Salesforce CRM Project – Phase 2 Report

Org Setup & Configuration

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1. Introduction

Phase 2 focuses on the **foundational configuration** of the Salesforce Org for the **EdTech Student Success CRM**.
The main objective is to ensure that **security, visibility, and data access** are well defined before building data models and automations.

This phase answers:

- Who are the different users of the system?
- What data should each role be able to see and update?
- How do we secure sensitive data like grades and attendance?
- How do we tailor Salesforce settings to match the university's academic year and working hours?

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2. Profiles

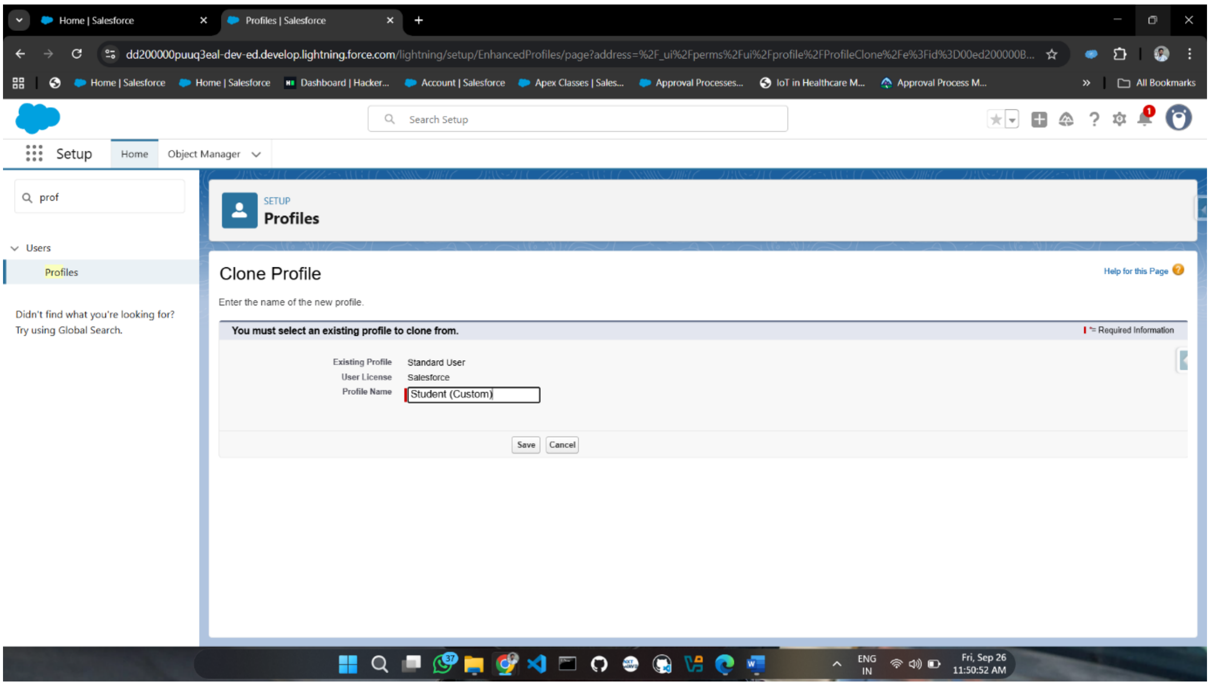
Profiles are the **baseline access control mechanism** in Salesforce. They define:

- Which apps, tabs, and objects users can access.
- What CRUD (Create, Read, Update, Delete) permissions they have.
- Field-level visibility.

Profiles Created:

1. **Student (Custom)**
   - Access: Read-only to Student, Grades, Attendance, Activities, Career Path.
   - Purpose: Students can only monitor their academic progress.
2. **Faculty (Custom)**
   - Access: Read/Edit Student, Grades, Attendance, Activities.
   - Purpose: Faculty manages academic records for students in their department.
3. **Career Advisor (Custom)**
   - Access: Read Student, Grades, Attendance, Activities; Full Edit on Career Path.
   - Purpose: Advisors provide career guidance and skill recommendations.

