

Project: EduLink Student & Course Management System

PHASE 2: Org Setup & Configuration.

Salesforce Edition

The foundation for the EduLink project is a Salesforce Developer Edition org. This edition was strategically chosen as it offers a comprehensive, full-featured development environment without any licensing costs. This makes it the ideal platform for building, testing, and refining the application in a sandboxed environment.

Company Profile Setup

The foundational identity of the Salesforce org was established by configuring the essential company information. This process is vital as it sets the organization's operational context, default regional settings, and the standard formats for data displayed to users.

- **Path:** Setup → Company Information
- **Purpose:** To define the core identity and localization settings for the entire EduLink instance, ensuring data consistency and appropriate user experience.
- **Configuration Details:**
 - **Organization Name:** EduLink-Education Platform
 - **Primary Contact:** OrgFarm EPIC
 - **Address:** Jabalpur 482001, Madhya Pradesh, India
 - **Default Locale:** English (United States)
 - **Default Language:** English
 - **Default Time Zone:** (GMT+05:30) India Standard Time (Asia/Kolkata)
 - **Currency Locale:** Hindi (India) - INR

The screenshot shows the 'Company Information' setup page in Salesforce. The main content area is titled 'Organization Detail' and contains fields for Organization Name (EduLink- Education Platform), Primary Contact (OrgFarm EPIC), Division (Jabalpur 482001 Madhya Pradesh India), and Fiscal Year Starts In (January). It also includes sections for Activate Multiple Currencies, Enable Data Translation, Newsletter, Admin Newsletter, Hide Notices About System Maintenance, Hide Notices About System Downtime, Locale Formats (ICU), and various system metrics like Default Time Zone, Used Data Space, and API Requests. A sidebar on the left lists categories like Business Hours, Calendar Settings, Company Information (which is selected), Data Protection and Privacy, Fiscal Year, Holidays, Language Settings, and My Domain. A message at the bottom left says 'Didn't find what you're looking for? Try using Global Search.'

Business Hours & Holidays

To properly manage student support timelines and automated processes, the organization's operational schedule has been defined. This configuration is key for calculating case aging and ensuring service level agreements (SLAs) are enforced correctly.

- **Path:** Setup → Business Hours and Setup → Holidays
- **Purpose:** To establish the official working schedule for the institution's support teams, which directly impacts case escalation rules, entitlements, and other time-dependent automations.

Configuration Details:

1. Business Hours:

- **Name:** EduLink Support Hours
- **Time Zone:** (GMT+05:30) India Standard Time (Asia/Kolkata)
- **Working Schedule:** Monday to Friday, from **9:00 AM to 6:00 PM**. This has been set as the default for the organization.

2. Holidays: Key academic and regional holidays have been configured to pause SLA calculations. The list includes **Diwali**, **Eid ul-Fitr**, **Independence Day**, **New Year's Day**, and the **End of Summer Break**.

Q company

- Company Settings
 - Business Hours**
 - Calendar Settings
 - Public Calendars and Resources
 - Company Information
 - Data Protection and Privacy
 - Fiscal Year
 - Holidays
 - Language Settings
 - My Domain

Didn't find what you're looking for?
Try using Global Search.

The screenshot shows the 'Business Hours' setup page. At the top, there's a search bar with 'company' typed in. Below it, a sidebar lists various settings like Company Information, Data Protection, and Fiscal Year. The main content area is titled 'Organization Business Hours'. It says, '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.' A note below states, 'If you enter blank business hours for a day, that means your organization does not operate on that day.' There's a 'Holidays [5+]' link. The 'Business Hours Detail' table shows the following data:

Business Hours Name	EduLink Support Hours	Time Zone
Business Hours	Sunday: No Hours 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: No Hours	(GMT+05:30) India Standard Time (Asia/Kolkata)
Default Business Hours	<input checked="" type="checkbox"/>	
Active	<input checked="" type="checkbox"/>	
Created By	Sanya Agrawal 9/20/2025, 5:45 AM	
Last Modified By	Sanya Agrawal 9/20/2025, 5:45 AM	

At the bottom right, there's a link to 'Activate Windows' and 'Go to Settings to activate Wi-Fi'.

The screenshot shows the 'Business Hours' setup page. It displays a single row of business hours: Friday: 9:00 AM to 6:00 PM, Saturday: No Hours. Below this, there's an 'Active' checkbox followed by a checked box. The 'Created By' field shows 'Sanya Agrawal 9/20/2025, 5:45 AM' and the 'Last Modified By' field shows 'Sanya Agrawal 9/20/2025, 5:45 AM'. An 'Edit' button is present.

Below this, there's a 'Holidays' section with an 'Add/Remove' button. It lists several holidays with their descriptions and dates:

Holiday Name	Description	Date and Time
Diwali	Festival of Lights - Office Closed	10/10/2025 All Day
Eid ul-Fitr	End of Ramadan - Office Closed	3/31/2026 All Day
Independence Day	Independence Day - National Holiday - Office Closed	8/15/2026 All Day
New Year's Day	New Year's Day - Office Closed	1/1/2026 All Day
Summer Break End	End of Summer Break - Office Closed	6/1/2026 All Day

At the bottom right, there's a link to 'Activate Windows'.

