Student Management System

Phase 7: Integration & External Access

Overview

Phase 7 extends your application beyond internal staff to external users (students, guests, prospective enrollees) through Salesforce Experience Cloud. This phase demonstrates scalability and real-world deployment scenarios where external parties interact with your system without full Salesforce licenses.

7.1 Use Cases for Education CRM:

- **Student Portal**: Students view their enrollments, grades, fee statements

- **Public Course Catalog**: Prospective students browse courses before registration

- **Registration Portal**: Guests submit applications or course inquiries

- **Payment Portal**: Students view and pay outstanding fees

- **Resource Library**: Access course materials, syllabus, announcements

7.2 Your Implementation: Student Portal (LWR Template)

Site Details:

- **Site Name**: Student Portal

- **URL**: yourdomain.lightning.force.com/s/studentportal

- **Template**: LWR (Lightning Web Runtime)

- **Purpose**: Allow guests to view course catalog and submit inquiries

7.3 Experience Builder: Creating Pages & Components

LWR Page Creation Process:

1. **Access Experience Builder**:
   - Setup → Digital Experiences → All Sites
   - Click "Builder" next to your site

2. **Add Navigation Menu Item**:
   - Left Panel → Navigation

- o Click "Add Menu Item"

- o Label: Course Catalog

- o Type: Page

- o Click "Create New Page"

- o Name: CourseCatalog

- o Click Create

3. **Add Components to Page**:

- o Use Components Panel (left sidebar)

- o Drag "Record List" component onto canvas

- o Configure: Object = Course__c, List View = "All Courses"

- o Publish Site

7.4 Guest User Access Configuration

Why Guest Access Matters: Guest users represent your largest potential audience. Proper configuration ensures they can access the portal without compromising security.

Step 1: Identify Guest User Profile

Every Experience Cloud site has an associated Guest User Profile. This profile controls what external visitors can see and do.

Step 2: Grant Object Access

Go to: Setup → Sites → [Your Site Name] → Public Access Settings

For each object you want guests to access:

Course__c (Read-Only Access):

1. Find "Course__c" in Object Settings

2. Click Edit

3. Set Permissions:

- o Read: Checked ✓

- o Create: Unchecked

- o Edit: Unchecked
- o Delete: Unchecked

4. Save

Student__c (Create Access - for Registration):

1. Find "Student__c" in Object Settings

2. Click Edit

3. Set Permissions:

   - o Read: Checked ✓

   - o Create: Checked ✓ (allows registration form submission)

   - o Edit: Unchecked

   - o Delete: Unchecked

4. Save

Step 3: Configure Field-Level Security (FLS)

For each object granted access, enable field visibility for guest users.

Configuration:

1. Public Access Settings → Course__c → Set Field Level Security

2. Toggle "Visible" for each field guests should see

3. Leave "Read-Only" checked (guests cannot edit)

4. Save

7.5 Testing External Access

Test Process:

1. **Get Your Site URL**:

   - o Setup → Digital Experiences → All Sites

   - o Copy the URL for your site

2. **Open in Incognito Window**:

   - o Ensures no Salesforce session cookies interfere

- Tests true external user experience

7.6 Record List Component Configuration

Purpose: Display Course__c records in a clean, organized table format

Configuration Steps:

1. In Experience Builder, select Record List component

2. Right panel shows properties:

   - **Object**: Course__c

   - **List Name**: "All Courses" (pre-built or custom list view)

   - **Filters**: None (or add if needed)

   - **Display Limit**: 10-20 records

   - **Show Search**: Yes (helps users find courses)

   - **Show Sorting**: Yes (sort by name, date, etc.)

3. **Customize Columns**:

   - List View defines which fields display

   - Edit the list view to show/hide columns as needed

   - Example columns: Course Name, Duration, Fees, Start Date