Phase 2: Org Setup & Configuration for Tuition Management System

This phase is essential for configuring your Salesforce organization to efficiently support the Tuition Management System. It ensures that the system's security, data management, and operational structure are properly established.

1. Salesforce Edition & Developer Org Setup

- **Create a New Developer Org:** This dedicated environment allows you to build and test without impacting your live production system.
- **Set Up My Domain:** Critical for security and branding, the domain will be a company-specific URL, such as tuition-management-dev-ed.my.salesforce.com.

2. Company Profile Setup

- **Navigate:** Access **Setup** > **Company Information** in your new org.
- **Configure:** Input the following details:
  - **Company Name:** Tuition Management System
  - **Primary Contact:** Administrator or a key stakeholder
  - **Default Locale:** English (India)
  - **Currency:** INR (₹)
  - **Timezone:** Asia/Kolkata
  - **Fiscal Year:** Set to **April - March**, aligning with typical educational institute reporting periods.

3. Business Hours & Holidays

- **Business Hours:** Define operating hours under **Setup** > **Company Settings** > **Business Hours** to reflect Monday to Friday, 9:00 AM to 6:00 PM.
- **Holidays:** Add official holidays in **Setup** > **Company Settings** > **Holidays** to prevent automated processes from occurring on these dates.

4. User Setup & Licenses

- **Create New Users:** Go to **Setup** > **Users** > **New User** to establish user accounts based on roles identified in project analysis.
- **Assign Licenses and Profiles:**
  - **Administrator:** Salesforce License with a custom **Tuition Admin Profile**.
  - **Teachers:** Salesforce Platform License and a custom **Teacher Profile**.

- **Students:** Community/Experience Cloud License for portal access to schedules and doubt submissions.

5. Profiles

- **Create Custom Profiles:** Clone and modify standard profiles for each user type to form the core of your security model.
- **Examples:**
  - **Tuition Admin Profile:** Full Read/Write/Delete access to all custom objects like **Student**, **Teacher**, and **Course**.
  - **Teacher Profile:** Read/Write access to assigned **Student** objects and Read-Only access to the **Course** object.
  - **Student Profile:** Read-Only access to their own **Student** record and ability to create new records for **Doubt Resolution**.

6. Roles

- **Create Role Hierarchy:** Set up under **Setup** > **Roles** to establish a hierarchy:
  - **Director** (Top)
  - **Tuition Admin**
  - **Head of Departments**
  - **Teachers** (reporting to their respective Head of Department)

This hierarchy provides managers visibility into teacher performance and student attendance.

7. Permission Sets

- **Create Permission Sets:** Assign additional access without altering profiles.
- **Examples:**
  - **Report Viewer:** Allows teachers to view student performance dashboards.
  - **Sensitive Data Access:** Grants admins access to sensitive data, like Teacher Salary.

8. OWD (Organization-Wide Defaults)

- **Navigate:** Go to **Setup** > **Sharing Settings**.
- **Set Defaults:**
  - **Student:** Private, ensuring individual user access to their records only.
  - **Teacher:** Private, securing student records visibility to assigned teachers.
  - **Course:** Public Read Only, allowing visibility of the course catalog to all users.

9. Sharing Rules

- **Create Sharing Rules:** Open access for specific groups due to Private OWD settings.
- **Example Rule:** Enable teachers to view student records for courses they teach by sharing related Student records with the Teacher's role.

10. Sandbox Usage

- **Create a Sandbox:** Under **Setup** > **Sandboxes**, create "Tuition_Mgmt_Test_Sandbox".
- **Purpose:** Test complex business logic like Teacher Salary Calculation or payment integration to ensure functionality before deploying to the main org.

11. Deployment Basics

- **Change Sets:** Use this basic method to move configurations from development to a testing sandbox.
- **VS Code + Salesforce CLI (SFDX):** For professional deployment, retrieve your project's metadata to your local machine for version control on GitHub.