

## Phase 2: Org Setup & Configuration

### Key Activities:

- Salesforce Editions
- Company Profile Setup
- Business Hours & Holidays
- Fiscal Year Settings
- User Setup & Licenses
- Profiles, Roles, Permission Sets
- OWD & Sharing Rules
- Login Access Policies
- Dev Org Setup
- Sandbox Usage
- Deployment Basics

### Description:

In this phase, we set up the Salesforce Org for the Institute Management System.

1. Select correct Salesforce edition (Developer/Enterprise).
2. Configure company profile with institute details.
3. Define working hours, holidays, and fiscal years.
4. Add users (Admins, Teachers, Students) with correct licenses.
5. Create profiles, roles, and permission sets for access control.
6. Configure Org-Wide Defaults and sharing rules for data visibility.
7. Set login policies and session settings.
8. Prepare developer orgs and sandboxes for development and testing.
9. Understand basics of deployment between sandboxes and production.

### Outcome:

The Salesforce org is properly configured with roles, permissions, and setup, ready for customizations.