

## 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 'MyUniversity Admissions Portal'. Below the title, it says 'The organization's profile is below.' There are links for 'User Licenses (10+)', 'Permission Set Licenses (10+)', 'Feature Licenses (11)', and 'Usage-based Entitlements (10+)'. The 'Organization Detail' section is expanded, showing a table of organization information. The table has columns 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', 'Locale Formats', 'Phone', 'Fax', 'Default Locale', 'Default Language', 'Default Time Zone', 'Currency Locale', 'Used Data Space', 'Used File Space', 'API Requests, Last 24 Hours', 'Streaming API Events, Last 24 Hours', 'Restricted Logins, Current Month', 'Salesforce.com Organization ID', 'Organization Edition', 'Instance', and 'Modified By'. The values are: Organization Name: MyUniversity Admissions Portal, Primary Contact: vedanshi chouksey, Division: United States, Address: United States, Fiscal Year Starts In: January, Activate Multiple Currencies: ☐, Enable Data Translation: ☐, Newsletter: ☒, Admin Newsletter: ☒, Hide Notices About System Maintenance: ☐, Hide Notices About System Downtime: ☐, Locale Formats: ICU, Phone: , Fax: , Default Locale: English (United States), Default Language: English, Default Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata), Currency Locale: English (United States) - USD, Used Data Space: 344 KB (7%) [View], Used File Space: 17 KB (0%) [View], API Requests, Last 24 Hours: 0 (15,000 max), Streaming API Events, Last 24 Hours: 0 (10,000 max), Restricted Logins, Current Month: 0 (0 max), Salesforce.com Organization ID: 00DgL000007a1Xp, Organization Edition: Developer Edition, Instance: CAN98, Created By: Vedanshi Chouksey, 7/20/2025, 12:01 AM, Modified By: Vedanshi Chouksey, 9/24/2025, 1:05 PM.

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	Locale Formats	Phone	Fax	Default Locale	Default Language	Default Time Zone	Currency Locale	Used Data Space	Used File Space	API Requests, Last 24 Hours	Streaming API Events, Last 24 Hours	Restricted Logins, Current Month	Salesforce.com Organization ID	Organization Edition	Instance	Modified By
MyUniversity Admissions Portal	vedanshi chouksey	United States	United States	January	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ICU			English (United States)	English	(GMT+05:30) India Standard Time (Asia/Kolkata)	English (United States) - USD	344 KB (7%) [View]	17 KB (0%) [View]	0 (15,000 max)	0 (10,000 max)	0 (0 max)	00DgL000007a1Xp	Developer Edition	CAN98	Vedanshi Chouksey, 9/24/2025, 1:05 PM

### 3.Business Hours & Holidays

Defined working hours → Mon-Fri, 9:00 AM – 6:00 PM.

Added Holidays like republic 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 12

Business Hours Detail

Edit

Business Hours Name	Admissions Office Hours	Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Business Hours	Sunday No Hours Monday 9:00 AM to 6:00 PM Tuesday 9:00 AM to 6:00 PM Wednesday 9:00 AM to 6:00 PM Thursday 9:00 AM to 6:00 PM Friday 9:00 AM to 6:00 PM Saturday No Hours	Default Business Hours	<input type="checkbox"/>

Active

☒

Created By

Vedanshi Chouksey 9/24/2025, 12:06 PM

Last Modified By

Vedanshi Chouksey 9/24/2025, 12:49 PM

Edit

Holidays

Add/Remove

Holiday Name	Description	Date and Time
diwali	all day	10/20/2025 All Day
republic day	all day	1/26/2025 All Day

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## 4.Fiscal Year Settings

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

SETUP

Fiscal Year

Setup

Organization Fiscal Year Edit: MyUniversity Admissions Portal

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

Name

MyUniversity Admissions Portal

Fiscal Year Start Month

April

Fiscal Year is Based On

The ending month

The starting month

## 5.User Setup & Licenses

Created users with appropriate roles:

Admission Officer Can review applications, verify documents, communicate with applicants, approve/reject.

Faculty/Staff View enrolled students, assign advisors, verify course eligibility.

Counselor Guides prospective students, answers admission queries, helps with application process.

Assigned Salesforce licenses to each.

