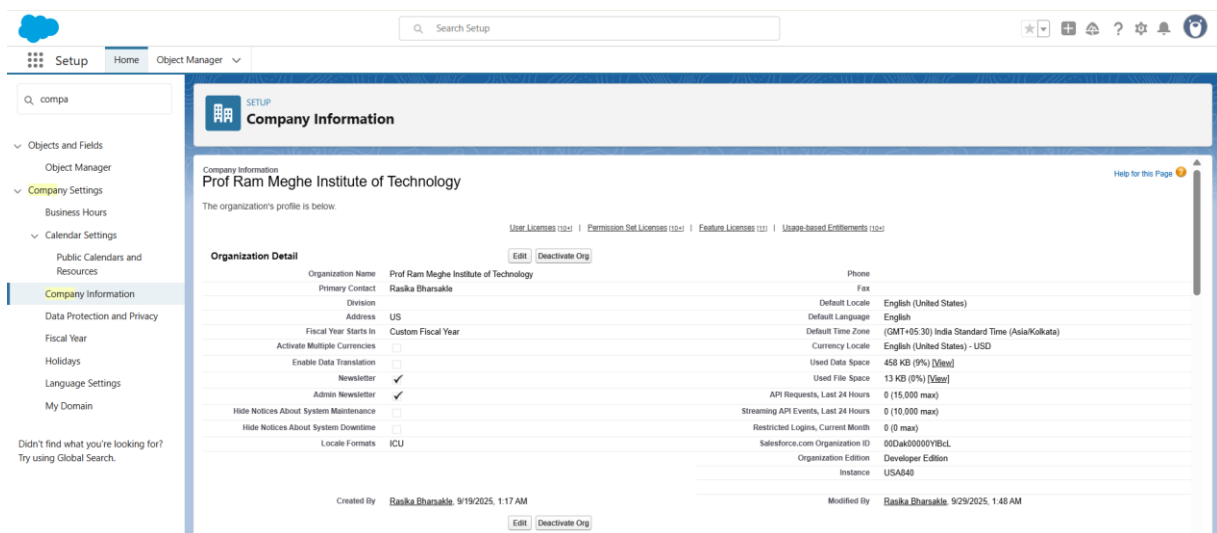


PHASE 2 – ORG SETUP & CONFIGURATION (INSTITUTE MANAGEMENT SYSTEM)

1. Salesforce Org Setup

- Created a **Developer Org** (free edition) specifically for the project.
- Updated **Company Profile**:
 - Company name set to *Prof Ram Meghe Institute of Technology*
 - Local time zone set to IST (India Standard Time).
 - Currency set to INR.

