# Phase 2: Org Setup & Configuration for AI Career Coach

1. Salesforce Editions

For AI Career Coach, the **Salesforce Enterprise Edition** or **Developer Edition** is ideal. It provides all essential CRM functionalities, automation tools, and API access needed for customization and integration with AI services.

2. Company Profile Setup

Set up the company profile with details like company name, address, primary contact, default locale, and currency. This ensures that all AI Career Coach records, reports, and dashboards reflect the correct organizational data.
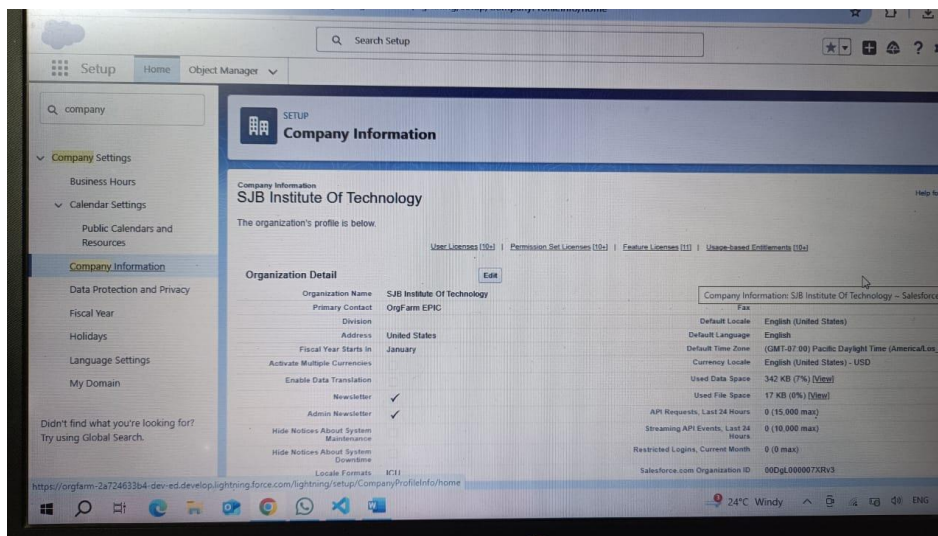

3. Business Hours & Holidays

Define business hours and holidays for your organization. This is critical for scheduling AI-driven interactions such as career counseling sessions, automated reminders, and workflow-based notifications.
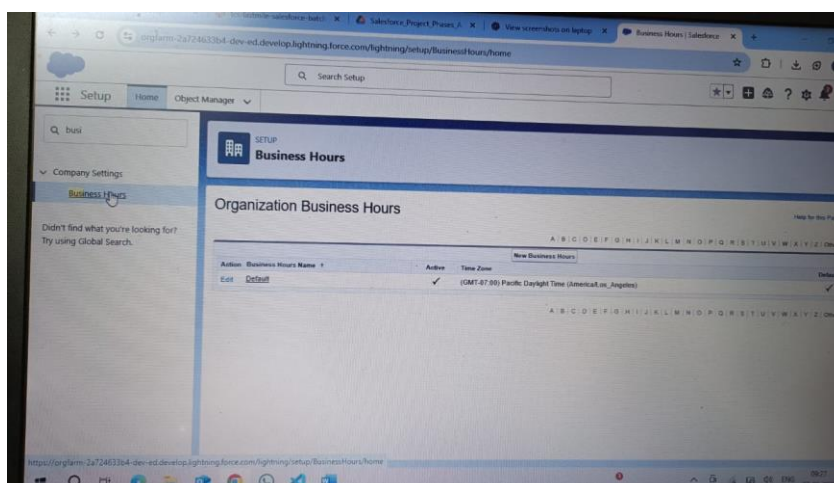
4. Fiscal Year Settings

