

Phase 2 Report

Org Setup & Configuration

Project: College Placement & Internship Management System

Batch: 4

Program: TCS Last Mile SmartBridge

Prepared by: Lowrence Devu

1. Introduction

This phase covers the Salesforce Org setup and configuration for the College Placement & Internship Management System. It establishes the foundational environment by creating roles, profiles, permissions, and security settings to ensure role-based access control.

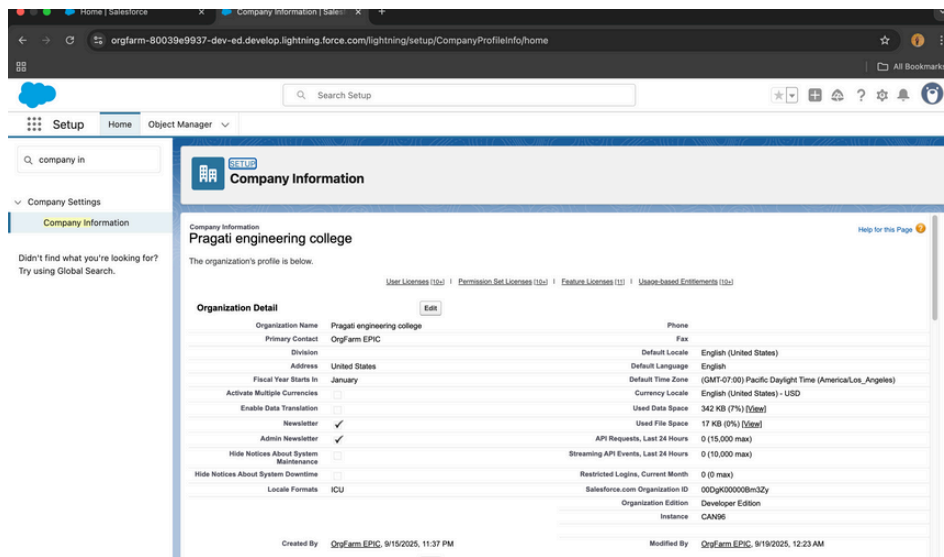
2. Objectives

- Configure Salesforce Developer Org and company profile.
- Define roles, profiles, and permission sets.
- Establish business hours, fiscal year, and user accounts.
- Apply security measures: Org-Wide Defaults (OWD), sharing rules, and field-level security.
- Document sandbox and deployment strategies.

3. Steps Performed

3.1 Salesforce Edition

- Developer Edition Org was created from developer.salesforce.com.
- Edition confirmed: **Salesforce Developer Edition.**



3.2 Company Profile Setup

- Organization Name updated to College Name.
- Default Locale, Timezone, Currency configured.
- Primary Contact details filled.

Company Information: **Pragati engineering college**

The organization's profile is below.

Organization Detail

Organization Name	Pragati engineering college	Phone	
Primary Contact	Lowrance Devu	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	<input type="checkbox"/>	Currency Locale	English (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	342 KB (7%) View
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) View
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (15,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	000gK000008m3Zy
		Organization Edition	Developer Edition
		Instance	CAN96

Created By: OrgFarm EPIC, 9/15/2025, 11:37 PM

Modified By: Lowrance Devu, 9/20/2025, 10:02 AM

3.3 Business Hours & Holidays

- Defined business hours: Mon–Fri, 9:00 AM–6:00 PM.
- Added public/college holidays for automation and approvals.

Organization 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.

Business Hours Detail

Business Hours Name	College Business Hours	Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Business Hours	Sunday: No 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: No Hours	Default Business Hours	<input checked="" type="checkbox"/>

Active: ☒

Created By: Lowrance Devu, 9/20/2025, 10:16 AM

Last Modified By: Lowrance Devu, 9/20/2025, 10:16 AM

3.4 Fiscal Year

- Chose **Standard Fiscal Year** (Jan–Dec).
- Option to switch to Custom Fiscal Year for academic cycle (Jul–Jun).

Fiscal Year

This page allows you to define and edit custom fiscal years, including the names used in reports and forecasts.

Click the New button to define a new fiscal year. Click Edit to edit a previously defined fiscal year.

