

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.

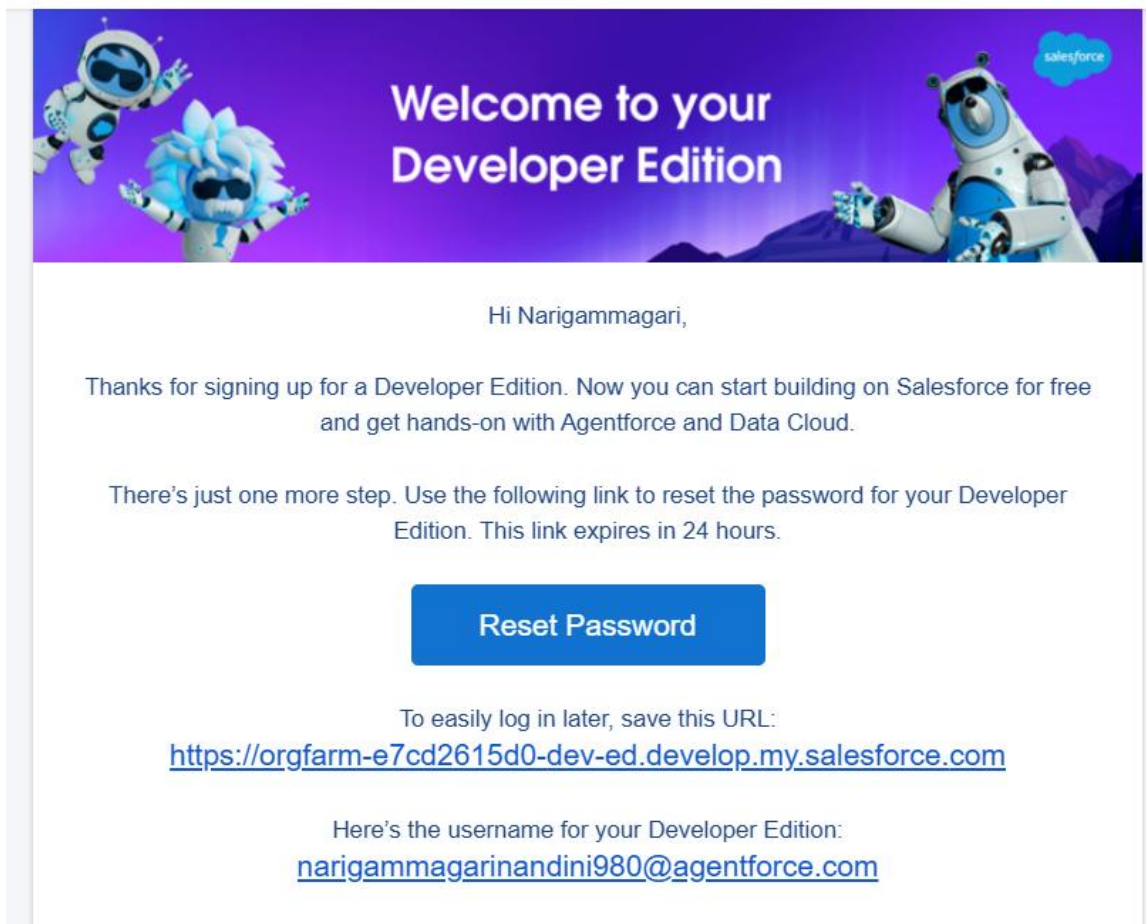


Fig 1: Developer Org

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.

The screenshot shows the 'Company Information' page in Salesforce Setup. The page has a header with the 'SETUP' logo and 'Company Information' title. Below the header is a table with various organization details. The table is divided into two columns. The left column contains fields like Organization Name, Primary Contact, Division, Address, Fiscal Year Starts In, Activate Multiple Currencies, Enable Data Translation, Newsletter, Admin Newsletter, Hide Notices About System Maintenance, Hide Notices About System Downtime, and Locale Formats. The right column contains fields like 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. At the bottom, there is a 'Created By' field showing 'OrgFarm EPIC, 9/12/2025, 10:59 PM' and a 'Modified By' field showing 'Maktumsabgari Juha Fathima, 9/18/2025, 10:15 AM'. There is also an 'Edit' button at the bottom center.

Organization Detail	
Organization Name	CodeSphere Institute Of Technology
Primary Contact	OrgFarm EPIC
Division	
Address	India
Fiscal Year Starts In	January
Activate Multiple Currencies	<input type="checkbox"/>
Enable Data Translation	<input type="checkbox"/>
Newsletter	<input checked="" type="checkbox"/>
Admin Newsletter	<input checked="" type="checkbox"/>
Hide Notices About System Maintenance	<input type="checkbox"/>
Hide Notices About System Downtime	<input type="checkbox"/>
Locale Formats	ICU
Phone	
Fax	
Default Locale	English (United States)
Default Language	English
Default Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Currency Locale	English (India) - INR
Used Data Space	352 KB (7%) View
Used File Space	119 KB (1%) View
API Requests, Last 24 Hours	0 (15,000 max)
Streaming API Events, Last 24 Hours	0 (10,000 max)
Restricted Logins, Current Month	0 (0 max)
Salesforce.com Organization ID	00DgL000008Y8ph
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.