SETUP

Users

All Users

Help for this Page

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

New User Reset Password(s) Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00dgl000007a1xpual.hvjrre9y5xa@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	Chouksey_Vedanshi	OEPIIC	epic.18eb3b86b83b@orgfarm.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Chouksey_Vedanshi	ved	vedanshi.chouksey.cs22478@agentforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	singh_priya	psing	priva23@example.com	Customer Support International	<input checked="" type="checkbox"/>	Work.com Only User
<input type="checkbox"/> Edit	Tiwari_Ram	rtwa	john.doe7821@example.com	Admissions Officer	<input checked="" type="checkbox"/>	Standard User
<input type="checkbox"/> Edit	User_Integration	integ	integration@00dgl000007a1xpual.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00dgl000007a1xpual.com		<input checked="" type="checkbox"/>	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

## 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.

SETUP

Roles

Creating the Role Hierarchy

Help for this Page

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

Collapse All Expand All

Show in tree view

MyUniversity Admissions Portal

Add Role

Admissions Officer (UG) Edit Del Assign

Add Role

Counselor Edit Del Assign

Add Role

CEO Edit Del Assign

Add Role

Admissions Officer Edit Del Assign

Add Role

CEO Edit Del Assign

Add Role

Counselors Edit Del Assign

Add Role

Faculty Edit Del Assign

Add Role

## 6.Profiles

Admission Officer -> Internal Staff (Administrative)

Counselor → Counselor Profile (custom).

Faculty → Faculty Profile (custom).

Profiles ensure correct permissions and object access.

**SETUP Users**

**All Users** [Help for this Page](#)

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
<a href="#">Edit</a>	Chatter Expert	Chatter	chatty.00dgl000007a1xpual.hvrjre9y5xa@chatter.salesforce.com		✓	Chatter Free User
<a href="#">Edit</a>	Chouksey_Vedanshi	OEPIG	epic.f9eb3b86b83b@orgfarm.salesforce.com		✓	System Administrator
<a href="#">Edit</a>	Chouksey_Vedanshi	ved	vedanshi.chouksey.cs22478@agentforce.com		✓	System Administrator
<a href="#">Edit</a>	singh_priya	psing	priya23@example.com	Customer Support International	✓	Work.com Only User
<a href="#">Edit</a>	Tiwari_Ram	rtwa	john.doe7821@example.com	Admissions Officer	✓	Standard User
<a href="#">Edit</a>	User_Integration	integ	integration@00dgl000007a1xpual.com		✓	Analytics Cloud Integration User
<a href="#">Edit</a>	User_Security	sec	insightsecurity@00dgl000007a1xpual.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:

Admissions Officer Access→ Reports & Dashboards Access (Correct Permissions)

Enrollment Manager Access → Import student/assessment data (API Enabled + object-level create/edit).

Assigned to relevant users as required.


**Permission Sets**

Permission Set  
**Admissions Officer Access**
[Video Tutorial](#) | [Help for this Page](#)

[Clone](#)
[Delete](#)
[Edit Properties](#)
[Manage Assignments](#)
[View Summary](#)

**Permission Set Overview**

Description	API Name	Admissions_Officer_Access
License	Namespace Prefix	
Session Activation Required <input type="checkbox"/>	Created By	Vedanshi Chouksey, 9/25/2025, 3:55 AM
Permission Set Groups Added To 0	Last Modified By	Vedanshi Chouksey, 9/25/2025, 3:55 AM

**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


**Permission Sets**

Permission Set  
**Enrollment Manager Access**
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[Clone](#)
[Delete](#)
[Edit Properties](#)
[Manage Assignments](#)
[View Summary](#)

**Permission Set Overview**

Description	API Name	Enrollment_Manager_Access
License	Namespace Prefix	
Session Activation Required <input type="checkbox"/>	Created By	Vedanshi Chouksey, 9/25/2025, 3:59 AM
Permission Set Groups Added To 0	Last Modified By	Vedanshi Chouksey, 9/25/2025, 3:59 AM

**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

SaveCancel

Setting	Enabled
Administrators Can Log in as Any User	<input checked="" type="checkbox"/>

Support Organization	Packages	Available to Users	Available to Administrators Only
Salesforce.com Support		<input checked="" type="radio"/>	<input type="radio"/>

SaveCancel

## 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