A CRM Application to Manage the Services offered by an Institution
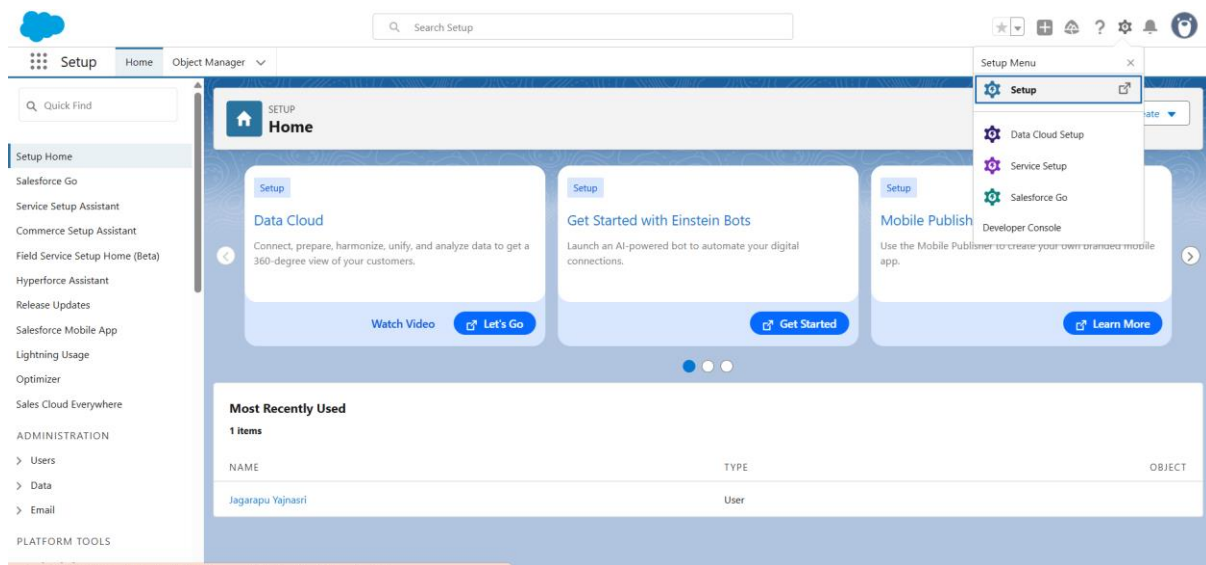
Phase 2: Org Setup & Configuration

Step 1: Goal of Phase 2

- Prepare Salesforce environment.

- Setup Users, Roles, Profiles, Permissions.

- Configure Company Info, Business Hours, Holidays, Fiscal Year.

- Expected Outcome (Phase 2 Goal): Org ready for Phase 3 (Data Modeling & Relationships).

Step 2: Salesforce Editions

- Use Developer Edition Org (free).

- Already account exists → login.

- Dev Org = sandbox for build/test.

Step 3: Company Profile Setup

- Setup → Company Settings → Company Information.

- Fill details: Name, Timezone, Currency.

- Save.

Step 4: Business Hours & Holidays

- Setup → Business Hours → New → 9 AM – 6 PM.

- Holidays → Add public holidays.

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 [2]

Business Hours Detail Edit

Business Hours Name	Institution CRM Working Hours		Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Business Hours	Sunday	24 Hours	Default Business 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	24 Hours		

Active	✓		
Created By	Jagarapu Yajnasri 9/20/2025, 11:31 PM	Last Modified By	Jagarapu Yajnasri 9/20/2025, 11:31 PM

