

# Phase 2: Org Setup & Configuration

## 1. Salesforce Edition Selection & Justification

### 1.1 Recommended Edition: Enterprise Edition

#### Justification:

- Advanced Workflow & Process Builder: Required for complex student intervention workflows
- Advanced Sharing & Security: Need granular control for FERPA compliance
- API Access: Essential for LMS, SIS, and payment gateway integrations
- Custom Report Types: Required for complex academic reporting
- Sandboxes: Critical for testing academic year transitions
- Storage: 1GB base + 20MB per user (sufficient for 25,000+ students)

SETUP My Domain

### My Domain Settings

My Domain showcases your company's brand and keeps your data more secure. The domains that Salesforce hosts for your org include your company-specific My Domain name.

My Domain Details		Edit
Current My Domain URL	stateuniversity-educonnect-dev-ed.develop.my.salesforce.com with partitioned enhanced domains	
My Domain Name	stateuniversity-educonnect-dev-ed	
Domain Suffix	Standard (*.my.salesforce.com)	
		Edit

## 2. Company Profile Setup

### 2.1 Organization Information

Navigate to: Setup → Company Information → Company Information

### 2.2 Critical Settings Configuration

**Default Language:** English **Default Locale:** English (United States)

**Default Time Zone:** America/New\_York (adjust based on university location)

Company Information

State University - EduConnect Platform

Help for this Page

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	State University - EduConnect Platform	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (United States)
Address	123 University Drive University City, New Hampshire 12345 United States	Default Language	English
Fiscal Year Starts In	Custom Fiscal Year	Default Time Zone	(GMT-05:00) Eastern Standard Time (America/Jamaica)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (United States) - USD
Enable Data Translation	<input type="checkbox"/>	Used Data Space	342 KB (7%) <a href="#">View</a>
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) <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	00DgK00000BGQcx
		Organization Edition	Developer Edition
		Instance	CAN96
Created By	OrgFarm EPIC, 9/10/2025, 1:23 PM	Modified By	Pulita Pope Nikolas, 9/17/2025, 3:16 AM

Edit

### 3. Business Hours & Holiday Configuration

#### 3.1 Academic Calendar Business Hours

**Setup Path:** Setup → Business Hours → New Business Hours

Academic Support Hours (Primary):

Emergency Support Hours:

Career Services Hours:

#### 3.2 Holiday Configuration

Setup Path: Setup → Business Hours → Holidays\*\*

Academic Year Holidays 2024-2025:

SETUP

Organization-Wide Addresses

Organization-Wide Email Addresses

An org-wide email address allows each user in a user profile to send email using this address. All messages use the same display name and email address. You can also designate an org-wide email address for unmonitored mailboxes that require a verified address.

Organization-Wide Email Addresses for User Selection and Default No-Reply Use

AddPrevious PageNext Page

Actions	Display Name	Email Address	Allowed Profiles	Status	Created Date	Purpose
<a href="#">Edit</a>   <a href="#">Del</a>	EduConnect Support	pnikolas1801@gmail.com	All Profiles	Verified	9/17/2025	Default No-Reply Address

Previous PageNext Page

SETUP

Business Hours

Organization Business Hours

Help for this Page

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

New Business Hours

Action	Business Hours Name	Active	Time Zone	Default
<a href="#">Edit</a>	Academic Support Hours	<input checked="" type="checkbox"/>	(GMT-05:00) Eastern Standard Time (America/Panama)	<input type="checkbox"/>
<a href="#">Edit</a>	Default	<input checked="" type="checkbox"/>	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	<input checked="" type="checkbox"/>
<a href="#">Edit</a>	Emergency Support Hours	<input checked="" type="checkbox"/>	(GMT-05:00) Eastern Standard Time (America/Jamaica)	<input type="checkbox"/>

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

SETUP

Holidays

Holidays

[Help for this Page](#)

Holidays are dates and times at which business hours are suspended. Business hours are the days and hours that your support team is available.

Holidays

New

Action	Holiday Name	Description	Date and Time
<a href="#">Edit</a>   <a href="#">Del</a>	Labor Day 2025	Fall semester break	9/17/2025 All Day
<a href="#">Edit</a>   <a href="#">Del</a>	Thanksgiving Break 2025	Thanksgiving week break	9/17/2025 All Day

## 4. Fiscal Year Settings

### 4.1 University Fiscal Year Setup

**Path:** Setup → Company Information → Fiscal Year

#### Impact on EduConnect:

- Financial aid disbursement tracking
- Alumni giving campaign periods
- Academic performance reporting cycles
- Budget planning and forecasting

SETUP

Fiscal Year

Fiscal Year

[Help for this Page](#)

This page allows you to define and edit custom fiscal years, including the names used in reports and forecasts.

Click the New button to define a new fiscal year. Click Edit to edit a previously defined fiscal year.

