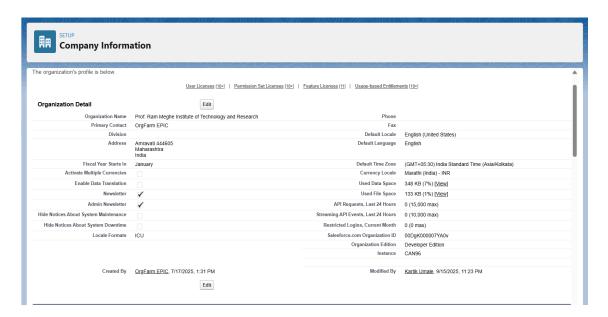
Phase 2 — Org Setup & Configuration

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

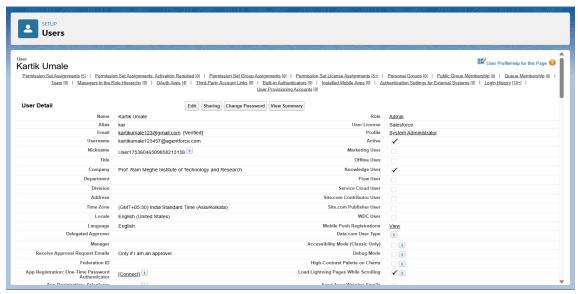
Steps

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

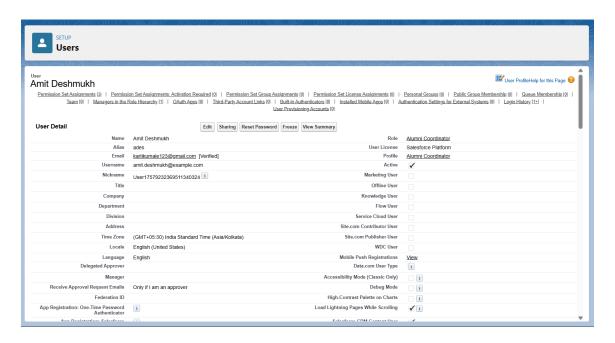


3. Users & Licenses:

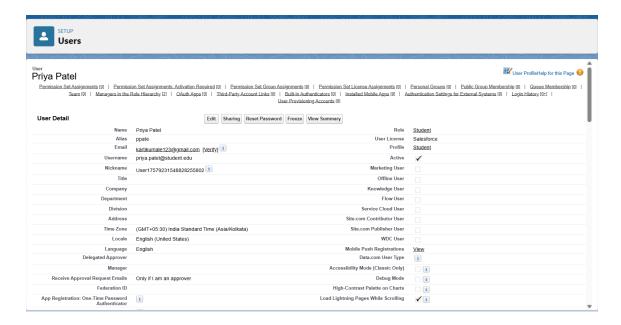
Admin



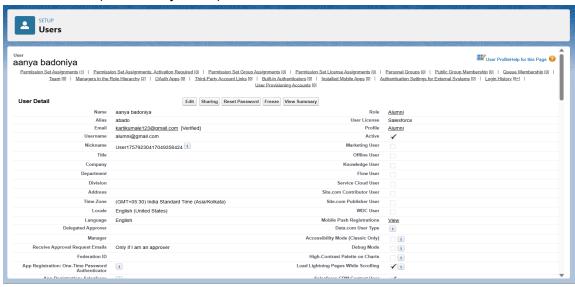
Alumni Coordinator (staff)



Students (Community users)

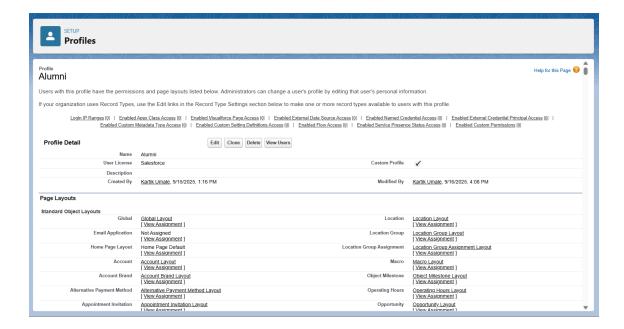


Alumni (Community users)

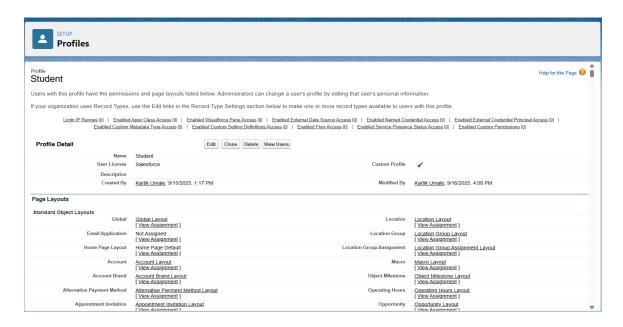


4. Profiles & Permission Sets:

Alumni Profile

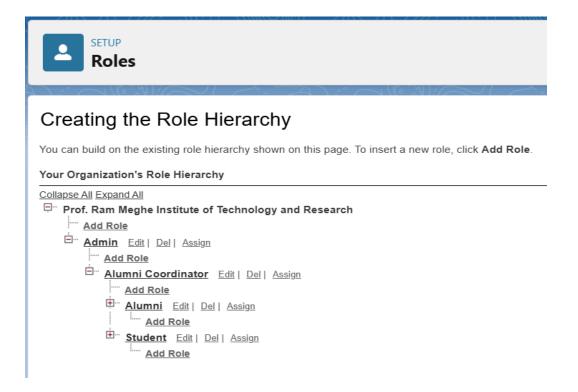


• Student Profile



5. Roles & Hierarchy:

Admin > Alumni Coordinator > Alumni/Students.



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.