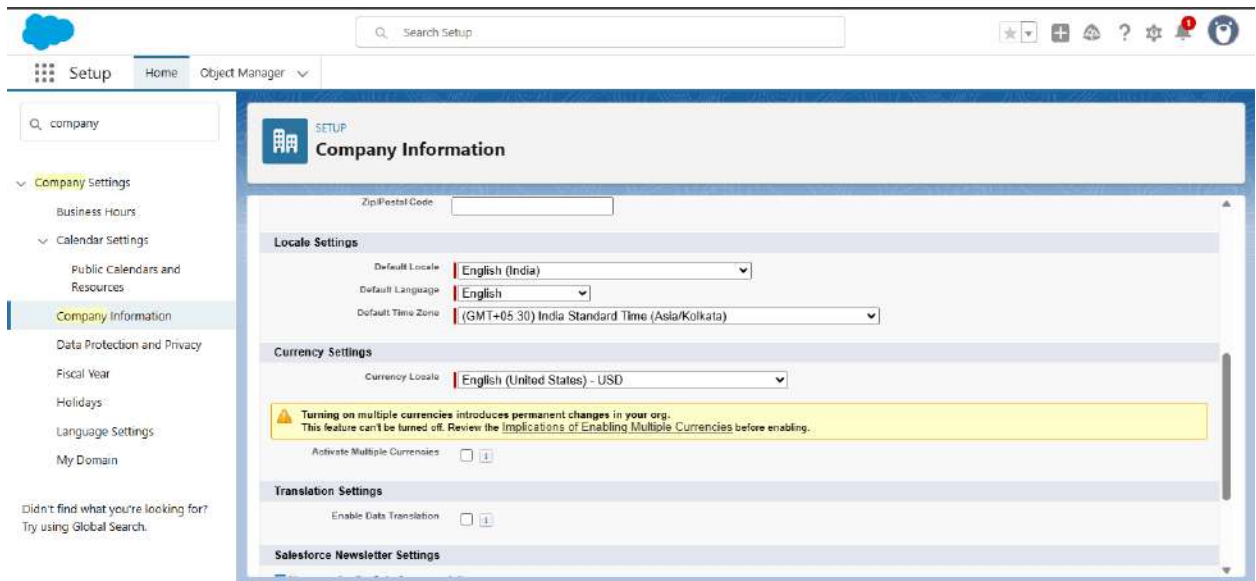


## Phase 2 — Org setup & configuration (exact clicks and choices)

### Project Title: Student Success & Career Guidance Portal

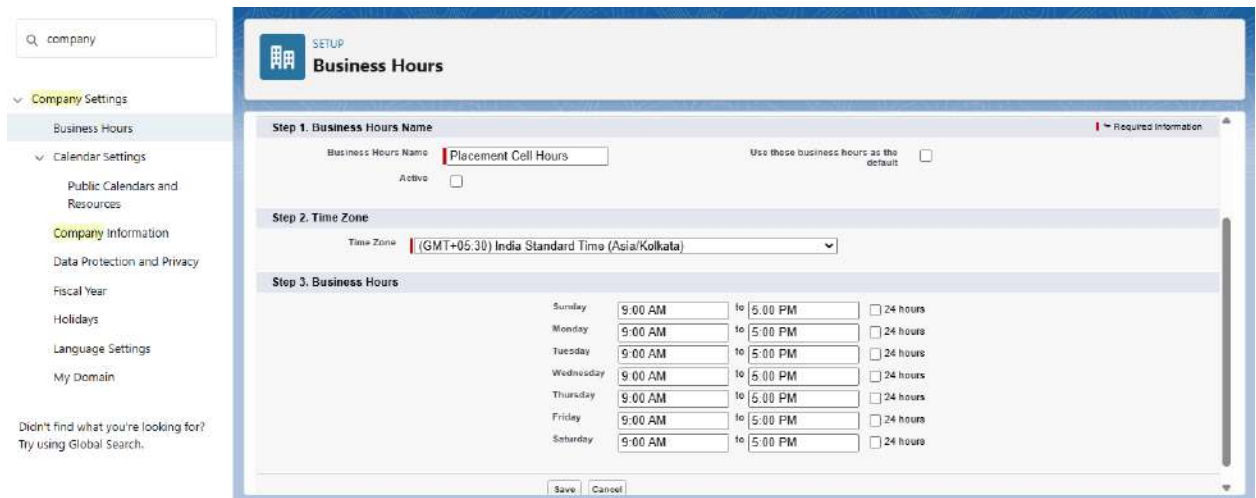
#### 2.1 Basic org settings

1. **Setup** → *Company Settings* → **Company Information** → update Default Locale, Time Zone, Default Currency.



