (0) | Managers in the Role Hierarchy (0) | Chatter Apps (4) | Third-Party Account Links (0) | Built-in Authenticators (0) | Installed Mobile Apps (0) | Authentication Settings for External Systems (0) | Login History (10+) | User Provisioning Accounts (0)

User Detail

Edit

Sharing

Change Password

View Summary

Name	Kartik Umale	Role	Admin
Alias	kar	User License	Salesforce
Email	kartikumale123@gmail.com [Verified]	Profile	System Administrator
Username	kartikumale123457@agentforce.com	Active	<input checked="" type="checkbox"/>
Nickname	User17536046509858213158 ⓘ	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company	Prof. Ram Meghe Institute of Technology and Research	Knowledge User	<input checked="" type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<a href="#">View</a>
Delegated Approver		Data.com User Type	ⓘ
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> ⓘ
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> ⓘ
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> ⓘ
App Registration: One-Time Password Authenticator	<a href="#">[Connect]</a> ⓘ	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> ⓘ
App Registrations: Salesforce	ⓘ	Send App-Welcome Email	ⓘ

- Alumni Coordinator (staff)

SETUP

Users

User

Amit Deshmukh

[User Profile Help for this Page](#)

[Permission Set Assignments \(0\)](#) | 
 [Permission Set Assignments Activation Required \(0\)](#) | 
 [Permission Set Group Assignments \(0\)](#) | 
 [Permission Set License Assignments \(0\)](#) | 
 [Personal Groups \(0\)](#) | 
 [Public Group Membership \(0\)](#) | 
 [Queue Membership \(0\)](#) | 
 [Team \(0\)](#) | 
 [Managers in the Role Hierarchy \(1\)](#) | 
 [OAuth Apps \(0\)](#) | 
 [Third-Party Account Links \(0\)](#) | 
 [Built-In Authenticators \(0\)](#) | 
 [Installed Mobile Apps \(0\)](#) | 
 [Authentication Settings for External Systems \(0\)](#) | 
 [Login History \(1+\)](#) | 
 [User Provisioning Accounts \(0\)](#)

User Detail

Edit

Sharing

Reset Password

Freeze

View Summary

Name	Amit Deshmukh	Role	Alumni Coordinator
Alias	ades	User License	Salesforce Platform
Email	karikumale123@gmail.com [Verified]	Profile	Alumni Coordinator
Username	amit.deshmukh@example.com	Active	<input checked="" type="checkbox"/>
Nickname	User17579232369511340324 ⓘ	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<a href="#">View</a>
Delegated Approver		Data.com User Type	ⓘ
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> ⓘ
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> ⓘ
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> ⓘ
App Registration: One-Time Password Authenticator	ⓘ	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> ⓘ
App Registrations: Salesforce		Salesforce CRM Content User	<input checked="" type="checkbox"/>

- Students (Community users)

SETUP

Users

User

Priya Patel

[User Profile Help for this Page](#)

[Permission Set Assignments \(0\)](#) | 
 [Permission Set Assignments Activation Required \(0\)](#) | 
 [Permission Set Group Assignments \(0\)](#) | 
 [Permission Set License Assignments \(0\)](#) | 
 [Personal Groups \(0\)](#) | 
 [Public Group Membership \(0\)](#) | 
 [Queue Membership \(0\)](#) | 
 [Team \(0\)](#) | 
 [Managers in the Role Hierarchy \(2\)](#) | 
 [OAuth Apps \(0\)](#) | 
 [Third-Party Account Links \(0\)](#) | 
 [Built-In Authenticators \(0\)](#) | 
 [Installed Mobile Apps \(0\)](#) | 
 [Authentication Settings for External Systems \(0\)](#) | 
 [Login History \(0+\)](#) | 
 [User Provisioning Accounts \(0\)](#)

User Detail

Edit

Sharing

Reset Password

Freeze

View Summary

Name	Priya Patel	Role	Student
Alias	ppate	User License	Salesforce
Email	karikumale123@gmail.com [Verify] ⓘ	Profile	Student
Username	priya.patel@student.edu	Active	<input checked="" type="checkbox"/>
Nickname	User17579231548828255802 ⓘ	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<a href="#">View</a>
Delegated Approver		Data.com User Type	ⓘ
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> ⓘ
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> ⓘ
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> ⓘ
App Registration: One-Time Password Authenticator	ⓘ	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> ⓘ

- Alumni (Community users)

SETUP

Users

User

aanya badoniya

Permission Set Assignments [1] | Permission Set Assignments: Activation Required [0] | Permission Set Group Assignments [0] | Permission Set License Assignments [0] | Personal Groups [0] | Public Group Membership [0] | Queue Membership [0] | Team [0] | Managers in the Role Hierarchy [2] | OAuth Apps [0] | Third-Party Account Links [0] | Built-in Authenticators [0] | Installed Mobile Apps [0] | Authentication Settings for External Systems [0] | Login History [0] | User Provisioning Accounts [0]

User Detail

Edit | Sharing | Reset Password | Freeze | View Summary

Name	aanya badoniya	Role	Alumni
Alias	abado	User License	Salesforce
Email	kartikumale123@gmail.com [Verified]	Profile	Alumni
Username	alumni@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User17579230417049358424 ⓘ	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	ⓘ
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> ⓘ
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> ⓘ
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/> ⓘ
App Registration: One-Time Password Authenticator	ⓘ	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> ⓘ
App Registrations: Salesforce	ⓘ	Salesforce CRM Contact User	ⓘ

#### 4. Profiles & Permission Sets:

- Alumni Profile

SETUP

Profiles

Profile

Alumni

Help for this Page ⓘ

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.

