Phase II: Org Setup and Configuration

Admission-Academic Journey Crm

Company profile setup

- **Explanation:** Configured the basic information for the educational institution to ensure that all system-generated data, such as addresses, currency, and time, is accurate and reflects the university's identity.
- **Salesforce Path:** Setup > Company Information
- **Procedure:** Updated the organization details to reflect the university's information, including its official name, address, and default localization settings.

Company Information
Admissions & Academic Journey CRM
Help fo

The organization's profile is below.

User Licenses [10+] | Permission Set Licenses [10+] | Feature Licenses [11] | Usage-based Entitlements [10+]

Organization Detail [Edit]

Organization Name	Admissions & Academic Journey CRM	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (India)
Address	India	Default Language	English
Fiscal Year Starts In	January	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	342 KB (7%) [View]
Newsletter	✔	Used File Space	17 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	00DgK00000Byt9I
		Organization Edition	Developer Edition
		Instance	CAN96
Created By	OrgFarm EPIC, 9/18/2025, 7:48 PM	Modified By	Ridima saraf, 9/23/2025, 9:11 PM

Business Hours & Holidays

Explanation: Defined the standard working hours for the admissions office and the official academic calendar holidays. This ensures that automated processes, such as applicant

notifications and task reminders, only occur during operational periods.

Salesforce Path: Setup > Business Hours and Setup > Holidays

Final Configuration:

- **Business Hours:** Mon-Fri, 9:00 AM - 5:00 PM

- **Holidays:** Specific dates added for academic semester breaks and festivals.

Holidays

Holidays are dates and times at which business hours are suspended. Business hours are the days and hours that your support team is available.

Holidays [New]

Action	Holiday Name	Description	Date and Time
Edit | Del	Christmas		12/25/2025 All Day
Edit | Del	Diwali Holiday		10/21/2025 All Day
Edit | Del	Holi		3/4/2026 All Day
Edit | Del	Independence day		8/15/2026 All Day ↻
Edit | Del	Republic day		1/26/2026 All Day ↻
Edit | Del	Winter break		12/12/2026 All Day

Elapsed Holidays

No records to display

If you enter blank business hours for a day, that means your organization does not operate on that day.

Business Hours Edit [Save] [Cancel]

Step 1. Business Hours Name

| Business Hours Name | University Business Hours | | Use these business hours as the default | ☑ |
| Active | ☑ | | | |

Step 2. Time Zone

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

Step 3. Business Hours

Sunday	9:00 AM	to	5:00 PM	☐ 24 hours
Monday	9:00 AM	to	5:00 PM	☐ 24 hours
Tuesday	9:00 AM	to	5:00 PM	☐ 24 hours
Wednesday	9:00 AM	to	5:00 PM	☐ 24 hours
Thursday	9:00 AM	to	5:00 PM	☐ 24 hours
Friday	9:00 AM	to	5:00 PM	☐ 24 hours
Saturday	HH:MM	to	HH:MM	☐ 24 hours

User Setup & Licenses

User Setup & Licenses

Explanation: Created user accounts for the key staff members who will manage the admissions process and track student

academic progress, providing them with login access to the Salesforce org.

Salesforce Path: Setup > Quick search **> user**

Procedure: Created FIVE new user With appropriate salesforce licenses to represent Operational roles within the admission and academic department.

Final configuration:

- User 1: Aarav Sharma (Principal admin)
- User 2: Rohan Verma (Admission head)
- User 3: Rajesh Iyer (Department head)
- User 4: Pooja Nair (Mentor)
- User 5: Vikram Patel (counselor).

