

Phase 2: Org Setup & Configuration

In this phase, we prepare and configure the Salesforce environment to align with the organization's requirements. This ensures the EduConnect system is set up with proper security, access controls, and foundational configurations before development begins.

Salesforce Editions

Choose the correct edition (Developer, Enterprise, Unlimited) based on requirements. For training and project demonstration, a Developer Edition org is typically used.

Company Profile Setup

Define organization details such as company name, address, currency, time zone, and default language. Ensures consistency across all records and processes.

Business Hours & Holidays

Set official business hours for case management and service operations. Define holidays to manage SLA calculations and escalations correctly.

Fiscal Year Settings

Configure fiscal year (standard or custom) for reporting and forecasting. Example: Start fiscal year in April instead of January to align with academic cycles.

User Setup & Licenses

Create users (Admins, Faculty, Students). Assign Salesforce licenses (e.g., Platform, Sales Cloud, Service Cloud).

Profiles

Control what users can see and do in the org. Example: Student profile → restricted access; Admin profile → full access.

Roles

Define hierarchy for record visibility. Example: Dean > Faculty > Student.

Permission Sets

Provide additional permissions without changing the base profile. Example: Faculty with extra reporting permissions.

Organization-Wide Defaults (OWD)

Set baseline data access for objects (Private, Public Read-Only, Public Read/Write). Example: Student records = private; Course catalog = public read-only.

Sharing Rules

Extend access to groups of users beyond OWD. Example: Faculty can view and edit student performance data.

Login Access Policies

Configure trusted IP ranges and login hours. Enhances org security by controlling access points.

Developer Org Setup

Register for a Salesforce Developer Org to build and test applications.

Sandbox Usage

Use Sandboxes for testing before deploying to production. Example: Developer Sandbox for code testing; Partial Sandbox for UAT.

Deployment Basics

Learn about Change Sets, ANT Migration Tool, and Salesforce CLI (sfdx) for deployment. Enable version control using GitHub for collaborative work.