Phase 2: Org Setup & Configuration

In this phase, we focus on establishing the foundational settings in your Salesforce organization. Think of it as preparing the digital groundwork before constructing your metaphorical house. All tasks are executed within the Salesforce Setup environment.

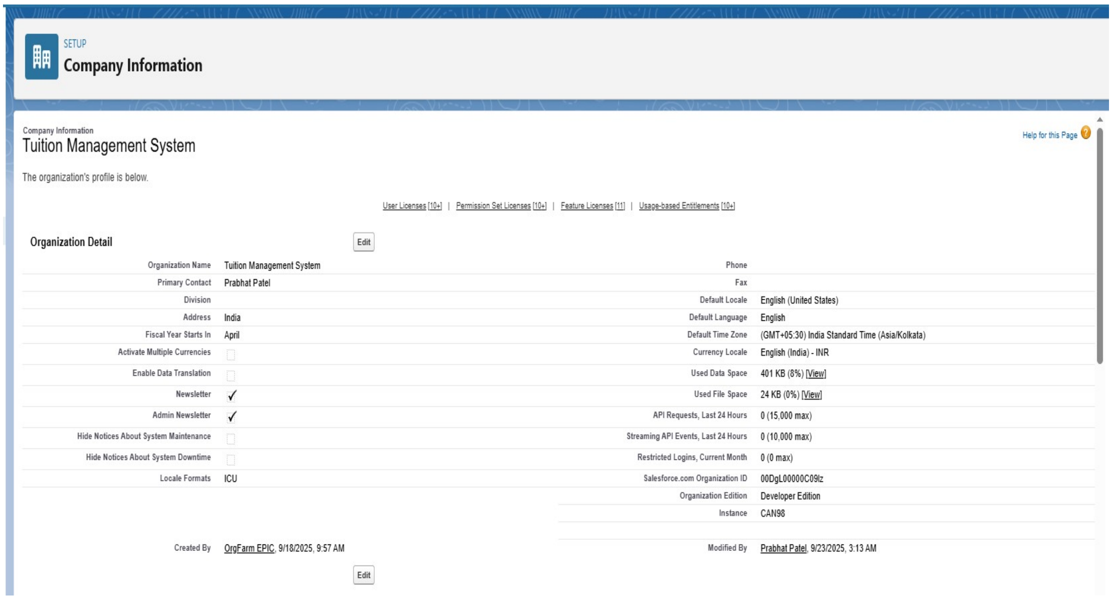
Salesforce Editions & Org Setup

Salesforce Editions

For a project like this, utilizing a **Developer Edition** or a **Trailhead Playground** is ideal. These environments are free, fully functional, and specifically designed for building and testing applications without impacting a live production environment.

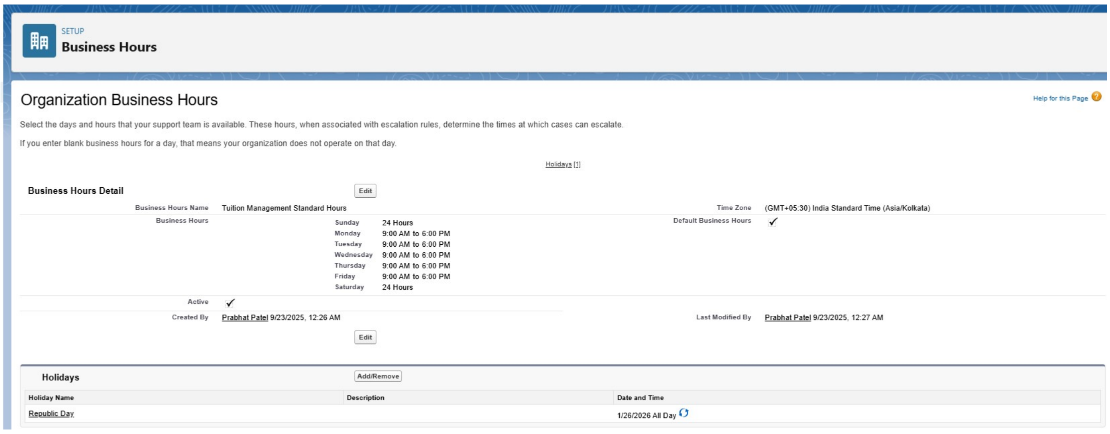
Company Profile Setup

Begin by navigating to **Setup > Company Information**. Here, you will input essential details such as the organization's name, primary contact, and address, ensuring the org's basic information is accurate.



Business Hours & Holidays

To define the institute's operating hours and holidays, go to **Setup > Business Hours** and **Setup > Holidays**. This setup is crucial for features like support ticket queues and automated processes that should only operate during business hours.



