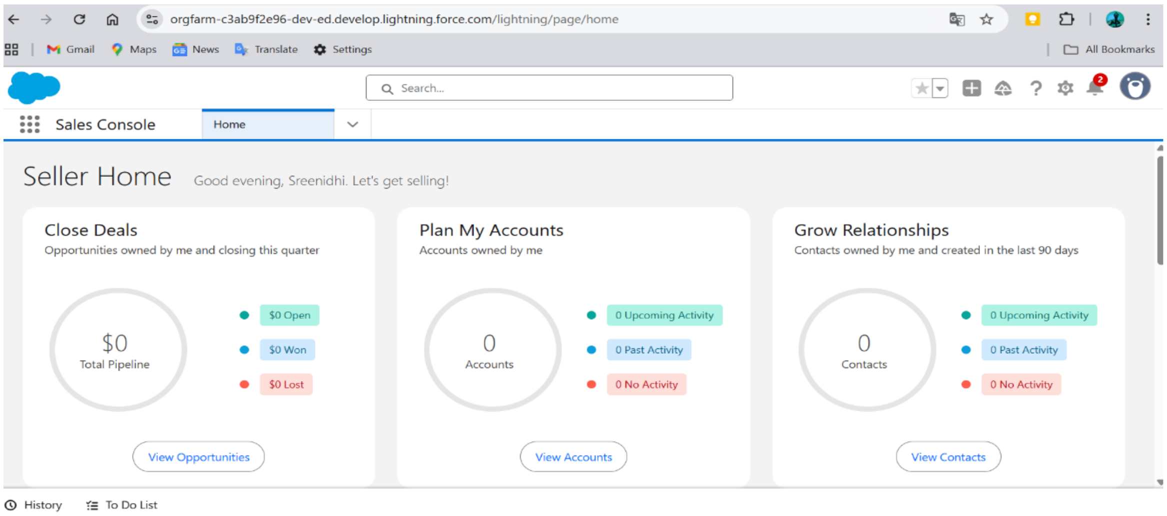
PHASE 2: Org Setup & Configuration

1.SETTING UP A NEW DEVELOPMENT ORG FOR THE PROJECT

i. Go to official Salesforce website and signup for a developer edition org
ii. Fill in the details like name, Organization, role etc(I used the organization name for which I assumed I am building an app for)
iii. After successful login you can see a dashboard like the below:

