

# 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.

SETUP

Company Information

Company Information

Tuition Management System

The organization's profile is below.

[User Licenses \(11\)](#) | [Permission Set Licenses \(10\)](#) | [Feature Licenses \(1\)](#) | [License-based Entitlements \(10\)](#)

Organization Detail

Organization Name

Tuition Management System

Phone

Primary Contact

Prabhat Patel

Fax

Division

Default Locale

English (United States)

Address

India

Default Language

English

Fiscal Year Starts In

April

Default Time Zone

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

Activate Multiple Currencies

☐

Currency Locale

English (India) - INR

Enable Data Translation

☐

Used Data Space

401 KB (8%) [View](#)

Newsletter

☒

Used File Space

24 KB (0%) [View](#)

Admin Newsletter

☒

API Requests, Last 24 Hours

0 (15,000 max)

Hide Notices About System Maintenance

☐

Streaming API Events, Last 24 Hours

0 (10,000 max)

Hide Notices About System Downtime

☐

Restricted Logins, Current Month

0 (0 max)

Locale Formats

ICU

Salesforce.com Organization ID

00DgL00000C09c

Organization Edition

Developer Edition

Instance

CAN98

Created By

OrgFarm EPIC: 9/18/2025, 9:57 AM

Modified By

Prabhat Patel: 9/23/2025, 3:13 AM

Edit

Edit

## 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.

SETUP

Business Hours

Organization Business Hours

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 Detail

Business Hours Name

Tuition Management Standard Hours

24 Hours

Sunday 9:00 AM to 6:00 PM  
Monday 9:00 AM to 6:00 PM  
Tuesday 9:00 AM to 6:00 PM  
Wednesday 9:00 AM to 6:00 PM  
Thursday 9:00 AM to 6:00 PM  
Friday 9:00 AM to 6:00 PM  
Saturday 24 Hours

Time Zone

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

Default Business Hours

☒

Active

☒

Created By

Prabhat Patel/ 9/23/2025, 12:26 AM

Last Modified By

Prabhat Patel/ 9/23/2025, 12:27 AM

Holidays

Add/Remove

Holiday Name	Description	Date and Time
Republic Day		1/26/2026 All Day

## 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.

SETUP

Users

All Users

On this page you can create, view, and manage users.  
To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users

Create New User

New User

Reset Password(s)

Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit   Login	1_Student	s1	student_one@tuition.dev	Student	<input checked="" type="checkbox"/>	Student Profile
<input type="checkbox"/> Edit   Login	1_Teacher	t1	teacher_one@tuition.dev	Teacher	<input checked="" type="checkbox"/>	Teacher Profile
<input type="checkbox"/> Edit   Login	1_Tuition Admin	ti	tuitionadmin@example.com	Tuition Admin	<input checked="" type="checkbox"/>	Tuition Admin
<input type="checkbox"/> Edit	Chatter Expert	chatter	chatter_00000000000000000000000000000000@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit   Login	EPIC, OrgFarm	OEPIC	epic.876672c7a54@orgfarm.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Patel, Prabhat	pat	patelprabhat2004533@openforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User Integration	intgr	integration@00000000000000000000000000000000@openforce.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	integration@00000000000000000000000000000000@openforce.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User


New User

Reset Password(s)

