

Phase 2: Org Setup & Configuration — EduManage (Student Management System)

Salesforce Edition

- **Choose:** Salesforce Enterprise Edition (sufficient for custom objects, automation, reports, dashboards, and Apex).
- **Why:** Supports role hierarchy (Admin, Teacher, Helpdesk), approval processes, custom apps, and LWC.

Company Profile Setup

- **Company Name:** “EduManage – Student Management System”.
- **Default Time Zone:** IST (India Standard Time).
- **Locale:** English (India).
- **Currency:** INR ₹ (for enrollment/academic fee reports if required).
- **Additional Settings:**
 - Enable State/Country picklists for accurate student/teacher addresses.
 - Set an institutional support email (helpdesk@edumanager.com) for system notifications.

Business Hours & Holidays

- **Default Hours:** Mon–Fri, 9:00 AM–6:00 PM (school/college working hours).
- **Holidays:** Add academic calendar holidays (public holidays, institutional breaks).
- **Use Case:** Case escalation and SLA logic will respect these business hours.

Fiscal Year Settings

- **Standard Fiscal Year:** April–March (aligned with Indian academic/financial year).
- **Reports/Dashboards:** Enrollment trends, case resolution times, and teacher performance aligned to fiscal year.

User Setup & Licenses

Internal Users:

- **System Administrator** → Full access (org setup, approvals).
- **Helpdesk User** → Handles student cases, assigned via sharing rules.
- **Teacher** → Limited access to student associations & ratings.
- **Management/Principal** → Read-only dashboards & reports.

License Mapping:

- **Salesforce License:** Admins, Management.
- **Salesforce Platform License:** Teachers, Helpdesk staff.

Security:

- Enforce **MFA (Multi-Factor Authentication)** for all internal users.
- Email deliverability set to **All Emails** (for alerts & notifications).

Profiles & Roles

- **Profiles:** Admin, Teacher, Helpdesk User, Management.
- **Roles:** Principal (Top), Teachers, Helpdesk Support.
- **Hierarchy:** Principal > Teachers/Helpdesk > Students (records accessed via sharing).

Permission Sets

- Create **Helpdesk Access Permission Set** → Edit on Student Object, Read on Teacher.
- Assign to Helpdesk Users when additional access is required.

Org-Wide Defaults (OWD)

- **Students:** Private (controlled by owner).
- **Enrollments:** Controlled by Parent (Student).
- **Cases:** Private.
- **Teachers:** Public Read Only (to allow ratings).

Sharing Rules

- **Students created by Admin** → Shared with Helpdesk Users.
- **Students with Source = Newspaper** → Shared with Helpdesk Users.