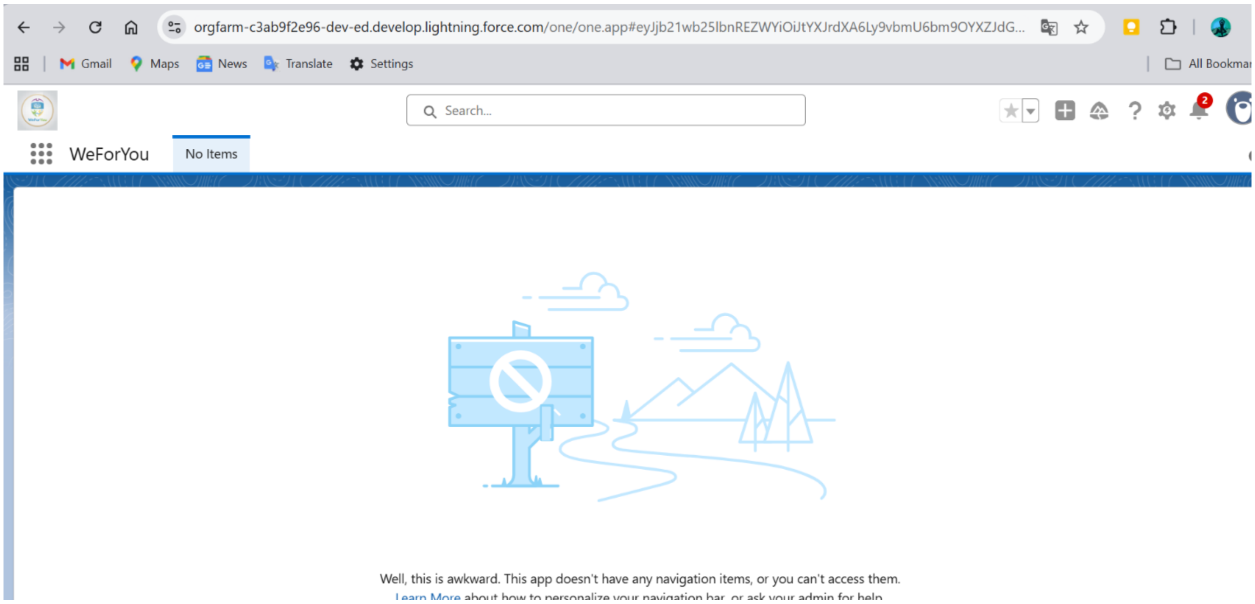


2.COMPANY PROFILE SETUP

i. **Navigate to Setup:** Click the gear icon in the top right and click "Setup."
ii. **Company Information:** In the "Quick Find" box on the left, type Company Information and click on it.
   a. Update the Organization Name
   b. Upload a Company logo (you can find a generic one online).
   c. Set your Default Time Zone, Default Language, and Default Locale.
iii. **Fiscal Year:** Type Fiscal Year in the Quick Find. For a university, the fiscal year is often different from the calendar year (e.g., July 1st to June 30th).
iv. **Business Hours:** Type Business Hours in the Quick Find. Set up the for a university standard operating hours (e.g., Mon-Fri, 9:00 AM to 5:00 PM

3.CREATE A NEW APP:

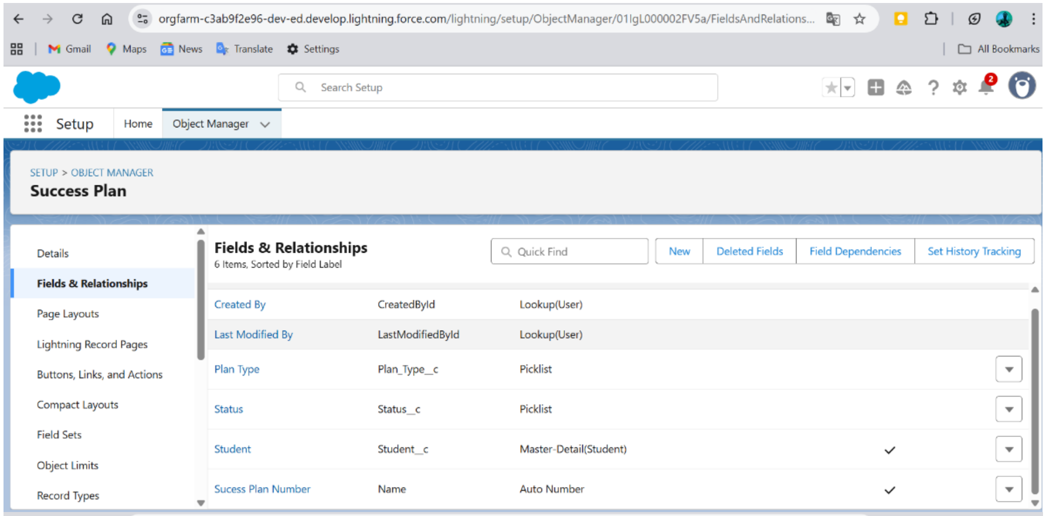
i. Go to **App Manager** → Click **"New Lightning App"**
ii. Name our app (e.g., "WeForYou") and follow the steps to create it.



3.1 Create Custom Object(s):

i. Go to **Object Manager** → Click **"Create"** → **Custom Object**
ii. Define your object name (e.g., "Success Plan")
iii. Here I created 4 custom objects:

- Success Plan
- Success Plan Task
- Support Interaction
- Well Being Check-in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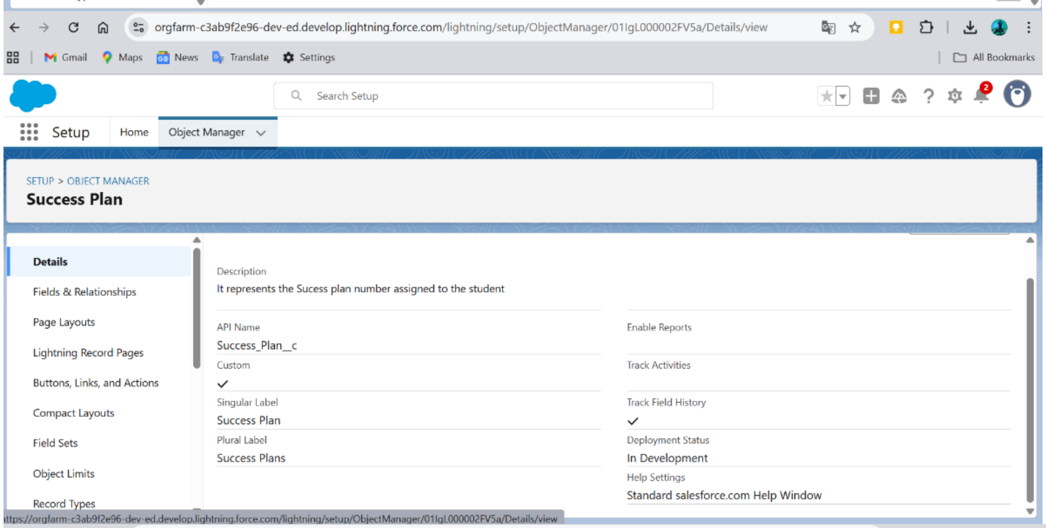
Student Student__c Master-Detail(Student) ✓
Sucess Plan Number Name Auto Number ✓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Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Description
It represents the Sucess plan number assigned to the student
API Name
Success_Plan__c
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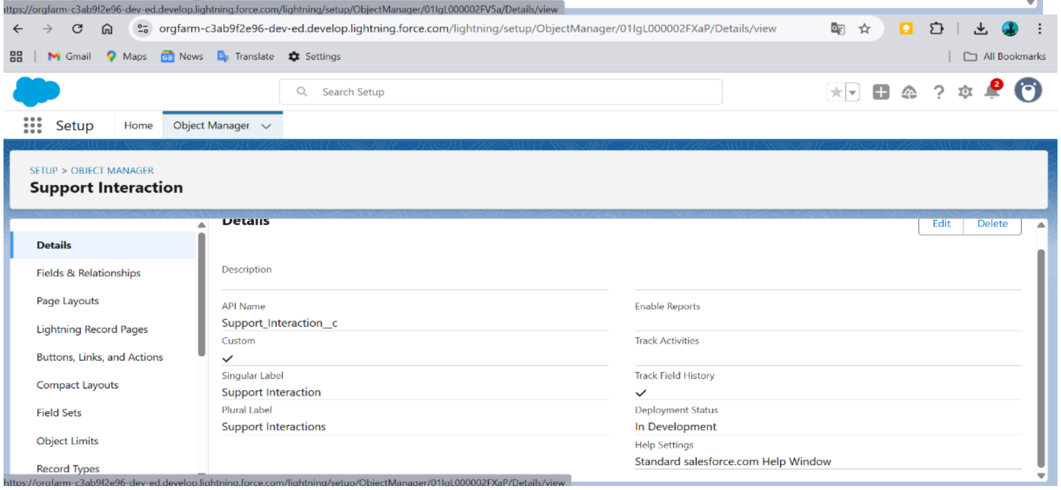
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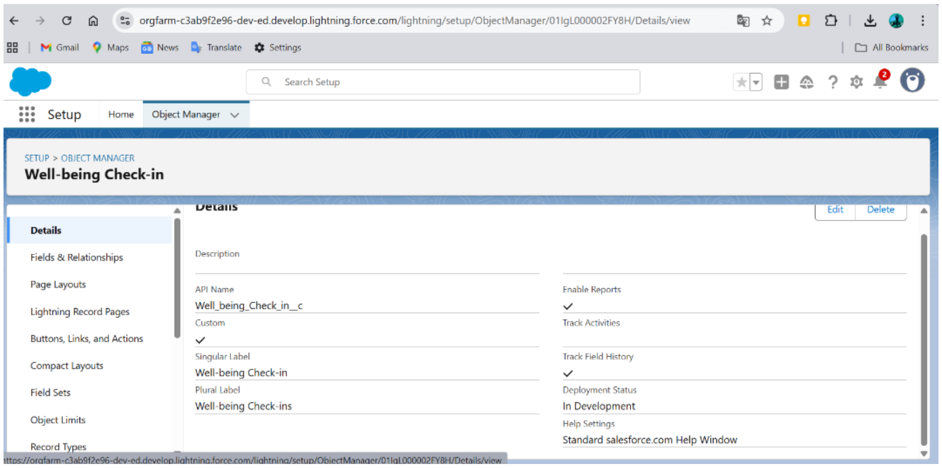
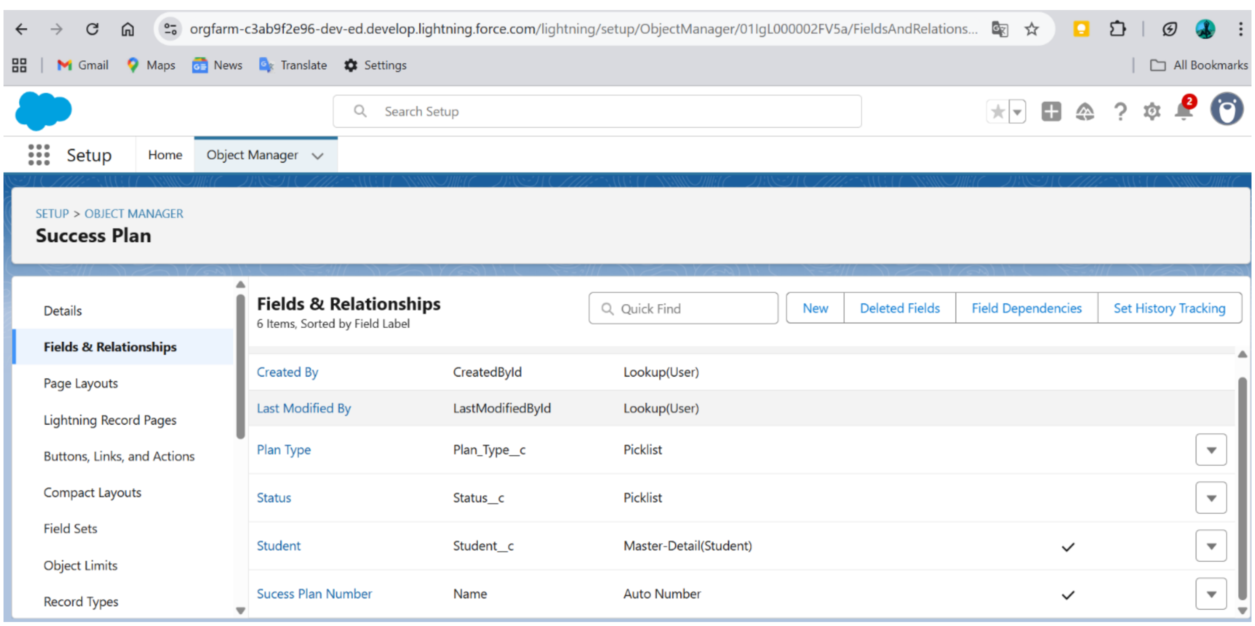