Login IP Ranges [0] | Enabled Apex Class Access [0] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] | Enabled External Credential Principal Access [0] | Enabled Custom Metadata Type Access [0] | Enabled Custom Setting Definitions Access [0] | Enabled Flow Access [0] | Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]

Profile Detail

Edit | Clone | Delete | View Users


Name	Alumni	Custom Profile	<input checked="" type="checkbox"/>
User License	Salesforce		
Description			
Created By	Kartik Umale: 9/15/2025, 1:16 PM	Modified By	Kartik Umale: 9/16/2025, 4:08 PM

Page Layouts

Standard Object Layouts

Global	Global Layout [ View Assignment ]	Location	Location Layout [ View Assignment ]
Email Application	Not Assigned [ View Assignment ]	Location Group	Location Group Layout [ View Assignment ]
Home Page Layout	Home Page Default [ View Assignment ]	Location Group Assignment	Location Group Assignment Layout [ View Assignment ]
Account	Account Layout [ View Assignment ]	Macro	Macro Layout [ View Assignment ]
Account Brand	Account Brand Layout [ View Assignment ]	Object Milestone	Object Milestone Layout [ View Assignment ]
Alternative Payment Method	Alternative Payment Method Layout [ View Assignment ]	Operating Hours	Operating Hours Layout [ View Assignment ]
Appointment Invitation	Appointment Invitation Layout [ View Assignment ]	Opportunity	Opportunity Layout [ View Assignment ]

- Student Profile



SETUP

Profiles

Profile

Student

[Help for this Page](#)

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.

[Login IP Ranges \(0\)](#) | 
 [Enabled Apex Class Access \(0\)](#) | 
 [Enabled Visualforce Page Access \(0\)](#) | 
 [Enabled External Data Source Access \(0\)](#) | 
 [Enabled Named Credential Access \(0\)](#) | 
 [Enabled External Credential Principal Access \(0\)](#) | 
 [Enabled Custom Metadata Type Access \(0\)](#) | 
 [Enabled Custom Setting Definitions Access \(0\)](#) | 
 [Enabled Flow Access \(0\)](#) | 
 [Enabled Service Presence Status Access \(0\)](#) | 
 [Enabled Custom Permissions \(0\)](#)

Profile Detail

Edit

Clone

Delete

View Users


Name	Student		
User License	Salesforce	Custom Profile	✓
Description			
Created By	Kartik Umalte, 9/15/2025, 1:17 PM	Modified By	Kartik Umalte, 9/16/2025, 4:08 PM

Page Layouts

Standard Object Layouts			
Global	Global Layout <a href="#">View Assignment</a>	Location	Location Layout <a href="#">View Assignment</a>
Email Application	Not Assigned <a href="#">View Assignment</a>	Location Group	Location Group Layout <a href="#">View Assignment</a>
Home Page Layout	Home Page Default <a href="#">View Assignment</a>	Location Group Assignment	Location Group Assignment Layout <a href="#">View Assignment</a>
Account	Account Layout <a href="#">View Assignment</a>	Macro	Macro Layout <a href="#">View Assignment</a>
Account Brand	Account Brand Layout <a href="#">View Assignment</a>	Object Milestone	Object Milestone Layout <a href="#">View Assignment</a>
Alternative Payment Method	Alternative Payment Method Layout <a href="#">View Assignment</a>	Operating Hours	Operating Hours Layout <a href="#">View Assignment</a>
Appointment Invitation	Appointment Invitation Layout <a href="#">View Assignment</a>	Opportunity	Opportunity Layout <a href="#">View Assignment</a>

## 5. Roles & Hierarchy:

Admin > Alumni Coordinator > Alumni/Students.



SETUP

## Roles

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## 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

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

- ▢ Prof. Ram Meghe Institute of Technology and Research
  - └─ [Add Role](#)
  - ▢ Admin Edit | Del | Assign
    - └─ [Add Role](#)
    - ▢ Alumni Coordinator Edit | Del | Assign
      - └─ [Add Role](#)
      - ▢ Alumni Edit | Del | Assign
        - └─ [Add Role](#)
        - ▢ Student Edit | Del | Assign
          - └─ [Add Role](#)

**6. OWD & Sharing Rules** (optional):

- Alumni & Students private by default.
- Sharing rules to allow “Connections”.

**7. Sandbox Setup:** Developer sandbox for build, UAT for testing.

Deliverables: Org ready with profiles, roles, and login policies.