

## Phase 2: Org Setup & Configuration

- **Salesforce Editions**

Selected Salesforce Education Cloud (or Developer Edition for learning) as the base platform.

Choose the edition based on available features like custom objects, automation, and user licenses suited to education needs.

- **Company Profile Setup**

Entered official school information: name, address, phone, and pacific time zone

Configured company details in Setup > Company Information.

These details are utilized in reporting, email alerts, and org-wide settings.

The screenshot shows the 'Company Information' page in the Salesforce Setup interface. The page title is 'Company Information' with a 'SETUP' icon. Below the title, it says 'Company Information mvgr'. A link 'Help for this Page' is visible. The page states 'The organization's profile is below.' and provides links for 'User Licenses (10)', 'Permission Set Licenses (10)', 'Feature Licenses (11)', and 'Usage-based Entitlements (10)'. The 'Organization Detail' section has an 'Edit' button. The details are organized into two columns. The left column includes fields for Organization Name (mvgr), Primary Contact (OrgFarm EPIC), Division, Address (United States), Fiscal Year Starts In (January), and checkboxes for Activate Multiple Currencies, Enable Data Translation, Newsletter (checked), Admin Newsletter (checked), Hide Notices About System Maintenance, Hide Notices About System Downtime, and Locale Formats (ICU). The right column includes fields for Phone, Fax, Default Locale (English (United States)), Default Language (English), Default Time Zone ((GMT-07:00) Pacific Daylight Time (America/Los\_Angeles)), Currency Locale (English (United States) - USD), Used Data Space (342 KB (7%) [View]), Used File Space (17 KB (0%) [View]), API Requests, Last 24 Hours (0 (15,000 max)), Streaming API Events, Last 24 Hours (0 (10,000 max)), Restricted Logins, Current Month (0 (0 max)), Salesforce.com Organization ID (00DgL00000C7G6v), Organization Edition (Developer Edition), and Instance (CAN98). At the bottom, it shows 'Created By: OrgFarm EPIC, 9/20/2025, 6:24 AM' and 'Modified By: Yakamullu Jahnvi, 9/26/2025, 2:15 AM'.

Organization Name	mvgr	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (United States)
Address	United States	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 (United States) - USD
Enable Data Translation	<input type="checkbox"/>	Used Data Space	342 KB (7%) [View]
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) [View]
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	00DgL00000C7G6v
		Organization Edition	Developer Edition
		Instance	CAN98

Created By: OrgFarm EPIC, 9/20/2025, 6:24 AM

Modified By: Yakamullu Jahnvi, 9/26/2025, 2:15 AM

- **Business Hours & Holidays**

- Created Business Hours named "School Hours" for Monday to Friday, 9:00 AM to 3:00 PM, with weekends closed.
- Added major school holidays (e.g., Diwali, Christmas) with annual recurrence.

- Business hours and holidays ensure attendance and processes respect school operational days.

### Organization Business Hours

Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate.

If you enter blank business hours for a day, that means your organization does not operate on that day.

Holidays 0

Business Hours Detail

Business Hours Name

School Hours

Time Zone

(GMT-07:00) Pacific Daylight Time (America/Los\_Angeles)

Business Hours	Sunday	No Hours	Default Business Hours
Monday	9:00 AM to 4:00 PM		
Tuesday	9:00 AM to 4:00 PM		
Wednesday	9:00 AM to 4:00 PM		
Thursday	9:00 AM to 4:00 PM		
Friday	9:00 AM to 4:00 PM		
Saturday	No Hours		

Active

☒

Created By

Vakamullu Jahnavi 9/25/2025, 11:21 PM

Last Modified By

Vakamullu Jahnavi 9/25/2025, 11:21 PM

Holidays

Add/Remove

### Holiday Detail

Holidays are dates and times at which business hours are suspended. These dates and times, when associated with business hours, also suspend any escalation rules associated with business hours.

Add or remove business hours to holidays to suspend business hours and escalation rules during the holidays.