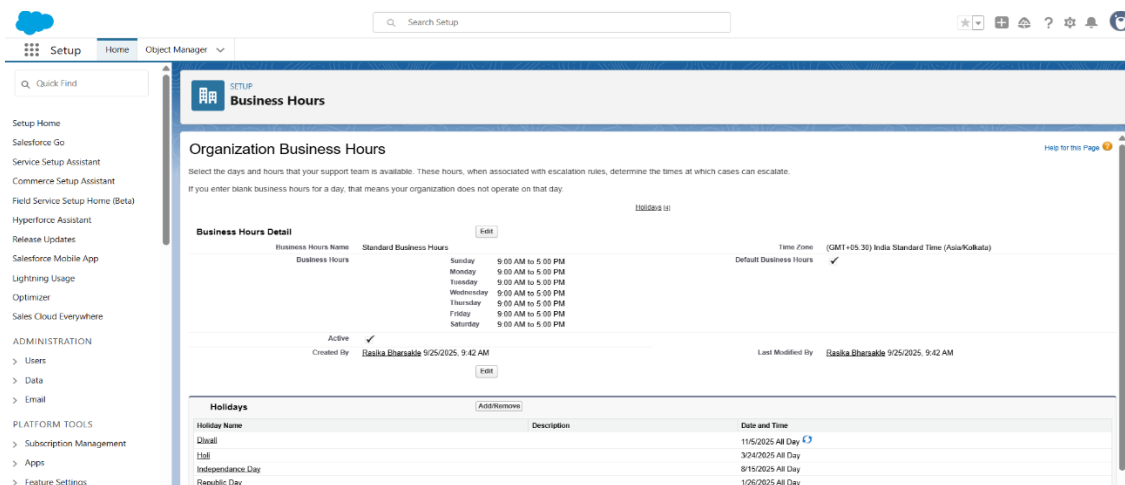


The screenshot shows the Salesforce Setup interface for the 'Company Information' section. The organization name is 'Prof Ram Meghe Institute of Technology'. The primary contact is 'Rasika Bhansale'. The address is 'US'. The fiscal year starts in 'Custom Fiscal Year'. The organization is set to 'English (United States)' for the default locale and language. The default time zone is '(GMT+05:30) India Standard Time (Asia/Kolkata)'. The currency is 'English (United States) - USD'. The organization edition is 'Developer Edition'. The instance is 'USA440'. The page was created by 'Rasika Bhansale' on 9/19/2025 at 1:17 AM and modified by 'Rasika Bhansale' on 9/29/2025 at 1:46 AM.

Organization Detail	
Organization Name	Prof Ram Meghe Institute of Technology
Primary Contact	Rasika Bhansale
Address	US
Fiscal Year Starts In	Custom Fiscal Year
Activate Multiple Currencies	<input type="checkbox"/>
Enable Data Translation	<input type="checkbox"/>
Newsletter	<input checked="" type="checkbox"/>
Admin Newsletter	<input checked="" type="checkbox"/>
Hide Notices About System Maintenance	<input type="checkbox"/>
Hide Notices About System Downtime	<input type="checkbox"/>
Locale Formats	ICU
Phone	
Fax	
Default Locale	English (United States)
Default Language	English
Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Currency Locale	English (United States) - USD
Used Data Space	458 KB (9%) View
Used File Space	13 KB (0%) View
API Requests, Last 24 Hours	0 (15,000 max)
Streaming API Events, Last 24 Hours	0 (10,000 max)
Restricted Logins, Current Month	0 (0 max)
Salesforce.com Organization ID	000ak00000YBcL
Organization Edition	Developer Edition
Instance	USA440

2. Business Hours and Holidays

- Defined business hours as **9 AM – 6 PM, Monday to Friday**.
- Added common Indian public holidays (e.g., Independence Day, Republic Day) so approval flows will not run on these days.



The screenshot shows the Salesforce Setup interface for the 'Business Hours' section. The organization business hours are defined as 9:00 AM to 5:00 PM from Monday to Friday. The time zone is '(GMT+05:30) India Standard Time (Asia/Kolkata)'. The page was created by 'Rasika Bhansale' on 9/25/2025 at 9:42 AM and last modified by 'Rasika Bhansale' on 9/25/2025 at 9:42 AM.

Business Hours Detail	
Business Hours Name	Standard Business Hours
Business Hours	Sunday 9:00 AM to 5:00 PM Monday 9:00 AM to 5:00 PM Tuesday 9:00 AM to 5:00 PM Wednesday 9:00 AM to 5:00 PM Thursday 9:00 AM to 5:00 PM Friday 9:00 AM to 5:00 PM Saturday 9:00 AM to 5:00 PM
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Default Business Hours	<input checked="" type="checkbox"/>
Active	<input checked="" type="checkbox"/>
Created By	Rasika Bhansale 9/25/2025, 9:42 AM
Last Modified By	Rasika Bhansale 9/25/2025, 9:42 AM

Holidays	
Holiday Name	Description
Diwali	11/5/2025 All Day
Holi	3/24/2025 All Day
Independence Day	8/15/2025 All Day
Republic Day	1/26/2025 All Day

3. Fiscal Year Setup

- Used the **Standard Fiscal Year (Jan–Dec)** to align with event planning and financial reporting.

The screenshot shows the 'Custom Fiscal Year Definition' page in Salesforce Setup. The left sidebar has a search bar with 'fisc' and a list of settings including 'Company Settings' and 'Fiscal Year'. The main content area has a title bar with 'SETUP' and a search bar. Below the title bar, there's a section 'Custom Fiscal Year Definition' with a subtitle: 'This page allows you to define a custom fiscal year record. Dates for the custom fiscal year will be generated based on the choices you make below. If you need to customize your fiscal year, expand the Advanced Customization section.' There are 'Preview', 'Save', and 'Cancel' buttons. The 'Fiscal Year Information' section has fields for 'Fiscal Year Start Date' (7/1/2025), 'Fiscal Year Name' (2025-26), 'Description' (empty), and 'Week Start Day' (Monday). There's a 'Reset Fiscal Year Structure' section below with 'Preview', 'Save', and 'Cancel' buttons.

