

Org Setup & Security
Configuration Phase 2 Implementation Documentation
Prepared by: Salesforce Admin Team
Date: September 2025

Executive Summary

This document provides a detailed breakdown of Phase 2: Org Setup & Security Configuration for the Enrollment object and supporting organizational settings. The setup ensures strong security, structured access management, and reliable data integrity within the Salesforce environment. Key highlights include private OWDs, modular permission sets, and enforcement of validation rules to maintain clean and consistent data. Login policies and role hierarchies provide governance and controlled access, while company information ensures correct localization, time zone, and fiscal year settings.

Company Information Setup

Navigated to Setup → Company Information

Verified and updated:

- Company Name: EdTech Enrollment Systems
- Primary Contact: Admin user
- Default Locale: English (India)
- Time Zone: Asia/Kolkata
- Currency: INR (₹)

Set Fiscal Year to standard calendar year (Jan–Dec)

Configured Business Hours and Holidays for automation logic (e.g., task due dates/escalation rules)

The screenshot shows the 'Company Information' setup page for 'EdTech Academy'. The page is divided into two main sections: 'Organization Detail' and 'System Information'. The 'Organization Detail' section includes fields for Organization Name, Primary Contact, Division, Address, Fiscal Year Starts In, Activate Multiple Currencies, Enable Data Translation, Newsletter, Admin Newsletter, Hide Notices About System Maintenance, Hide Notices About System Downtime, and Locale Formats. The 'System Information' section includes fields for Phone, Fax, Default Locale, Default Language, Default Time Zone, Currency Locale, Used Data Space, Used File Space, API Requests, Last 24 Hours, Streaming API Events, Last 24 Hours, Restricted Logins, Current Month, Salesforce.com Organization ID, Organization Edition, and Instance. The page also shows a 'Created By' field with the value 'OrgFarm EPIC, 7/17/2025, 11:57 AM' and a 'Modified By' field with the value 'Parth Khare, 9/13/2025, 5:18 AM'.

Organization Detail		System Information	
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	00DGL0000075pI7
		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

Custom Object: Enrollment

Created a custom object named Enrollment to track student applications.

Key Fields:

- Student_Name__c (Text): Captures full name of the applicant.
- Program_Type__c (Picklist): Options like Full-Time, Part-Time.
- Status__c (Picklist): Tracks application stage—New, Approved, Rejected, Waitlisted.
- Counselor__c (Lookup to User): Assigns a staff member to the record.
- Enrollment_Date__c (Date): Stores the date of application.

Fields & Relationships

15 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

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)	✓ ▼

Fields & Relationships

15 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

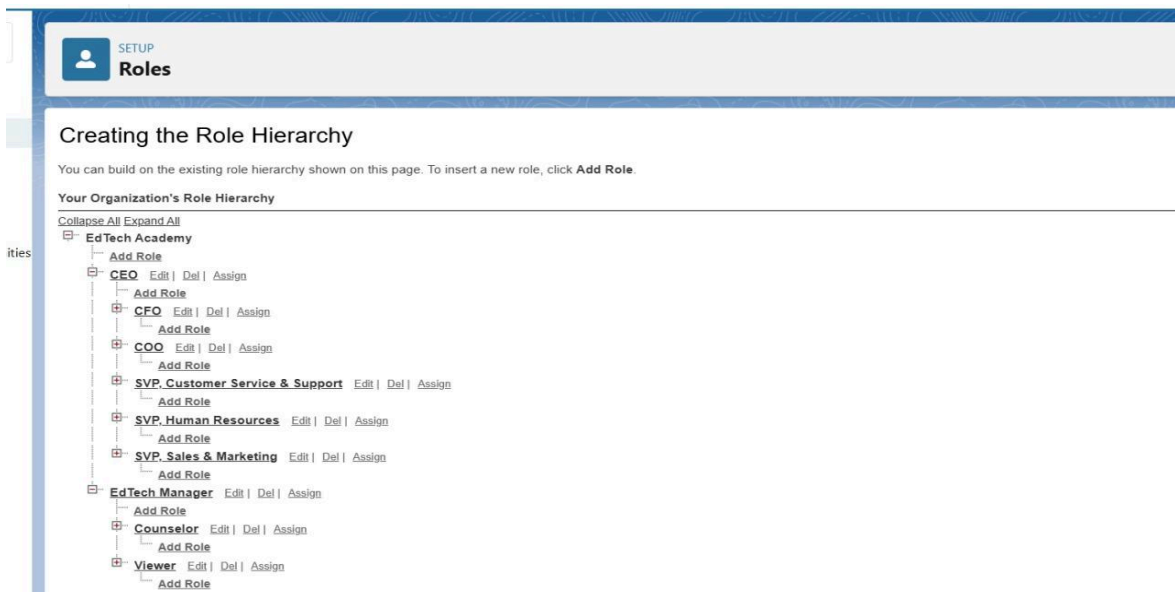
Set History Tracking

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		

Roles & Profiles

Defined a role hierarchy:

- Admin: Full access to all records.
- Counselor: Access to assigned or shared enrollments.
- Student: Read-only access to their own record (if exposed via Experience Cloud).
- Customized profiles:
- Controlled tab visibility and field-level security.
- Restricted access to sensitive fields like Rejection_Reason__c for non-admins.