Configure fiscal years according to your organization's reporting needs. You can choose standard fiscal years or custom fiscal years. This helps track metrics like user engagement, career guidance sessions, or subscription revenues on a structured timeline.
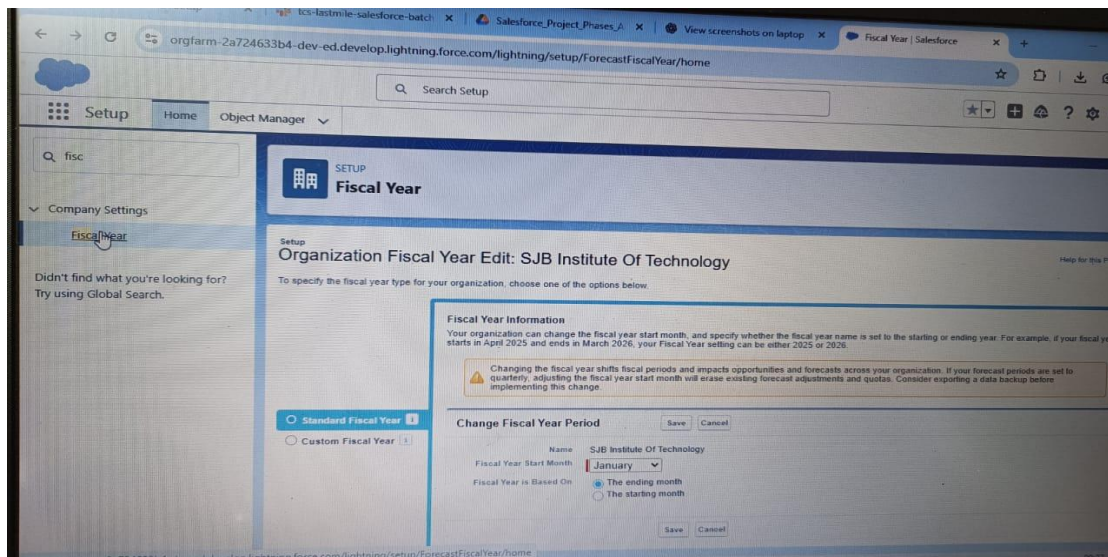
5. User Setup & Licenses

Create Salesforce users for administrators, career coaches, and students. Assign appropriate **licenses**:

- **Salesforce Platform License** for staff managing AI workflows.
- **Salesforce CRM License** for full access to objects, reports, and dashboards.
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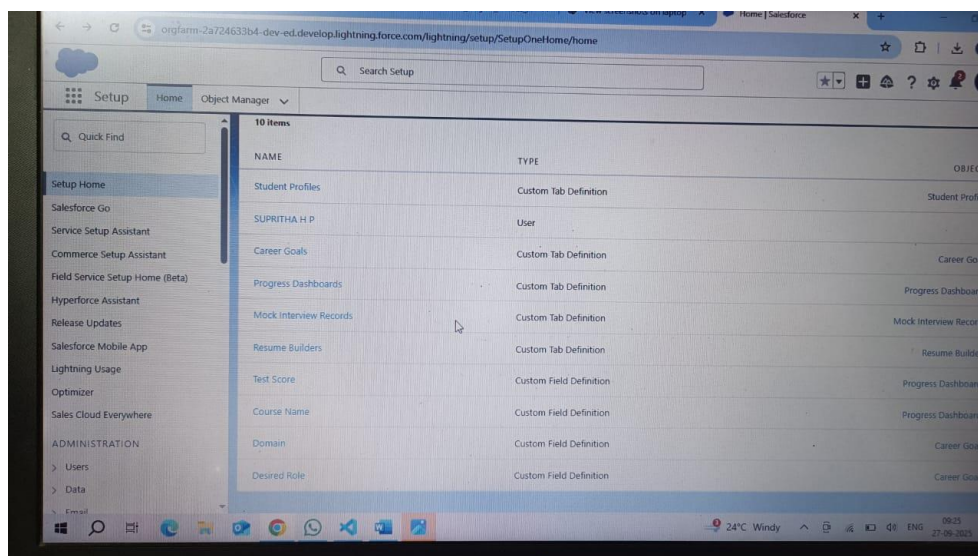
6. Profiles

