

Phase 2: Org Setup & Security Configuration

Executive Summary

Phase 2 focused on establishing a secure and scalable Salesforce environment for the EdTech Enrollment system. The configuration emphasized strong data integrity, role-based access, and controlled security protocols. This phase laid the foundation required for efficient automation and data management in subsequent stages.

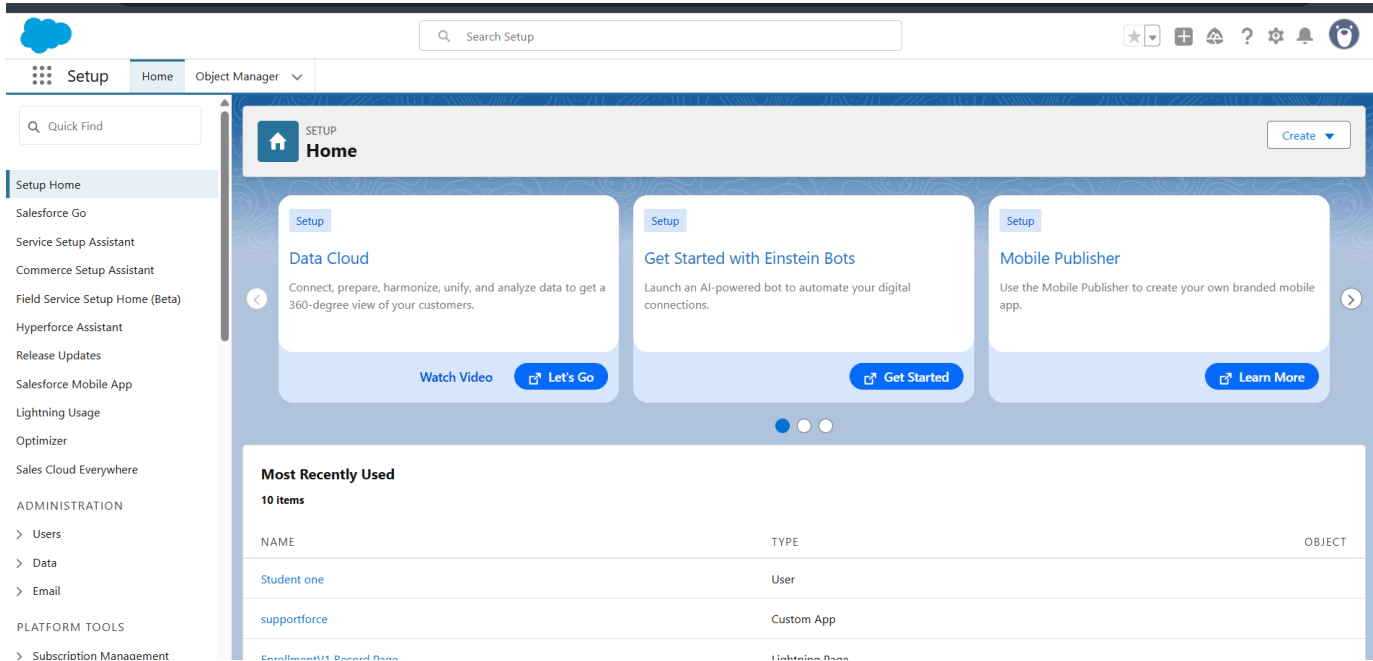
Salesforce Editions

Evaluated and selected the appropriate Salesforce Edition to meet business requirements.

Ensured that chosen edition supported required features such as custom objects, workflows, approvals, and API access.

Provisioned licenses in accordance with edition capabilities and user roles.

I have used Salesforce Developer org for this Project.