Permission Sets

Created modular permission sets for flexible access control:

- Enrollment Viewer: Grants read-only access to Enrollment records. - Enrollment Editor: Allows create/edit access for counselors.

Assigned permission sets based on user responsibilities, not just profiles.

Object Manager

Search Setup

Star

Plus

Home

Help

Settings

Notifications

Profile

Object Manager

SETUP > PERMISSION SETS > ENROLLMENT VIEWER

Permission Sets

API Name
Enrollment_Viewer

License
--

Created By
Parth Khare

Last Modified By
Parth Khare

Namespace Prefix
--

Session Activation Required
Not Required

Created Date
9/24/2025, 10:45 AM

Last Modified Date
9/24/2025, 10:48 AM

Related Permission Set Groups
0

Assigned Users
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

Search this list...

Label	Object API N...	Read	Create	Edit	Delete	View All Rec...	Modify All R...	View All Fields
Enrollment	Enrollment__c	✓	✗	✗	✗	✓	✗	✗

Object Manager

Search Setup

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Object Manager

SETUP > PERMISSION SETS > ENROLLMENT EDITOR

Permission Sets

API Name
Enrollment_Editor

License
--

Created By
Parth Khare

Last Modified By
Parth Khare

Namespace Prefix
--

Session Activation Required
Not Required

Created Date
9/24/2025, 10:48 AM

Last Modified Date
9/24/2025, 10:49 AM

Related Permission Set Groups
0

Assigned Users
3

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

Search this list...

Label	Object API N...	Read	Create	Edit	Delete	View All Rec...	Modify All R...	View All Fields
Enrollment	Enrollment__c	✓	✓	✓	✓	✓	✓	✓

Organization-Wide Defaults (OWD)

Set OWD for Enrollment to Private to ensure records are only visible to owners and users with explicit access.

Enabled role hierarchy so managers can see records owned by subordinates.

Sharing Rules

Created criteria-based sharing rules:

- Example: If Program_Type__c = "Full-Time", share with public group Full-Time

Counselors.

Used public groups to simplify sharing logic and scale access control.

Login Policies

Configured login hours for Student profile to restrict access outside business hours. Set IP ranges for internal users to prevent unauthorized access from unknown networks.

SETUP

Business Hours

Organization Business Hours

Help for this Page

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
Business Hours	<div>Sunday24 Hours</div> <div>Monday10:00 AM to 6:00 PM</div> <div>Tuesday10:00 AM to 6:00 PM</div> <div>Wednesday10:00 AM to 6:00 PM</div> <div>Thursday10:00 AM to 6:00 PM</div> <div>Friday10:00 AM to 6:00 PM</div> <div>Saturday10:00 AM to 6:00 PM</div>	(GMT+05:30) India Standard Time (Asia/Kolkata)
	Default Business Hours	<input type="checkbox"/>
	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

Edit

Validation Rules

Enforced data integrity with formulas:

- Prevent status update unless Program_Type__c is selected:

ISBLANK(Program_Type__c) && NOT(ISBLANK(Status__c))

- Block submission if Enrollment_Date__c is in the past.

Enrollment Validation Rule

Back to Enrollment

Validation Rule Detail

Edit

Clone

Rule Name	Status_Must_Be_Selected	Active	<input checked="" type="checkbox"/>
Error Condition Formula	ISPICKVAL(Status__c, "") && NOT(ISNEW())	Error Location	Enrollment Status
Error Message	Status is required.		
Description			
Created By	Parth Khare, 9/24/2025, 11:24 AM	Modified By	Parth Khare, 9/25/2025, 5:02 AM

Edit

Clone

Conclusion

The Phase 2 implementation builds a secure and scalable foundation for managing student enrollments. With properly defined roles, profiles, and permission sets, access is tailored to user responsibilities. Data privacy is preserved by restricting sensitive fields, while validation rules guarantee data consistency. The configuration also ensures compliance with governance standards by enforcing login hours, IP restrictions, and company-wide settings such as locale and fiscal year. This framework provides a strong baseline for future enhancements, such as automation flows and Experience Cloud integration.