Fiscal Year Settings

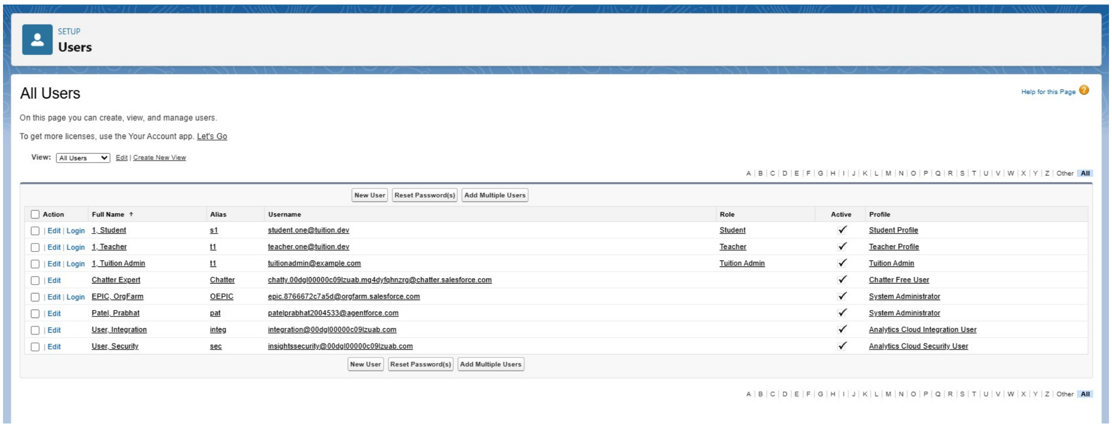
Under **Setup > Fiscal Year**, configure the institute's fiscal year. This is vital for financial reporting and analytics, especially when using tools like Einstein Discovery for revenue forecasting.

User, Security & Access

This step is critical to ensure that students, teachers, and administrators have appropriate data access without excess.

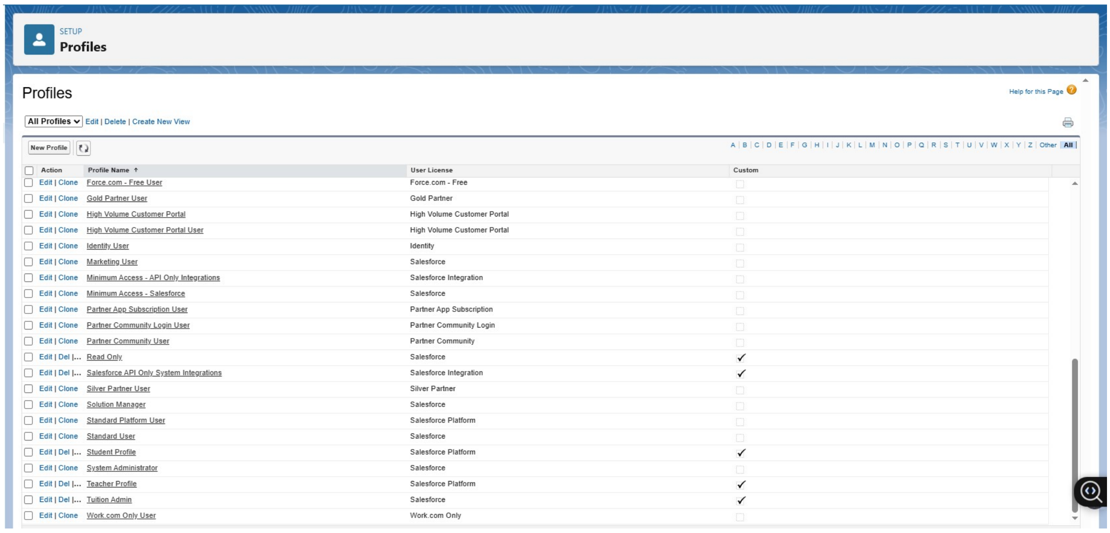
User Setup & Licenses

Navigate to **Setup > Users > Users**. Create user accounts for each team member (e.g., Jane Doe, the administrator) and assign them a Salesforce license. Options include a Salesforce Platform license for users needing access only to custom apps, or a standard Salesforce license for administrators.



