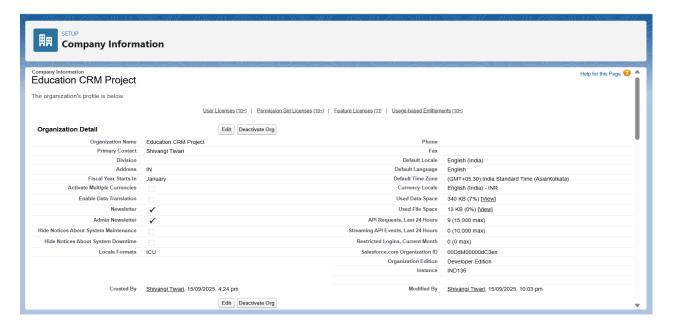
PHASE 2 - Org Setup & Configuration

1. Salesforce Editions

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

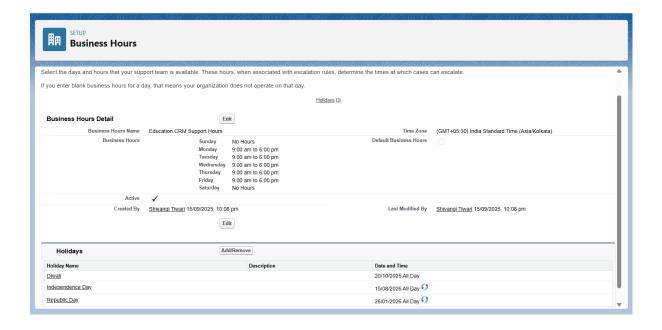
2. Company Profile Setup

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



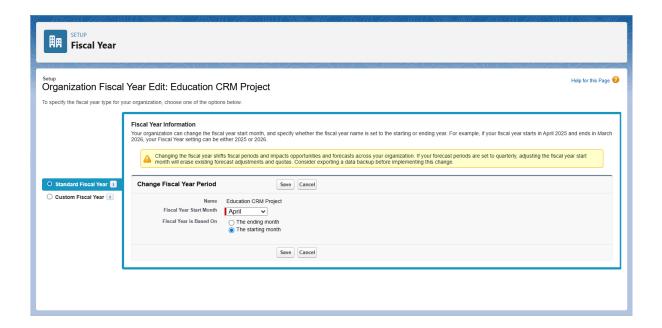
3. Business Hours & Holidays

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



4. Fiscal Year Settings

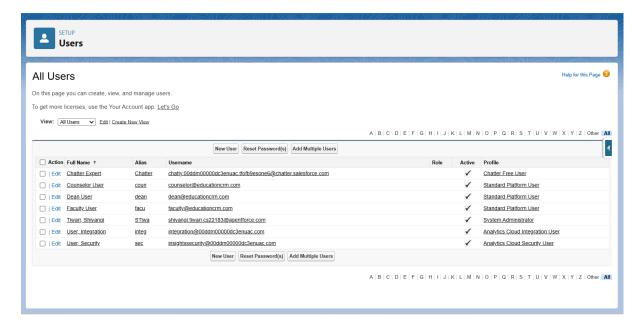
Setup → Quick Find: Fiscal Year → choose Standard Fiscal Year (Apr–Mar) → Save.



5. User Setup & Licenses

o 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.



5. Role Hierarchy

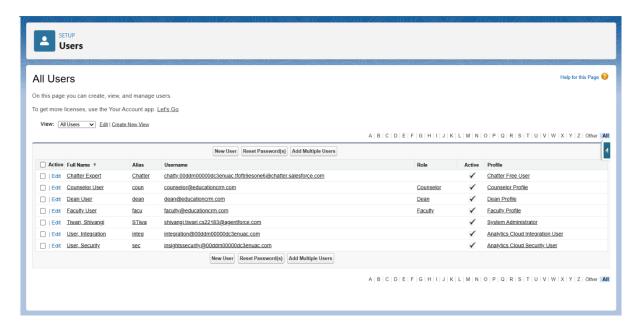
Ensures data visibility based on position in the institute:

- o Dean has top-level visibility.
- Counselor manage students.
- o Faculty handle courses and performance.
- \circ Dean \rightarrow Counselor \rightarrow Faculty



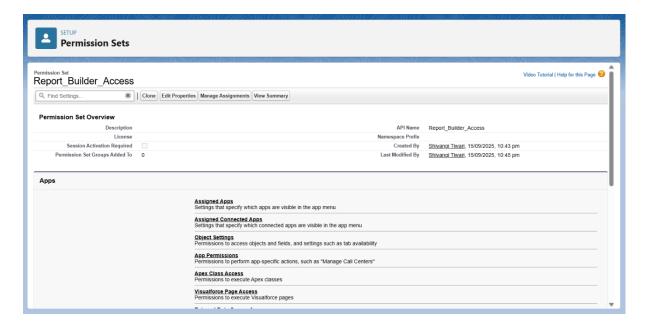
6. Profiles

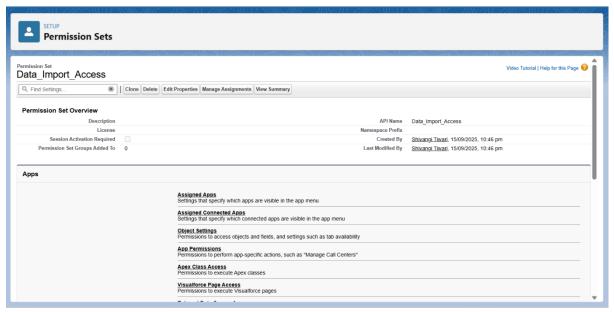
- \circ **Dean** \rightarrow Dean profile (custom)
- o **Counselor** → Counselor Profile (custom).
- \circ Faculty \rightarrow Faculty Profile (custom).
- o Profiles ensure correct permissions and object access.



7. Permission Sets

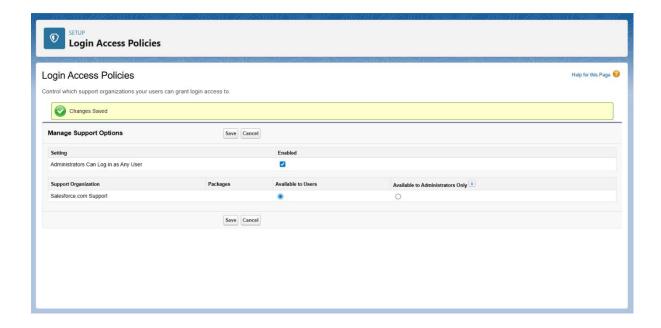
- o Created for extra access without modifying profiles:
 - **Report Builder Access** → Create & Customize Reports/Dashboards
 - Data_Import_Access → Import student/assessment data (API Enabled + object-level create/edit).
- Assigned to relevant users as required.





8. Login Access & Session Settings

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



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**.