Fiscal Year Settings

The fiscal year is defined to structure reporting and dashboards around the academic year.

- Path:** Setup → Company Information → Fiscal Year
- Purpose:** Aligns financial and performance reporting with the calendar year.
- Configuration Details:**
- Type:** Standard Fiscal Year.
- Start Month:** January.

User Setup & Licenses (Profiles, Roles, Permission Sets)

To model the access hierarchy for the institution's various stakeholders, a comprehensive structure of users, profiles, and roles was established. Sample users were created and assigned the appropriate configurations to simulate a real-world operational environment.

- **Path:** Setup → Users → Users
- **Purpose:** To create individual user records and assign them the correct profile for baseline permissions and a role for data visibility within the hierarchy.

Sample Users Configured-

Full Name	Role	Profile	Purpose
Admin EduLink	(not set)	Force.com - Free User	A dedicated user for administrative or integration tasks.
Abhishek Bajaj	Admissions Manager	EduLink Admissions Staff	Represents a manager within the admissions department.
Dr. Anjali Mehta	Course Instructor s	Standard Platform User	Represents an academic staff member responsible for courses.

Rahul Kumar	Admissions Specialist	EduLink Admissions Staff	Represents a frontline staff member handling student applications.
--------------------	------------------------------	---------------------------------	--

The screenshot shows the Salesforce Setup - Users page. At the top, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'. Below this is a table with columns: Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists the following users:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Agrawal, Sanya	san	sanya.agrawal.csbs22893@agentforce.com	CEO	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Bajaj, Abhishek	abaja	abhishek.bajaj@edulink-demo.com.orgfarm	Admissions Manager	<input checked="" type="checkbox"/>	EduLink Admissions Staff
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00dgl000007wnrbusa_to7ownnqr3l@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	EduLink Admin	aedul	admin@edulink-demo.com.orgfarm		<input checked="" type="checkbox"/>	Force.com - Free User
<input type="checkbox"/> Edit	EPIC_OrgFarm	OEPIC	epic.6b65e7115edb@orgfarm.salesforce.com	CEO	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Kumar, Rahul	rkuma	rahul.kumar@edulink-demo.com.orgfarm	Admissions Specialist	<input checked="" type="checkbox"/>	EduLink Admissions Staff
<input type="checkbox"/> Edit	Mehta, Dr. Anjali	meht	anjali.mehta@edulink-demo.com.orgfarm	Course Instructors	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	User_Integration	integ	integration@00dgl000007wnrbusa.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00dgl000007wnrbusa.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

At the bottom of the page, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'. A note says 'Go to Settings to activate Windows.'

Profiles

Custom profiles were cloned from standard profiles to provide baseline permissions tailored to each user group.

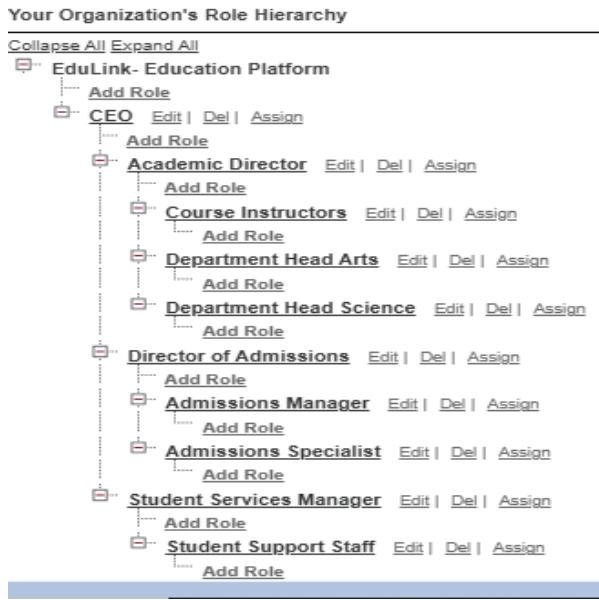
Configured Profiles-

- **System Administrator**
 - **Permissions:** Full access to all system settings and data (Modify All Data).
 - **Assigned Users:** Sanya Agrawal, OrgFarm EPIC.
- **EduLink Admissions Staff**
 - **Permissions:** Full access to manage student applications (Leads) and profiles (Contacts, Accounts). Ability to create and run reports.
 - **Assigned Users:** Abhishek Bajaj, Rahul Kumar.
- **EduLink Course Instructor**
 - **Permissions:** Read-only access to enrolled students and course information. Can read/write student progress records.
 - **Assigned User:** Dr. Anjali Mehta.

Role Hierarchy

A role hierarchy was defined to control data visibility and create accurate reporting roll-ups that mirror the institution's organizational structure. This ensures that users have access to the data they need while maintaining confidentiality.