Add Multiple Users

## 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.


**SETUP**  
**Profiles**

## Profiles

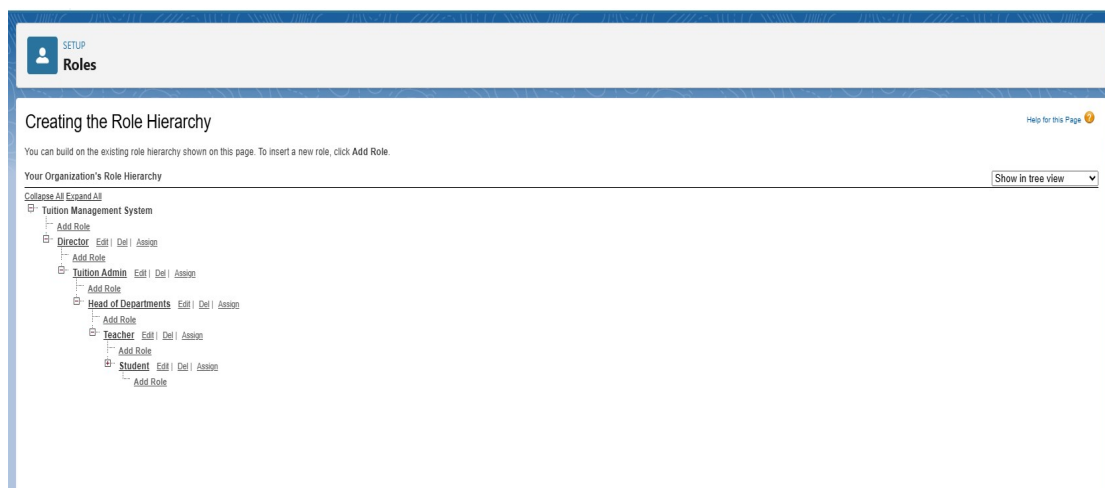
[Help for this Page](#)

All Profiles ▾ Edit | Delete | Create New View
Print

New Profile	Profile Name	User License	Custom
<input type="checkbox"/>	Action	Profile Name 4	
<input type="checkbox"/>	Edit   Clone	Essex.com - First User	
<input type="checkbox"/>	Edit   Clone	Gold Partner User	
<input type="checkbox"/>	Edit   Clone	High Volume Customer Portal	
<input type="checkbox"/>	Edit   Clone	High Volume Customer Portal User	
<input type="checkbox"/>	Edit   Clone	Identity User	
<input type="checkbox"/>	Edit   Clone	Marketing User	
<input type="checkbox"/>	Edit   Clone	Minimum Access - API Only Integrations	
<input type="checkbox"/>	Edit   Clone	Minimum Access - Salesforce	
<input type="checkbox"/>	Edit   Clone	Partner App Subscription User	
<input type="checkbox"/>	Edit   Clone	Partner Community Login User	
<input type="checkbox"/>	Edit   Clone	Partner Community User	
<input type="checkbox"/>	Edit   Del   ...	Bread Only	✓
<input type="checkbox"/>	Edit   Del   ...	Salesforce API Only System Integrations	✓
<input type="checkbox"/>	Edit   Clone	Silver Partner User	
<input type="checkbox"/>	Edit   Clone	Solution Manager	
<input type="checkbox"/>	Edit   Clone	Standard Platform User	
<input type="checkbox"/>	Edit   Clone	Standard User	
<input type="checkbox"/>	Edit   Del   ...	Student Profile	✓
<input type="checkbox"/>	Edit   Clone	System Administrator	
<input type="checkbox"/>	Edit   Del   ...	Teacher Profile	✓
<input type="checkbox"/>	Edit   Del   ...	Tuition Admin	✓
<input type="checkbox"/>	Edit   Clone	Work.com Only User	

## 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.

The screenshot shows the 'Sharing Settings' page in Salesforce Setup. It features a table of sharing settings for various objects, followed by 'Other Settings' and 'Sharing Rules' sections.

Object	Default Sharing Setting	Controlled by Parent	Checkmark
Work Plan	Private	Private	✓
Work Plan Template	Private	Private	✓
Work Step Template	Private	Private	✓
Work Type	Private	Private	✓
Work Type Group	Public Read/Write	Private	✓
Course	Public Read Only	Private	✓
Doubt Resolution	Private	Private	✓
Enrollment	Controlled by Parent	Controlled by Parent	
Payment	Private	Private	✓
Student	Private	Private	✓
Teacher	Private	Private	✓

**Other Settings**

- Manager Groups: ☐ (1)
- Secure guest user record access: ☒ (1)
- Require permission to view record names in lookup fields: ☐ (1)

**Sharing Rules**

**Lead Sharing Rules** [New] [Recalculate] [Lead Sharing Rules Help ?]  
No sharing rules specified.

**Account Sharing Rules** [New] [Recalculate] [Account Sharing Rules Help ?]  
No sharing rules specified.

## 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.