

Phase 2: Org Setup & Configuration – Step by Step

1. Salesforce Developer Org & Tools Setup

1. ****Sign up for a Salesforce Developer Edition Org****

- Go to

<https://developer.salesforce.com/signup>

- Fill in your details and activate your org via email.

2. ****Install Salesforce CLI (SFDX)****

- Download and install from

<https://developer.salesforce.com/tools/sfdxcli>

3. ****Install Visual Studio Code****

- Download from

<https://code.visualstudio.com/>

- Install the Salesforce Extension Pack.

4. ****Create a GitHub Repository for Source Control****

- Go to <https://github.com/> and create a new repo (e.g., `SalesForce-EduConnect-automates-admissions-enrollment-and-tracking-with-real-time-insights.-`)

- Clone the repo to your local machine using VS Code or Git CLI.

2. Company Profile Setup

1. **Navigate:**

Setup → Company Settings → Company Information

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'company' entered and a list of settings categories. The 'Company Settings' category is expanded, showing 'Business Hours', 'Company Information' (highlighted), 'Data Protection and Privacy', 'Fiscal Year', 'Holidays', 'Language Settings', 'Maps and Location Settings', and 'My Domain'. The main content area is titled 'SETUP Company Information' and contains an 'Organization Detail' section with an 'Edit' button. The details are organized into two columns. The first 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 second 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, 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	
Organization Name	Global EduConnect University
Primary Contact	Vinod Patnam
Division	
Address	12 Knowledge Park, Sector 62, Andhra Pradesh, India
Fiscal Year Starts In	July
Activate Multiple Currencies	<input type="checkbox"/>
Enable Data Translation	<input type="checkbox"/>
Newsletter	<input checked="" type="checkbox"/>
Admin Newsletter	<input checked="" type="checkbox"/>
Hide Notices About System Maintenance	<input type="checkbox"/>
Hide Notices About System Downtime	<input type="checkbox"/>
Locale Formats	ICU
Phone	
Fax	
Default Locale	English (India)
Default Language	English
Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Currency Locale	English (India) - INR
Used Data Space	666 KB (0%) View
Used File Space	0 B (0%) View
API Requests, Last 24 Hours	0 (15,000 max)
Restricted Logins, Current Month	0 (0 max)
Salesforce.com Organization ID	00DR600000BRcsT
Organization Edition	Starter Edition
Instance	IND 160

Created By: [Vinod Patnam](#), 16/09/2025, 9:33 am
Modified By: [Vinod Patnam](#), 17/09/2025, 12:12 pm

2. **Edit Company Information:**

- Organization Name: `Global EduConnect University`
- Address: `12 Knowledge Park, Sector 62, Noida, Uttar Pradesh, India`
- Default Locale: `English (India)`
- Default Language: `English`

- Default Time Zone: `Asia/Kolkata (GMT +5:30)`
- Currency Locale: `Hindi (India) - INR`
- Primary Contact: `educonnect.admin@geu.edu.in`
- Click ****Save****

3. Business Hours & Holidays

1. **Set Business Hours:**

Setup → Company Settings → Business Hours → New Business Hours

- Name: `University Business Hours`
- Time Zone: `Asia/Kolkata`
- Monday–Friday: `09:00 AM – 06:00 PM`
- Saturday: `09:00 AM – 01:00 PM`
- Sunday: Closed
- Save

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'business' entered and a list of settings including 'Company Settings' and 'Business Hours'. The main content area is titled 'Business Hours' and 'Organization Business Hours'. It features a table with columns for 'Action', 'Business Hours Name', 'Active', 'Time Zone', and 'Default'. Two entries are listed: 'Default' (Pacific Daylight Time) and 'University Business Hours' (India Standard Time). A 'New Business Hours' button is visible above the table.