Custom Fiscal Years

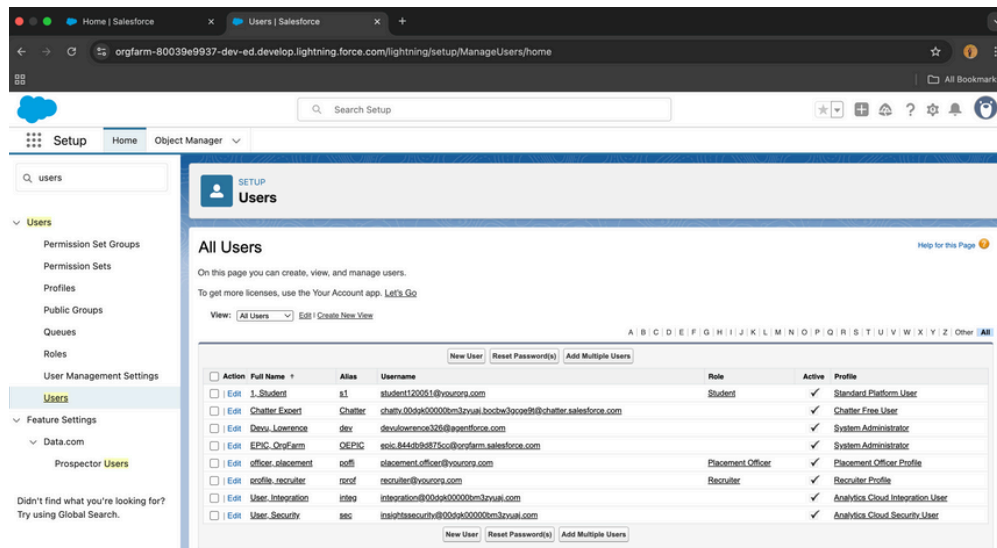
Action	Year	FY Start Date	FY End Date	Description
Edit	2025	1/1/2025	12/31/2025	

Custom Fiscal Year Names

Action	Field Label
Edit Replace	Quarter Prefix
Edit Replace	Period Prefix
Edit Replace	Quarter Name
Edit Replace	Period Name

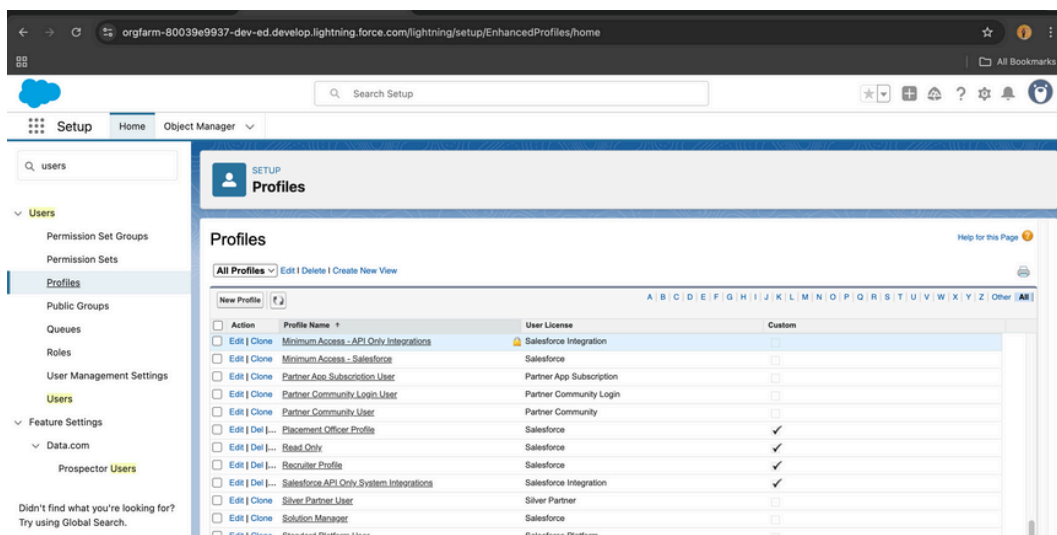
3.5 User Setup & Licenses

- Created test users:
 - Placement Officer
 - Recruiter
 - Student
- Each assigned a role and profile.



