

Phase 2: Org Setup & Configuration

Salesforce Editions - Developer Org

Set up the Salesforce Developer Org to build and test functionalities tailored to academic workflows.

Process Flow: Setup → Salesforce Editions → Developer Org

1. Company Profile Setup

Configured the company profile with the following details:

- **Organization Name:** Prof. Ram Meghe Institute of Technology & Research
- **Default Locale:** English (India)
- **Default Currency:** INR
- **Default Time Zone:** (GMT+05:30) India Standard Time

The screenshot shows the 'Company Information' setup page in Salesforce. The organization name is 'Prof. Ram Meghe Institute Of Technology and Research'. The page includes various configuration options for the organization, such as locale, currency, time zone, and data space. The 'Organization Detail' section is expanded, showing fields like Organization Name, Primary Contact, Division, Address, Fiscal Year Starts In, Activate Multiple Currencies, Enable Data Translation, Newsletter, Admin Newsletter, Hide Notices About System Maintenance, Hide Notices About System Downtime, Locale Formats, Phone, Fax, Default Locale, Default Language, Default Time Zone, Currency Locale, Used Data Space, Used File Space, API Requests, Last 24 Hours, Streaming API Events, Last 24 Hours, Restricted Logins, Current Month, Salesforce.com Organization ID, Organization Edition, and Instance.

Organization Detail	
Organization Name	Prof. Ram Meghe Institute Of Technology and Research
Primary Contact	OrgFarm EPIC
Division	
Address	India
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 (India)
Default Language	English
Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Currency Locale	Hindi (India) - INR
Used Data Space	501 KB (10%) View
Used File Space	17 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	00DgK000007ZvaW
Organization Edition	Developer Edition
Instance	CAN96

Process Flow: Setup → Company Information → Edit

2. Business Hours & Holidays

Created a Business Hours setting named 'School Hours' with all days available 9:00AM to 5:00PM hours to accommodate academic activities at any time.

Business Hours

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.

Holidays (0)

Business Hours Detail

[Edit](#)

Business Hours Name	School Hours	Time Zone
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	(GMT+05:30) India Standard Time (Asia/Kolkata)

Default Business Hours ☐

Active ☒

Created By [Shruti Misal](#) 9/15/2025, 4:57 AM

Last Modified By [Shruti Misal](#) 9/16/2025, 6:28 AM

[Add/Remove](#)

No records to display

Process Flow: Setup → Business Hours → New Business Hours

3. Fiscal Year Settings

Defined the fiscal year from April 1, 2025, to March 31, 2026, aligning financial tracking and reporting to academic schedules.

Custom Fiscal Year Definition

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.

[Preview](#) [Save](#) [Cancel](#)

Fiscal Year Information

Fiscal Year Start Date 4/1/2025

Fiscal Year Name 2026

Description

Week Start Day Tuesday

[Reset Fiscal Year Structure](#)

[Preview](#) [Save](#) [Cancel](#)

Process Flow: Setup → Fiscal Year → Define

4. User Setup & Licenses

Configured user roles, profiles, and licenses:

- Teacher User:
 - License: Salesforce
 - Profile: Teacher_Profile
- Student User:
 - License: Salesforce
 - Profile: Student_Profile
- Guardian User:
 - License: Salesforce
 - Profile: Guardian_Profile

The screenshot shows the 'Clone Profile' page in the Salesforce Setup interface. The page title is 'Clone Profile' with a 'Help for this Page' link. Below the title, it says 'Enter the name of the new profile.' A message box states 'You must select an existing profile to clone from.' with a 'Required Information' icon. The form contains the following fields:

Existing Profile	Standard User
User License	Salesforce
Profile Name	<input type="text" value="Teacher_Profile"/>

At the bottom of the form are 'Save' and 'Cancel' buttons.

