

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

The screenshot shows the 'Company Information' setup page in Salesforce. The page title is 'Contact training tracker'. Below the title, it says 'The organization's profile is below.' There are links for 'User Licenses (10)', 'Permission Set Licenses (10)', 'Feature Licenses (11)', and 'Usage-based Entitlements (10)'. The 'Organization Detail' section is expanded, showing various settings. The 'Organization Name' is 'Contact training tracker'. The 'Primary Contact' is 'OrgFarm EPIC'. The 'Address' is 'India'. The 'Fiscal Year Starts In' is 'January'. The 'Default Locale' is 'English (India)'. The 'Default Language' is 'English'. The 'Default Time Zone' is '(GMT+05:30) India Standard Time (Asia/Kolkata)'. The 'Currency Locale' is 'English (India) - INR'. The 'Used Data Space' is '384 KB (8%)'. The 'Used File Space' is '17 KB (0%)'. The 'API Requests, Last 24 Hours' is '0 (15,000 max)'. The 'Streaming API Events, Last 24 Hours' is '0 (10,000 max)'. The 'Restricted Logins, Current Month' is '0 (0 max)'. The 'Salesforce.com Organization ID' is '00DgL000007XJFF'. The 'Organization Edition' is 'Developer Edition'. The 'Instance' is 'CAN98'. The 'Created By' is 'OrgFarm EPIC' on '7/18/2025, 9:00 PM'. The 'Modified By' is 'Nilin Dwivedi' on '9/22/2025, 5:49 AM'.

Organization Detail	
Organization Name	Contact training tracker
Primary Contact	OrgFarm EPIC
Division	
Address	India
Fiscal Year Starts In	January
Activate Multiple Currencies	<input type="checkbox"/>
Enable Data Translation	<input type="checkbox"/>
Newsletter	<input checked="" type="checkbox"/>
Admin Newsletter	<input checked="" type="checkbox"/>
Hide Notices About System Maintenance	<input type="checkbox"/>
Hide Notices About System Downtime	<input type="checkbox"/>
Locale Formats	ICU
Phone	
Fax	
Default Locale	English (India)
Default Language	English
Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Currency Locale	English (India) - INR
Used Data Space	384 KB (8%) 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	00DgL000007XJFF
Organization Edition	Developer Edition
Instance	CAN98
Created By	OrgFarm EPIC, 7/18/2025, 9:00 PM
Modified By	Nilin Dwivedi, 9/22/2025, 5:49 AM

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.

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.

Business Hours Edit

SaveCancel

Step 1. Business Hours Name

Business Hours Name

Contact training tracker

Active

☒

Use these business hours as the default

☒

Required Information

Step 2. Time Zone

Time Zone

(GMT+05:30) India Standard Time (Asia/Kolkata)

Step 3. Business Hours

Sunday	<div>HH:MM</div>	to	<div>HH:MM</div>	<input type="checkbox"/> 24 hours
Monday	<div>9:00 AM</div>	to	<div>6:00 PM</div>	<input type="checkbox"/> 24 hours
Tuesday	<div>9:00 AM</div>	to	<div>6:00 PM</div>	<input type="checkbox"/> 24 hours
Wednesday	<div>9:00 AM</div>	to	<div>6:00 PM</div>	<input type="checkbox"/> 24 hours
Thursday	<div>9:00 AM</div>	to	<div>6:00 PM</div>	<input type="checkbox"/> 24 hours
Friday	<div>9:00 AM</div>	to	<div>6:00 PM</div>	<input type="checkbox"/> 24 hours
Saturday	<div>HH:MM</div>	to	<div>HH:MM</div>	<input type="checkbox"/> 24 hours

SaveCancel

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.

SETUP

Fiscal Year

Organization Fiscal Year Edit: Contact training tracker

Help for this Page

Setup
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

SaveCancel

Name

Contact training tracker

Fiscal Year Start Month

April

Fiscal Year is Based On

☒ The ending month

☐ The starting month

SaveCancel

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 managers, trainer and trainee see only what is relevant to them.

SETUP

Roles

Creating the Role Hierarchy

[Help for this Page](#)

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 Show in tree view

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

- Contact training tracker
 - Add Role
 - CEO [Edit](#) | [Del](#) | [Assign](#)
 - Add Role
 - Head of training [Edit](#) | [Del](#) | [Assign](#)
 - Add Role
 - Training Manager [Edit](#) | [Del](#) | [Assign](#)
 - Add Role
 - Trainer [Edit](#) | [Del](#) | [Assign](#)
 - Add Role
 - trainee [Edit](#) | [Del](#) | [Assign](#)
 - Add Role
- SVP, Customer Service & Support [Edit](#) | [Del](#) | [Assign](#)
 - Add Role
- SVP, Human Resources [Edit](#) | [Del](#) | [Assign](#)
 - Add Role
- SVP, Sales & Marketing [Edit](#) | [Del](#) | [Assign](#)
 - Add Role

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.

SETUP

Login Access Policies

Login Access Policies

Help for this Page

Control which support organizations your users can grant login access to.

Manage Support Options

SaveCancel

Setting	Enabled
Administrators Can Log in as Any User	<input checked="" type="checkbox"/>

Support Organization	Packages	Available to Users	Available to Administrators Only
Salesforce.com Support		<input checked="" type="radio"/>	<input type="radio"/>

SaveCancel

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