School/College Student CRM —

Phase 2: Org Setup & Configuration

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1. Introduction

This phase covers the setup and configuration of a Salesforce Developer Org to simulate a School/College environment. The system will support management of students, courses, enrollments, grades, and fees. It will also demonstrate how different users (Admin, Teacher, Parent, Finance Officer) interact with the CRM and access data securely.

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2. Objectives

- Configure a Salesforce Developer Org named “Student CRM.”
- Create sample users (Admin, Teacher, Parent, Finance Officer).
- Build custom profiles for role-specific access.
- Design a role hierarchy for School Admin, Faculty, Finance, and Parents.
- Configure Org-Wide Defaults (OWD) and Sharing Rules for secure access.
- Create a Lightning App “Student CRM” with custom tabs.
- Test access and verify that security and sharing rules function as expected.

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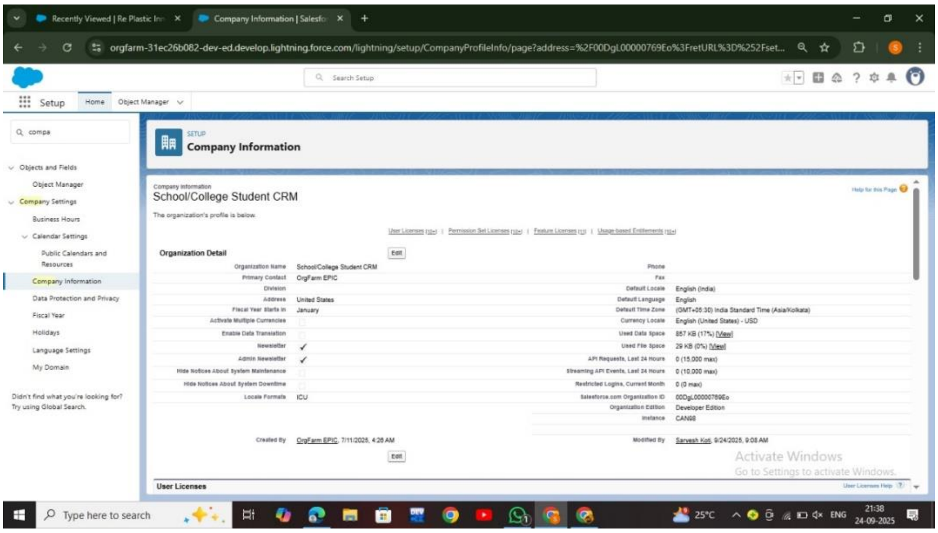
3. Configuration Steps

