Phase 2: Org Setup & Configuration Summary

1. Core Company Configuration

The foundational settings for the Salesforce org were established to mirror the environment of the university's departments like placements, clubs, administration into one place -Educonnect PRO.

- **Company Information**: Default time zone (Asia/Kolkata), and locale to ensure all time-stamped data is accurate.
- **Business Hours & Fiscal Year**: Standard business hours (Mon-SAT, 12 AM - 12 AM) were set to enable future tracking of case/query response times. A standard fiscal year was confirmed for reporting consistency.
- **Developer Org**: A new Salesforce Developer Edition org was created to serve as the dedicated environment for this project.

2. Security Model Implementation

A multi-layered security model was configured to ensure data is accessible only to the appropriate users.

Profiles: Five custom profiles were created by cloning the "Standard User" profile:

1. **Academic Staff Profile**: For academic staff managing student records and courses.
2. **Faculty Profile**: For faculty members teaching courses.

3. **Placement Officer Profile**: For placement team managing job opportunities.
4. **Student Community Profile**: For students accessing their academic information
5. **Club Coordinator Profile**: For managing student clubs and activities

Company Profile Setup:

SETUP
Company Information

Company Information
EduConnect Pro

The organization's profile is below.

Help for this Page

User Licenses [10+] | Permission Set Licenses [10+] | Feature Licenses [11] | Usage-based Entitlements [10+]

Organization Detail [Edit]

Organization Name	EduConnect Pro	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (India)
Address	India	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	☐	Currency Locale	English (India) - INR
Enable Data Translation	☐	Used Data Space	342 KB (7%) [View]
Newsletter	✓	Used File Space	17 KB (0%) [View]
Admin Newsletter	✓	API Requests, Last 24 Hours	39 (15,000 max)
Hide Notices About System Maintenance	☐	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	☐	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00DgK00000C0KZK
		Organization Edition	Developer Edition
		Instance	CAN96
Created By	OrgFarm EPIC, 9/19/2025, 5:19 AM	Modified By	Aakash Gonuguntla, 9/24/2025, 12:25 AM

[Edit]

Business Hours Configuration:

|			
Edit	Examination Period Hours	☐	(GMT+05:30) India Standard Time (Asia/Kolkata)
Edit	Standard College Hours	☐	(GMT+05:30) India Standard Time (Asia/Kolkata)

Holidays Setup:

Holidays

Holidays are dates and times at which business hours are suspended. Business hours are the days and hours that your support team is available.

Help for this Page

Action	Holiday Name	Description	Date and Time
Edit | Del	Gandhi Jayanti		10/2/2025 All Day
Edit | Del	Independence Day		8/15/2026 All Day
Edit | Del	Republic Day		1/26/2026 All Day

Elapsed Holidays

No records to display

Role Hierarchy:

Five roles were created and this is the role hierarchy.

- **Academic Dean** Edit | Del | Assign
  - Add Role
  - **Academic Staff** Edit | Del | Assign
    - Add Role
    - **Department Heads** Edit | Del | Assign
      - Add Role
      - **Faculty - Business Administration** Edit | Del | Assign
        - Add Role
      - **Faculty - Computer Science** Edit | Del | Assign
        - Add Role
      - **Faculty - Electronics** Edit | Del | Assign
        - Add Role
      - **Faculty - Mechanical Engineering** Edit | Del | Assign
        - Add Role
- **Placement Director** Edit | Del | Assign
  - Add Role
  - **Placement Officers** Edit | Del | Assign
    - Add Role
- **Student Affairs Director** Edit | Del | Assign
  - Add Role
  - **Club Coordinators** Edit | Del | Assign
    - Add Role
- **Students** Edit | Del | Assign
  - Add Role
  - **Final Year Students** Edit | Del | Assign
    - Add Role
  - **First Year Students** Edit | Del | Assign
    - Add Role
  - **Second Year Students** Edit | Del | Assign
    - Add Role
  - **Third Year Students** Edit | Del | Assign
    - Add Role

CREATE USERS:

☐ | Edit	Kumar, Dr. Rajesh	dkuma	rajesh.kumar@youruniversity.edu.in	Academic Dean	✓	Standard Platform User
☐ | Edit	Sharma, Prof. Priya	shar	priya.sharma@youruniversity.edu.in	Faculty - Computer Science	✓	Standard Platform User
☐ | Edit	Singh, Mr. Amit	msing	amit.singh@youruniversity.edu.in	Placement Officers	✓	Standard Platform User

ORGANIZATION-WIDE DEFAULTS (OWD) CONFIGURATION:

A Private data model was established as the baseline. This is a security best practice, ensuring users can only see their own records by default unless explicitly granted access.

