

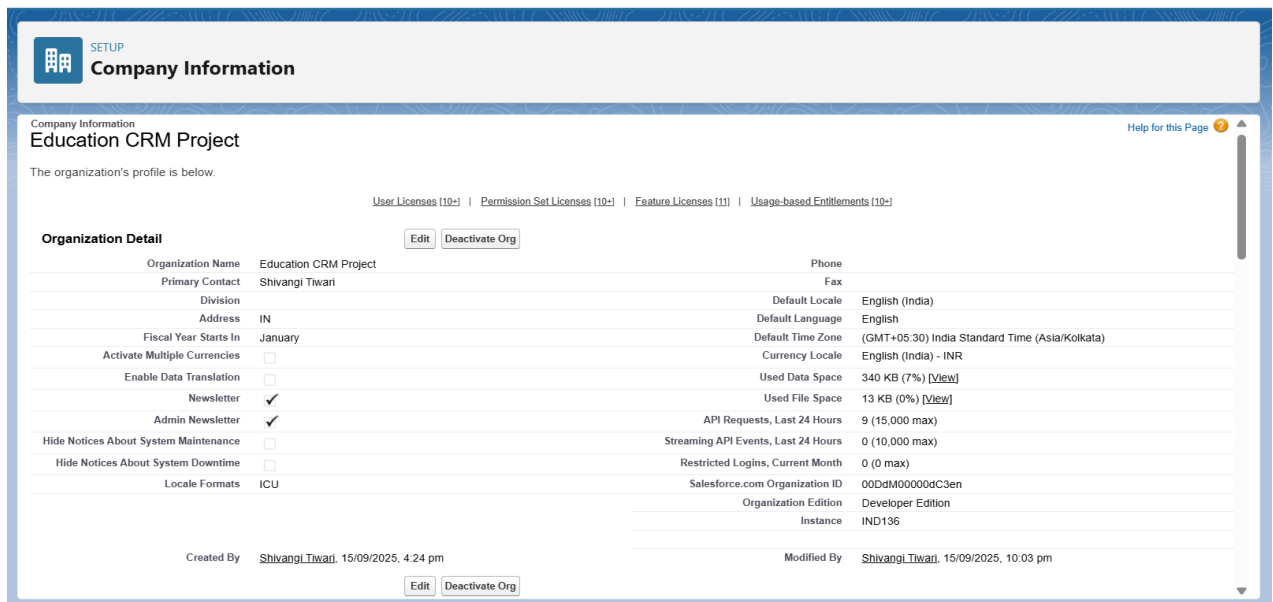
PHASE 2 - Org Setup & Configuration

1. Salesforce Editions

- Selected **Developer Edition Org** (free) to build the Education CRM.

2. Company Profile Setup

- Org Name** → Education CRM Project.
- Time Zone** → Asia/Kolkata (IST).
- Locale** → English (India).
- Currency** → INR.



SETUP Company Information

Company Information
Education CRM Project

The organization's profile is below.

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

Organization Detail [Edit](#) [Deactivate Org](#)

Organization Name	Education CRM Project	Phone	
Primary Contact	Shivangi Tiwari	Fax	
Division		Default Locale	English (India)
Address	IN	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	340 KB (7%) View
Newsletter	<input checked="" type="checkbox"/>	Used File Space	13 KB (0%) View
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	9 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00DdM00000dc3en
		Organization Edition	Developer Edition
		Instance	IND136

Created By [Shivangi Tiwari](#) 15/09/2025, 4:24 pm

[Edit](#) [Deactivate Org](#)

Modified By [Shivangi Tiwari](#) 15/09/2025, 10:03 pm

3. Business Hours & Holidays

- Defined **working hours** → Mon–Fri, 9:00 AM – 6:00 PM.
- Added **Holidays** like Independence Day, Diwali, etc.
- Ensures support and academic activities follow institutional timings.

SETUP

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.

Holidays [2]

Business Hours Detail

Edit

Business Hours Name	Education CRM Support Hours	Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Business Hours	<div> <div>Sunday</div> <div>No Hours</div> </div> <div> <div>Monday</div> <div>9:00 am to 6:00 pm</div> </div> <div> <div>Tuesday</div> <div>9:00 am to 6:00 pm</div> </div> <div> <div>Wednesday</div> <div>9:00 am to 6:00 pm</div> </div> <div> <div>Thursday</div> <div>9:00 am to 6:00 pm</div> </div> <div> <div>Friday</div> <div>9:00 am to 6:00 pm</div> </div> <div> <div>Saturday</div> <div>No Hours</div> </div>	Default Business Hours	<input type="checkbox"/>
Active	<input checked="" type="checkbox"/>	Created By	Shivangli Tiwari 15/09/2025, 10:08 pm
		Last Modified By	Shivangli Tiwari 15/09/2025, 10:08 pm

Edit

Holidays

Add/Remove

Holiday Name	Description	Date and Time
Dussehra		20/10/2025 All Day
Independence Day		15/08/2026 All Day
Republic Day		26/01/2026 All Day

4. Fiscal Year Settings

- Setup → Quick Find: **Fiscal Year** → choose **Standard Fiscal Year (Apr–Mar)** → Save.

