

## 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.

The screenshot shows the 'Company Information' setup page in Salesforce. The page title is 'Education CRM Project'. Below the title, it says 'The organization's profile is below.' There are links for 'User Licenses (10)', 'Permission Set Licenses (10)', 'Feature Licenses (11)', and 'Usage-based Entitlements (10)'. The 'Organization Detail' section has 'Edit' and 'Deactivate Org' buttons. The details are organized into two columns. The left column includes fields for Organization Name, Primary Contact, Division, Address, Fiscal Year Starts In, Activate Multiple Currencies, Enable Data Translation, Newsletter, Admin Newsletter, Hide Notices About System Maintenance, Hide Notices About System Downtime, and Locale Formats. The right column includes fields for Phone, Fax, Default Locale, Default Language, Default Time Zone, Currency Locale, Used Data Space, Used File Space, API Requests, Last 24 Hours, Streaming API Events, Last 24 Hours, Restricted Logins, Current Month, Salesforce.com Organization ID, Organization Edition, and Instance. At the bottom, it shows 'Created By' and 'Modified By' information.

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%) <a href="#">View</a>		
Newsletter	<input checked="" type="checkbox"/>	Used File Space	13 KB (0%) <a href="#">View</a>		
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	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>

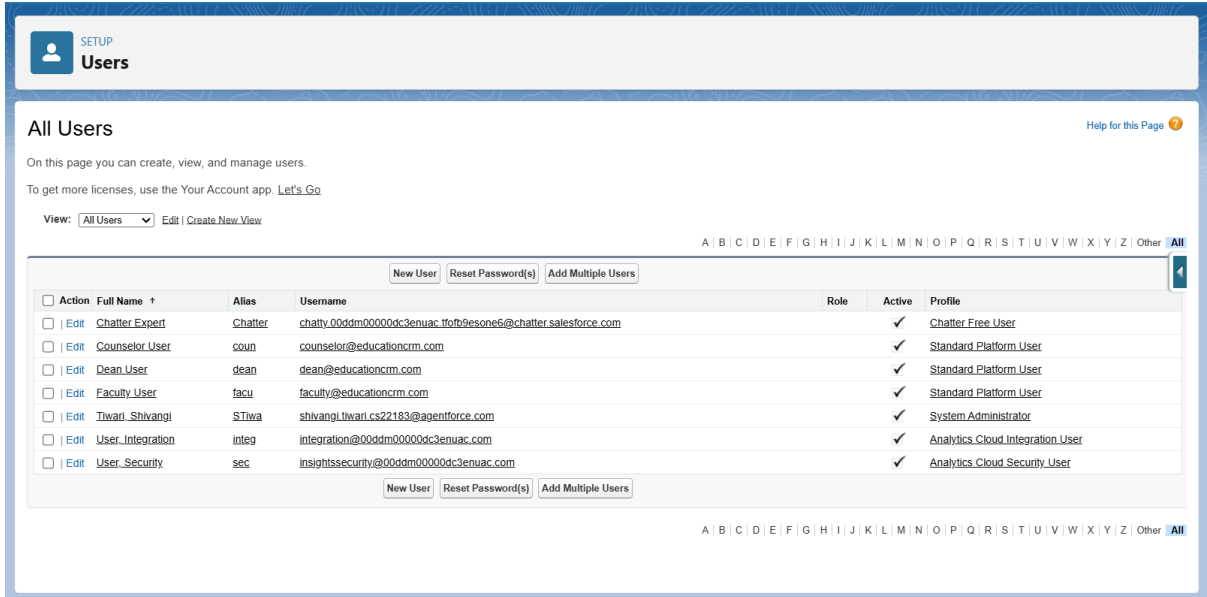
Save

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.