Edit

Holidays Add/Remove

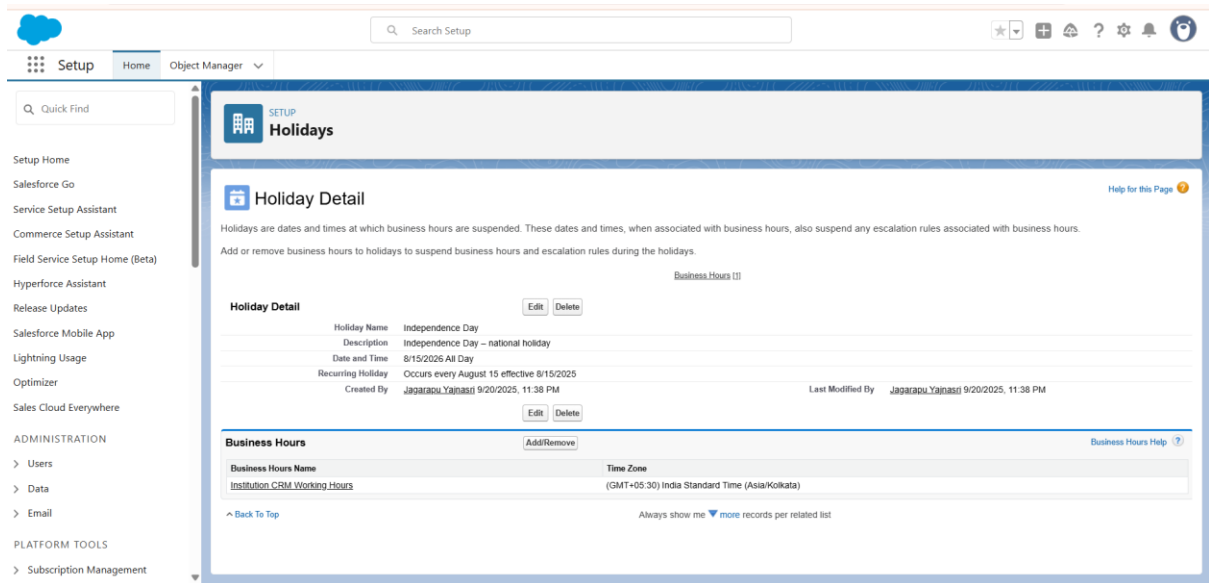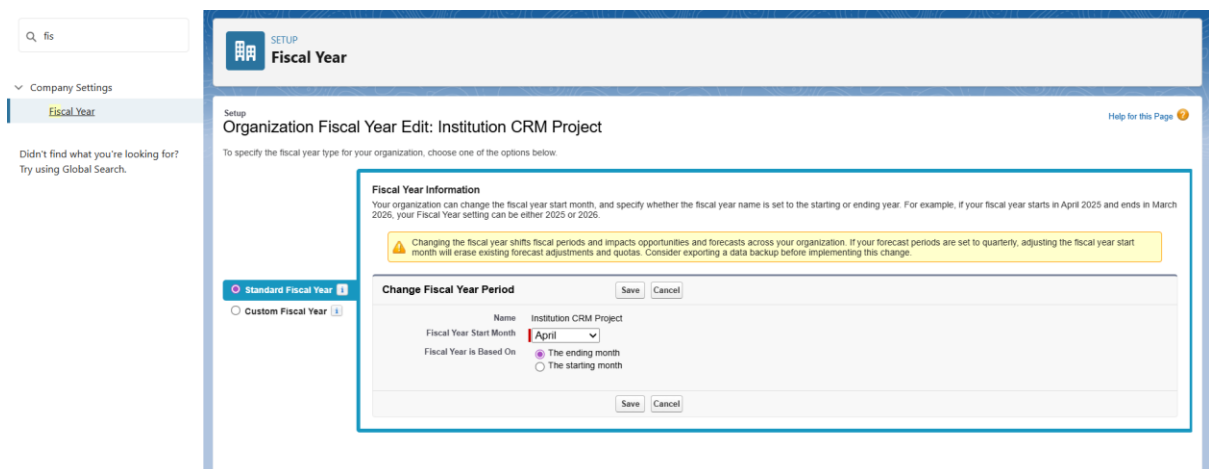| Holiday Name	Description	Date and Time
Independence Day	Independence Day – national holiday	8/15/2026 All Day
Republic Day	Republic Day-national holiday	1/26/2026 All Day

Step 5: Fiscal Year settings

- Setup-> Fiscal Year -> standard (jan-Dec)
- Save

Step 6: Users & Licenses

- Setup → Users → New User

- Create: Admin, Manager, Collection Staff

- Assign Salesforce license

Step 7: Profiles

- **Collection Staff** → create/update tasks

- **Manager** → full access

- **Admin** → full + setup permissions

Step 8: Roles & Hierarchy

- **Manager** → Top

- **Collection Staff** → Below Manager

-

Step 9: Permission Sets

- Provide extra access for specific users by creating **Permission Sets**.

Step 10: Org-Wide Defaults (OWD)

- Sensitive/Personal Data → Private
- Reference Data (like courses, programs) → Public Read Only
- Collaboration Data (like service requests) → Public Read/Write

Step 11: Sharing Rules

- Create a rule to share **CollectionRecord__c** with **Manager**.

Step 12: Login Access Policies

- Restrict login hours for **Collection Staff** → 9 AM – 6 PM.

Step 13: Dev Org & Sandbox

- Build configurations in **Developer Org**.

- **Sandbox** → mirrors production for testing & practice.

Step 14: Deployment Basics

- Move changes **sandbox → production** using:

    o **Change Sets**

    o **VS Code + SFDX**

Step 15: Expected Outcome (Phase 2 Completion)

- Salesforce org fully setup.

- Users, Roles, Profiles, Permission Sets, OWD, Business Hours, Holidays configured.