

Student Management System

Phase 2: Org Setup & Configuration

Overview

Phase 2 establishes the foundational Salesforce environment, including security controls, user hierarchies, and access permissions. This phase is critical because it ensures data governance, role-based visibility, and compliance with institutional policies.

2.1 Developer Org Creation & Initialization

Setup Process:

1. Navigate to developer.salesforce.com
2. Register with institutional email
3. Verify email and set security token
4. Access org via login.salesforce.com
5. Complete security setup (two-factor authentication recommended)

Post-Creation Configuration:

- Set organization locale and time zone
- Configure language preferences
- Enable Lightning Experience (standard in modern orgs)
- Set up company information

2.2 Company Settings & Localization

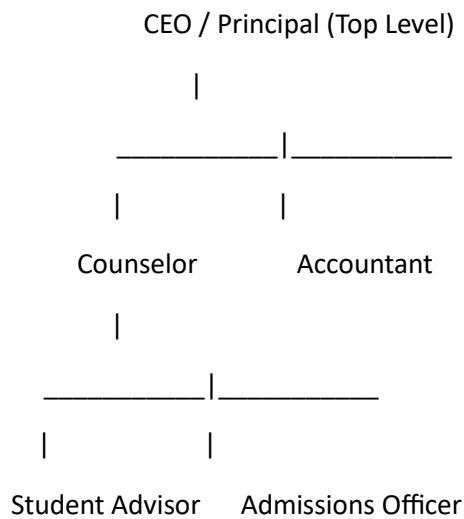
Company Information:

- **Organization Name:** Student Management System
- **Instance:** Determines regional data center (impacts compliance and latency)
- **Fiscal Year:** Aligned with academic calendar (e.g., July-June for most Indian institutions or April-March for financial year alignment)
- **Locale & Time Zone:** Set to organization's primary location
- **Language:** English (or institution's preferred language)

Currency Configuration: For institutions serving domestic and international students, multi-currency setup enables:

- Storing fees in multiple currencies (USD, INR, EUR)
- Automatic conversion using exchange rates
- Reporting across currencies
- Better financial accuracy for international transactions

2.3 User Roles & Hierarchy



- Keep hierarchy shallow (3-4 levels maximum) for performance
- Align roles with organizational structure
- Avoid matrix reporting (one parent per role)
- Regularly audit role usage as organization evolves

2.4 Profiles & Permission Sets

What is a Profile? A Profile is a collection of settings and permissions that controls what users can do and see. Every Salesforce user must have exactly one profile.

Object-Level Permissions: Profiles control whether users can Create, Read, Edit, or Delete records for each object.

Example Profile: Counselor Profile

Student__c: Create, Read, Edit, Delete

Course__c: Read only

Payment__c: Read only

Enrollment__c: Create, Read, Edit, Delete

Field-Level Security (FLS):

- Student Email: Visible, Read-Only
- Total Fees: Visible, Read-Only
- Internal Notes: NOT Visible (hidden from Counselors)

Field-Level Security (FLS): Adds granular control by showing/hiding specific fields within objects.

Example:

- Finance team sees Payment Amount, Payment Date

- Counselors do NOT see Payment Amount (privacy)
- All see Student Name and Contact

Page Layouts: Control which fields appear on record pages for each profile. Reduces clutter and focuses users on relevant data.

Student Record Page Layout

- Header: Name, Email, Phone
- Section 1: Enrollment Details (Course, Start Date, Status)
- Section 2: Contact Information

Permission Sets (Best Practice Addition): Permission Sets are optional but recommended for supplementary access without modifying profiles.

Example Permission Sets:

- **Finance Team Access:** Grants Read/Edit on all Payment objects and Reports
- **Academic Team Access:** Grants Read/Edit on Student, Course, Enrollment objects

Advantages:

- Users can have multiple permission sets (unlike profiles)
- Easier to grant temporary access
- Cleaner organization for complex permission schemes

2.5 Navigation & App Setup

Lightning App Creation: A Lightning App is a collection of tabs, utilities, and navigation organized for specific user workflows.

Your App: Student Management App

Components:

1. **Tabs** (Navigation items):
 - Students (List of all students)
 - Courses (Course catalog)
 - Payments (Payment records)
 - Reports (Dashboards and reports)
 - Searchable and customizable