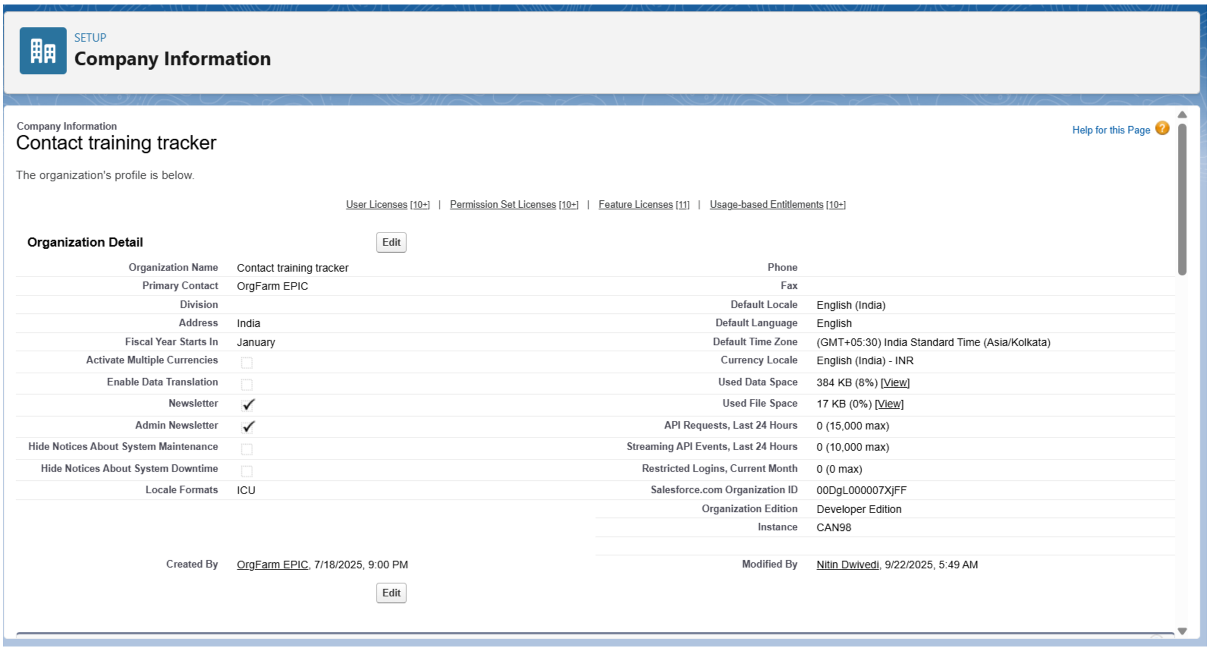
Phase 2 - Org Setup & Configuration

1.Salesforce Editions

We used a Salesforce Developer Edition Org for this implementation. This edition was selected because it provides all the core CRM features required for our project, such as custom objects, roles, profiles, automation tools, and APIs. It also supports AppExchange integration, which we plan to explore in later phases.

