PHASE 2 - Org Setup & Configuration

1. Salesforce Editions

Selected Developer Edition Org (free) to build the Education CRM.

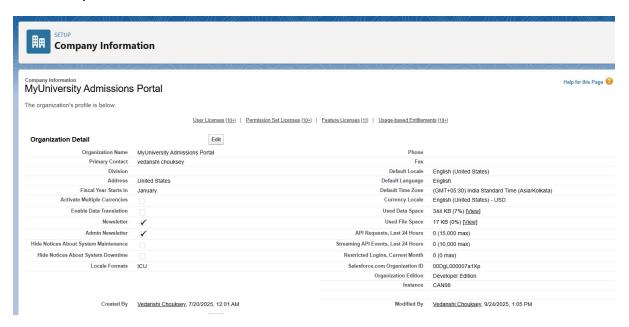
2. Company Profile Setup

Org Name \rightarrow Education CRM Project.

Time Zone \rightarrow Asia/Kolkata (IST).

Locale \rightarrow English (India).

Currency \rightarrow INR.

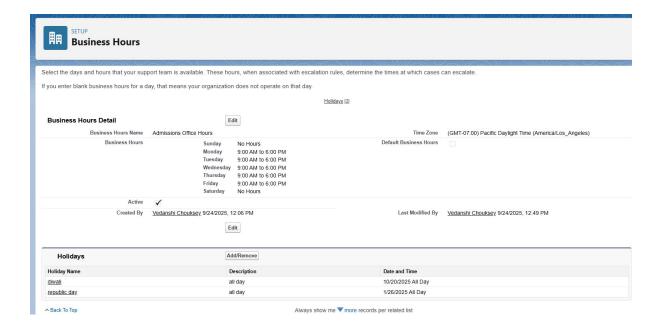


3. Business Hours & Holidays

Defined working hours \rightarrow Mon-Fri, 9:00 AM - 6:00 PM.

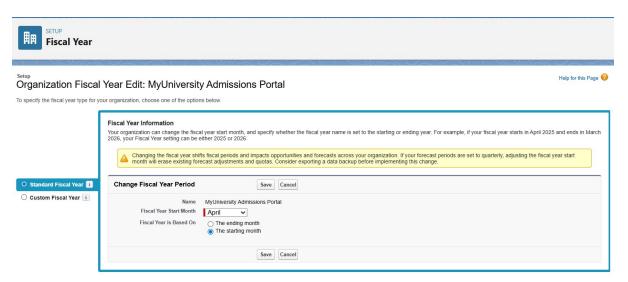
Added Holidays like republic Day, Diwali, etc.

Ensures support and academic activities follow institutional timings.



4. Fiscal Year Settings

Setup \rightarrow Quick Find: Fiscal Year \rightarrow choose Standard Fiscal Year (Apr- Mar) \rightarrow Save.



5.User Setup & Licenses

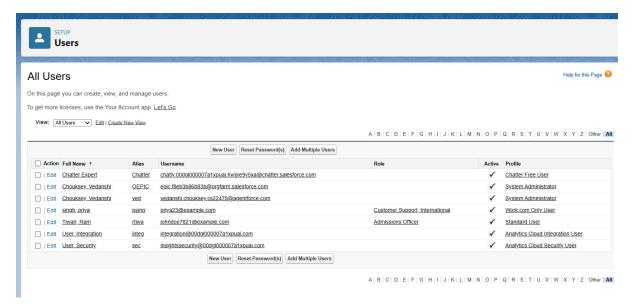
Created users with appropriate roles:

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.



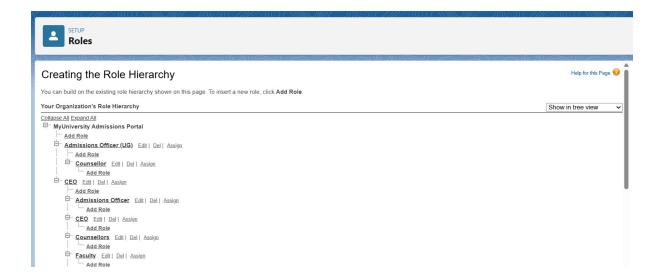
5. Role Hierarchy

Ensures data visibility based on position in the institute:

Dean has top-level visibility.

Counselor manage students.

Faculty handle courses and performance.



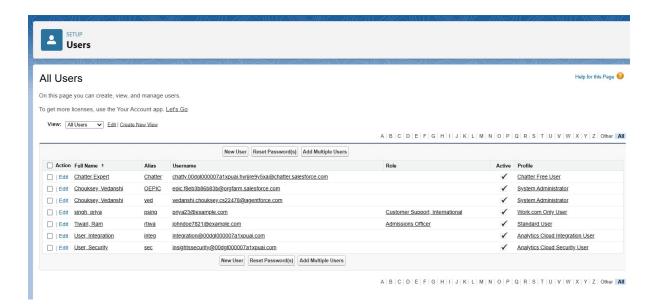
6.Profiles

Admission Officer -> Internal Staff (Administrative)

Counselor \rightarrow Counselor Profile (custom).

Faculty \rightarrow Faculty Profile (custom).

Profiles ensure correct permissions and object access.



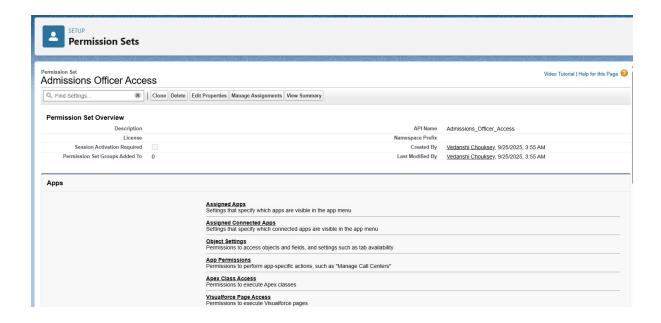
7. Permission Sets

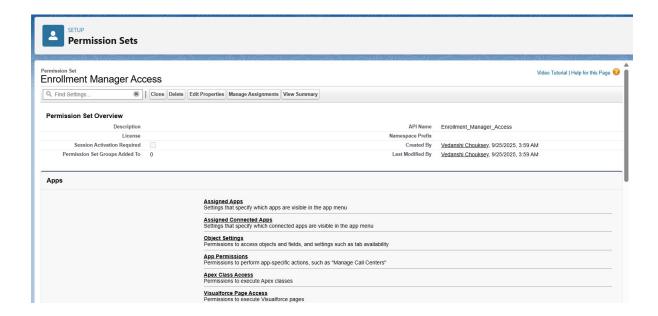
Created for extra access without modifying profiles:

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.

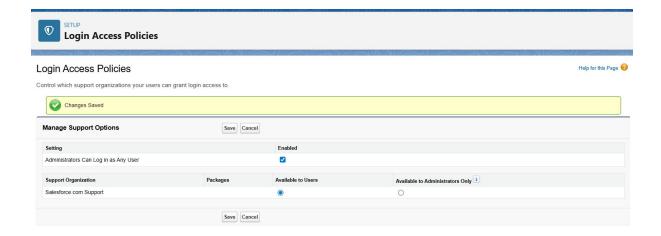




8. Login Access & Session Settings

Setup \rightarrow Login Access Policies \rightarrow enable Administrators Can Log in as Any User (for testing).

Save



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