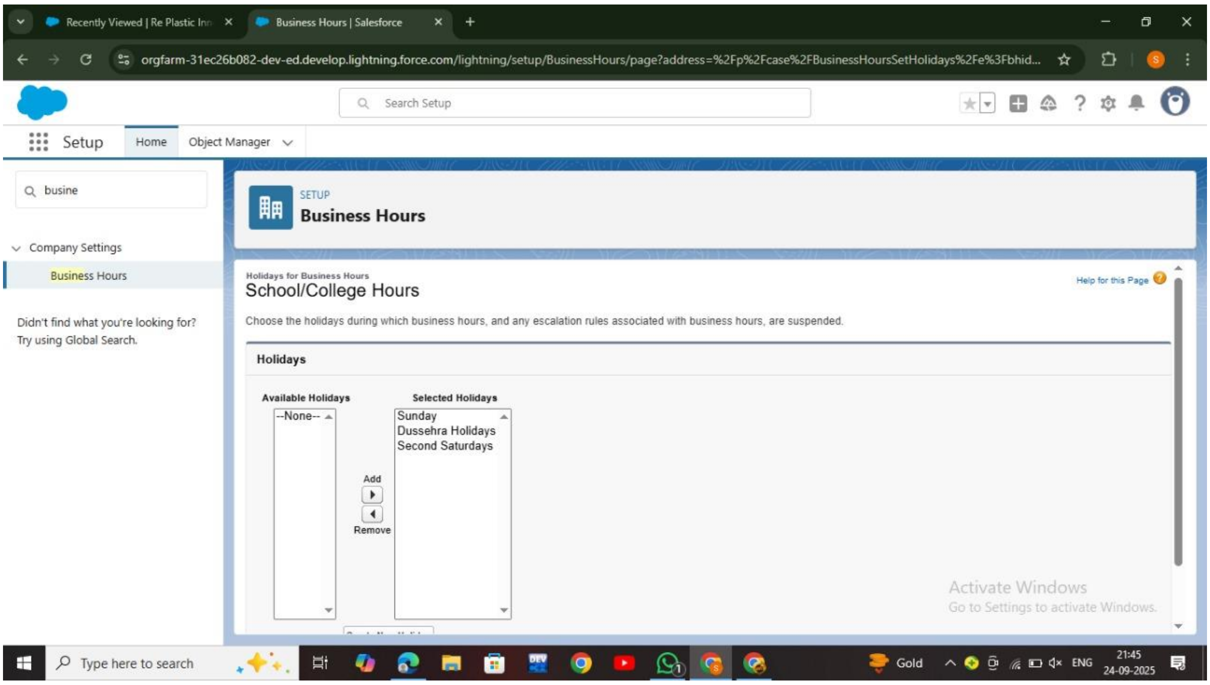
Step 0 — Company Info

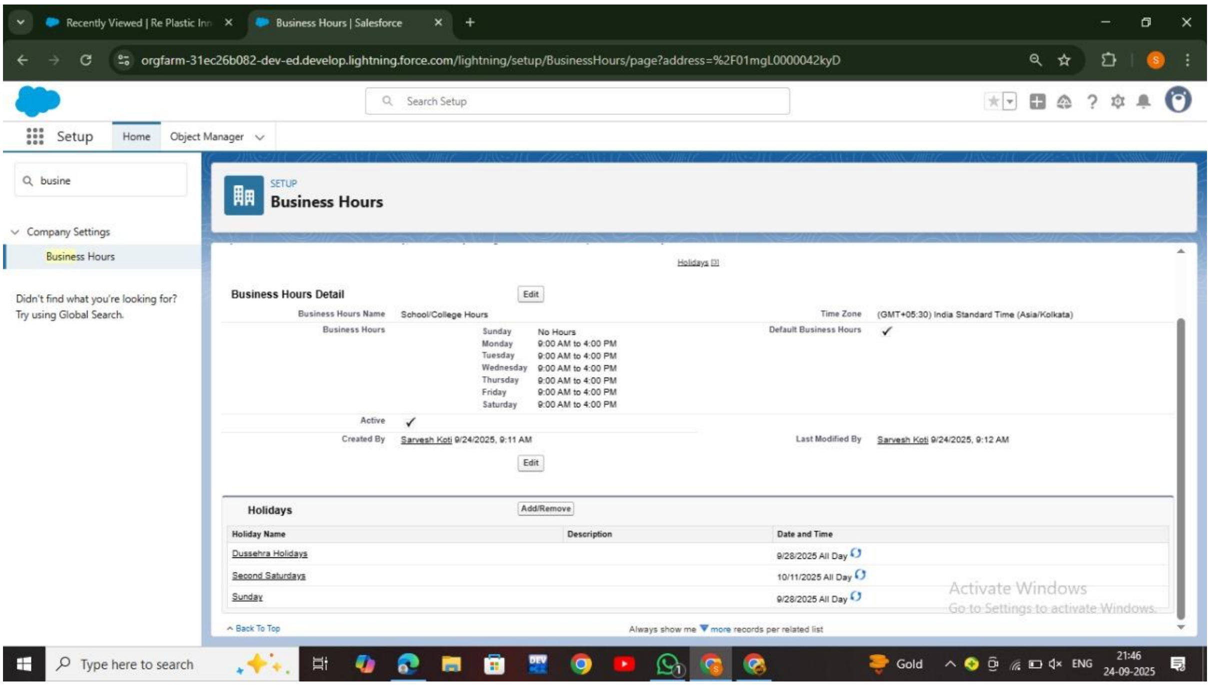
- Signed up for Salesforce Developer Edition and logged in.
- Setup → Company Information → updated Organization Name = Student CRM, Locale = English (India), Timezone = IST.



Step 1 — Business Hours & Holidays

- Created “School Hours” Mon–Fri 9 AM–4 PM.
- Added school holidays (e.g., Summer Break, National Holidays).
- Linked holidays to business hours.





Step 2 — Users

Created four sample users:

Display Name	Username (example)	Profile	Role
School Admin	admin@schoolcrm.com	System Administrator	School Admin
Teacher	teacher@schoolcrm.com	Teacher Profile	Faculty
Parent	parent@schoolcrm.com	Parent Profile	Parent
Finance Officer	finance@schoolcrm.com	Finance Profile	Finance Dept

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Step 3 — Profiles

- Cloned Standard User → created **Teacher Profile**.
  - Access: Student, Course, Enrollment, Grade = Read/Edit.
  - Fee = Read Only.
- Cloned Standard User → created **Parent Profile**.
  - Access: Student, Grade, Fee = Read Only.
- Cloned Standard User → created **Finance Profile**.
  - Access: Fee = Read/Create/Edit/Delete.
  - Student = Read Only.

Step 4 — Role Hierarchy

Created a simple hierarchy:

- School Admin (Top)
  - Faculty (Teachers)
  - Finance Department
  - Parents

This ensures School Admin sees all, while other roles have limited visibility.

Step 5 — Org-Wide Defaults (OWD)

- Student__c = Private
- Course__c = Public Read Only
- Grade__c = Private
- Fee__c = Private

Step 6 — Sharing Rules

- **Teachers → Students**
  - Created a custom lookup field `Assigned_Teacher__c` on Student.
  - Sharing rule ensures Teachers see only their assigned students.
- **Parents → Students**
  - Created a lookup field `Parent__c` linking Student to Parent user.
  - Enabled Experience Cloud + Sharing Set so parents only see their own child's record.
- **Finance → Fees**
  - Role-based sharing rule for Finance Department → Full Read/Write access to Fee records.

Step 7 — Lightning App Setup

- Created Lightning App "Student CRM."
- Added tabs: Students, Courses, Enrollments, Grades, Fees, Reports, Dashboards.

Step 8 — Testing

- Logged in as Teacher → verified access to assigned students only.

- Logged in as Parent → verified access to child’s records only.
- Logged in as Finance Officer → verified access to Fee records.
- Logged in as Admin → verified full access.

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4. Results / Observations

- Role hierarchy ensured proper record visibility.
- Teachers could access only their assigned students.
- Parents accessed records only through the Parent Portal.
- Finance department had full control over fee records.
- Admin had global access.

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5. Next Steps (Enhancements)

- Add automation for admission workflow (auto email + pending status).
- Build fee reminder flows (scheduled notifications).
- Add GPA calculation flows for automatic student performance updates.
- Create dashboards for admissions, fee collections, and academic performance.
- Enhance Parent Portal with attendance, notices, and downloadable report cards.