Business Hours 0

Holiday Detail

Holiday Name

Diwali

Description

Date and Time

10/25/2025 All Day

Created By

Vakamullu Jahnavi 9/25/2025, 11:23 PM

Last Modified By

Vakamullu Jahnavi 9/25/2025, 11:23 PM

Business Hours

Add/Remove

No records to display

Business Hours Help

## • Fiscal Year Settings

- Configured a Custom Fiscal Year matching the academic calendar from April 1 to March 31.
- Aligned reporting and automation to the school's fiscal timeline.

### Organization Fiscal Year Edit: mvgr

To specify the fiscal year type for your organization, choose one of the options below:

Standard Fiscal Year

Custom Fiscal Year

Fiscal Year Information

Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example, if your fiscal year starts in April 2025 and ends in March 2026, your Fiscal Year setting can be either 2025 or 2026.

Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing this change.

Change Fiscal Year Period

Name

mvgr

Fiscal Year Start Month

January

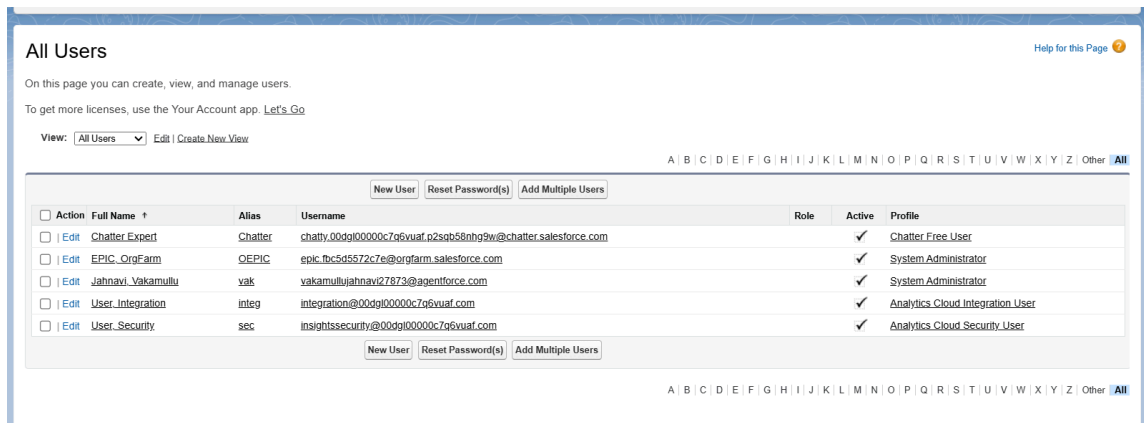
Fiscal Year is Based On

The ending month

The starting month

## • User Setup & Licenses

- Created user records for teachers, students, admins, and parents with unique usernames and email addresses.
- Assigned appropriate Salesforce or Salesforce Platform licenses based on user role and access needs.
- Activated all users for login.



## • Profiles

- Cloned standard profiles to create tailored profiles: Teacher Profile, Student Profile, Parent Profile, and Admin Profile.
- Defined role-appropriate permissions like read/write access, system admin rights, or limited record visibility.

## • Roles

- Established role hierarchy with roles: Admin (top), Teacher, Student, Parent.

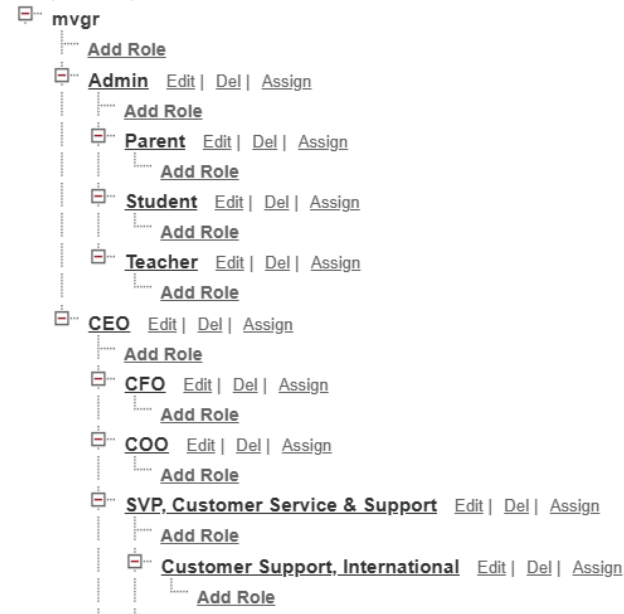
- Roles control data visibility and sharing in hierarchical structure correlating to the school's organizational chart.

## Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

### Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)



- Permission Sets
  - Created permission sets to grant special permissions, for example, marking attendance or accessing reports.

- Assigned permissions flexibly to users without changing their core profiles.

The screenshot shows the Salesforce 'Permission Sets' setup page for a permission set named 'Attendance Marker'. The page includes a search bar, action buttons (Clone, Delete, Edit Properties, Manage Assignments, View Summary), and a 'Permission Set Overview' section. Below this is an 'Apps' section with links to various configuration areas.

**Permission Set Overview**

Description	Allows marking attendance	API Name	Attendance_Marker
License	Salesforce	Namespace Prefix	
Session Activation Required	<input type="checkbox"/>	Created By	Vakamullu Jahnavi, 9/26/2025, 2:05 AM
Permission Set Groups Added To	0	Last Modified By	Vakamullu Jahnavi, 9/26/2025, 2:05 AM

**Apps**

- Assigned Apps**  
Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**  
Settings that specify which connected apps are visible in the app menu
- Object Settings**  
Permissions to access objects and fields, and settings such as tab availability
- App Permissions**  
Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**  
Permissions to execute Apex classes
- Visualforce Page Access**  
Permissions to execute Visualforce pages

- OWD
  - Set Private default sharing on sensitive objects like Student and Attendance Record to maintain confidentiality.
  - Allowed Public Read Only access on classes and sessions to facilitate general visibility.
- Sharing Rules
  - Created sharing rules to extend access beyond OWD, such as:
    - Allowing teachers to see only students assigned to them.

- Enabling parents to view only their own child's attendance.

Object	Sharing Setting 1	Sharing Setting 2	Checkbox
Tableau Host Mapping	Public Read Only	Private	<input checked="" type="checkbox"/>
User Presence	Public Read Only	Private	<input checked="" type="checkbox"/>
Waitlist	Private	Private	<input checked="" type="checkbox"/>
Web Cart Document	Private	Private	<input checked="" type="checkbox"/>
Work Order	Private	Private	<input checked="" type="checkbox"/>
Work Plan	Private	Private	<input checked="" type="checkbox"/>
Work Plan Template	Private	Private	<input checked="" type="checkbox"/>
Work Step Template	Private	Private	<input checked="" type="checkbox"/>
Work Type	Private	Private	<input checked="" type="checkbox"/>
Work Type Group	Public Read/Write	Private	<input checked="" type="checkbox"/>
Attendance	Public Read/Write	Private	<input checked="" type="checkbox"/>
Course	Public Read/Write	Private	<input checked="" type="checkbox"/>
Enrollment	Public Read/Write	Private	<input checked="" type="checkbox"/>
Exam	Public Read/Write	Private	<input checked="" type="checkbox"/>
Result	Public Read/Write	Private	<input checked="" type="checkbox"/>
Student	Private	Private	<input checked="" type="checkbox"/>

**Other Settings**

Standard Report Visibility ☒ Manual User Record Sharing ☐ Manager Groups ☐ Secure guest access ☐

## Login Access Policies

- Configured login policies to restrict login times and IP ranges if needed for security.
- Enabled administrator login access for troubleshooting and support.
- Dev Org Setup
  - Provisioned Developer Org or Sandbox environment for safe development and testing.
  - Prepared to build and customize objects, workflows, and user interfaces without impacting production data.
- Sandbox Usage
  - Created sandbox copies to test new features, automation, and changes in isolation from production.
  - Used sandbox for validation before deploying changes live.
- Deployment Basics
  - Planned deployment strategy using Change Sets and/or Salesforce DX for moving changes from sandbox to production.
  - Established version control and backup routines to safeguard org changes.