- **Path:** Setup → Users → Roles
- **Purpose:** The hierarchy determines the data access model. Users in any given role can view, edit, and report on all data owned by or shared with users in roles below them in the hierarchy.
- **Configured Role Hierarchy:**



Permission Sets

Permission sets were created to grant additional, specific permissions to users without changing their base profile.

- **Advanced Reporting PS:** Grants permissions to create, edit, and export reports and dashboards. Assigned to manager and director-level users.
- **Student Data Management PS:** Grants enhanced access to student Contact records and read access to related Enrollment and Progress records. Assigned to Student Services staff.
- **Course Administration PS:** Grants permissions to create and edit Course records. Assigned to Academic staff like Department Heads.

OWD & Sharing Rules

Organization-Wide Defaults (OWDs) and Sharing Rules were configured to establish the baseline data security and define exceptions for collaboration.

- **Path:** Setup → Sharing Settings

- **OWD Strategy:** A private model was adopted for sensitive student data.
 - **Contact (Student):** Private
 - **Opportunity:** Private
 - **Course (Custom Object):** Public Read Only
 - **Enrollment (Custom Object):** Controlled by Parent (due to Master-Detail relationship)
 - **Progress (Custom Object):** Private
- **Sharing Rules Strategy:**
 - **Admissions Team Access:** An owner-based rule shares all Contact records owned by users in the admissions hierarchy with other users in the same hierarchy with Read/Write access.
 - **Department Course Access:** A criteria-based rule shares Course records where Department equals "Science" with the Department Head - Science role. A similar rule was created for the "Arts" department.

Login Access Policies

Security policies were configured to protect the organization from unauthorized access and to align with standard IT security practices.

- **Password Policies:** (Path: Setup → Password Policies)
 - Passwords expire in **90 days**.
 - Minimum length set to **8 characters**.
 - Complexity set to require **alpha and numeric characters**.
- **Login IP Ranges:** (Path: Setup → Network Access)
 - Trusted IP ranges were configured for office and remote work environments to bypass login verification for known locations.
- **Session Settings:** (Path: Setup → Session Settings)
 - Session timeout set to **2 hours** of inactivity.
 - Sessions are locked to the IP address from which they originated to enhance security.

The screenshot shows the 'Password Policies' section under 'SETUP'. It includes fields for password expiration (90 days), history (3 passwords remembered), minimum length (8 characters, requiring alpha-numeric), complexity (cannot contain the password), invalid attempts (10), lockout period (15 minutes), and self-reset options.

The screenshot shows the 'Session Settings' section under 'SETUP'. It includes a 'Session Timeout' section with a dropdown for timeout value (2 hours) and checkboxes for 'Disable session timeout warning popup' (unchecked) and 'Force logout on session timeout' (checked). Below is a 'Session Settings' section with several checkboxes: 'Lock sessions to the IP address from which they originated' (unchecked), 'Lock sessions to the domain in which they were first used' (checked), 'Terminate all of a user's sessions when an admin resets that user's password' (unchecked), 'Force relogin after Login-As-User' (checked), 'Require HttpOnly attribute' (unchecked), 'Use POST requests for cross-domain sessions' (unchecked), 'Enforce login IP ranges on every request' (unchecked), and 'When embedding a Lightning application in a third-party site, use a session token instead of a session cookie' (unchecked).

The screenshot shows the 'Trusted IP Range Edit' section under 'Network Access'. It allows specifying a range of IP addresses (Start IP Address: 5.161.223.26, End IP Address: 5.161.223.26) and includes a 'Description' field (Home Office). Buttons for 'Save' and 'Cancel' are at the bottom.

Development Environment & Tooling

A structured development lifecycle was established for the EduLink project using a standard set of modern tools.

- **Primary Org:** A Salesforce Developer Edition was set up to serve as the project's source of truth for all metadata.
- **Version Control:** A GitHub repository is used to store and manage all source code and metadata components, enabling team collaboration and change tracking.
- **IDE:** The chosen Integrated Development Environment is Visual Studio Code, equipped with the official Salesforce Extension Pack for efficient development.

Environment Management & Sandbox Strategy

A multi-layered sandbox strategy was defined to ensure smooth and reliable release cycles from development to production.

- **Developer Sandboxes:** These are used by individuals for daily development tasks, including building new features and addressing bug fixes.
- **Partial Copy Sandbox:** This environment is designated for User Acceptance Testing (UAT), providing a realistic testing ground with a sample of production data.
- **Full Sandbox:** Used for final-stage activities like performance testing and end-user training, this environment is a complete replica of the production org.

Deployment Methodology

The project follows a defined strategy for migrating changes between Salesforce environments.

- **Primary Deployment Tool:** The Salesforce Command Line Interface (SFDX) is the primary method for deploying metadata, allowing for automated and scriptable releases.
- **Secondary Deployment Tool:** For smaller, more straightforward deployments, Salesforce Change Sets are available as a simpler alternative