The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'company' and a list of settings: Company Settings, Calendar Settings, Company Information (highlighted), Data Protection and Privacy, Fiscal Year, Holidays, Language Settings, and My Domain. The main content area is titled 'Company Information' and includes fields for Zip/Postal Code, Locale Settings (Default Locale: English (India), Default Language: English, Default Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)), Currency Settings (Currency Locale: English (United States) - USD), Translation Settings (Enable Data Translation), and Salesforce Newsletter Settings. A yellow warning banner states: 'Turning on multiple currencies introduces permanent changes in your org. This feature can't be turned off. Review the implications of Enabling Multiple Currencies before enabling.'

2. **Setup** → *Business Hours* → **New** → create Placement Cell Hours.



The screenshot shows the Salesforce Setup interface for creating new business hours. The left sidebar is the same as the previous screenshot. The main content area is titled 'Business Hours' and shows 'Step 1. Business Hours Name' with 'Placement Cell Hours' entered. It also has an 'Active' checkbox and a 'Use these business hours as the default' checkbox. 'Step 2. Time Zone' shows '(GMT+05:30) India Standard Time (Asia/Kolkata)'. 'Step 3. Business Hours' shows a table for setting hours for each day of the week, with '9:00 AM' and '5:00 PM' entered for all days, and a '24 hours' checkbox for each day.

Day	Start Time	End Time	24 hours
Sunday	9:00 AM	5:00 PM	<input type="checkbox"/>
Monday	9:00 AM	5:00 PM	<input type="checkbox"/>
Tuesday	9:00 AM	5:00 PM	<input type="checkbox"/>
Wednesday	9:00 AM	5:00 PM	<input type="checkbox"/>
Thursday	9:00 AM	5:00 PM	<input type="checkbox"/>
Friday	9:00 AM	5:00 PM	<input type="checkbox"/>
Saturday	9:00 AM	5:00 PM	<input type="checkbox"/>

### 3. Setup → Holidays → add semester breaks.

**Holidays**

Holidays are dates and times at which business hours are suspended. Business hours are the days and hours that your support team is available.

Action	Holiday Name	Description	Date and Time
<a href="#">Edit</a>   <a href="#">Del</a>	Diwali Holiday	There is an diwali holiday	10/20/2025 All Day
<a href="#">Edit</a>   <a href="#">Del</a>	Ganesh Visarjan Holiday	There is an holiday for Ganesh Visarjan	9/19/2025 All Day

**Elapsed Holidays**

Action	Holiday Name	Description	Date and Time
<a href="#">Clone</a>	Semester Break	This is a Semester Break in our college	9/11/2025 All Day

## 2.2 Enable features

1. Setup → Quick Find → **Digital Experiences** → enable if you want a student/recruiter portal.

## 2.3 Users, Profiles, Roles

1. Setup → Users → **New User** → create sample accounts: student1@, faculty1@, placement1@.

**Users**

To get more licenses, use the Your Account app. [Let's Go](#)

View: [All Users](#) | [Edit](#) | [Create New View](#)

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

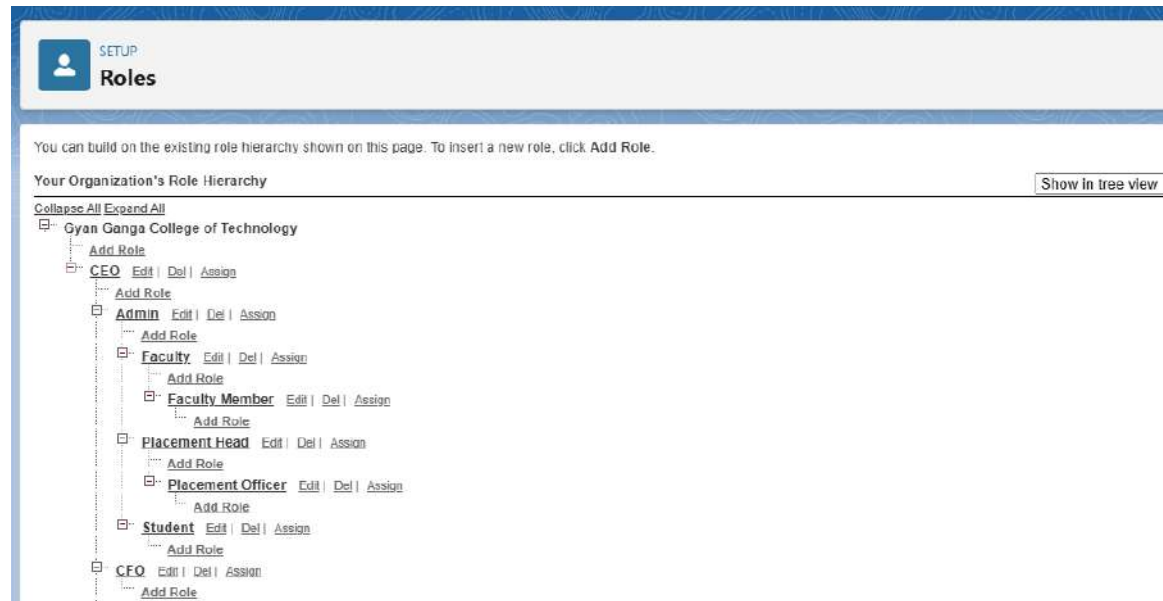
Action	Full Name ↑	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	Chatter Expert	Chatter	chatty.00j0i00007qicfuag.fgnbtmnn200c@chatter.salesforce.com		✓	Chatter Free User
<a href="#">Edit</a>   <a href="#">Login</a>	EPIC_OrgFarm	OEPIQ	epic.eb76301f20c2@orgfarm.salesforce.com		✓	Test Profile
<a href="#">Edit</a>   <a href="#">Login</a>	Koshta, Prashant	pkos	faculty1@demo.com		✓	Faculty Profile
<a href="#">Edit</a>	Nema, Ania	anema	student1@demo.com			Student Profile
<a href="#">Edit</a>   <a href="#">Login</a>	Sethi	seth	placement1@demo.com		✓	Placement Profile
<a href="#">Edit</a>	Tamrakar, Swayam	cse	cse22_swayamtamrakar887@agentforce.com		✓	System Administrator
<a href="#">Edit</a>	User_Integration	integ	integration@00icgl000007qlcfuag.com		✓	Analytics Cloud Integration User
<a href="#">Edit</a>	User_Security	sec	insightsecurity@00icgl000007qlcfuag.com		✓	Analytics Cloud Security User

