

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 states 'The organization's profile is below.' and provides links for 'User Licenses (10)', 'Permission Set Licenses (10)', 'Feature Licenses (11)', and 'Usage-based Entitlements (10)'. The 'Organization Detail' section 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 'Phone' section includes fields for Phone, Fax, Default Locale, Default Language, Default Time Zone, Currency Locale, Used Data Space, and Used File Space. The 'API Requests, Last 24 Hours' section includes fields for API Requests, Last 24 Hours, Streaming API Events, Last 24 Hours, Restricted Logins, Current Month, Salesforce.com Organization ID, Organization Edition, and Instance. The 'Created By' field shows 'Shivangi Tiwari' on '15/09/2025, 4:24 pm'. The 'Modified By' field shows 'Shivangi Tiwari' on '15/09/2025, 10:03 pm'. There are 'Edit' and 'Deactivate Org' buttons at the bottom of the page.

| Organization Detail | | Phone | |
|---------------------------------------|-------------------------------------|-------------------------------------|--|
| 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

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

Help for this Page

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

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.tfofb9esone5@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 Shiyangi | STiwa | shiyangi.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 |

[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

SETUP Roles

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy Show in tree view

[Collapse All](#) [Expand All](#)

- Education CRM Project
 - [Add Role](#)
 - CEO [Edit](#) [Del](#) [Assign](#)
 - [Add Role](#)
 - Dean [Edit](#) [Del](#) [Assign](#)
 - [Add Role](#)
 - Counselor [Edit](#) [Del](#) [Assign](#)
 - [Add Role](#)
 - Faculty [Edit](#) [Del](#) [Assign](#)
 - [Add Role](#)

6. Profiles

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

SETUP Users

All Users

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

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

| Action | Full Name | Alias | Username | Role | Active | Profile |
|---|------------------|---------|--|-----------|--------|----------------------------------|
| <input type="checkbox"/> Edit | Chatter Expert | Chatter | chatty.00ddm0000dc3enuac.tfb9esone6@chatter.salesforce.com | | ✓ | Chatter Free User |
| <input type="checkbox"/> Edit | Counselor User | coun | counselor@educationcm.com | Counselor | ✓ | Counselor Profile |
| <input type="checkbox"/> Edit | Dean User | dean | dean@educationcm.com | Dean | ✓ | Dean Profile |
| <input type="checkbox"/> Edit | Faculty User | facu | faculty@educationcm.com | Faculty | ✓ | Faculty Profile |
| <input type="checkbox"/> Edit | Tiwari Shivangi | STiwa | shivangi.tiwari.cs22183@agentforce.com | | ✓ | System Administrator |
| <input type="checkbox"/> Edit | User Integration | integ | integration@00ddm0000dc3enuac.com | | ✓ | Analytics Cloud Integration User |
| <input type="checkbox"/> Edit | User Security | sec | insightssecurity@00ddm0000dc3enuac.com | | ✓ | Analytics Cloud Security User |

New User | Reset Password(s) | Add Multiple Users

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

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.

SETUP

Permission Sets

Permission Set

Report_Builder_Access

Video Tutorial | Help for this Page

Find Settings...

Clone

Edit Properties

Manage Assignments

View Summary

Permission Set Overview

| | | |
|--------------------------------|------------------|--------------------------------------|
| Description | API Name | Report_Builder_Access |
| License | Namespace Prefix | |
| Session Activation Required | Created By | Shivangi Tiwari 15/09/2025, 10:43 pm |
| Permission Set Groups Added To | 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

SETUP

Permission Sets

Permission Set

Data_Import_Access

Video Tutorial | Help for this Page

Find Settings...

Clone

Delete

Edit Properties

Manage Assignments

View Summary

Permission Set Overview

| | | |
|--------------------------------|------------------|--------------------------------------|
| Description | API Name | Data_Import_Access |
| License | Namespace Prefix | |
| Session Activation Required | Created By | Shivangi Tiwari 15/09/2025, 10:46 pm |
| Permission Set Groups Added To | 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**.