**Phase 2: Org Setup & Configuration  
tutor-match (salesforce CRM project)**

***1. Salesforce Edition & Org Setup***

* ***Salesforce Edition****: Salesforce* ***Developer Edition*** *(free, best for prototyping & testing).*
* ***Dev Org Setup****: Create a* ***dedicated Developer Org*** *named Tutor Match CRM.*

***2. Company Profile Setup***

* ***Company Name****: Tutor Match CRM*
* ***Default Currency****: INR*
* ***Default Time Zone****: (GMT+05:30) India Standard Time*
* ***Language****: English (India) A screenshot of a computer

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***3. Business Hours & Holidays***

* ***Working Hours****: 8 AM – 8 PM (Mon–Sat)*
* ***Holidays Configured****:*
  + *Sundays (weekly off)*
  + *National holidays (Republic Day, Independence Day, Diwali, etc.) A screenshot of a computer

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* ***Fiscal Year Type****: Standard Fiscal Year (Jan–Dec).*

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***5. User Setup & Licenses***

*Stakeholders (from Phase 1): Admin, Parents, Tutors, Manager/Coordinator, Customer Support.*

* ***Users to Create*** *(limited due to Developer Org → max 2 active users):*
  + *System Admin (default full access).*
  + *Tutor User (to test tutor functionality).*
  + *Other roles (Parents, Manager, Customer Support) → Defined in role hierarchy (future scope)*

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***6. Profiles & Roles***

* ***Role Hierarchy:***
  + ***System Admin (top)***
  + ***Manager/Coordinator***
  + ***Tutors***
  + ***Parents***
  + ***Customer Support (parallel branch under Admin for issue resolution)***
* ***Profiles to Create:***
  + ***Tutor Profile (manage availability, sessions, feedback).***
  + ***Parent Profile (search tutors, book sessions, give feedback).***
  + ***Manager Profile (approve packages, view reports).***
  + ***Customer Support Profile (handle disputes, cancellations).***

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***7. Permission Sets***

* ***Session Management Set (for Tutors)***
  + ***Label: Session Management Set***
  + ***Grants ability to Create/Edit Session records.***
* ***Reports Access Set (for Managers & Admin)***
  + ***Label: Reports Access Set***
  + ***Grants ability to Create/Run Reports (performance, revenue).***

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8. Organization-Wide Defaults (OWD)***

• Will be configured in Phase 3 after objects (Job Post,

Candidate, Application, Interview) are created.

***9. Sharing Rules***

*• Will be configured in Phase 3 after objects are*

*created.*

***10.Login & Access Policies***

*❖ Enable: Force re-login after session timeout*

*❖ Save*

***11.Sandbox Usage & Deployment Basics***

*❖ Sandbox is used for testing automation and Apex*

*before deployment.*

*❖ Deployment from Sandbox → Production will be*

*done using Change Sets or SFDX.*