SETUP

Users

New User

Help for this Page

User Edit

SaveSave & NewCancel

General Information

First NameHarshal

Last NameAlaspure

Aliashalas

Email

Username

Nickname

Title

Company

Department

Division

Role<None Specified>

User LicenseSalesforce Platform

ProfileStandard Platform User

Active☒

Marketing User☐

Offline User☐

Knowledge User☐

Flow User☐

Service Cloud User☐

Site.com Contributor User☐

Site.com Publisher User☐

WDC User☐

Data.com User Type--None--

Data.com Monthly Addition LimitDefault Limit (300)

Process Flow: Setup → Users → New User → Assign Role/Profile

5. Roles & Hierarchy

Defined hierarchy to control visibility and reporting structure in the academic system:

- **Academic_Admin**

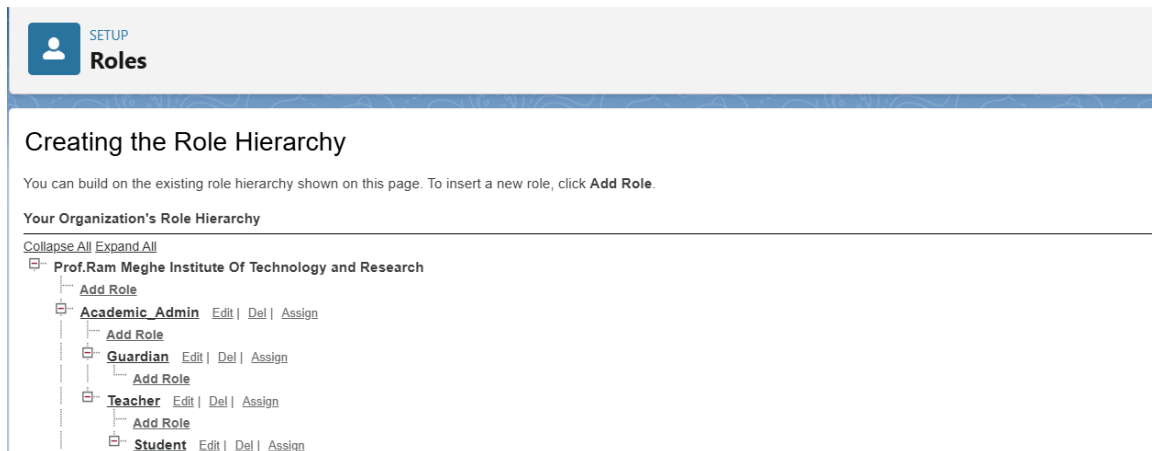
↓

- **Teacher**

↓

- **Student**

Guardian role is placed under **Admin** for independent visibility of child's records.



The screenshot shows a web interface for setting up roles. At the top, there's a header with a user icon, the word 'SETUP', and 'Roles'. Below this is a section titled 'Creating the Role Hierarchy' with a subtext: 'You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.' Underneath is 'Your Organization's Role Hierarchy' with 'Collapse All' and 'Expand All' links. The hierarchy is a tree structure for 'Prof. Ram Meghe Institute Of Technology and Research'. It starts with 'Add Role' at the root. Below it is 'Academic_Admin' with 'Edit', 'Del', and 'Assign' links. Under 'Academic_Admin' is another 'Add Role' link. Below that is 'Guardian' with 'Edit', 'Del', and 'Assign' links. Under 'Guardian' is another 'Add Role' link. Below that is 'Teacher' with 'Edit', 'Del', and 'Assign' links. Under 'Teacher' is another 'Add Role' link. At the bottom is 'Student' with 'Edit', 'Del', and 'Assign' links.