Company Information Setup

Configured Company Information in Salesforce Setup:

Company Name: EdTech Enrollment Systems

Primary Contact: Admin user

Default Locale: English (India)

Time Zone: Asia/Kolkata

Currency: INR

SETUP

Company Information

Company Information

EdTech Academy

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	EdTech Academy	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (India)
Address	United States	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (United States) - USD
Enable Data Translation	<input type="checkbox"/>	Used Data Space	424 KB (8%) View
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) View
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	48 (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	00DgL000007Spl7
		Organization Edition	Developer Edition
		Instance	CAN98
Created By	OrgFarm EPIC, 7/17/2025, 11:57 AM	Modified By	Parth Khare, 9/13/2025, 5:18 AM

Set Fiscal Year to calendar year (January to December).

Configured Business Hours and Holidays to align with organizational operations, supporting task and escalation automation.

SETUP

Business Hours

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

Edit

Business Hours Name	Counselor Hours	Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)														
Business Hours	<table><tr><td>Sunday</td><td>24 Hours</td></tr><tr><td>Monday</td><td>10:00 AM to 6:00 PM</td></tr><tr><td>Tuesday</td><td>10:00 AM to 6:00 PM</td></tr><tr><td>Wednesday</td><td>10:00 AM to 6:00 PM</td></tr><tr><td>Thursday</td><td>10:00 AM to 6:00 PM</td></tr><tr><td>Friday</td><td>10:00 AM to 6:00 PM</td></tr><tr><td>Saturday</td><td>10:00 AM to 6:00 PM</td></tr></table>	Sunday	24 Hours	Monday	10:00 AM to 6:00 PM	Tuesday	10:00 AM to 6:00 PM	Wednesday	10:00 AM to 6:00 PM	Thursday	10:00 AM to 6:00 PM	Friday	10:00 AM to 6:00 PM	Saturday	10:00 AM to 6:00 PM	Default Business Hours	<input type="checkbox"/>
Sunday	24 Hours																
Monday	10:00 AM to 6:00 PM																
Tuesday	10:00 AM to 6:00 PM																
Wednesday	10:00 AM to 6:00 PM																
Thursday	10:00 AM to 6:00 PM																
Friday	10:00 AM to 6:00 PM																
Saturday	10:00 AM to 6:00 PM																
Active	<input type="checkbox"/>																
Created By	Parth Khare 9/12/2025, 6:39 AM	Last Modified By	Parth Khare 9/12/2025, 6:39 AM														

Login Policies

Restricted login hours for Student profile to business hours only.

Enabled IP range restrictions for internal users for network layer security.
Here is the updated Phase 2 documentation including "Salesforce Editions" as requested:

Organization-Wide Defaults (OWD) & Sharing Rules

Set OWD for Enrollment object to Private to secure record visibility.

Enabled role hierarchy to allow managers access to subordinates' records.

Created criteria-based sharing rules; for example, Full-Time program enrollments shared with Full-Time Counselors public group.

Used public groups to streamline sharing logic and scalability.

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: Enrollment

[Disable External Sharing Model](#)

Default Sharing Settings

Organization-Wide Defaults [Edit](#) [Organization-Wide Defaults Help](#)

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Enrollment	Private	Private	<input checked="" type="checkbox"/>

Other Settings [Other Settings Help](#)

Manager Groups ☐ [i](#)

Secure guest user record access ☒ [i](#)

Require permission to view record names in lookup fields ☐ [i](#)

Sharing Rules

Enrollment Sharing Rules [New](#) [Recalculate](#) [Enrollment Sharing Rules Help](#)

No sharing rules specified.

Sharing Overrides

Roles & Profiles Configuration

Defined a role hierarchy for clear access control:

Admin: Full system and record access.

Counselor: Access to assigned/shared enrollments.

Student: Read-only access to own records via Experience Cloud.

like Rejection_Reason__c were hidden from counselors and students.



Key fields included:

Student_Name__c (Text) for applicant's full name.

Program_Type__c (Picklist) options like Full-Time, Part-Time.

Status__c (Picklist) tracking stages: New, Approved, Rejected,

Waitlisted. Counselor__c (Lookup to User) for record owner/staff

assignment. Enrollment_Date__c (Date) capturing application

submission date.

