

# Phase 2: Org Setup & Configuration

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Project: Student Management System

## Salesforce Editions

Setup → Company Settings → Company Information.

Check the Salesforce Edition (e.g., Enterprise, Professional).

Purpose: Determines available features for the org.

## Company Profile Setup

Setup → Company Information → Fill details: Company Name, Address, Phone, Locale & Currency.

Purpose: Basic org identity for reporting and records.

## Business Hours & Holidays

Setup → Business Hours → Set school operational hours.

Setup → Holidays → Add school holidays.

Purpose: Define active times for workflow rules, approvals, and case assignment.

## Fiscal Year Settings

Setup → Fiscal Year → Select Standard or Custom.

Purpose: Align reports and budgets with school financial year.

## User Setup & Licenses

Setup → Users → New User (create Admin, Teacher, Student users).

Setup → Company Information → User Licenses to view available licenses.

Purpose: Assign access to different users based on roles.

## Profiles

Setup → Profiles → Create/Modify profiles (Admin, Teacher, Student).

Purpose: Control what users can view/edit.

## Roles

Setup → Roles → Set Up Roles Hierarchy (Principal → Teachers → Students).

Purpose: Enable data visibility through hierarchy.

## **Permission Sets**

Setup → Permission Sets → Assign extra permissions if needed.

Purpose: Provide additional access without changing profile.

## **Organization-Wide Defaults (OWD)**

Setup → Sharing Settings → Set OWD (e.g., Student object → Private).

Purpose: Define baseline data access for objects.

## **Sharing Rules**

Setup → Sharing Rules → Create New (e.g., Teachers can access students in their class).

Purpose: Grant record access beyond OWD.

## **Login Access Policies**

Setup → Login Access Policies.

Purpose: Secure admin access to troubleshoot.

## **Dev Org Setup**

Sign up for Developer Org → Configure same settings as above.

Purpose: Safe environment for development/testing.

## **Sandbox Usage**

Setup → Sandboxes → Create Sandbox (Partial Copy sandbox for testing student records).

Purpose: Test new features without affecting production.

## **Deployment Basics**

Use Change Sets or Salesforce Deployment Tools (Deploy Student object & workflows from Sandbox → Production).

Purpose: Move changes safely from testing to live environment.