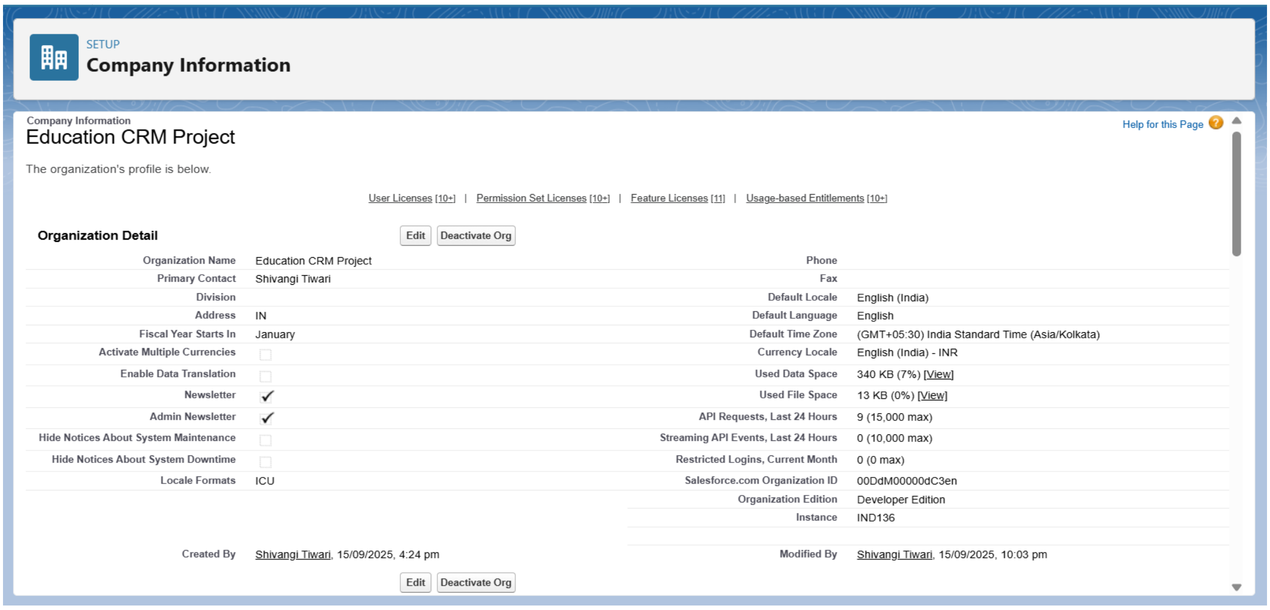
PHASE 2 - Org Setup & Configuration

1. Salesforce Editions

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

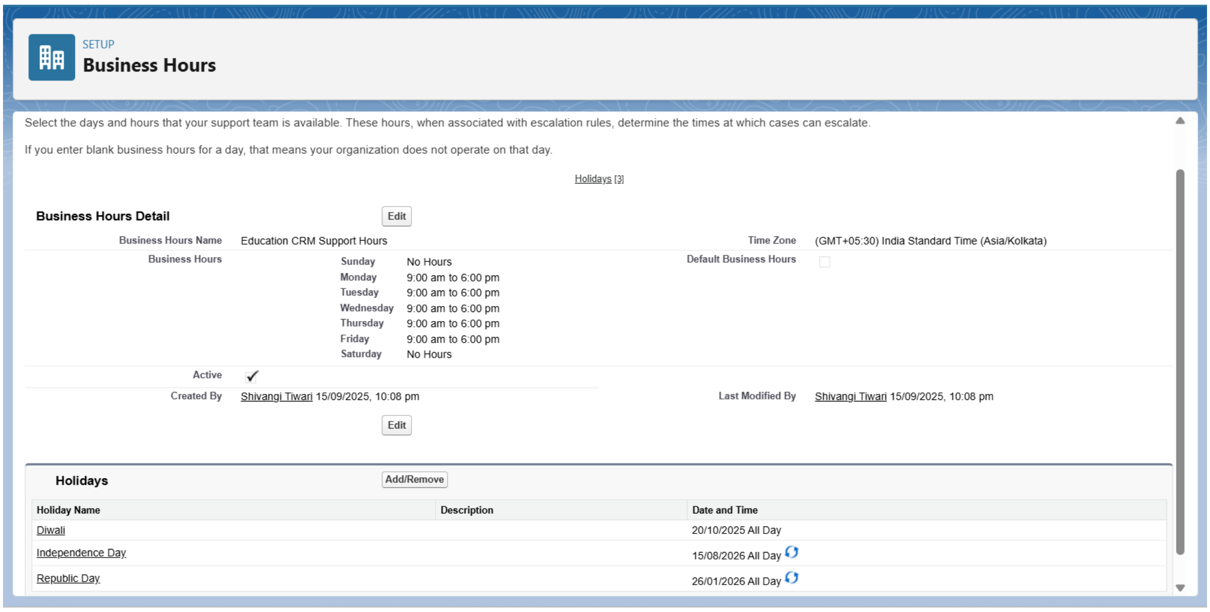