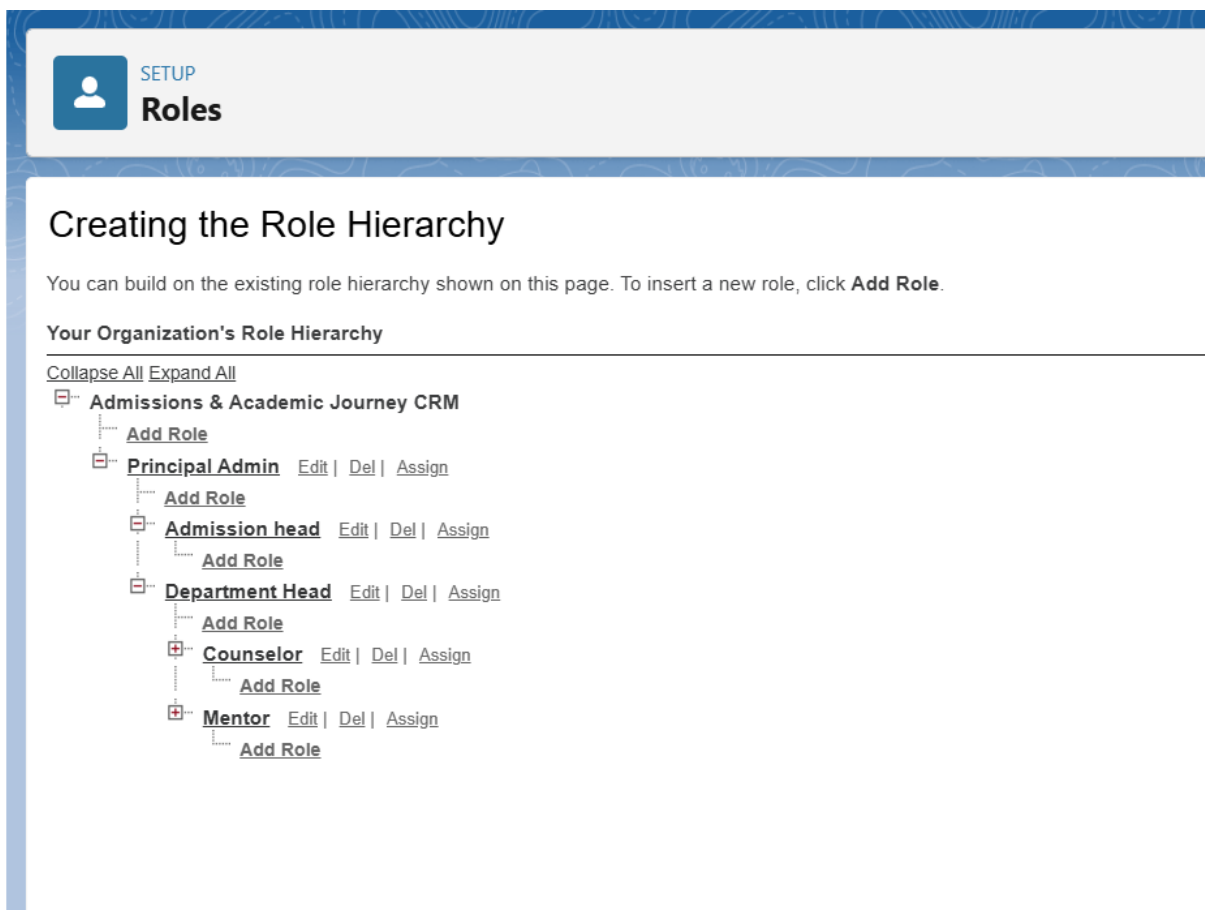|	Action	Full Name ↑	Alias	Username	Role	Active	Profile
☐	Edit	Chatter Expert	Chatter	chatty.00dgk00000byt9luab.wc7lnrhjpwgo@chatter.salesforce.com		✓	Chatter Free User
☐	Edit	Deshmukh, Anita	adesh	anita.deshmuk22h.supporthead@educrm.com		✓	Identity User
☐	Edit	EPIC, OrgFarm	OEPIC	epic.adbf801ca971@orgfarm.salesforce.com		✓	System Administrator
☐	Edit	Iyer, Rajesh	riyer	rajesh.iyer22.academichead@educrm.com	Department Head	✓	Standard Platform User
☐	Edit	Kapoor, Neha	nkapo	neha.kapoor.admissionshead22@educrm.com		☐	Work.com Only User
☐	Edit	Nair, Pooja	pnair	pooja.nair.22faculty@educrm.com	Mentor	✓	Standard Platform User
☐	Edit	Patel, Vikram	vpate	vikram.patel22.support@educrm.com	Counselor	✓	Standard Platform User
☐	Edit	saraf, Ridima	rid	ridima.saraf.ex22488@agentforce.com		✓	System Administrator
☐	Edit	Sharma, Aarav	ashar	aaravsharma25@edu.com	Principal Admin	✓	System Administrator
☐	Edit	User, Integration	integ	integration@00dgk00000byt9luab.com		✓	Analytics Cloud Integration User
☐	Edit	User, Security	sec	insightssecurity@00dgk00000byt9luab.com		✓	Analytics Cloud Security User
☐	Edit	Verma, Rohan	rverm	rohan.verma22.admissions@educrm.com	Admission head	✓	Admission officer

Profiles & Roles

Explanation: Defined user permissions and data visibility to protect sensitive student information. **Profiles** control what a

user can *do* (e.g., edit an application), and **Roles** control what records they can *see* based on the organizational hierarchy.

> **Salesforce Path:** Setup > Quick find >Profiles and roles.
> **Procedure:**

1. **Profiles:** Cloned the Standard User profile to create custom profiles: Admissions head Profile, department head Profile, Counsellor, Mentor.
2. **Roles:** Principal admin, Admission head, Departmental head(Councillor and mentor).

SETUP
Roles

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

Collapse All Expand All

- **Admissions & Academic Journey CRM**
  - Add Role
  - **Principal Admin** Edit | Del | Assign
    - Add Role
    - **Admission head** Edit | Del | Assign
      - Add Role
    - **Department Head** Edit | Del | Assign
      - Add Role
      - **Counselor** Edit | Del | Assign
        - Add Role
      - **Mentor** Edit | Del | Assign
        - Add Role

Organization-Wide Defaults (OWD) & Sharing Rules

Explanation: Set the baseline security for the org by making all student-related custom objects private to ensure data privacy and compliance. Sharing rules were then created as specific exceptions to this private setting to allow for necessary collaboration.

Salesforce Path: Setup > Quick find >Sharing Settings

OWD: Set the default internal access for the Academic record, Application, Student, Course, Counselling notes, Department, Prospective Student Custom Objects to private.

Sharing Rules:

Dev Org Setup & Deployment Basics

Explanation: This served as a conceptual checkpoint. It confirmed that the Developer Org is the single environment for building and testing all configurations in this phase. No additional configuration for login policies or deployment is required at this stage.

Procedure: No action was needed as all necessary configurations were already performed in the previous steps.