Fields & Relationships				
15 Items, Sorted by Field Label				
		Q Quick Find		
		New Deleted Fields Field Dependencies Set History Tracking		
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Counselor Comments	Counselor_Comments__c	Long Text Area(32768)		
Created By	CreatedById	Lookup(User)		
Created Date	Created_Date__c	Date/Time		
Enrollment Name	Name	Text(80)		✓
Follow up Required	Follow_up_Required__c	Checkbox		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Program Name	Program_Name__c	Text(80)		
Record Type	RecordTypeId	Record Type		✓
Review Date	Review_Date__c	Date		

Fields & Relationships			<input type="text" value="Quick Find"/>		New	Deleted Fields	Field Dependencies	Set History Tracking
15 Items, Sorted by Field Label								
Last Modified By	LastModifiedById	Lookup(User)						
Owner	OwnerId	Lookup(User,Group)	✓					
Program Name	Program_Name__c	Text(80)	▼					
Record Type	RecordTypeId	Record Type	✓					
Review Date	Review_Date__c	Date	▼					
Reviewed By	Reviewed_By__c	Lookup(User)	✓					
Status	Status__c	Picklist	▼					
Student email	Student_email__c	Email	▼					
Student Name	Student_Name__c	Text(80)	▼					
User	Counselor__c	Lookup(User)	✓					

Permission Sets

Created modular permission sets for targeted access:

Enrollment Editor: Create and edit Enrollment records (primarily for counselors).

Enrollment Viewer: Read-only access for other stakeholders.

Permission sets supplemented profile access for flexibility.

[illegible]

Object Manager ▾

🔍 Search Setup

[SETUP >](#)
[PERMISSION SETS >](#)
[ENROLLMENT VIEWER](#)
Permission Sets

API Name	License	Created By	Last Modified By
Enrollment_Viewer	--	Parth Khare	Parth Khare
Namespace Prefix	Session Activation Required	Created Date	Last Modified Date
--	Not Required	9/24/2025, 10:45 AM	9/24/2025, 10:48 AM
Related Permission Set Groups	Assigned Users ⓘ		
0	1		
Description			
--			

Permission Set Information

See the permissions enabled for this permission set and the permission set groups it's added to.

Related Permission Set Groups
User Permissions
Object Permissions
Field Permissions
Custom Permissions
Tabs

1 item

Edit


Label ▾	Object API N... ▾	Read ▾	Create ▾	Edit ▾	Delete ▾	View All Rec... ▾	Modify All R... ▾	View All Fields ▾
Enrollment	Enrollment_c	✔	✘	✘	✘	✔	✘	✘

Validation Rules








Prevented status updates unless Program_Type__c is selected:

Formula: ISBLANK(Program_Type__c) && NOT(ISBLANK(Status__c))

Blocked Enrollment_Date__c from being set in the past.



Search Setup



Setup

Home

Object Manager

Setup > OBJECT MANAGER

Enrollment

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Validation Rules

4 Items, Sorted by Rule Name

New

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY	
Date_Cannot_Be_in_the_Past	Review Date	review date cannot be before creation date	✓	Parth Khare, 9/24/2025, 11:34 AM	▼
Require_Program_Name_For_Approved_Or_InP	Program Name	Program Name is required when Status is Approved or In Progress.	✓	Parth Khare, 9/24/2025, 11:26 AM	▼
Status_Must_Be_Selected	Enrollment Status	Status is required.	✓	Parth Khare, 9/25/2025, 5:02 AM	▼
Validate_Student_Email_Format	Student email	this field cannot be blank	✓	Parth Khare, 9/24/2025, 11:35 AM	▼

Conclusion

Phase 2 set up a secure, compliant foundation for managing enrollments with clearly defined roles, permissions, data validations, and organizational settings. The added consideration of Salesforce Editions ensured the environment was provisioned with correct capabilities, enabling future phases of automation and user experience enhancements.