2. Company Profile Setup

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



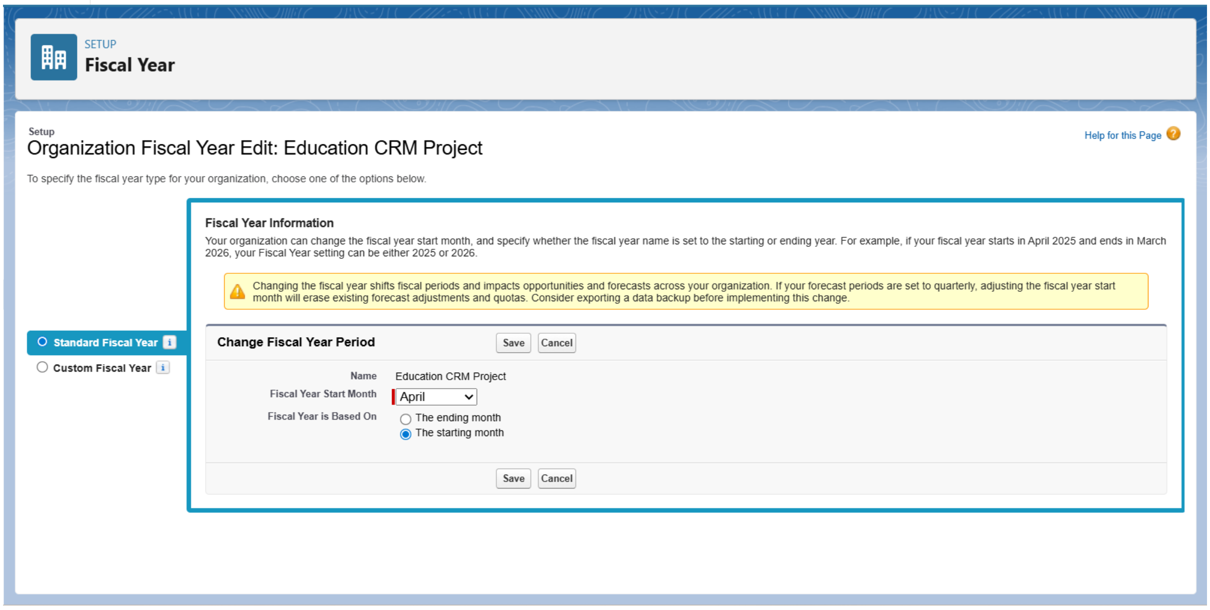
3. Business Hours & Holidays

- 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.