4. **Admin (System Administrator)**



- Access: Modify All Data, Customize Application.
- Purpose: Full control of the org.

Best Practice:

- Keep profiles as general as possible.
- Use **Permission Sets** to grant extra privileges to individual users without modifying profiles.

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3. Role Hierarchy

Roles define **record-level visibility** and reporting structure.
They answer *"who can see whose records?"*.

Hierarchy Implemented:

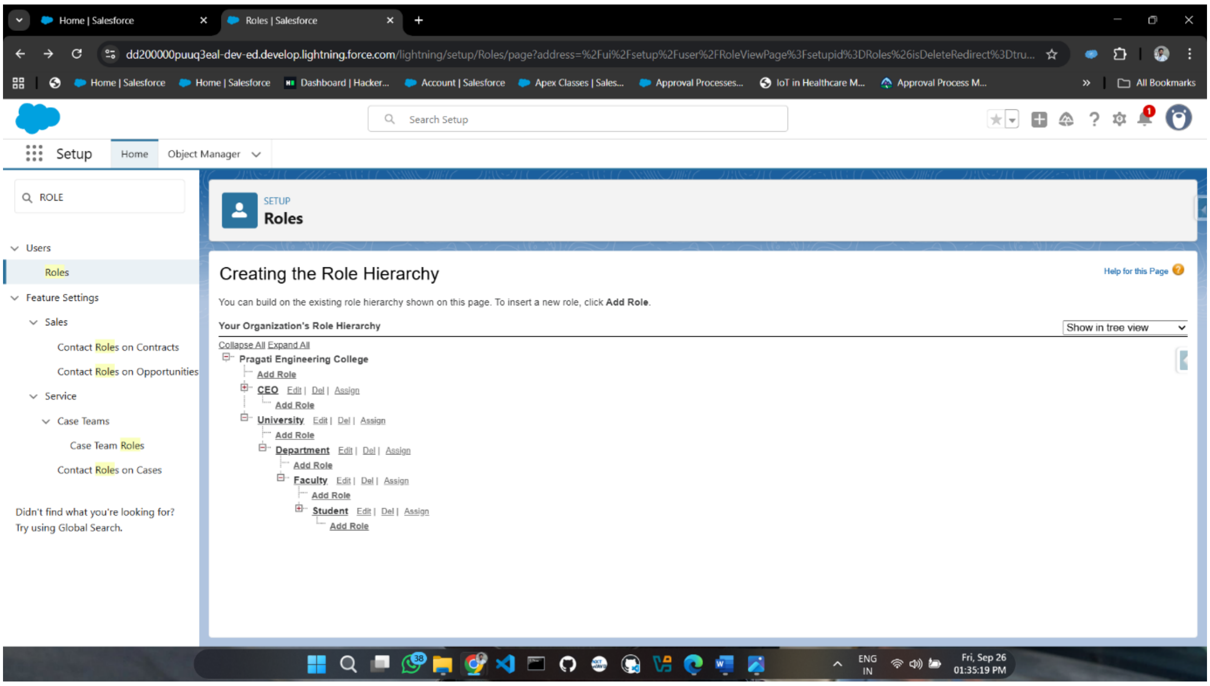
- **University (Root)**
    - **Department** (e.g., CSE, ECE, IT, EEE,MECH)
        - **Faculty**
            - **Student**

Example:

- A Faculty role under CSE can view/edit student records for the CSE department but not ECE students.
- University Admin (top role) can view all records.

Best Practice:

- Roles = record visibility.
- Profiles = functional permissions.
- Don't mix them up.



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4. Permission & Sharing Settings

After setting **Organization-Wide Defaults (OWD)**, Sharing Rules define *how records are shared*.