2.Company Profile Setup

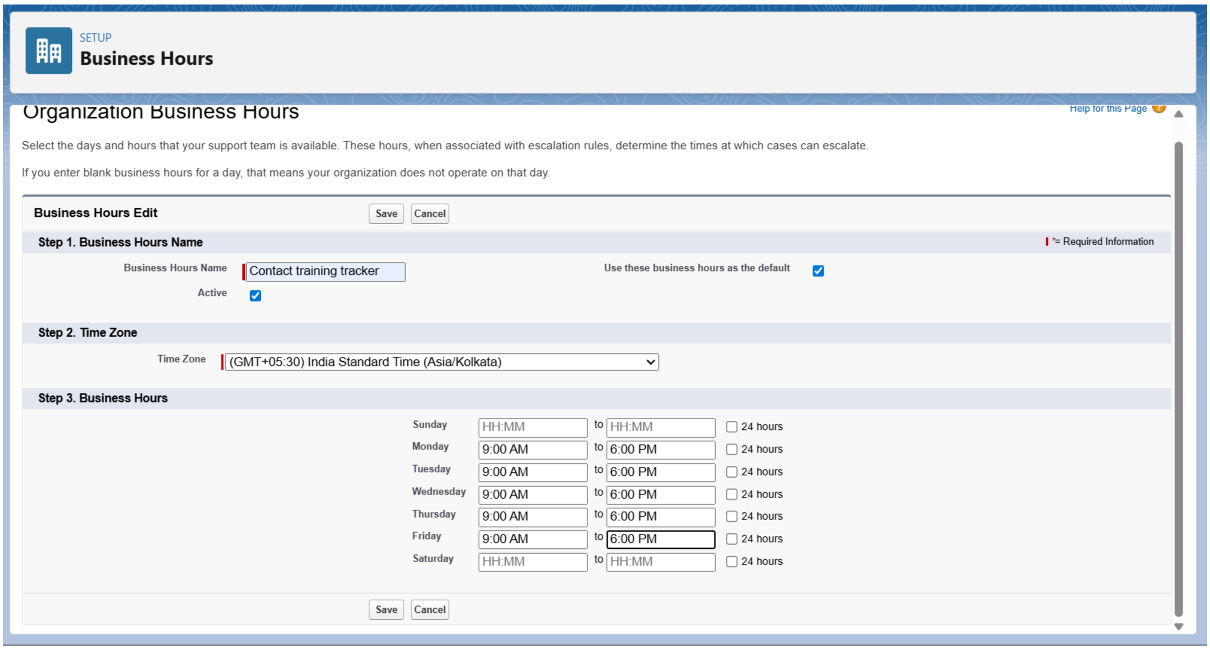
• Setup → Company Information
• Updated Organization Name to Contact Training Tracker.
• Set Default Currency as INR (Indian Rupees).
• Configured Locale as English (India) to ensure formatting of numbers, currency, and dates as per Indian standards.
• Set Time Zone to (GMT+5:30) Asia/Kolkata



3. Business Hours & Holidays

• Setup → Business Hours → Created SN SmartLearn Hours as 9:00 AM to 6:00 PM (Mon–Fri).

• Setup → Holidays → Added major holidays like Diwali, Republic Day, Independence Day, and New Year.

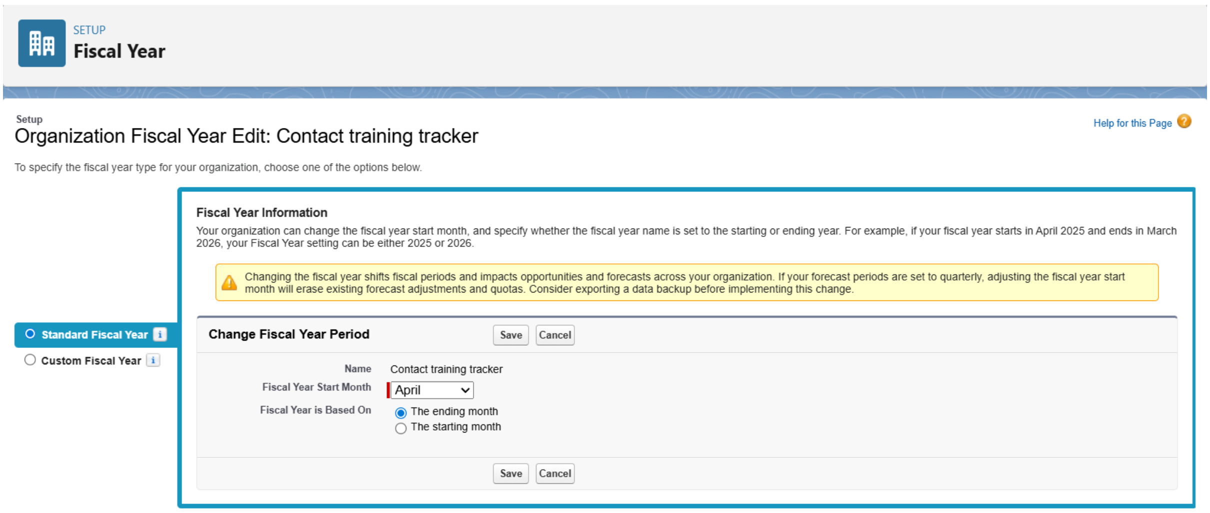


4. Fiscal Year Settings

• Setup → Fiscal Year

• Configured Standard Fiscal Year (April–March) to align with the Indian academic and financial cycle.