4. User Setup

- Created separate users for key roles:
 - Institute Admin
 - Faculty
 - Student

The screenshot shows the 'Users' page in Salesforce Setup. The left sidebar has a search bar with 'users' and a list of settings including 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', and 'User Management Settings'. The main content area has a title bar with 'SETUP' and a search bar. Below the title bar, there's a section 'Users' with a subtitle: 'User Profile Help for this Page'. There are 'Edit', 'Sharing', 'Reset Password', 'Freeze', and 'View Summary' buttons. The 'User Detail' section shows information for 'John Doe' (jdoe) with fields for Name, Alias, Email (johndoe@example.com), Username (johndoe111@example.com), Nickname (User17588221691883589877), Title, Company, Department, Division, Address, Time Zone (GMT-07:00 Pacific Daylight Time (America/Los_Angeles)), Locale (English (United States)), Language (English), Delegated Approver, Manager, Receive Approval Request Emails (Only if I am an approver), Federation ID, App Registration: One-Time Password Authenticator, App Registration: Salesforce Authenticator, Security Key (U2F or WebAuthn), Role (Salesforce), User License (System Administrator), Profile (Active), Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations (View), Data.com User Type, Accessibility Mode (Classic Only), Debug Mode, High Contrast Palette on Charts, Load Lightning Pages While Scrolling, Send Apex Warning Emails, and Salesforce CRM Content User.

5.Profile

- **Faculty Profile:**

- Can access **Student Records, Attendance, courses.**

- **Permission:**

- Student Object-Read/Write(For Their students).
- Attendance Object-Full Access.
- Fees Object-Read only.

- **Student Profile:**

- Can access only their own records.

- **Permission:**

- Student Object-Read(self Only)
- Attendance Object-Read(self Only)
- Course Object-Read Only

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled 'Profiles' and shows the 'Faculty' profile. Below the profile name, there is a section for 'Page Layouts' with a table listing various layouts and their assignments.

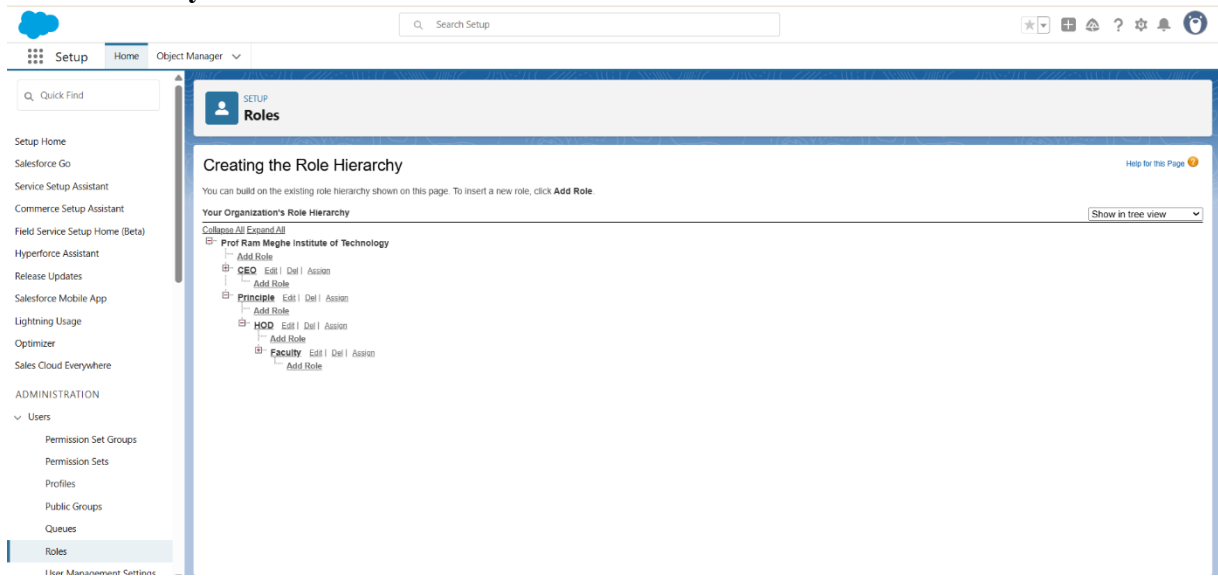
Standard Object Layouts	
Global	Global Layout [View Assignment]
Email Application	Not Assigned [View Assignment]
Home Page Layout	Home Default [View Assignment]
Account	Account Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]
Asset	Asset Layout [View Assignment]
Asset Action	Asset Action Layout [View Assignment]