Action	Business Hours Name	Active	Time Zone	Default
Edit	Default	<input type="checkbox"/>	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	<input type="checkbox"/>
Edit	University Business Hours	<input checked="" type="checkbox"/>	(GMT+05:30) India Standard Time (Asia/Kolkata)	<input checked="" type="checkbox"/>

2. **Add Holidays:**

Setup → Company Settings → Holidays → New Holiday

- Diwali: `10/20/2025` (All Day)
- Independence Day: `08/15/2025` (All Day)
- Republic Day: `01/26/2025` (All Day)
- Save each holiday

The screenshot shows the Salesforce Setup interface for the 'Holidays' section. The left sidebar has a search bar with 'holidays' entered and a list of settings including 'Company Settings' and 'Holidays'. The main content area is titled 'Holidays' and includes a description: 'Holidays are dates and times at which business hours are suspended. Business hours are the days and hours that your support team is available.' Below this, there are two tables: 'Holidays' and 'Elapsed Holidays'. The 'Holidays' table has columns for 'Action', 'Holiday Name', 'Description', and 'Date and Time', with one entry for 'Diwali' on '26/10/2025 All Day'. The 'Elapsed Holidays' table has columns for 'Action', 'Holiday Name', 'Description', and 'Date and Time', with two entries: 'Republic day' on '26/01/2025 All Day' and 'ugadhi' on '18/03/2025 All Day'.

Action	Holiday Name	Description	Date and Time
Edit Del	Diwali	festival	26/10/2025 All Day

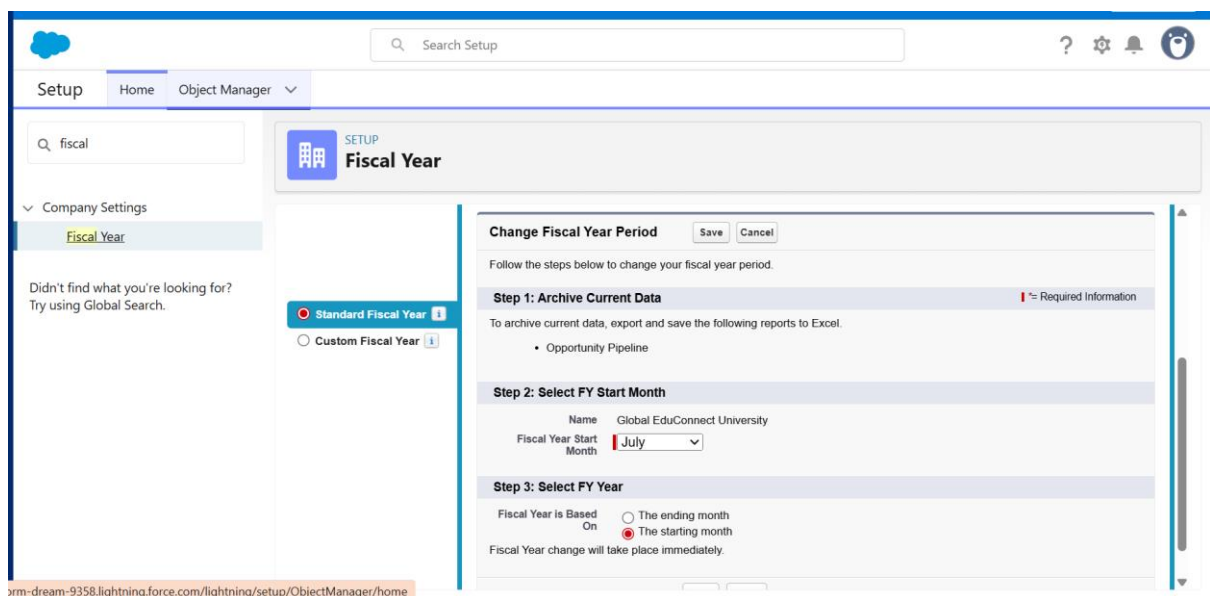
Action	Holiday Name	Description	Date and Time
Clone	Republic day		26/01/2025 All Day
Clone	ugadhi		18/03/2025 All Day

4. Fiscal Year Settings

1. Setup → Company Settings → Fiscal Year

2. Use ****Standard Fiscal Year****

- Start Month: `July`
- Fiscal is Based On: `The Starting Month`
- Save



5. Create Profiles

1. Setup → Profiles → Clone Profile

- Clone `Standard User` → Name as `Admission Officer Profile`
- Clone `Standard User` → Name as `Faculty Profile`

- Clone `Standard User` → Name as `Student Profile`
- Clone `System Administrator` → Name as `EduConnect Admin Profile`

2. Save each profile.

Setup Home Object Manager ▾

Q users

▾ Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users**

Didn't find what you're looking for? Try using Global Search.