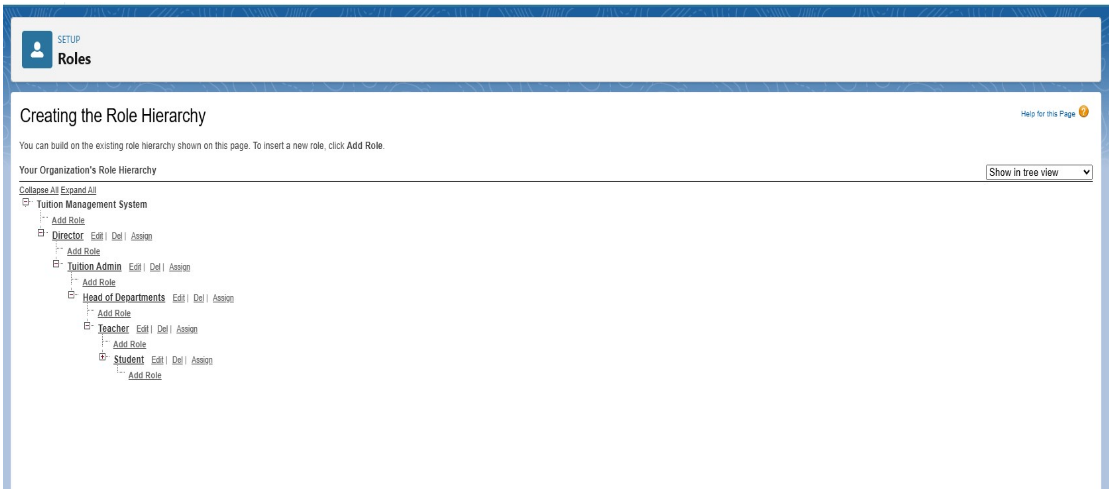
Profiles

Profiles serve as the foundation of user permissions. Create or clone profiles for different user types, such as "Tuition Admin," "Teacher," and "Student." Profiles determine which objects, fields, and tabs a user can access.



Roles

Roles manage what data users can see based on their position in the organization's hierarchy. You might establish a role hierarchy where the "Tuition Admin" role is at the top, followed by "Lead Teacher," and "Teacher" at the bottom.



Permission Sets

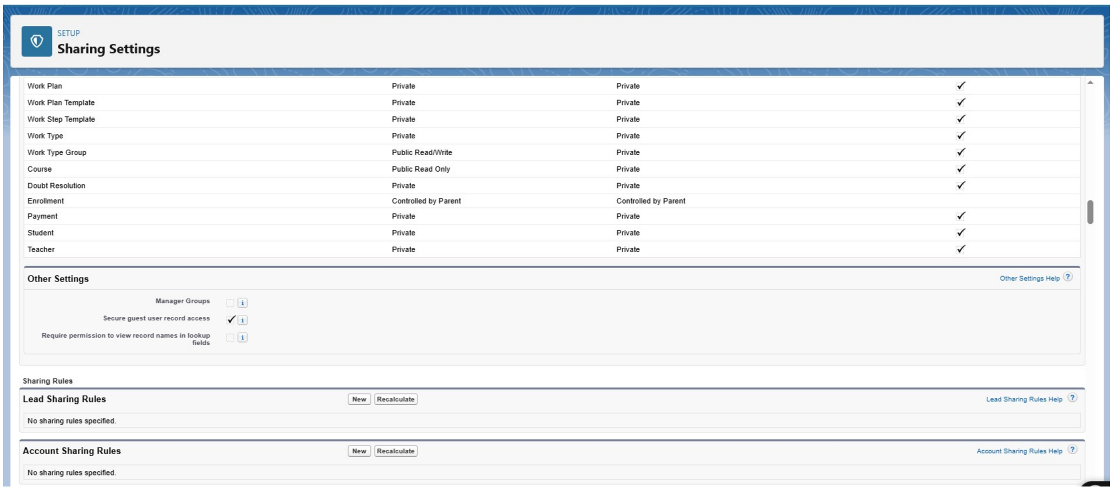
Permission sets offer a flexible method to grant additional permissions without altering a user's profile. For example, you can assign all teachers a "View Reports" permission set, enabling them to access student performance dashboards, even if their profile doesn’t allow it.

OWD (Organization-Wide Defaults)

OWD settings establish the baseline level of access for every record. For this project, it's advisable to set the OWD for custom objects like Student and Course to **Private**, ensuring teachers can only view their own students' data.

Sharing Rules

Given the private OWD, sharing rules are necessary to broaden access. For instance, a sharing rule might grant "Read-Only" access to teachers for all students in their assigned courses.



Login Access Policies

Within **Setup** > **Security** > **Session Settings**, define login access policies, such as password expiration policies or session timeout settings.

Development & Deployment

This section outlines the structure of development in preparation for deployment.

Dev Org Setup

The Salesforce Developer Edition org serves as your development environment. Here, you will build all custom objects, fields, Apex classes, and Lightning components.

Sandbox Usage

While a Developer Edition org suffices for a single developer, in real-world scenarios, a **Sandbox** is preferable. Sandboxes are isolated copies of your production org used for development and testing, protecting live data from risks.

Deployment Basics

Upon completing development, deployment involves moving your metadata from your dev org to a testing sandbox or production org. This process utilizes tools like the Salesforce CLI, which will be explored in Phase 3. The first step in a professional deployment pipeline is retrieving all your code to VS Code and pushing it to GitHub.