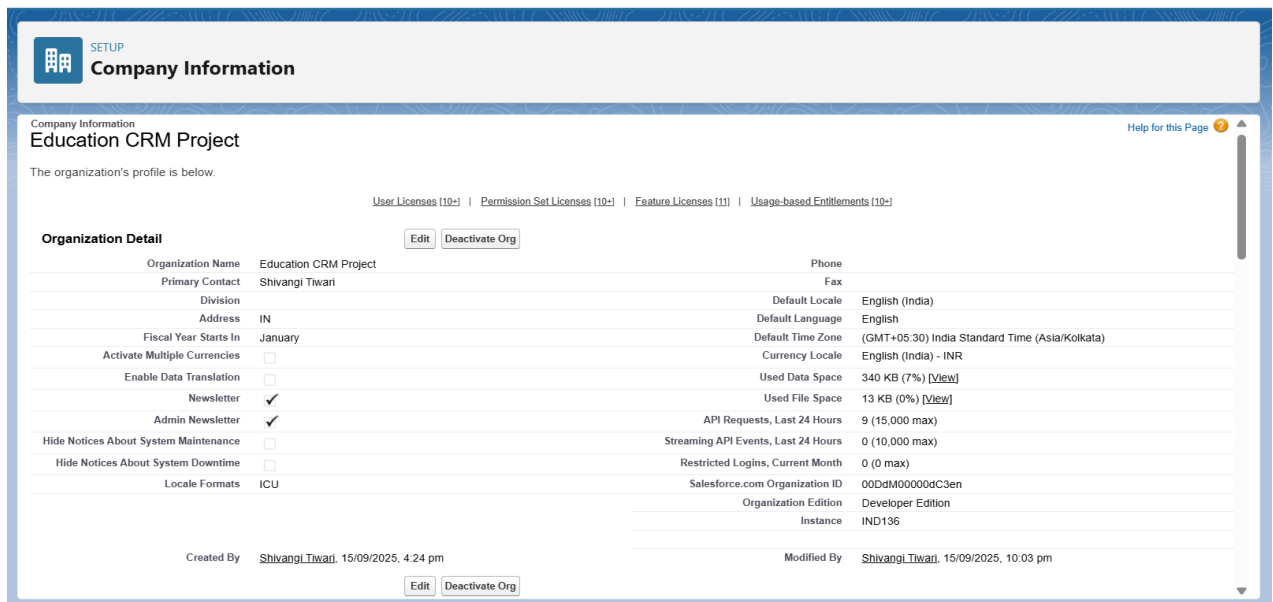# PHASE 2 - Org Setup & Configuration

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** → Asia/Kolkata (IST).

   o **Locale** → English (India).

   o **Currency** → INR.

3. **Business Hours & Holidays**

   o Defined **working hours** → 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

- o 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.

o Assigned **Salesforce licenses** to each.


5. **Role Hierarchy**

Ensures data visibility based on position in the institute:

o Dean has top-level visibility.

o Counselor manage students.

o Faculty handle courses and performance.

o Dean → Counselor → Faculty
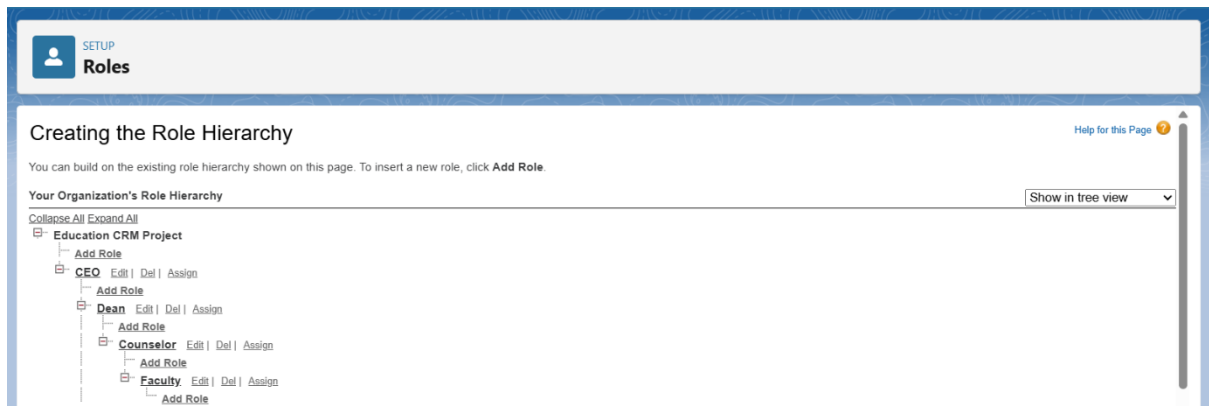
6. Profiles

- o **Dean** → Dean profile (custom)

- o **Counselor** → Counselor Profile (custom).

- o **Faculty** → Faculty Profile (custom).

- o Profiles ensure correct permissions and object access.
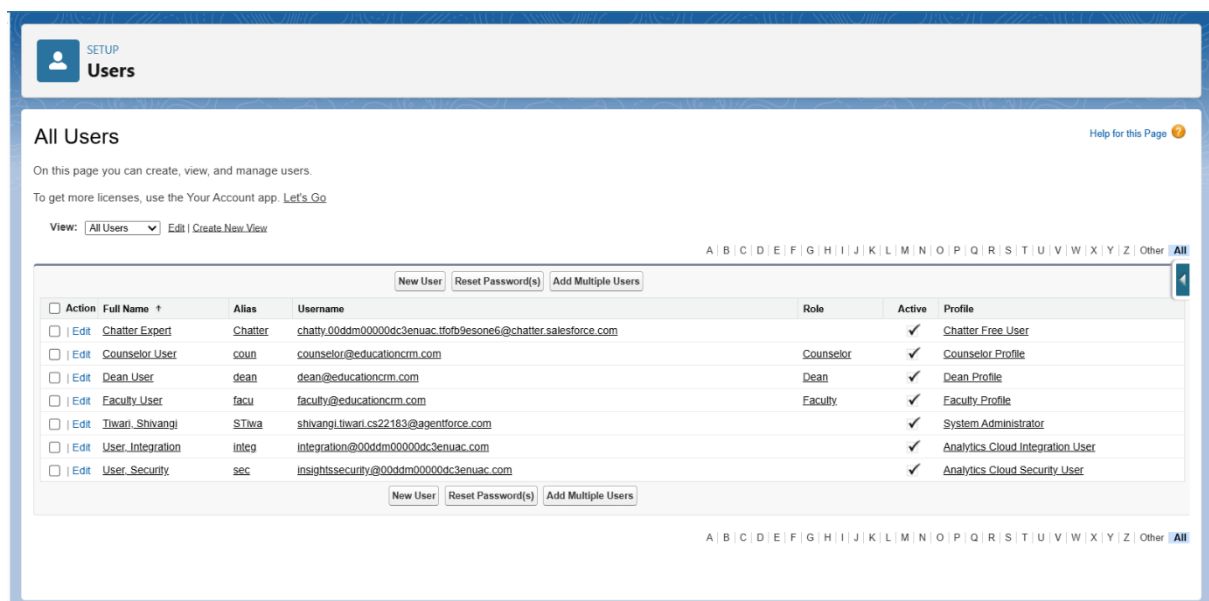
7. Permission Sets

- o Created for extra access without modifying profiles:

  - ▪ Report_Builder_Access.

  - ▪ Data_Import_Access.

o Assigned to relevant users as required.

8. Login Access & Session Settings

o 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**.