This setup ensures reporting and dashboards for admissions, enrollments, and revenue match the organization's fiscal planning.



5. User Setup & Licenses

• **We created different users to represent key stakeholders of the system:**

• System Administrator – Owns the system, does all config, deployments, and troubleshooting.

• Training Manager – Oversees all training sessions, trainers, and reports. Needs visibility into everything.

• Trainer – Runs training sessions, tracks attendance, updates completion. Needs CRUD access to training records.

• Trainee – Attends sessions, can view their schedule, progress, and certificates. Limited access.

6. Profiles

We created custom profiles by cloning the Standard User Profile and tailoring object level permissions:

• System Administrator – Full access, all permissions.

• Standard User → Basic CRM usage.

• Read Only → Only view records.

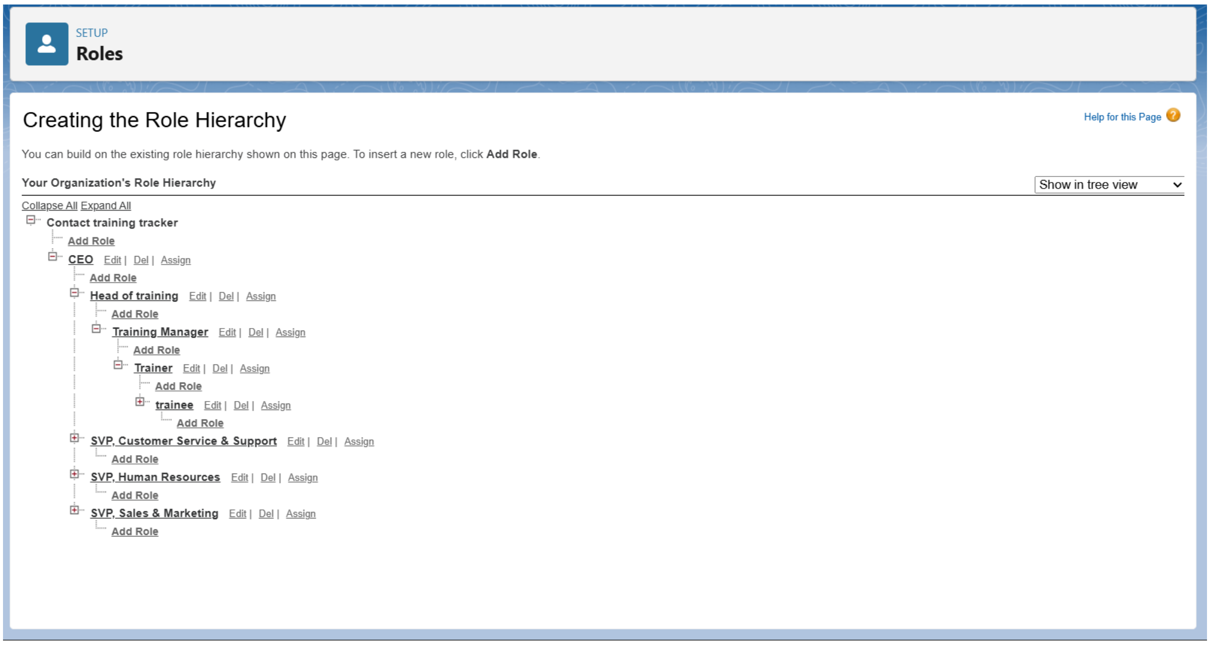
• Contract Manager, Marketing User, Solution Manager → Special-purpose, but outdated.

• Minimum Access – Salesforce → New baseline (no object access, use for custom profiles). Profiles ensure each role has the exact level of access needed to perform their duties, reducing risks of unauthorized data exposure.

7.Roles

• **Setup → Roles → Created a hierarchy to control data visibility:**

• Head of Training (Top) o Training Manager o Trainer o Trainee. This hierarchy system admin can view all related data, while training mangers, trainer and trainee see only what is relevant to them.



8. Permission Sets

• **To provide additional, flexible access without altering profiles, we created**:

• Report Viewer → For management to access analytical dashboards.

• Trainer Extra Access → Assign only to Senior Trainers

• Trainee Certificate Access → Assign to Trainees who should see their certificates. Permission Sets give fine-grained control and can be assigned on a need basis.