4. Fiscal Year Settings

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

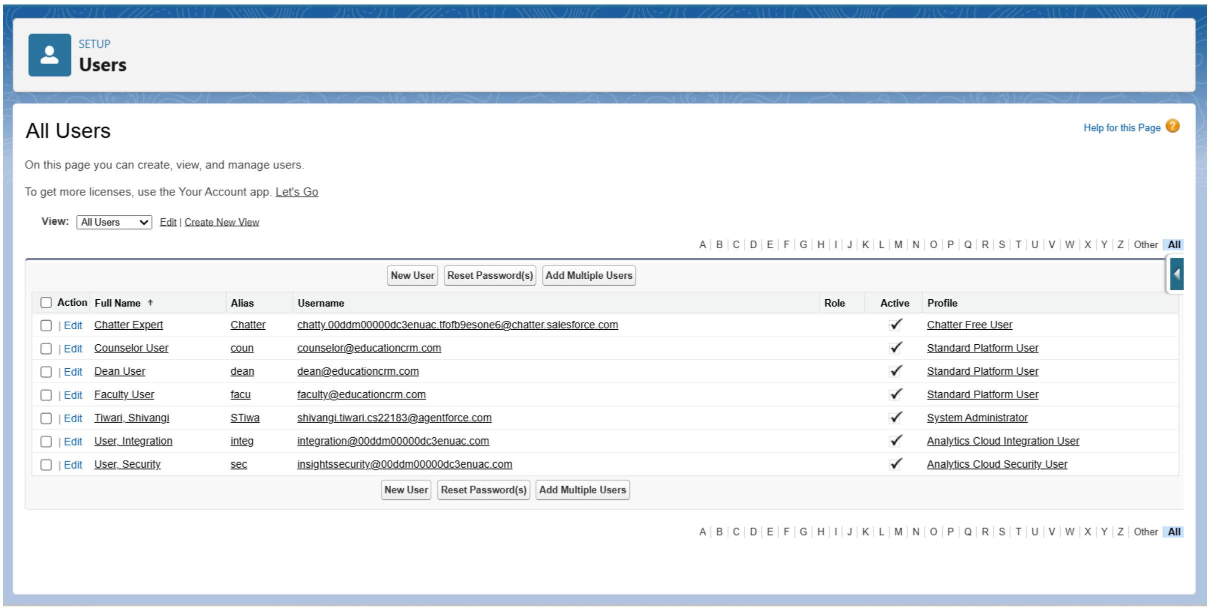


5. User Setup & Licenses

- Created users with appropriate roles:

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

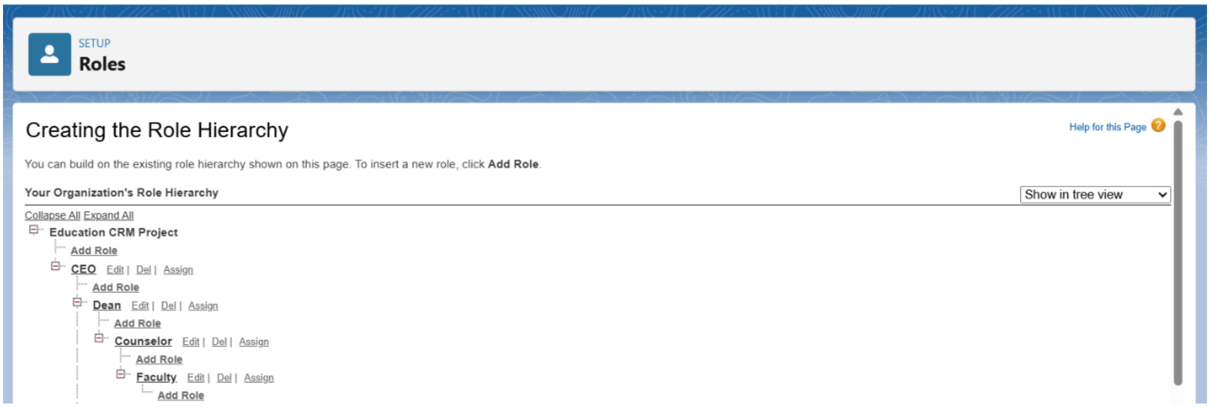
  - Assigned **Salesforce licenses** to each.



5. **Role Hierarchy**

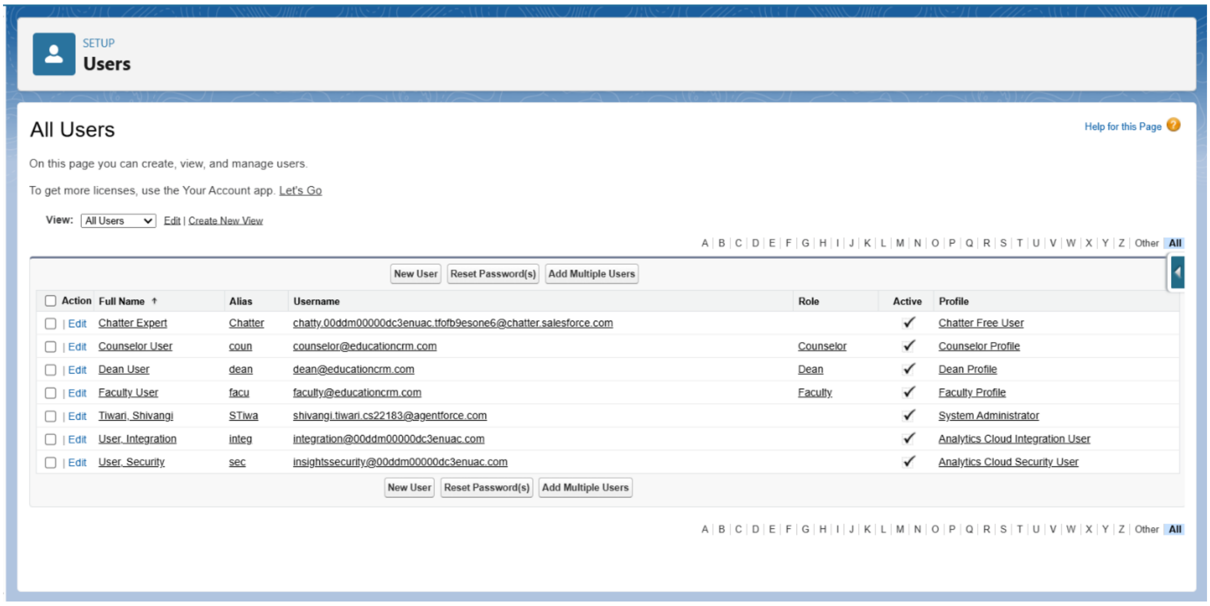
Ensures data visibility based on position in the institute:

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



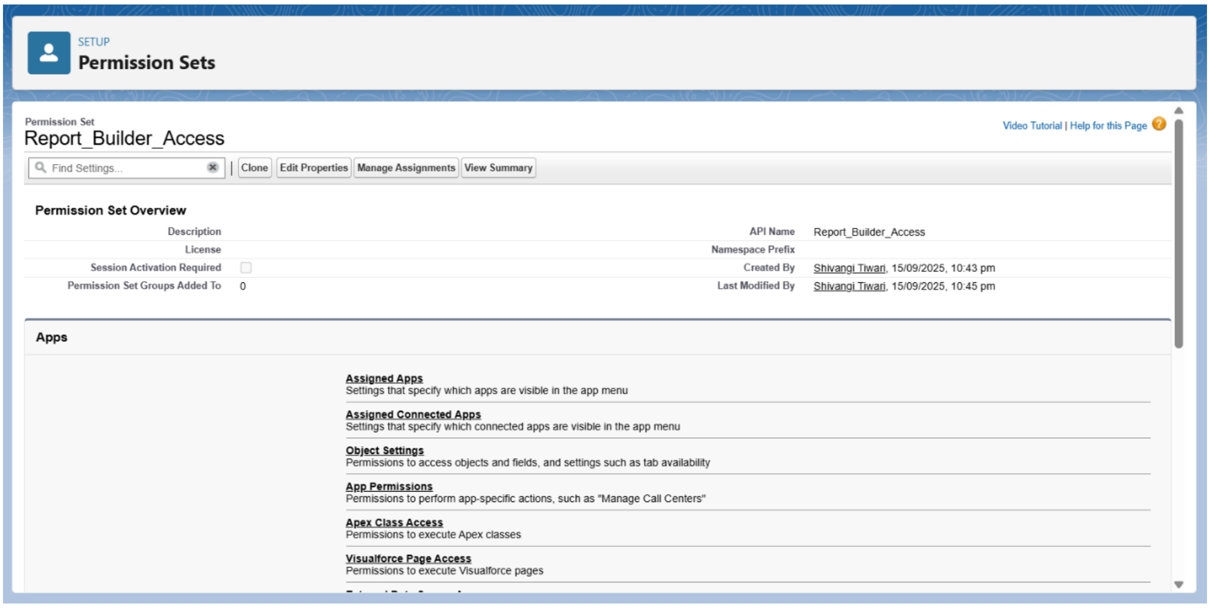
6. Profiles

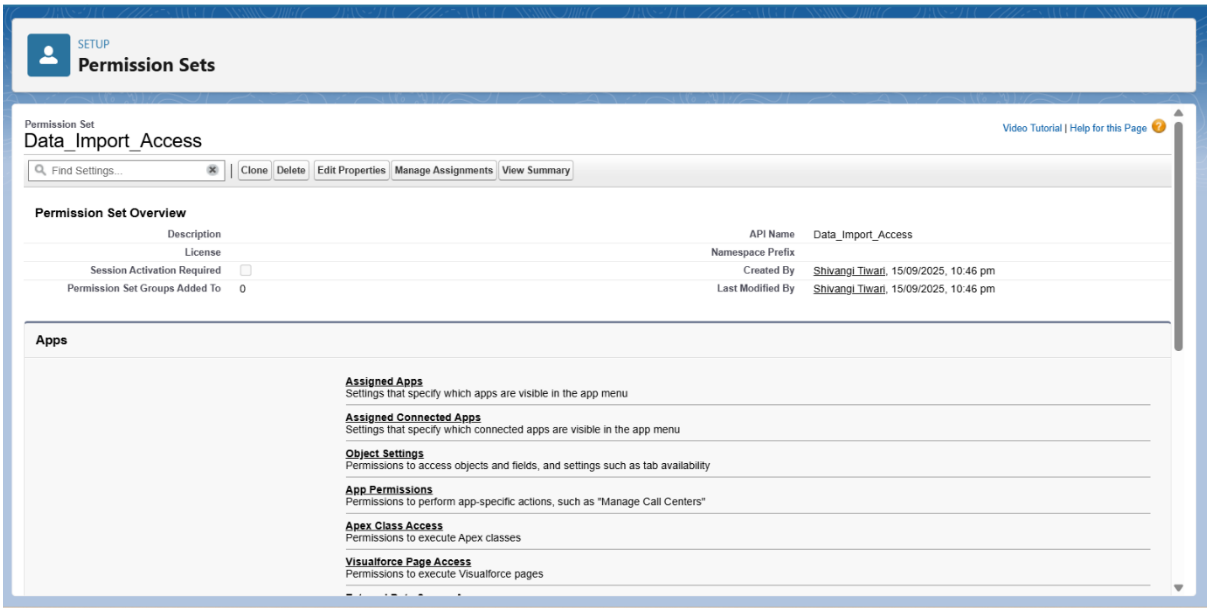
- **Dean** → Dean profile (custom)
- **Counselor** → Counselor Profile (custom).
- **Faculty** → Faculty Profile (custom).
- Profiles ensure correct permissions and object access.



7. Permission Sets

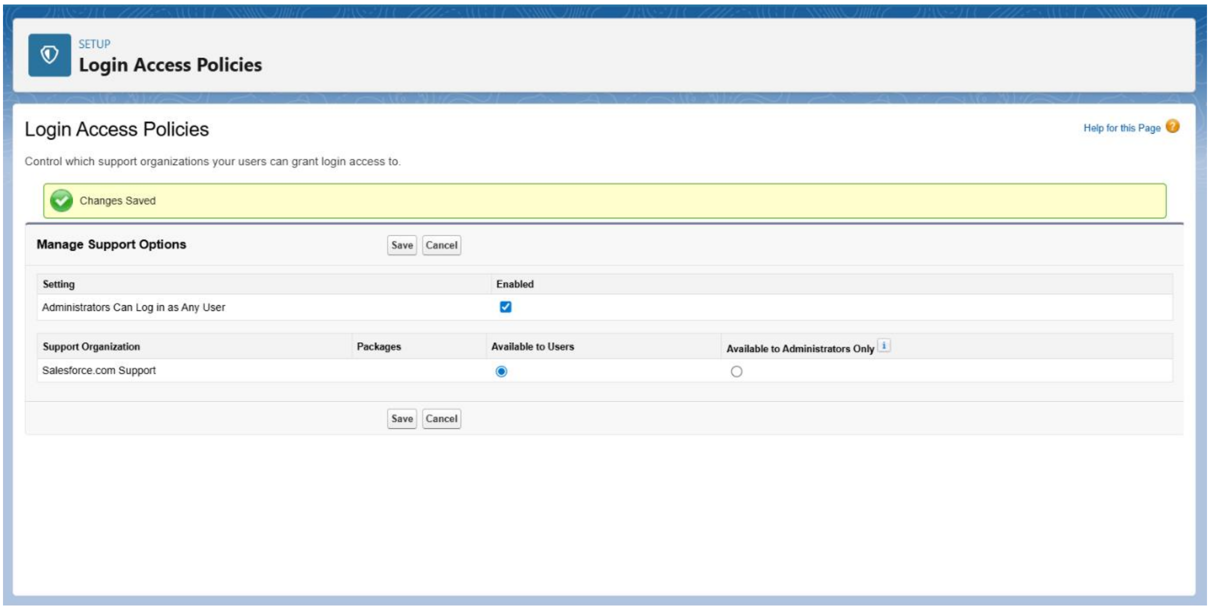
- Created for extra access without modifying profiles:
  - **Report_Builder_Access** → Create & Customize Reports/Dashboards
  - **Data_Import_Access** → Import student/assessment data (API Enabled + object-level create/edit).
- Assigned to relevant users as required.





8. Login Access & Session Settings

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