OWD Configuration:

- **Student__c:** Private → Students can only see their own record.
- **Grade__c, Attendance__c:** Controlled by Parent (Student).
- **Activity__c, Career_Path__c:** Private (shared as needed).

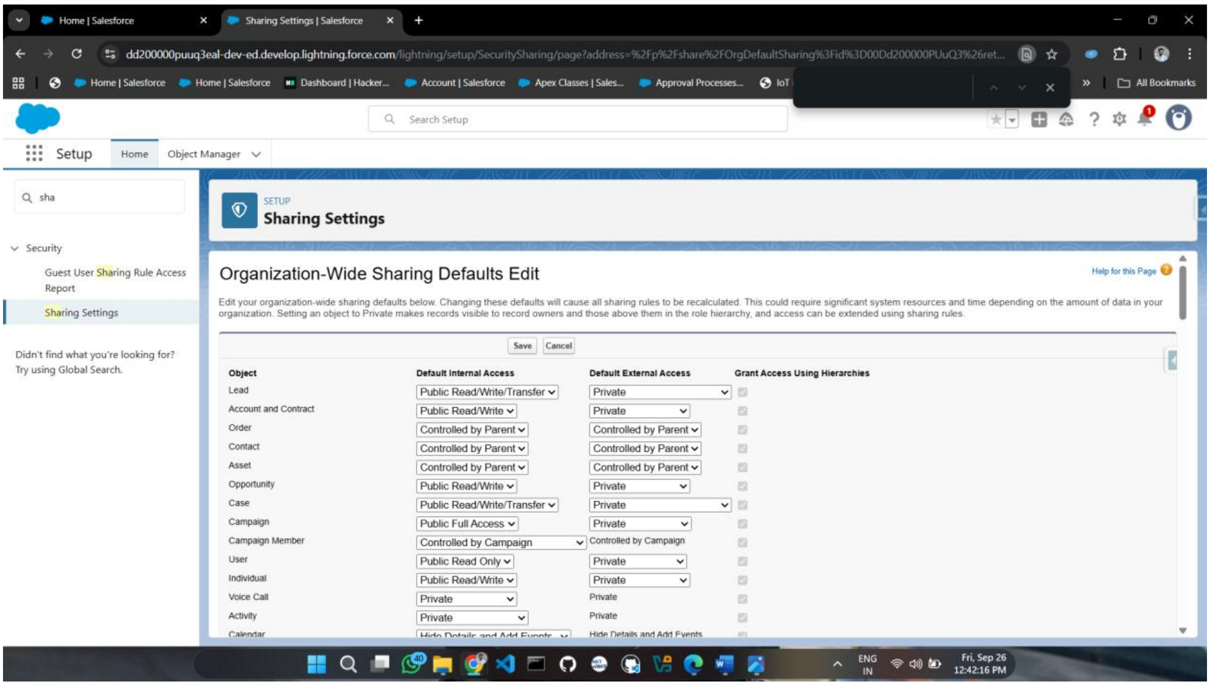
Sharing Rules:

- **Faculty Sharing Rule:** Share Student records where Department = "CSE" with Faculty (CSE role).

- **Advisor Sharing Rule:** Share all Student career-related data with Career Advisor role.

Best Practice:

- Always start with OWD = Private, then open access via Sharing Rules.
- Avoid Public Read/Write unless absolutely necessary.