Process Flow: Setup → Roles → New Role → Define Hierarchy

6. Permission Sets

Created permission sets to manage access and rights:

- PS_Grade_Manager: Extra edit rights on Grade__c
- Submission_Reviewer: Manage rights on Submission__c (assigned to Teacher user Anita)
- PS_Assignment: Manage rights on Assignment__c (assigned to Teacher user Anita)

Permission Sets

Permission Set: **PS_Grade_Manager** Video Tutorial | Help for this Page

Find Settings... Clone Edit Properties Manage Assignments View Summary

Permission Set Overview

Description	Allows teachers to create/edit/delete Grade__c records	API Name	PS_Grade_Manager
License		Namespace Prefix	
Session Activation Required	<input type="checkbox"/>	Created By	Shruti Misal, 9/14/2025, 8:23 AM
Permission Set Groups Added To	0	Last Modified By	Shruti Misal, 9/15/2025, 5:29 AM

Apps

Assigned Apps
Settings that specify which apps are visible in the app menu

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings such as tab availability

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access
Permissions to execute Apex classes

Visualforce Page Access

Process Flow: Setup → Permission Sets → New → Assign

7. Organization-Wide Defaults (OWD)

Set sharing model to ensure privacy and access control:

- Student__c = Private
- Guardian__c = Private
- Assignment__c = Private
- Submission__c = Private
- Grade__c = Private
- Course__c = Public Read Only

Sharing Settings

Object	Default Sharing Model	Controlled Sharing	Visible to All
Work Order	Private	Private	<input checked="" type="checkbox"/>
Work Plan	Private	Private	<input checked="" type="checkbox"/>
Work Plan Template	Private	Private	<input checked="" type="checkbox"/>
Work Step Template	Private	Private	<input checked="" type="checkbox"/>
Work Type	Private	Private	<input checked="" type="checkbox"/>
Work Type Group	Public Read/Write	Private	<input checked="" type="checkbox"/>
Assignment	Private	Private	<input checked="" type="checkbox"/>
Course	Public Read Only	Private	<input checked="" type="checkbox"/>
Exam	Private	Private	<input checked="" type="checkbox"/>
Grade	Private	Private	<input checked="" type="checkbox"/>
Guardian	Private	Private	<input checked="" type="checkbox"/>
Mentor	Private	Private	<input checked="" type="checkbox"/>
Student	Private	Private	<input checked="" type="checkbox"/>
Submission	Private	Private	<input checked="" type="checkbox"/>

Other Settings

Standard Report Visibility ☒ ? Manual User Record Sharing ☐ ? Manager Groups ☐ ? Secure guest user record access ☒ ? Require permission to view record names in lookup fields ☐ ?

Save Cancel

Process Flow: Setup → Sharing Settings → Edit Defaults

8. Sharing Rules

Implemented sharing rules for effective collaboration and visibility:

- Grades (Grade__c): Shared with Guardian role to view child's records
- Submissions (Submission__c): Shared with Teacher role for management
- Assignments: Configured to ensure proper access as per role hierarchy

The screenshot shows the 'Setup' page for 'Grade Sharing Rule'. The page title is 'Grade Sharing Rule' with a 'Help for this Page' link. Below the title, there is a note: 'Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users. Note: "Roles and subordinates" includes all users in a role, and the roles below that role. You can use sharing rules only to grant wider access to data, not to restrict access.'

The configuration form includes the following fields:

- Label:** Share_Grades_to_Guardian
- Rule Name:** Share_Grades_to_Guardian
- Description:** (Empty text area)
- Grade:** owned by members of
- Share with:** Role: Student
- Access Level:** Read Only (dropdown menu)
- Created By:** Shruti Misal, 9/15/2025, 6:06 AM
- Modified By:** Shruti Misal, 9/15/2025, 6:06 AM

At the bottom of the form, there are 'Save' and 'Cancel' buttons.

Process Flow: Setup → Sharing Settings → New Sharing Rule

9. Outcomes of Phase 2

This phase successfully established the Salesforce environment with proper configurations for users, roles, profiles, permissions, and data-sharing policies. It ensures secure, role-based access while enabling seamless academic workflows, timely communication, and transparent management of student records.