SETUP

Fiscal Year

Setup

Organization Fiscal Year Edit: Education CRM Project

To specify the fiscal year type for your organization, choose one of the options below.

Standard Fiscal Year

Custom Fiscal Year

Fiscal Year Information

Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example, if your fiscal year starts in April 2025 and ends in March 2026, your Fiscal Year setting can be either 2025 or 2026.

Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing this change.

Change Fiscal Year Period

Save

Cancel

Name	Education CRM Project
Fiscal Year Start Month	April
Fiscal Year is Based On	<div>The ending month</div> <div>The starting month</div>

Save

Cancel

5. User Setup & Licenses

- Created users with appropriate roles:

- **Dean User** → Full access (System Admin).
 - **Counselor User** → Manages student guidance.
 - **Faculty User** → Handles courses & performance.
- Assigned **Salesforce licenses** to each.

SETUP Users

All Users [Help for this Page](#)

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** | [Edit](#) | [Create New View](#)

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

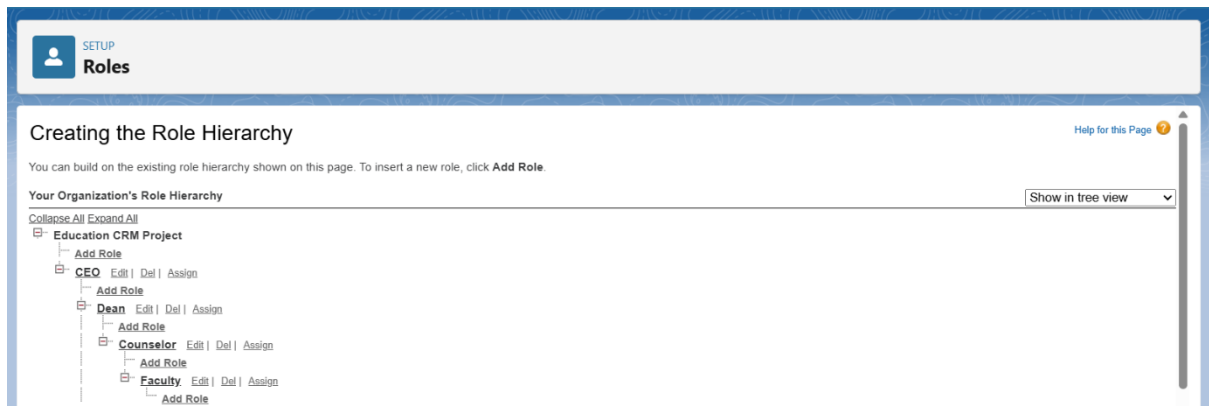
Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chattv.00ddm00000dc3enuac.ttoft9esone5@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	Counselor User	coun	counselor@educationcrm.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	Dean User	dean	dean@educationcrm.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	Faculty User	facu	faculty@educationcrm.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	Tiwari Shivangi	STiwa	shivangi.tiwari.cs22183@agentforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User Integration	integ	integration@00ddm00000dc3enuac.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00ddm00000dc3enuac.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

5. Role Hierarchy

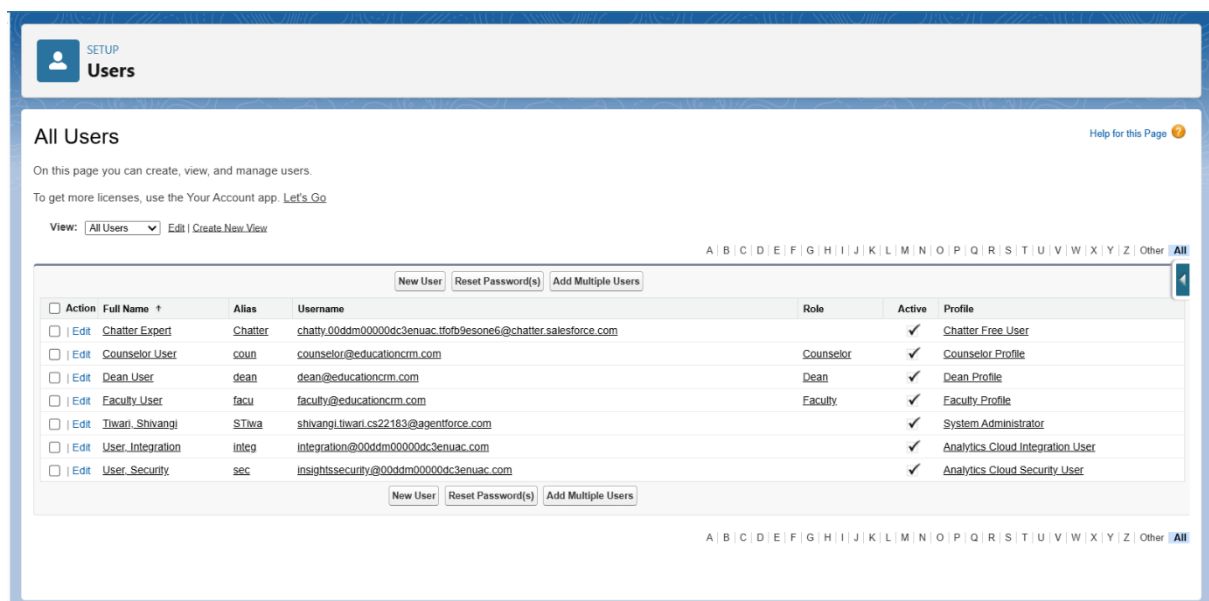
Ensures data visibility based on position in the institute:

- Dean has top-level visibility.
- Counselor manage students.
- Faculty handle courses and performance.
- Dean → Counselor → Faculty



6. Profiles

- **Dean** → Dean profile (custom)
- **Counselor** → Counselor Profile (custom).
- **Faculty** → Faculty Profile (custom).
- Profiles ensure correct permissions and object access.



7. Permission Sets

- Created for extra access without modifying profiles:
 - Report_Builder_Access.
 - Data_Import_Access.

- Assigned to relevant users as required.

The screenshot shows the Salesforce Setup interface for a Permission Set named 'Report_Builder_Access'. The page includes a search bar, navigation tabs (Clone, Edit Properties, Manage Assignments, View Summary), and a 'Permission Set Overview' section. The overview table lists details such as API Name, Namespace Prefix, License, Session Activation Required, and Permission Set Groups Added To. Below the overview, the 'Apps' section lists various permission categories like Assigned Apps, Assigned Connected Apps, Object Settings, App Permissions, Apex Class Access, and Visualforce Page Access.

Permission Set Overview	
Description	API Name: Report_Builder_Access
License	Namespace Prefix
Session Activation Required <input type="checkbox"/>	Created By: Shivangi Tiwari, 15/09/2025, 10:43 pm
Permission Set Groups Added To: 0	Last Modified By: Shivangi Tiwari, 15/09/2025, 10:45 pm

Apps

- Assigned Apps**
Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**
Settings that specify which connected apps are visible in the app menu
- Object Settings**
Permissions to access objects and fields, and settings such as tab availability
- App Permissions**
Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**
Permissions to execute Apex classes
- Visualforce Page Access**
Permissions to execute Visualforce pages

The screenshot shows the Salesforce Setup interface for a Permission Set named 'Data_Import_Access'. The page includes a search bar, navigation tabs (Clone, Delete, Edit Properties, Manage Assignments, View Summary), and a 'Permission Set Overview' section. The overview table lists details such as API Name, Namespace Prefix, License, Session Activation Required, and Permission Set Groups Added To. Below the overview, the 'Apps' section lists various permission categories like Assigned Apps, Assigned Connected Apps, Object Settings, App Permissions, Apex Class Access, and Visualforce Page Access.


Permission Set Overview	
Description	API Name: Data_Import_Access
License	Namespace Prefix
Session Activation Required <input type="checkbox"/>	Created By: Shivangi Tiwari, 15/09/2025, 10:46 pm
Permission Set Groups Added To: 0	Last Modified By: Shivangi Tiwari, 15/09/2025, 10:46 pm

Apps

- Assigned Apps**
Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**
Settings that specify which connected apps are visible in the app menu
- Object Settings**
Permissions to access objects and fields, and settings such as tab availability
- App Permissions**
Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**
Permissions to execute Apex classes
- Visualforce Page Access**
Permissions to execute Visualforce pages


8. Login Access & Session Settings

- Setup → Login Access Policies → enable Administrators Can Log in as Any User (for testing).
- Save


SETUP
Login Access Policies

Login Access Policies
[Help for this Page](#)

Control which support organizations your users can grant login access to.


 Changes Saved

Manage Support Options
Save Cancel

Setting	Enabled
Administrators Can Log in as Any User	<input checked="" type="checkbox"/>

Support Organization	Packages	Available to Users	Available to Administrators Only i
Salesforce.com Support		<input checked="" type="radio"/>	<input type="radio"/>

Save Cancel

9. Org-Wide Defaults (OWD) & Sharing Rules

- To be configured in **Phase 3**, once objects (Students, Courses, Counseling Sessions) are created.

10. Dev Org Setup & Deployment Basics

- Connected Salesforce Org with **VS Code** + **SFDX** for development.
- Learned **Deployment Basics** (Change Sets, ANT, SFDX CLI).
- Actual deployments will be implemented in **Phase 8**.