Set up profiles to control access levels:

- **Admin Profile** – Full access to all objects, AI modules, and settings.
- **Coach Profile** – Access to student data, AI recommendations, and session tracking.
- **Student Profile** – Limited access to personal progress, AI suggestions, and learning modules.
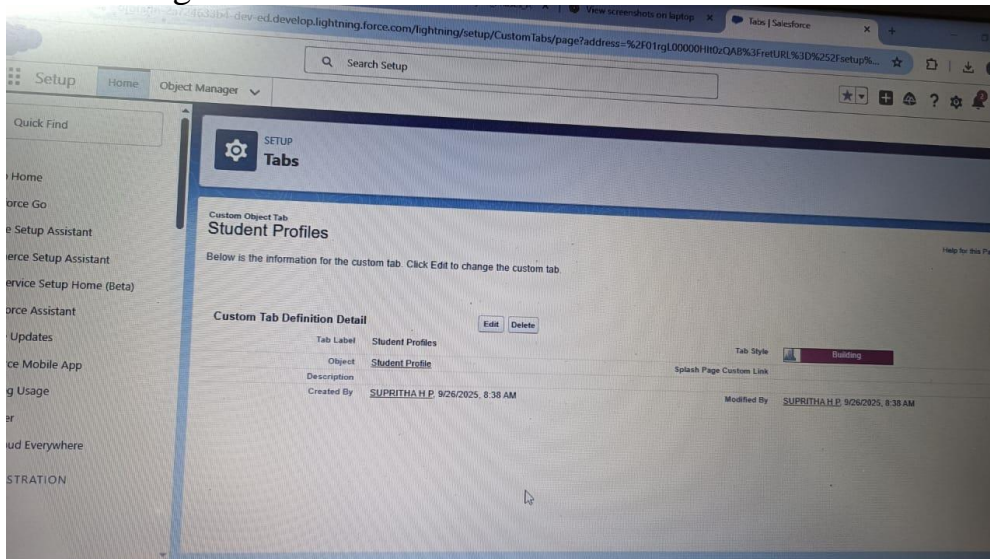
7. Roles

Create a **role hierarchy** to manage visibility:

- Admin (Top-level)
- Coaches (Middle-level)
- Students (Bottom-level)

Roles ensure that sensitive student data is visible only to authorized personnel while enabling data-sharing for analytics and reporting.

8. Permission Sets

Use permission sets to grant additional privileges without changing profiles. For example, allow certain coaches to access beta AI features or advanced reporting modules.

9. Organization-Wide Defaults (OWD)

Set OWD to **Private** for student records to ensure that sensitive information like assessments and AI recommendations is accessible only to authorized users.

10. Sharing Rules

Create sharing rules to allow controlled access:

- Coaches can view all student records within their team.
- Admins can access all records for management and reporting purposes.

11. Login Access Policies

Enable login access policies to allow administrators or Salesforce support to log in for troubleshooting while maintaining privacy and compliance.

12. Developer Org Setup

Set up a **Developer Org** for testing AI Career Coach workflows, custom objects, and integrations without affecting live data. This environment is essential for iterative development and testing AI features.

13. Sandbox Usage

Use **Sandbox environments** to safely test:

- AI integrations
- Workflow automation
- New features like chatbot interactions or career recommendation modules

Types of sandboxes: Developer, Developer Pro, Partial Copy, Full Copy.

14. Deployment Basics

Deploy configurations and customizations from **sandbox to production** using:

- Change Sets
- Salesforce CLI (SFDX) for version control and CI/CD pipelines
- Metadata API for automated deployment

Ensure all objects, workflows, and AI integrations are thoroughly tested in sandbox before production deployment.