Users New

You have 6 out of 10 active Salesforce users

Name ↑	User Name	Last Login	Profile	Active
Pradeep A	sunnyvinu023@gmail.com	17/9/2025, 01:14 pm	System Administrator	✓
SalesforceQ Integration	salesforceiqintegration@...		SalesforceIQ Integration ...	✓
User	vv721615@gmail.com		Standard User	✓
Venkat P	arjunsai8978@gmail.com	17/9/2025, 01:11 pm	Standard User	✓
Vicky V	vv7216815@gmail.com	17/9/2025, 01:04 pm	EduConnect Admin Profile	✓
Vinod Patnam	23695a0520-ys5h@force....	18/9/2025, 09:51 pm	System Administrator	✓
Virat kohli	patnamvinod8978@gmail...	17/9/2025, 12:58 pm	System Administrator	✓

n-dream-9358.lightning.force.com/lightning/setup/AddUsers/home

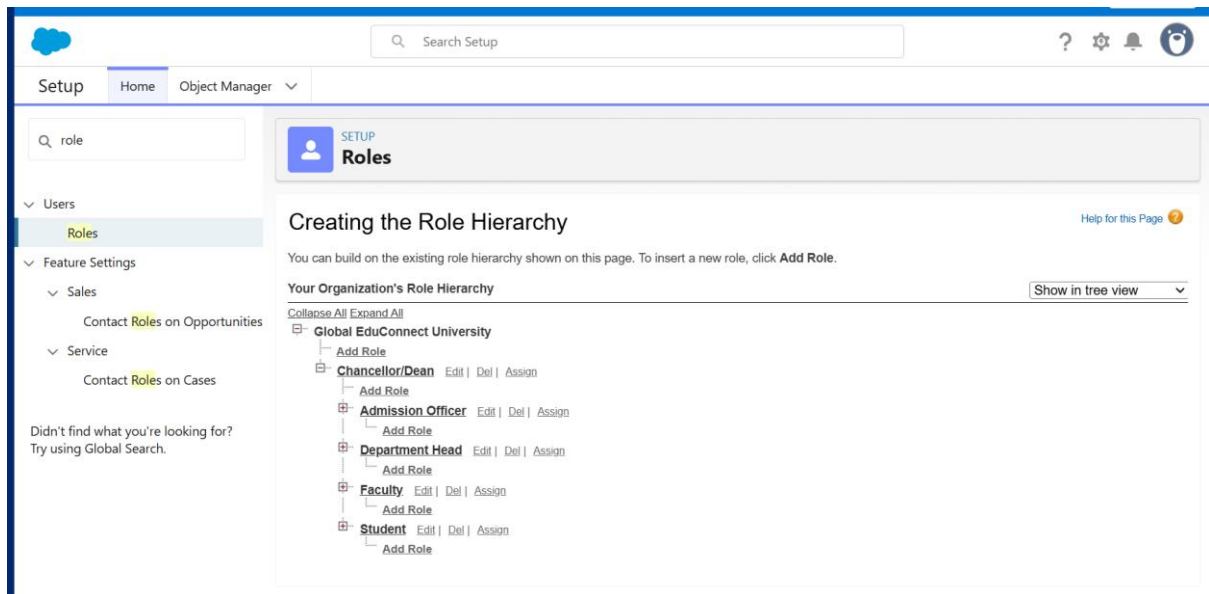
6. Create Role Hierarchy

1. Setup → Roles → Set Up Roles

2. Click ****Add Role**** and build:

- Chancellor/Dean (top)
- Department Head
- Faculty
- Admission Officer
- Student

3. Save each role.



7. User Setup & Licenses

1. Setup → Users → Users → New User

2. ****Add Sample Users:****

Note: These are the example users

- Admission Officer:

Name: Ananya Sharma

Email: ananya.admissions@geu.edu.in

Username: ananya.admissions@geu.edu.in

Role: Admission Officer

Profile: Admission Officer Profile

License: Salesforce Platform

- Faculty:

Name: Prof. Ravi Kumar

Email: ravi.faculty@geu.edu.in

Username: ravi.faculty@geu.edu.in

Role: Faculty

Profile: Faculty Profile

License: Salesforce Platform

- Student:

Name: Priya Verma

Email: priya.student@geu.edu.in

Username: priya.student@geu.edu.in

Role: Student

Profile: Student Profile

License: Salesforce Platform (or Community/Portal if available)

- Parent:

Name: Rajesh Verma

Email: rajesh.parent@geu.edu.in

Username: rajesh.parent@geu.edu.in

Role: None (Community/Portal User if enabled)

Profile: Student Profile

License: Salesforce Platform

- Management:

Name: Dr. Meera Joshi

Email: meera.management@geu.edu.in

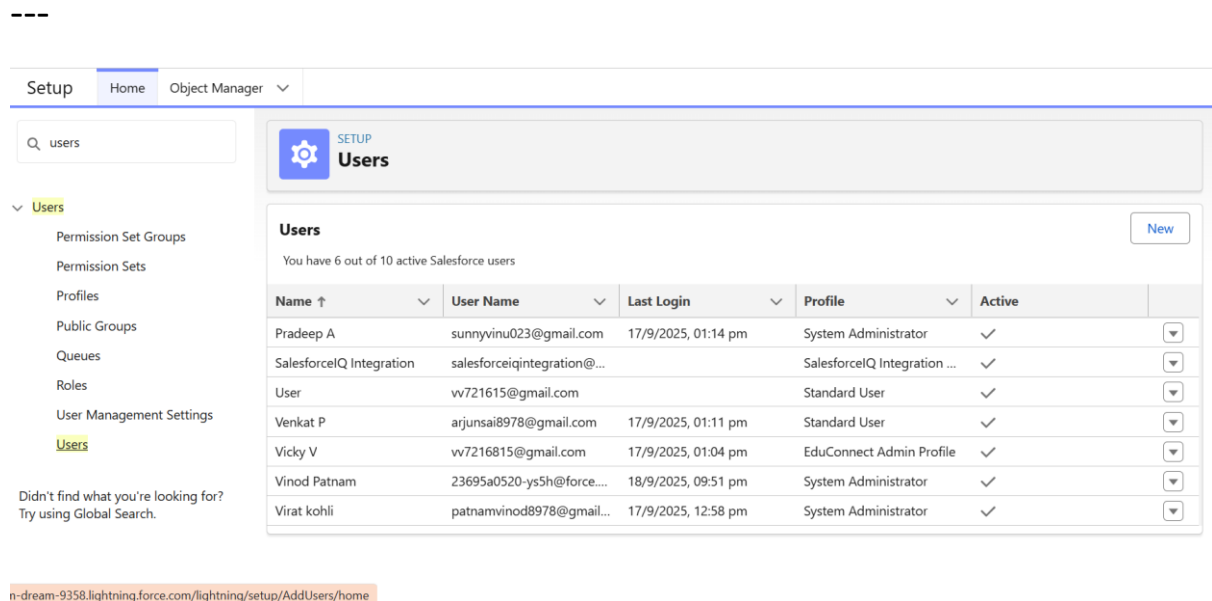
Username: meera.management@geu.edu.in

Role: Dean

Profile: EduConnect Admin Profile

License: Salesforce

3. Assign each user to the correct profile and role.



Setup Home Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Didn't find what you're looking for? Try using Global Search.