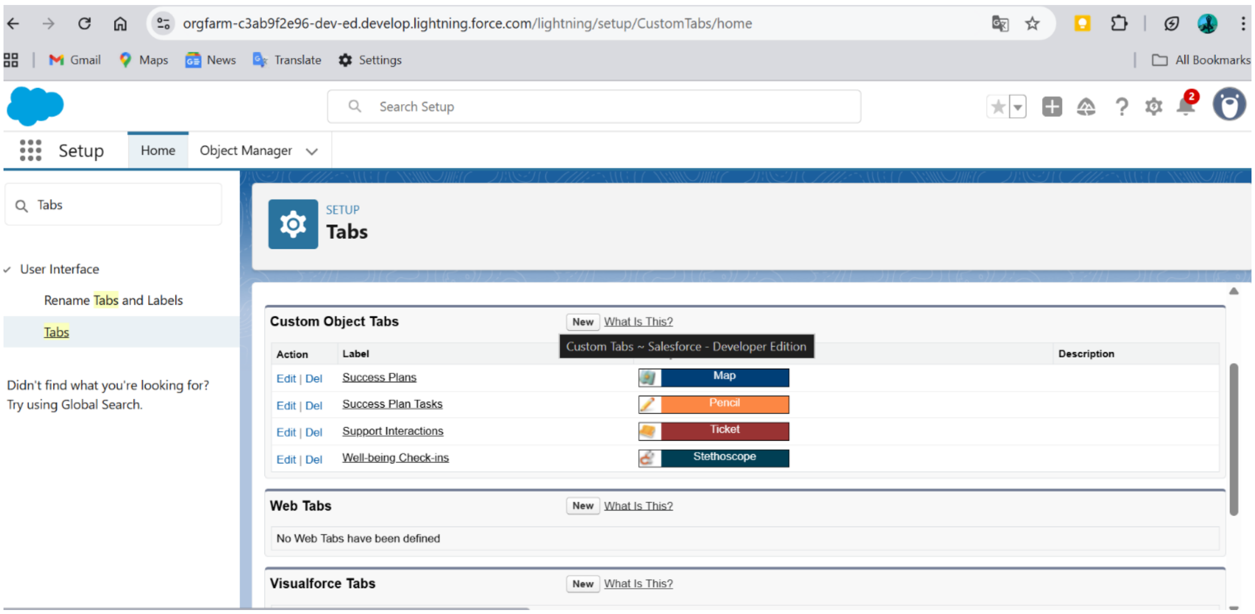
3.2 Create Custom Fields:

i. Inside your object, go to **Fields & Relationships**
ii. Add new fields based on your project requirements
iii. Like Success Plan Number and Student for Success Plan Object



3.3 Create Tabs for Custom Objects:

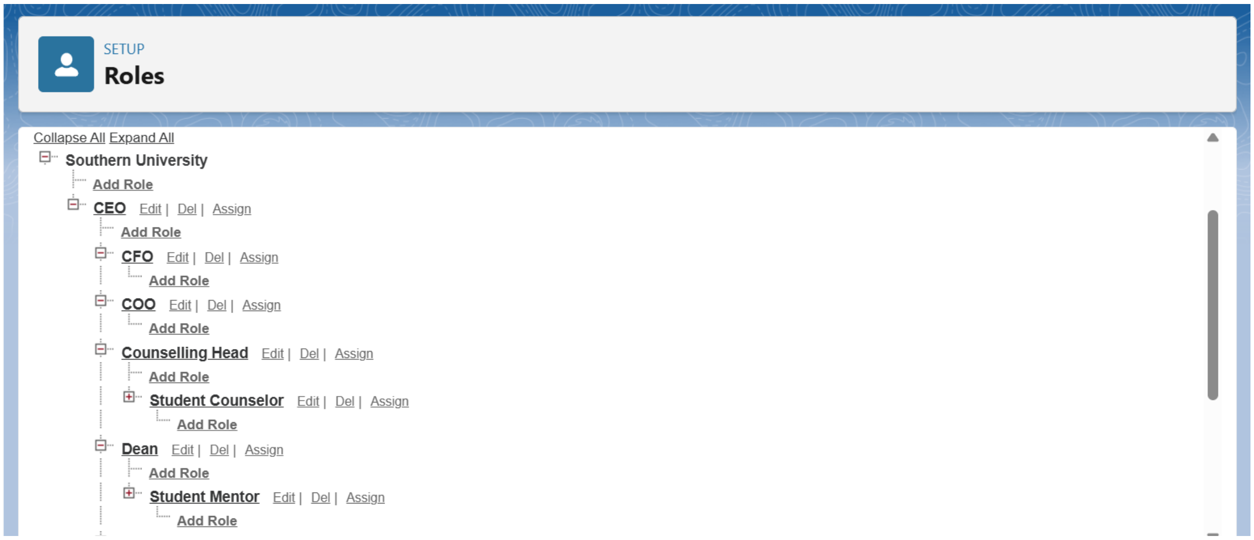
i. Go to **Tabs** in Setup
ii. Create a new tab for your custom object



4.ROLES

Roles in salesforce define “Who Can See What” i.e Visibility of Data. I our app:

i. CEO(at the top of the hierarchy, can see all information related to the organization)
ii. Dean(Who can see all the student information and reports. Directly reports to CEO)
iii. Counselling Head(Who can see student well-being information, reports to CEO)
iv. Student Mentor(Who can see all the information about his students only, reports to Dean)
v. Student Counselor(Who can see all the well being details of a students assigned to them, reports to counselling head)



5.PROFILES: We need to define the jobs in our app.

i. Go to Setup -> Profiles.
ii. We'll clone the "Standard User" profile to create our custom profiles. Cloning is a best practice.
iii. Here I created two profiles, Student Advisor and Student Counselor