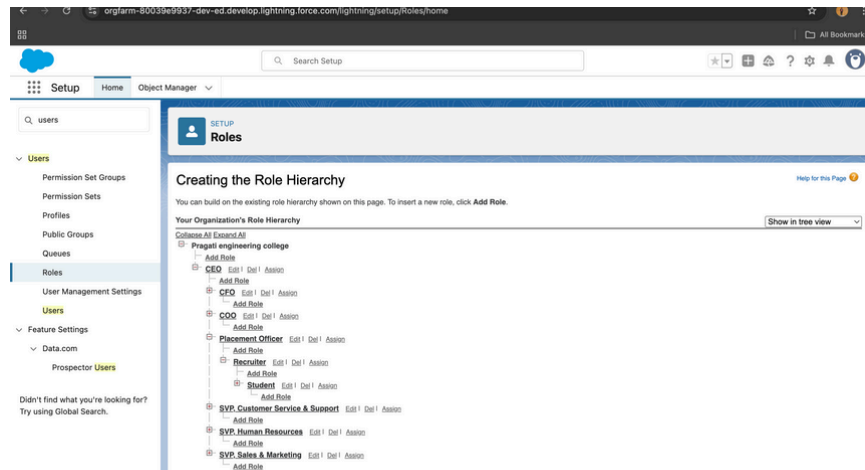
3.6 Profiles

- Cloned Standard User profile into:
 - Placement Officer Profile (full access to Leads & Opportunities).
 - Recruiter Profile (create/edit their own Opportunities, read Leads).
 - Student Profile (read-only Opportunities).



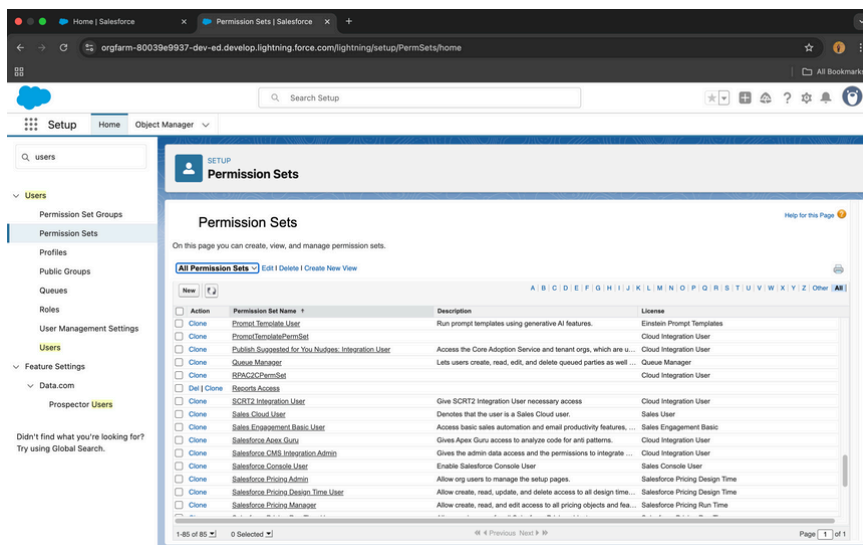
3.7 Roles

- Role hierarchy created:
 - CEO (default)
 - Placement Officer
 - Recruiter
 - Student