SETUP Users

New

Users

You have 6 out of 10 active Salesforce users

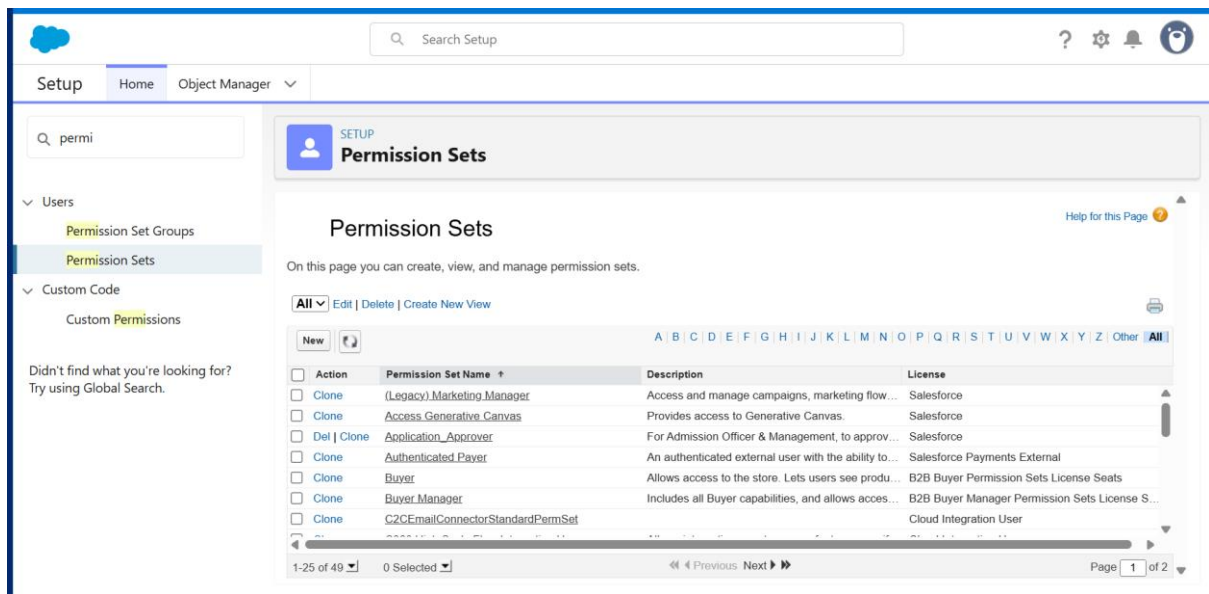
Name ↑	User Name	Last Login	Profile	Active
Pradeep A	sunnyvinu023@gmail.com	17/9/2025, 01:14 pm	System Administrator	✓
SalesforceQ Integration	salesforceqintegration@...		SalesforceQ Integration ...	✓
User	vv721615@gmail.com		Standard User	✓
Venkat P	arjunsai8978@gmail.com	17/9/2025, 01:11 pm	Standard User	✓
Vicky V	vv7216815@gmail.com	17/9/2025, 01:04 pm	EduConnect Admin Profile	✓
Vinod Patnam	23695a0520-ys5h@force....	18/9/2025, 09:51 pm	System Administrator	✓
Virat kohli	patnamvinod8978@gmail...	17/9/2025, 12:58 pm	System Administrator	✓

n-dream-9358.lightning.force.com/lightning/setup/AddUsers/home

8. Permission Sets

1. Setup → Permission Sets → New Permission Set

- ****Application_Approver:**** For Admission Officer & Management, to approve applications.
- ****Course_Editor:**** For Faculty, to manage courses and attendance records.



2. Assign permission sets:

- Application_Approver → Ananya Sharma, Dr. Meera Joshi
- Course_Editor → Prof. Ravi Kumar

9. Login Access Policies

1. Setup → Profiles → [Edit Each Profile]

- Set Login Hours: 7:00 AM – 9:00 PM IST (restrict as needed)

- Set Login IP Ranges: (Optionally) restrict for Management & Faculty to campus/trusted IPs

10. Dev Org & Source Control

1. Confirm Dev Org is ready for development.
2. Use Salesforce CLI to connect VS Code to your org:
 - Open VS Code terminal.
 - Run: ``sfdx force:auth:web:login -a EduConnectDevOrg``
 - Follow login flow.
3. Initialize your GitHub repo in your project folder:
 - ``git init``
 - ``git remote add origin <your-repo-url>``
 - ``git add .``
 - ``git commit -m "Initial setup"``
 - ``git push -u origin main``