Security Model Implemented:

Object	Internal Access	External Access	Controlled by Parent	Reasoning
Account	Public Read Only	Private	No	College/company info should be visible
Contact	Private	Private	Yes	Personal information protection
Case	Private	Private	No	Student support confidentiality
Lead	Private	Private	No	Prospect information security
Opportunity	Private	Private	Yes	Academic opportunity privacy

PERMISSION SETS:

Usage Strategy:

- Assigned to senior faculty for advanced grade management
- Analytics permissions for department heads
- Flexible permission enhancement without profile changes

Permission Set
Advanced Student Analytics

Video Tutorial | Help for this Page ❓

🔍 Find Settings...   ✖

| Clone | Delete | Edit Properties | Manage Assignments | View Summary |

Permission Set Overview > Object Settings ▼ Accounts ▼

Accounts   Edit

Object Permissions

Permission Name	Enabled
Read	☑
Create	☐
Edit	☐
Delete	☐
View All Records	☑
Modify All Records	☐
View All Fields	☑

Permission Set
Placement Coordinator

Video Tutorial | Help for this Page ❓

🔍 Find Settings...   ✖ | Clone | Delete | Edit Properties | Manage Assignments | View Summary |

Permission Set Overview

Description	Enhanced placement management features for placement team	API Name	Placement_Coordinator
License		Namespace Prefix	
Session Activation Required	☐	Created By	Aakash Gonuguntla, 9/24/2025, 2:09 AM
Permission Set Groups Added To	0	Last Modified By	Aakash Gonuguntla, 9/24/2025, 2:09 AM

Permission Set
Grade Management Plus

Video Tutorial | Help for this Page ❓

🔍 Find Settings...   ✖ | Clone | Delete | Edit Properties | Manage Assignments | View Summary |

Permission Set Overview > System Permissions ▼

System Permissions

▼ System

Permission Name	Er
Access Actionable Relationship Center for partner users	☐
Access Activities	☐
Access Agent for Setup	☐
Access Banking Relationship Assistance	☐
Access Banking Service Agent	☐
Access Customer Asset Lifecycle Management APIs	☐
Access Custom Mobile Apps	☐
Access Data Cloud Data Explorer	☐
Access Data Cloud Profile Explorer	☐
Access drag-and-drop content builder	☐
Access Experience Management	☐
Access Libraries	☐
Access Personalization Platform	☐
Access Policy Agent	☐
Access Service Einstein	☐
Access the Fulfillment Order routing APIs	☐
Access to manage the template framework apps	☐

Permission Changes Confirmation ✖

Do you want to save these permissions?

Make sure to review your permissions before you continue. These permissions can impact org security and user experience.

Enabled

App Permissions	System Permissions	Object Permissions
	Export Reports	
	Mass Edits from Lists	
	Edit Read Only Fields	
	Create and Customize Reports	
	Run Reports	

Disabled

App Permissions	System Permissions	Object Permissions

Save   Cancel

LOGIN ACCESS POLICIES:

Policy Configuration:

Login Hours: 06:00 AM - 10:00 PM IST

Time Zone: (GMT+05:30) India Standard Time

IP Restrictions: None (flexible access)

Invalid Login Attempts: 5 attempts

Lockout Period: 15 minutes

Administrator Login: Enabled for troubleshooting

Educational Rationale:

- **Extended Hours**: Covers early morning and evening study sessions

- **Geographic Flexibility**: Students access from home, hostels, library

- **Security Balance**: Protection without accessibility barriers