Location Group Assignment	
Macro	Macro Layout [View Assignment]
Object Milestone	Object Milestone Layout [View Assignment]
Operating Hours	Operating Hours Layout [View Assignment]
Opportunity	Opportunity Layout [View Assignment]
Opportunity Product	Opportunity Product Layout [View Assignment]
Order	Order Layout [View Assignment]
Order Product	Order Product Layout [View Assignment]

6.Roles and Hierarchy

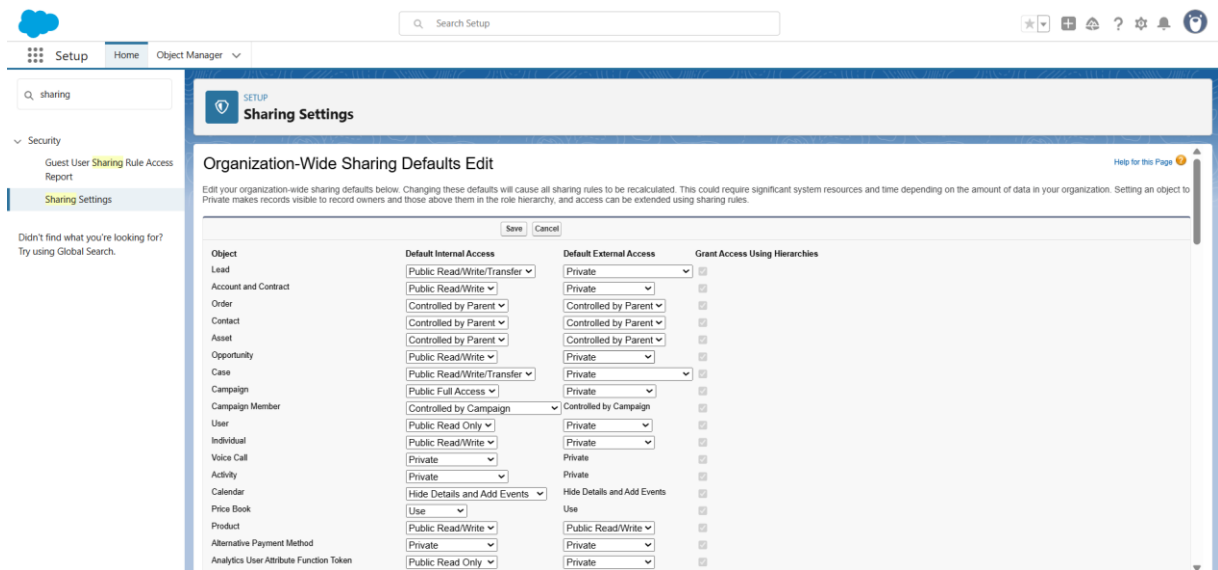
- **CEO** at top of hierarchy.
- **Principle** below CEO, acts as head of the institute.

- **HOD** positioned under Principle.
- **Faculty** lowest in this branch.



7. Org-Wide Defaults (OWD) and Sharing Rules

- **Student Object:** Private → only the record owner(faculty) and their hierarchy(HOD,Principle)can see student records.
- **Course Object:** Public Read Only → everyone can see available courses,but only authorized users ca edit.
- Created sharing rules so that:
 - faculty of the same department can view each others courses/attendance records for collaboration.
 - HOD can access all student records within their department,even if they don't own them.



8.Outcome of Phase 2:

At the end of this Phase: The Institute Management System has a fully configured salesforce org with:

- Secure user roles and profile.
- Define record visibility & data sharing rules.
- Practical alignment with an academic institutions structure.