The screenshot shows the 'Faculty Profile' setup page in Salesforce. The page has a header with a 'SETUP' icon and a 'Profiles' title. Below the header, the title 'Faculty Profile' is displayed, followed by the instruction 'Set the permissions and page layouts for this profile.' The main section is titled 'Profile Edit' and contains a 'Name' field with the value 'Faculty Profile', a 'User License' dropdown set to 'Salesforce', and a 'Description' text area. To the right of these fields are buttons for 'Save', 'Save & New', and 'Cancel', and a 'Custom Profile' checkbox which is checked. Below this section is a 'Custom App Settings' table with two columns of settings, each with 'Visible' and 'Default' checkboxes. A legend indicates that a red exclamation mark icon means '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).

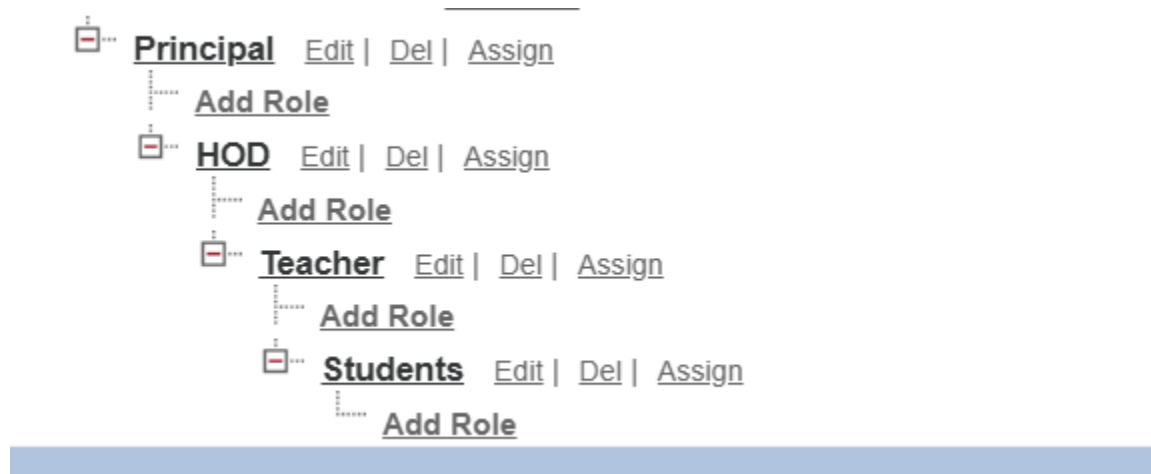


Fig 4: Hierarchy of Roles

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
Edit	Regum, shahida	sbegu	shahid@email.com	Teacher	✓	Faculty Profile
Edit	Chatter Expert	Chatter	chatty.00d9l00000by8phuad.4k2d3kv4bpxa@chatter.salesforce.com		✓	Chatter Free User
Edit	EPIC, QrgFarm	QEPIG	epic.67b5b17f44a4@orgfarm.salesforce.com		✓	System Administrator
Edit	Juha Fathima, Maktumsabgari	zuh	zuha8899720@agentforce.com		✓	System Administrator
Edit	Maktumsabgari, Mahaboob Basha	mmb	basha89@blurgmail.com	Principal	✓	System Administrator
Edit	User, Integration	integ	integration@00d9l00000by8phuad.com		✓	Analytics Cloud Integration User
Edit	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.

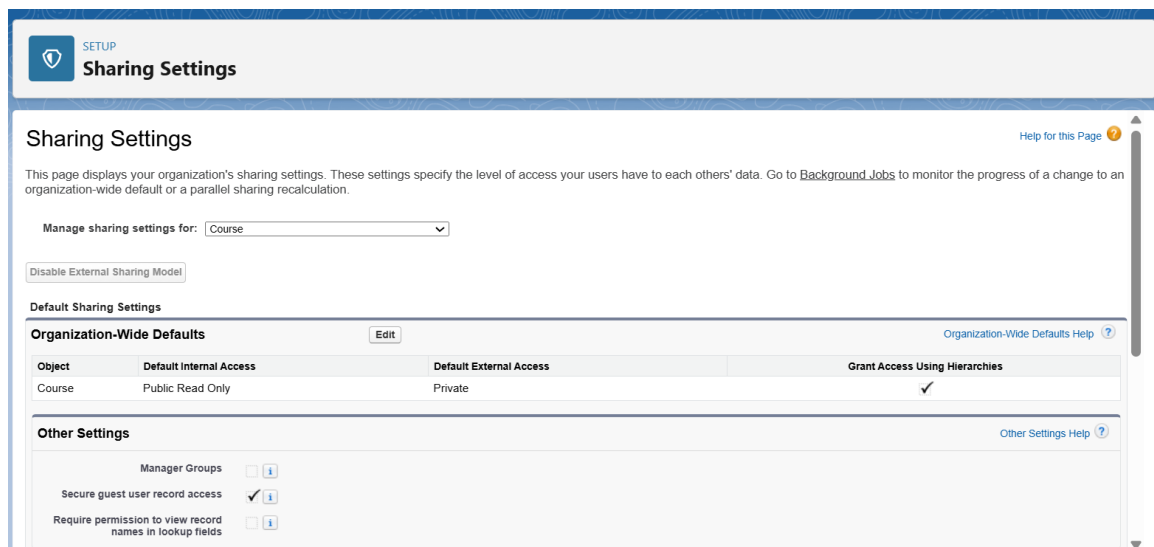


Fig 6: The OWD settings