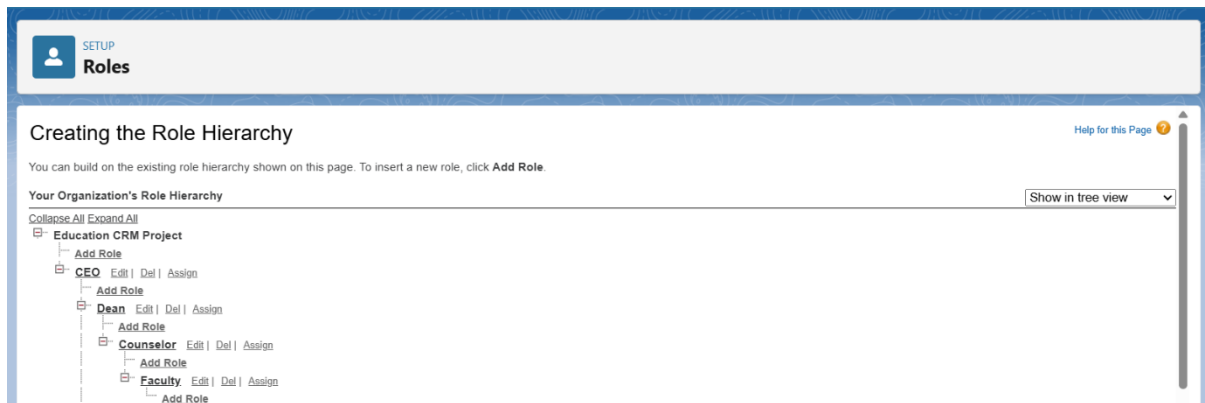
The screenshot shows the 'All Users' page in Salesforce. At the top, there's a 'SETUP Users' header. Below it, a sub-header 'All Users' is followed by a help link. A message states: 'On this page you can create, view, and manage users. To get more licenses, use the Your Account app. Let's Go'. A 'View:' dropdown is set to 'All Users' with links for 'Edit', 'Create New', and 'View'. Below this is a table of users with columns: Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists seven users: Chatter Expert, Counselor User, Dean User, Faculty User, Tiwari Shivangi, User Integration, and User Security. Each user has an 'Edit' link and a checkbox. The 'Active' column shows checkmarks for all users. The 'Profile' column lists the assigned roles: Chatter Free User, Standard Platform User, Standard Platform User, Standard Platform User, System Administrator, Analytics Cloud Integration User, and Analytics Cloud Security User. At the bottom of the table are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'. A navigation bar at the very bottom contains alphabetical links from A to Z and an 'All' link.

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

## 5. Role Hierarchy

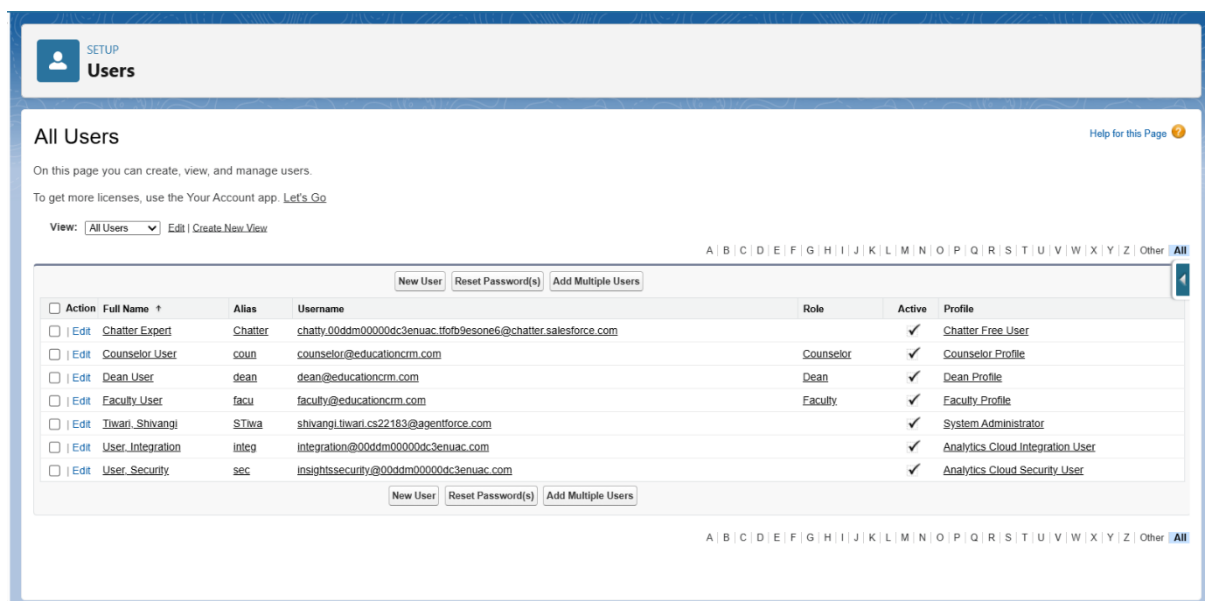
Ensures data visibility based on position in the institute:

- 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** → Create & Customize Reports/Dashboards
  - **Data\_Import\_Access** → Import student/assessment data (API Enabled + object-level create/edit).
- Assigned to relevant users as required.

**Permission Sets**

Permission Set

Report\_Builder\_Access

[Find Settings...](#)
[Clone](#)
[Edit Properties](#)
[Manage Assignments](#)
[View Summary](#)

[Video Tutorial](#) | [Help for this Page](#)

**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

**Permission Sets**

Permission Set

Data\_Import\_Access

[Find Settings...](#)
[Clone](#)
[Delete](#)
[Edit Properties](#)
[Manage Assignments](#)
[View Summary](#)

[Video Tutorial](#) | [Help for this Page](#)

**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 <a href="#">i</a>
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**.