Custom Fiscal Years

New

Action	Year	FY Start Date	FY End Date	Description
<a href="#">Edit</a>	FY 2025-	9/17/2025	9/15/2026	

Custom Fiscal Year Names

Action	Field Label
<a href="#">Edit</a>   <a href="#">Replace</a>	Quarter Prefix
<a href="#">Edit</a>   <a href="#">Replace</a>	Period Prefix
<a href="#">Edit</a>   <a href="#">Replace</a>	Quarter Name
<a href="#">Edit</a>   <a href="#">Replace</a>	Period Name

## 5. User Setup & License Management

### 5.1 User Categories & License Assignment

Administrative Users (Enterprise Licenses):

Academic Staff (Enterprise Licenses):

Faculty (Platform Licenses):

Support Staff (Enterprise Licenses):

### 5.2 User Management Best Practices

#### Security Requirements:

- Password complexity: 8+ characters with mixed case, numbers, symbols
- Password expiration: 90 days
- Login hours: Restricted to business hours (except emergency support)
- Two-factor authentication: Required for all administrative users

#### User Lifecycle Management:

- New employee onboarding workflow
- Role change approval process

SETUP

Users

All Users

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

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X

Y

Z

Other

All

New User

Reset Password(s)

Add Multiple Users

<input type="checkbox"/>	Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	<a href="#">Edit</a>	Alapati, Chani	nAlap	pnikolas1801@gmail.com	Director of Student Affairs	<input checked="" type="checkbox"/>	Custom: Marketing Profile
<input type="checkbox"/>	<a href="#">Edit</a>	Chatter Expert	Chatter	chatly00dsk00000bopcxuah.qy7qwiaowkf@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	<a href="#">Edit</a>	EPIC, OrgFarm	OEPIQ	epic.0628268bcc12@orgfarm.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	<a href="#">Edit</a>	Nikolas, Putla	PNiko	npopenikolasoutla@gmail.com	CEO	<input checked="" type="checkbox"/>	Custom: Sales Profile
<input type="checkbox"/>	<a href="#">Edit</a>	Pope Nikolas, Putla	pnl	pnikolas1801489@agenforce.com	Dean of Students	<input checked="" type="checkbox"/>	System Administrator

## 6. Profile Configuration

### 6.1 Standard Profile Modifications

#### System Administrator Profile:

- Reserved for IT team only (5 users maximum)
- Full access to all objects and system functions
- No restrictions on login hours or IP ranges

### 6.2 Custom Profile Creation

#### Profile 1: University Executive

#### Profile 2: Academic Advisor

#### Profile 3: Career Services Counselor

#### Profile 4: Alumni Relations Officer

#### Profile 5: Faculty Coordinator

### 6.3 Permission Set Strategy

#### Why Permission Sets for EduConnect:

- Flexible access management across departments
- Temporary access grants (e.g., during registration periods)
- Cross-functional project access
- Compliance with principle of least privilege

SETUP

Profiles

Profiles

All Profiles

Edit

Delete

Create New View

A

B

C

D

E

F

G

H

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J

K

L

M

N

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Other

All

New Profile

+

<input type="checkbox"/>	Action	Profile Name	User License	Custom
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>   ...	Academic Advisor	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>   ...	Alumni Relations Officer	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Clone</a>	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Clone</a>	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Clone</a>	Anypoint Integration	Identity	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Clone</a>	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Clone</a>	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>   ...	B2B Reordering Portal Buyer Profile	External Apps Login	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>   ...	Career Services Counselor	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Clone</a>	Chatter External User	Chatter External	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Clone</a>	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Clone</a>	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Clone</a>	Contract Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Clone</a>	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>   ...	Custom: Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>   ...	Custom: Sales Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>   ...	Custom: Support Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Clone</a>	Customer Community Login User	Customer Community Login	<input type="checkbox"/>

SETUP

## Profiles

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**Profiles**

[Help for this Page](#)

All Profiles ▾
[Edit](#)
[Delete](#)
[Create New View](#)

New Profile	Profile Name ↑	User License	Custom
<input type="checkbox"/>	<a href="#">Edit   Clone</a> External Identity User	External identity	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit   Del   ...</a> Faculty Coordinator	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit   Clone</a> Force.com - App Subscription User	Force.com - App Subscription	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit   Clone</a> Force.com - Free User	Force.com - Free	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit   Clone</a> Gold Partner User	Gold Partner	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit   Clone</a> High Volume Customer Portal	High Volume Customer Portal	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit   Clone</a> High Volume Customer Portal User	High Volume Customer Portal	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit   Clone</a> Identity User	Identity	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit   Clone</a> Marketing User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit   Clone</a> Minimum Access - API Only Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit   Clone</a> Minimum Access - Salesforce	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit   Clone</a> Partner App Subscription User	Partner App Subscription	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit   Clone</a> Partner Community Login User	Partner Community Login	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit   Clone</a> Partner Community User	Partner Community	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit   Del   ...</a> Read Only	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit   Del   ...</a> Salesforce API Only System Integrations	Salesforce Integration	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit   Clone</a> Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit   Clone</a> Solution Manager	Solution Manager	<input type="checkbox"/>

## 8. Organization-Wide Defaults (OWD)

### 8.1 Security Model Strategy

EduConnect follows a "Restrictive by Default" approach due to FERPA requirements:

## 9. Sharing Rules Configuration

### 9.1 Criteria-Based Sharing Rules

Rule 1: Student Academic Support Sharing

Rule 2: Alumni by Graduation Year

Rule 3: Career Services by Program

### 9.2 Owner-Based Sharing Rules

Rule 1: Cross-Department Case Collaboration

### 9.3 Public Groups Configuration

Public Group: Academic Support Team

Public Group: Alumni Engagement Team

## 10. Login Access Policies

### 10.1 IP Range Restrictions

Administrative Users:

General Users:

### 10.2 Login Hours Configuration

Academic Support Hours (Profile-based):

Administrative Hours:

## 11. Development Environment Setup

### 11.1 Sandbox Strategy

Full Copy Sandbox (Production Mirror):

Partial Copy Sandbox (Development):

Developer Pro Sandbox (Individual Development):

## 12. Change Set and Deployment Preparation

### 12.1 Deployment Strategy

#### Release Management:

- **Major Releases:** Beginning and end of each semester
- **Minor Releases:** Monthly during semester
- **Hotfixes:** As needed with proper approval