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

2. Setup → Profiles → open Standard User → **Clone** → name Student\_Profile; repeat for Faculty\_Profile, Placement\_Profile. Set baseline object permissions (Contacts: read for Students, edit for Faculty).

3. **Setup** → *Roles* → **Set Up Roles** → create hierarchy:

- Admin
  - Placement Head
    - Placement Officer
  - Faculty
    - Faculty Member
- Student



4. **Setup** → *Permission Sets* → **New** → Placement\_Officer\_PS — grant object and field-level permissions not in profile (e.g., export data).

SETUP

Permission Sets

Permission Set

Placement Officer

Video Tutorial | Help for this Page

Find Settings...

Clone

Edit Properties

Manage Assignments

View Summary

Permission Set Overview

Description

Extra permissions for placement officers (data export, placements)

API Name

Placement\_Officer

License

Namespace Prefix

Session Activation Required

☐

Created By

Swayam Tamrakar, 9/12/2025, 12:38 AM

Permission Set Groups Added To

0

Last Modified By

Swayam Tamrakar, 9/12/2025, 12:54 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 Center"

## 2.4 Security / OWD / Sharing

1. **Setup** → *Sharing Settings* → set **Contact** OWD = **Private** (students' personal data protected).

**SETUP Sharing Settings**

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: All Objects

[Disable External Sharing Model](#)

**Default Sharing Settings**

**Organization-Wide Defaults** [Edit](#) [Organization-Wide Defaults Help](#)

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchie:
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Private	Private	✓
Order	Controlled by Parent	Controlled by Parent	✓

2. Create **Sharing Rules**: e.g., Share Student (Contact) records to Role = Placement Officer where Department = Computer Science.

**SETUP Sharing Settings**

**Sharing Rules** [New](#) [Recalculate](#) [Lead Sharing Rules Help](#)

**Lead Sharing Rules**  
No sharing rules specified.

**Account Sharing Rules** [New](#) [Recalculate](#) [Account Sharing Rules Help](#)

**Account Sharing Rules**  
No sharing rules specified.

**Contact Sharing Rules** [New](#) [Recalculate](#) [Contact Sharing Rules Help](#)

Action	Criteria	Shared With	Criteria
<a href="#">Edit</a>   <a href="#">Del</a>	Contact: Department equals Computer Science	Role: Placement Officer	Contact Read/Write

**Opportunity Sharing Rules** [New](#) [Recalculate](#) [Opportunity Sharing Rules Help](#)

**Opportunity Sharing Rules**  
No sharing rules specified.

**Case Sharing Rules** [New](#) [Recalculate](#) [Case Sharing Rules Help](#)

**Case Sharing Rules**  
No sharing rules specified.

3. **Setup** → *Login Access Policies* → enable admin access if needed for troubleshooting.



## 2.5 Dev org & sandbox usage

- Use Developer org for building, Sandbox for UAT. Create a Partial Copy sandbox for more realistic data if available.
- Dev Org Setup
- To implement the following project a Salesforce Developer Edition org was setup.
- Made a GitHub Repository for source control.
- Setting up the VS Code and SFDX for the implementation of the LWC Component for development.