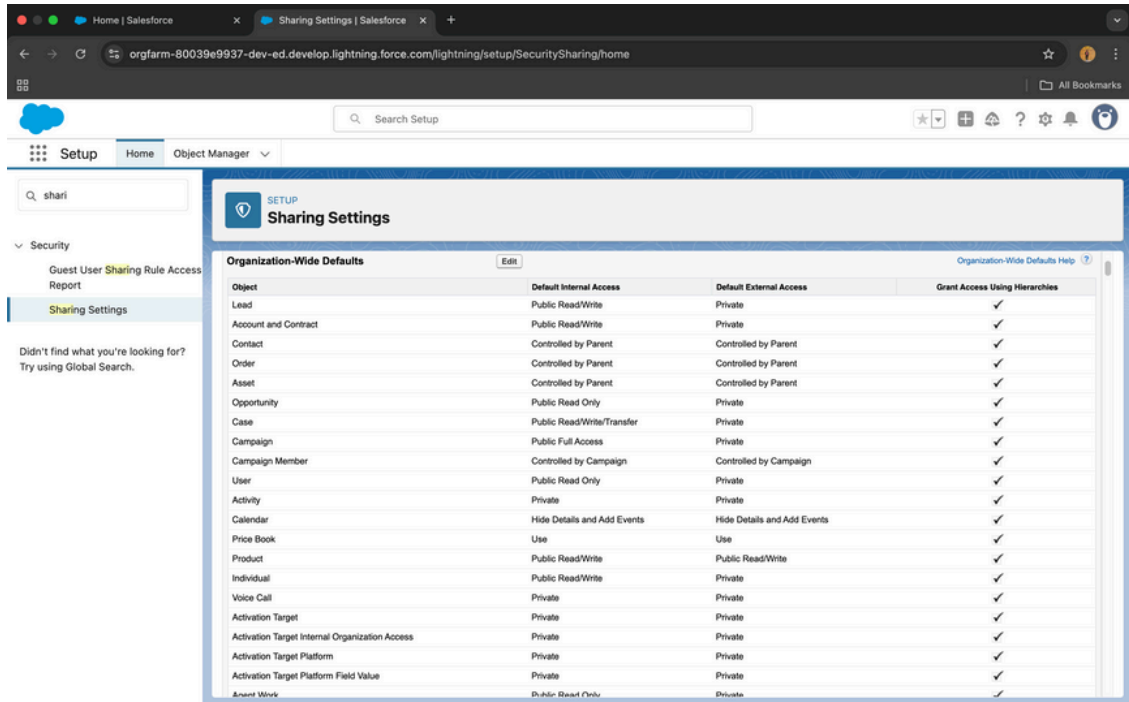
3.8 Permission Sets

- Created **Reports Access** permission set for dashboards.
- Assigned to Placement Officer and Recruiter.



3.9 Org-Wide Defaults (OWD)

- Leads: Public Read/Write.
- Opportunities: Public Read Only.
- Custom objects (Students, Applications) will be Private in Phase 3.

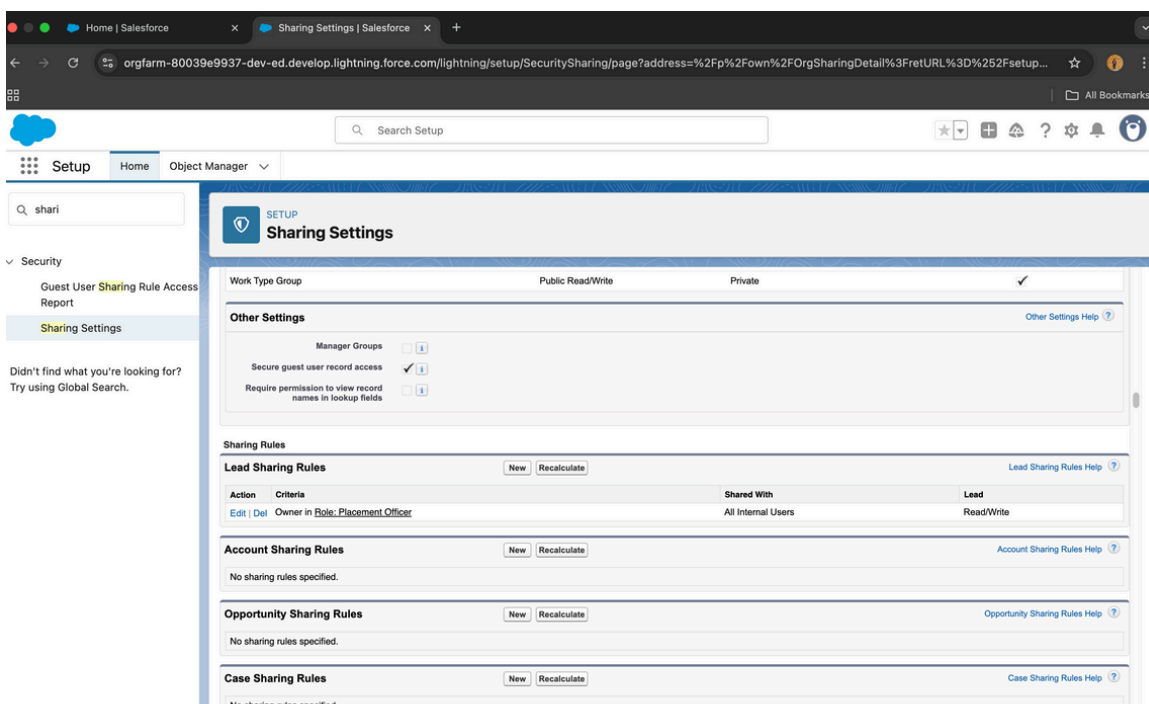


The screenshot shows the Salesforce Setup page for Sharing Settings. The left sidebar includes a search bar with 'shari' and a 'Security' section with links to 'Guest User Sharing Rule Access Report' and 'Sharing Settings'. The main content area is titled 'Sharing Settings' and features a table of 'Organization-Wide Defaults'. The table has four columns: Object, Default Internal Access, Default External Access, and Grant Access Using Hierarchies. The 'Grant Access Using Hierarchies' column contains checkmarks for all listed objects.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read Only	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓
Product	Public Read/Write	Public Read/Write	✓
Individual	Public Read/Write	Private	✓
Voice Call	Private	Private	✓
Activation Target	Private	Private	✓
Activation Target Internal Organization Access	Private	Private	✓
Activation Target Platform	Private	Private	✓
Activation Target Platform Field Value	Private	Private	✓
Account Work	Public Read Only	Private	✓

3.10 Sharing Rules

- Planned to share Student records with Placement Officer role.
- Planned to share Applications with Recruiter role.
- To be finalized after custom objects are created in Phase 3.



