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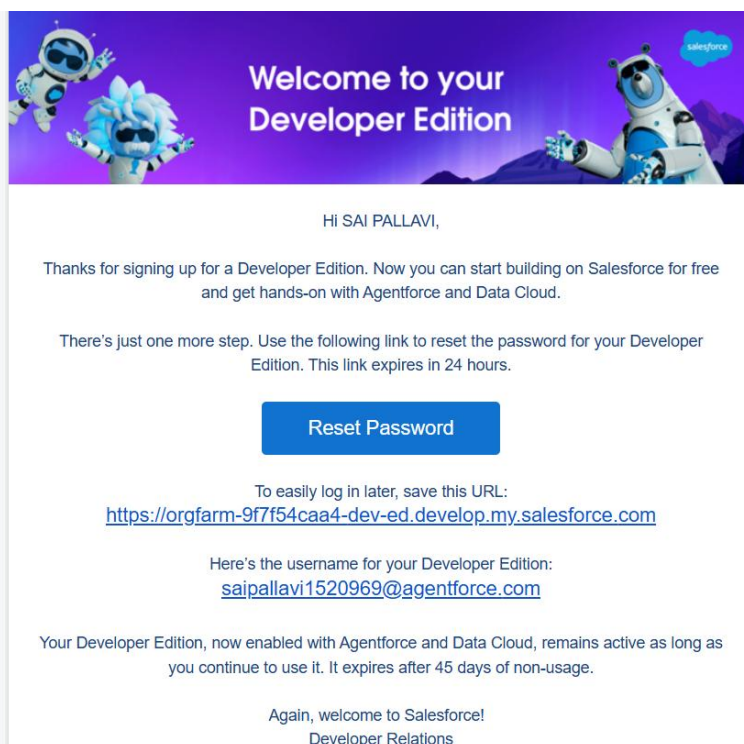
# *INSTITUTE MANAGEMENT SYSTEM*

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## **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.



### **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)
Locale Formats	ICU	Restricted Logins, Current Month	0 (0 max)
		Salesforce.com Organization ID	00000000000000000000000000000000
		Organization Edition	Developer Edition
		Instance	CAN08

Created By: OrgFarm EPIC, 9/12/2025, 10:59 PM  
Modified By: Makunsubopari Juha Fathima, 9/18/2025, 10:15 AM

### 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.


**Profiles**

## Faculty Profile

Set the permissions and page layouts for this profile.

**Profile Edit**
Save Save & New Cancel

Name

User License
Salesforce

Description

Custom Profile
☒

**Custom App Settings**
Required Information

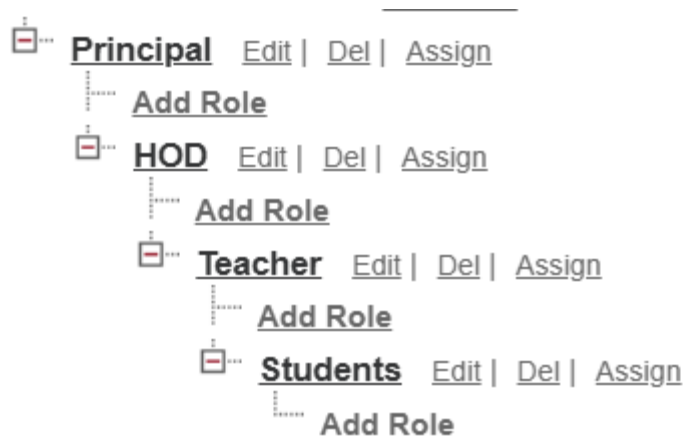
	Visible	Default		Visible	Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>	My Service Journey (standard__MSJApp)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>	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 type="checkbox"/>	<input checked="" type="radio"/>
Automation (standard__FlowsApp)	<input type="checkbox"/>	<input type="radio"/>	Sales Cloud Mobile	<input type="checkbox"/>	<input type="radio"/>

## 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).



## 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.

**SETUP Users**

**All Users** [Help for this Page](#)

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: **All Users** [Edit](#) [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> <a href="#">Edit</a>	Begum Shahida	sbegu	shahid@email.com	Teacher	✓	Faculty Profile
<input type="checkbox"/> <a href="#">Edit</a>	Chatter Expert	Chatter	chatty.00dgl00000by8pquad.4k2d3kv4bpxa@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> <a href="#">Edit</a>	EPIC_OrgFarm	OEPIG	epic.67b5b17f44a4@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/> <a href="#">Edit</a>	Juha Fathima Maktumsabgari	zuh	zuha1899720@agentforce.com		✓	System Administrator
<input type="checkbox"/> <a href="#">Edit</a>	Maktumsabgari_Mahaboob Basha	mmb	basha99@blurgmail.com	Principal	✓	System Administrator
<input type="checkbox"/> <a href="#">Edit</a>	User_Integration	integ	integration@00dgl00000by8pquad.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> <a href="#">Edit</a>	User_Security	sec	insightssecurity@00dgl00000by8pquad.com		✓	Analytics Cloud Security User

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

## 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.



SETUP

## Sharing Settings

## Sharing Settings

[Help for this Page](#) ?

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: Course ▼[Disable External Sharing Model](#)

## Default Sharing Settings

## Organization-Wide Defaults

[Edit](#)[Organization-Wide Defaults Help](#) ?

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Course	Public Read Only	Private	✓

## Other Settings

[Other Settings Help](#) ?

- Manager Groups ☐ [?](#)
- Secure guest user record access ☒ [?](#)
- Require permission to view record names in lookup fields ☐ [?](#)