
Phase 2: Org Setup & Configuration

Overview

In this phase, the Salesforce Developer Edition org was set up to provide the base environment for the AlumniConnect CRM project. The focus was on configuring only the most essential settings to keep the system secure, structured, and ready for building alumni engagement features such as donation tracking, event management, and communication automation.

Activities Done

1. Salesforce Edition

- Selected **Developer Edition**, which provides essential CRM features such as custom objects, automation, reports, and dashboards.
 - Chosen because it is free, easy to use, and suitable for student, prototype, and training projects.
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2. Company Profile Setup

- Company Name: **AlumniConnect CRM**.
 - Currency: **INR and USD** (to handle international alumni donations).
 - Locale/Time Zone: **English (India), IST (GMT+05:30)**.
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3. Business Hours & Holidays

- Business Hours: Configured as **9:00 AM – 6:00 PM** (standard university office hours).
 - Holidays Added: **Graduation Day, Founders' Day, Diwali, Christmas, New Year**.
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4. Fiscal Year Settings

- Fiscal cycle configured as **April – March** to align with common university financial and fundraising practices.
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5. User Setup

- Added the following users for simulation:
 - System Administrator** – Full access (project owner).
 - Alumni Relations Officer** – To manage alumni data.
 - Event Manager** – To organize reunions and track attendance.
 - Fundraising Coordinator** – To manage campaigns and donations.
- Assigned available licenses (limited in Developer Edition).

6. Profiles & Roles

- Profiles Created: **Admin, Alumni Officer, Event Manager, Fundraising Officer.**
- Roles Defined: **University Management** → **Officers** → **Staff** (basic hierarchy for data visibility).

7. Security Settings

- OWD (Organization-Wide Defaults):**
 - Alumni object = **Private** (sensitive contact/donation info).
 - Campaigns = **Public Read/Write** (event details visible to staff).
- MFA (Multi-Factor Authentication):** Enabled for secure logins.
- Sharing Rules:** Created to allow officers from different departments to access cross-alumni engagement data.

The screenshot displays the Salesforce Setup interface. The top navigation bar includes a search bar labeled 'Search Setup' and various utility icons. The left sidebar shows the Setup menu with options like Home, Object Manager, and a search bar. The main content area is divided into two sections: 'Roles' and 'Business Hours'.

Roles Section: The 'Roles' page shows a hierarchy of roles. The 'AlumniConnect CRM' role is expanded, revealing a list of roles including CEO, Alumni Officer, Event Manager, Fundraising Officer, CEO, COO, SVP Customer Service & Support, Customer Support International, Customer Support North America, Installation & Repair Services, volunteer, and SVP Human Resources. Each role has links for 'Add Role', 'Edit', 'Del', and 'Assign'.

Business Hours Section: The 'Business Hours' page shows the 'Organization Business Hours' configuration. A table lists the business hours for the 'Alumni Office Hours'.

Action	Business Hours Name	Active	Time Zone	Default
Edit	Alumni Office Hours	✓	(GMT+05:30) India Standard Time (Asia/Kolkata)	✓

Setup

Home

Object Manager

Search Setup

Star

Plus

Cloud

Help

Settings

2

Profile

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

User Interface

Action Link Templates

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

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New User

Reset Password(s)

Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Acharya, Shreya	sacha	shreyamr@gmail.com	Fundraising Officer	✓	Solution Manager
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00096000007@gnuae.hhoveev5hstw@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	D.R. Thejas	dit	drthejas12957@agentforce.com	CEO	✓	System Administrator
<input type="checkbox"/> Edit	EPIC, OrgFarm	DEPIC	epic.d30e7dd1295d@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/> Edit	P.Thrupati	tp	thrupatigoi@gmail.com	Event Manager	✓	Minimum Access - API Only Integrations
<input type="checkbox"/> Edit	Shetty T. Hitesh	hshet	hiteshst@gmail.com	Alumni Officer	✓	System Administrator
<input type="checkbox"/> Edit	User Integration	integ	integration@00096000007@gnuae.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00096000007@gnuae.com		✓	Analytics Cloud Security User

New User

Reset Password(s)

Add Multiple Users

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Setup

Home

Object Manager

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Settings

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Profile

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Company Settings

Holidays

Didn't find what you're looking for? Try using Global Search.

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
Edit Del	Christmas		25/12/2025 All Day
Edit Del	Dwali		22/10/2025 All Day
Edit Del	Founder's Day		24/7/2026 All Day
Edit Del	Graduation Day		21/11/2025 All Day
Edit Del	New Year		1/1/2026 All Day

Elapsed Holidays

No records to display

orgfarm-7224234874-dev-ed.develop.lightning.force.com/lightning/setup/CompanyProfileInfo/home

Setup

Home

Object Manager

Search Setup

Star

Plus

Cloud

Help

Settings

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Profile

company

Company Settings

Business Hours

Calendar Settings

Public Calendars and Resources

Company Information

Data Protection and Privacy

Fiscal Year

Holidays

Language Settings

My Domain

Didn't find what you're looking for? Try using Global Search.

SETUP

Company Information

Company Information

AlumniConnect CRM

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	AlumniConnect CRM	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (India)
Address	India	Default Language	English
Fiscal Year Starts In	April	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	Hindi (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	342 KB (7%) View
Newsletter	✓	Used File Space	1,023 KB (5%) View
Admin Newsletter	✓	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	00DgK000007Kgn
		Organization Edition	Developer Edition
		Instance	CAN96

Created By

OrgFarm EPIC

21/7/2025, 7:09 PM

Modified By

Thejas D.R.

23/9/2025, 11:53 AM

ss/orgfarm-7224234874-dev-ed.develop.lightning.force.com/lightning/setup/CompanyProfileInfo/home