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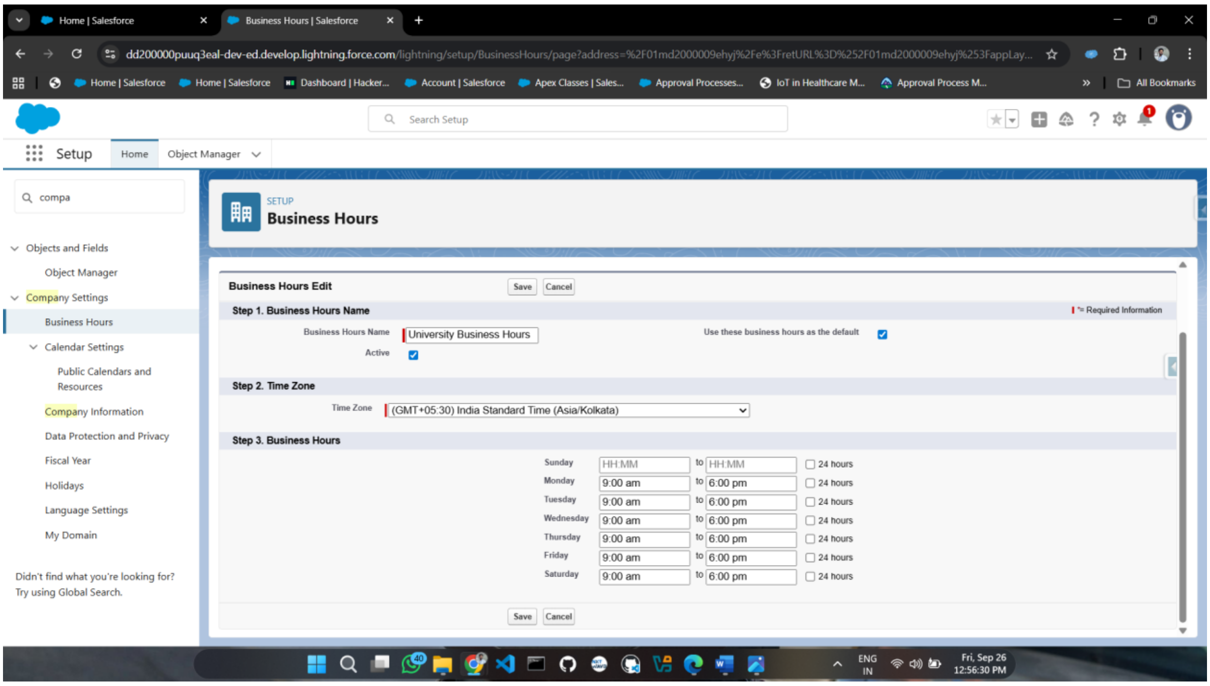
5. Org Settings

Tailoring Salesforce to fit the **academic environment** ensures the system aligns with real-world workflows.

- **Fiscal Year:** Configured to run July–June (academic year).
- **Business Hours:** Advisors available Mon–Fri, 9:00 AM – 6:00 PM. Used for escalation rules and SLAs.
- **Login IP Restrictions:** Faculty and Admin profiles restricted to university network. Prevents unauthorized logins from outside campus.

Best Practice:

- Keep fiscal year aligned with academic sessions for accurate reporting.
- Business hours help with support processes (e.g., automated reminders).
- Profile-level IP restrictions provide strict enforcement of login policies.