The screenshot shows the Salesforce Setup page for Sharing Settings, specifically the 'Other Settings' and 'Sharing Rules' sections. The 'Other Settings' section includes checkboxes for 'Manager Groups', 'Secure guest user record access' (checked), and 'Require permission to view record names in lookup fields'. The 'Sharing Rules' section lists 'Lead Sharing Rules', 'Account Sharing Rules', 'Opportunity Sharing Rules', and 'Case Sharing Rules'. The 'Lead Sharing Rules' section shows a rule for 'Lead' with 'All Internal Users' as the 'Shared With' criteria and 'Read/Write' as the 'Lead' criteria.

Work Type Group	Public Read/Write	Private
		✓

Other Settings

- Manager Groups ☐
- Secure guest user record access ☒
- Require permission to view record names in lookup fields ☐

Sharing Rules

Lead Sharing Rules

Action	Criteria	Shared With	Lead
Edit Del	Owner in Role: Placement Officer	All Internal Users	Read/Write

Account Sharing Rules

No sharing rules specified.

Opportunity Sharing Rules

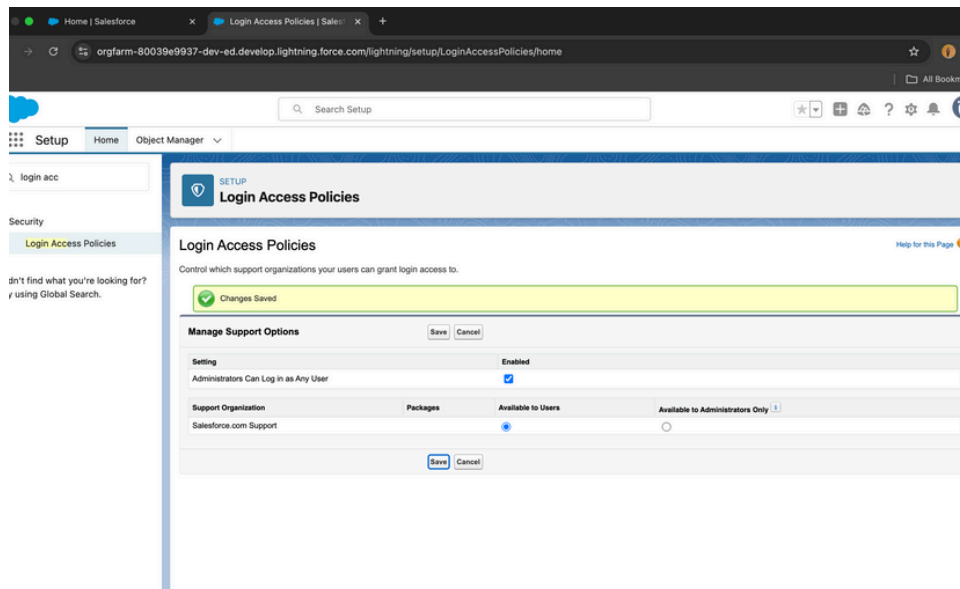
No sharing rules specified.

Case Sharing Rules

No sharing rules specified.

3.11 Login Access Policies

- Enabled “Administrators can log in as any user”.



3.12 Security & Field-Level Security

- Field-level security applied for sensitive fields.
- Example: **Placement_Status** visible but read-only for Students.

3.13 Sandbox & Testing Strategy

- Developer Edition has no full sandboxes.
- For testing, we use:
 - A second Developer Org as Sandbox.
 - Optionally Scratch Orgs with Salesforce CLI.

3.14 Deployment Basics •

Deployment Options:

- Change Sets (UI-based).
 - Salesforce CLI (sfdx source push/deploy).
 - ANT Migration Tool.
- For this project: plan to use Change Sets for simple deployment.

4. Expected Outcomes

- Salesforce Org fully configured with profiles, roles, and security.
- Defined business hours, fiscal year, and company profile.
- Sandbox strategy documented.
- Ready for Phase 3: Data Modeling & Relationships.

5. Conclusion

Phase 2 established the secure foundation for the College Placement & Internship Management System. By setting up roles, profiles, permission sets, OWD, and login policies, the project now has role-based access control. Sandbox and deployment strategies were defined to support future development. This environment is now prepared for data modeling in Phase 3.