9.Org-Wide Defaults (OWD)

• **Setup → Sharing Settings → Configured the following:**

• Training Session → Private (trainers see only their sessions)

• Training Materials → Read-only for trainees

• Certificates → Controlled by role/permission set This enforces data security and ensures confidentiality of student records.

10.Sharing Rules

• **Use criteria-based sharing to grant visibility:**

• All trainees in Department A see Department A sessions.

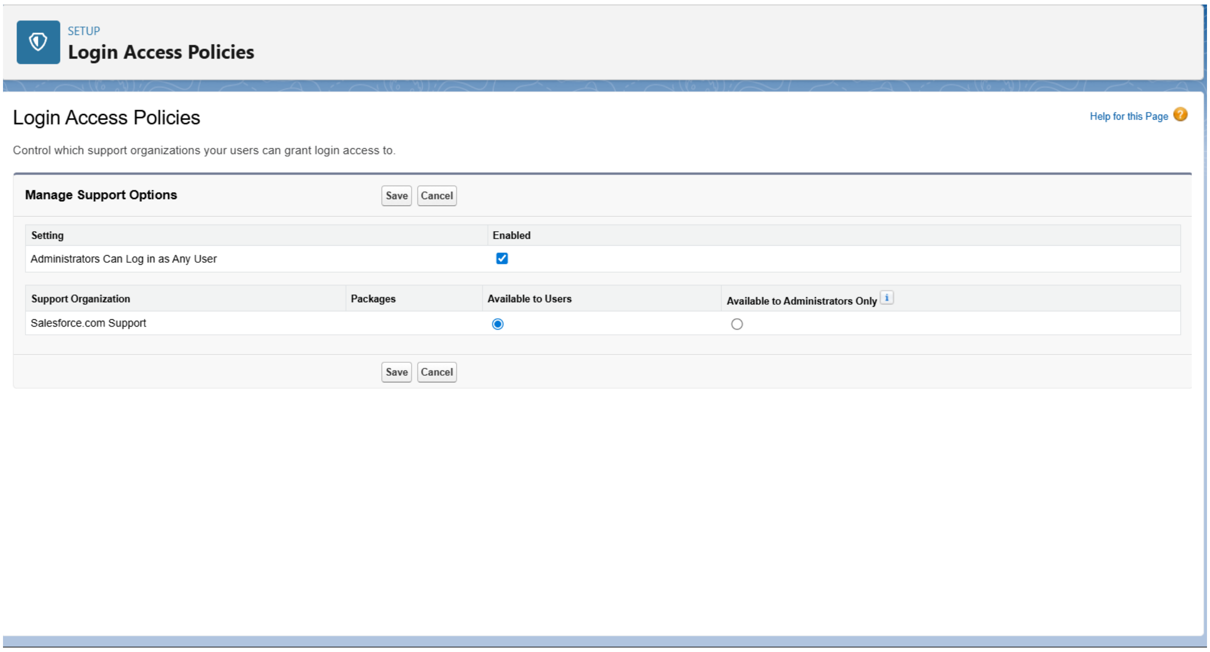
• Trainers see only sessions they manage unless overridden. This prevents unnecessary exposure of sensitive data while enabling collaboration.

11.Login Access Policies

• Setup → Login Access Policies

• Enabled Administrators Can Log in as Any User to simplify troubleshooting and support. For example, the admin can log in as a student to check if course enrollment processes are working correctly.

• Enabled Salesforce.com Support Login Access to allow Salesforce support teams to securely access the org in case of technical issues. This ensures quick issue resolution and strong governance during system operations.



12.Developer Org Setup

• Create Salesforce Developer Edition account.

• Configure Company Profile, Users, Roles, Profiles, Business Hours, and Security settings.

• Enable required features: custom objects, automation, reports. • Integrate with GitHub/Salesforce CLI for version control.

13.Sandbox Usage

• Use Developer Sandbox for building and testing changes safely.

• Optionally, use Full Sandbox for testing production-level scenarios.

• Always test major changes in a sandbox before deploying to production.

14.Deployment Basics

• Change Sets: Simple point-and-click deployment between orgs.

• Salesforce CLI (SFDX): Advanced deployment with version control and automation.

- GitHub Integration: Track changes, collaborate, and maintain version control.
- Always document deployment steps and maintain backups