6. Test Users

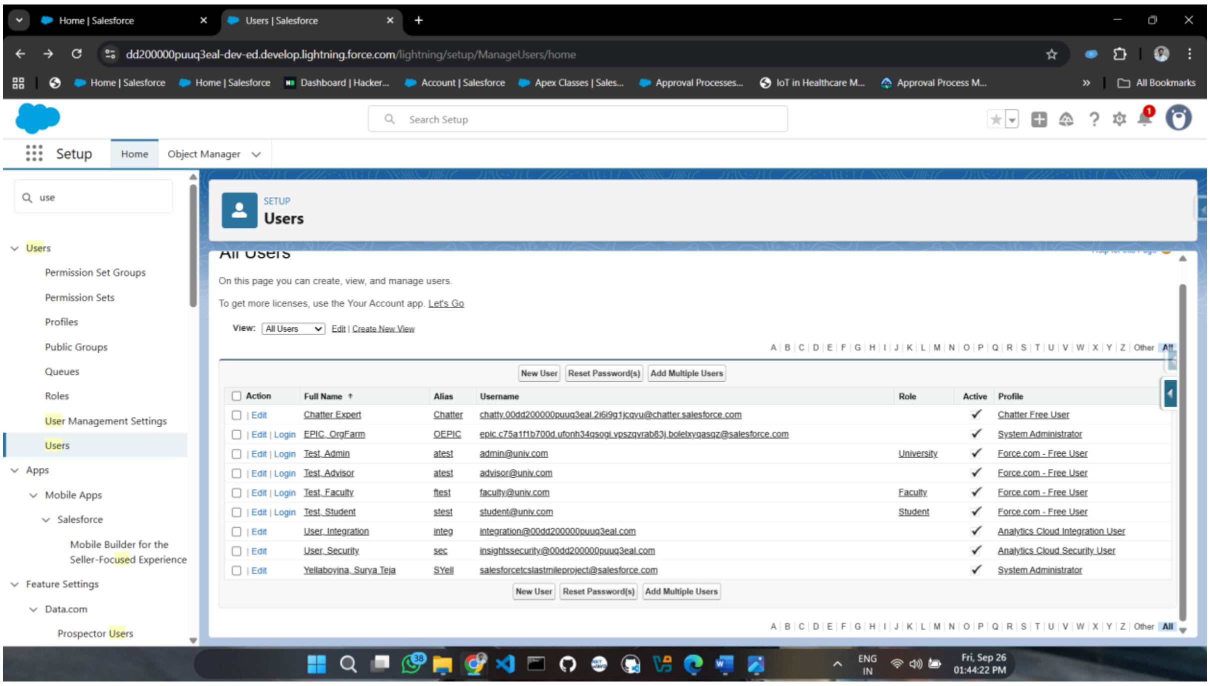
Test users validate the configuration. Each user is assigned a profile + role.

Created Users:

1. **Student Test** → Profile: Student (Custom), Role: Student.
2. **Faculty Test** → Profile: Faculty (Custom), Role: Faculty – Department.
3. **Advisor Test** → Profile: Career Advisor (Custom), Role: Advisor.
4. **Admin Test** → Profile: Admin (System Administrator), Role: University.

Verification Performed:

- Logged in as Student → can only see own record.
- Logged in as Faculty → can access only students in their department.
- Logged in as Advisor → can access career paths and student career-related info.
- Logged in as Admin → has full visibility.



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7. Security Model Summary (Matrix)

Profile	Student__c	Grade__c	Attendance__c	Activity__c	Career_Path__c	Reports
Admin	R, C, E, D (Full)	Full	Full	Full	Full	Full
Faculty	Read/Edit	Read/Edit	Read/Edit	Read/Edit	Read	Create/Run
Advisor	Read	Read	Read	Read	Read/Edit	Run
Student	Read (own)	Read (own)	Read (own)	Read (own)	Read (own)	Limited

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8. Importance of Phase 2

Phase 2 ensures that:

- Students feel secure (they cannot see others' data).
- Faculty have enough access to monitor and improve academic performance.
- Advisors have focused access to career records.
- Admins have global visibility for decision-making.

Without this foundation, later phases (Data Modeling, Automations, Apex, Integrations) would fail due to inconsistent security and visibility.

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9. Best Practices Recap

- **Profiles for baseline permissions** → keep them simple.
- **Permission Sets for exceptions** → avoid profile sprawl.
- **OWD = Private first** → then open access using Sharing Rules.
- **Roles ≠ Permissions** → they only control visibility.
- **Always test with sample users** → simulate real-world access.

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10. Conclusion

Phase 2 builds the **security and access backbone** of the CRM. With profiles, roles, sharing rules, org settings, and test users properly set up, the system is now ready to proceed to **Phase 3: Data Modeling & Relationships**, where we design the objects (Student, Grades, Attendance, Activities, Career Path) and their relationships.