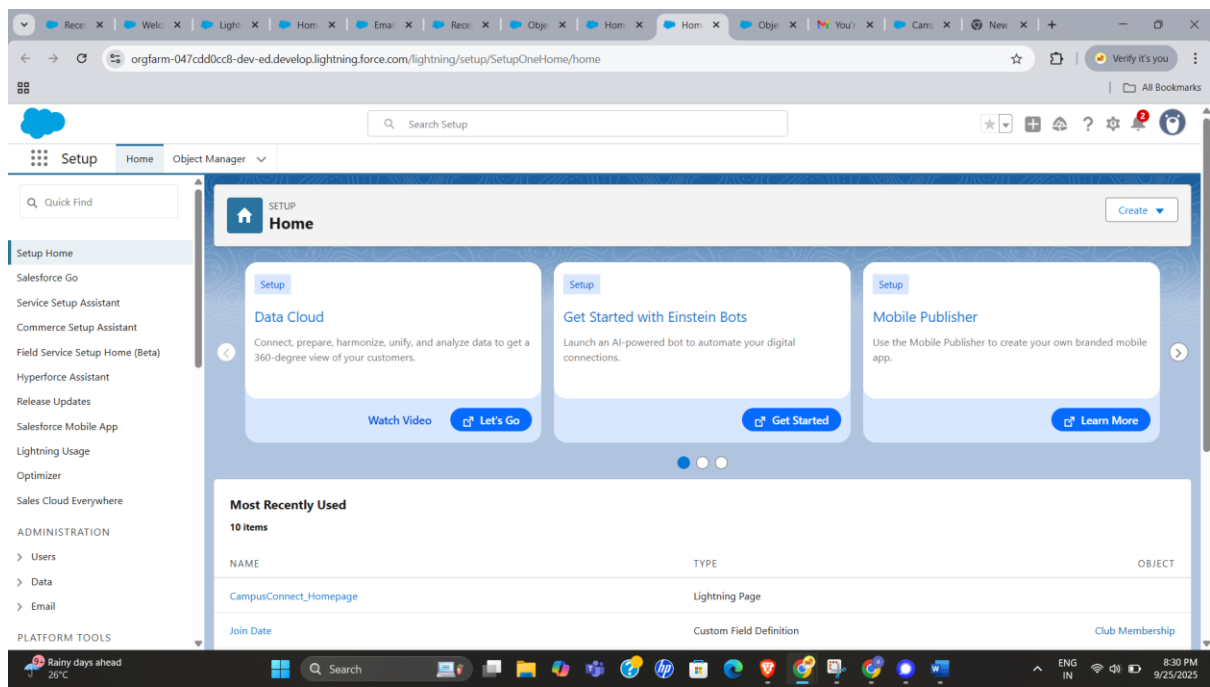


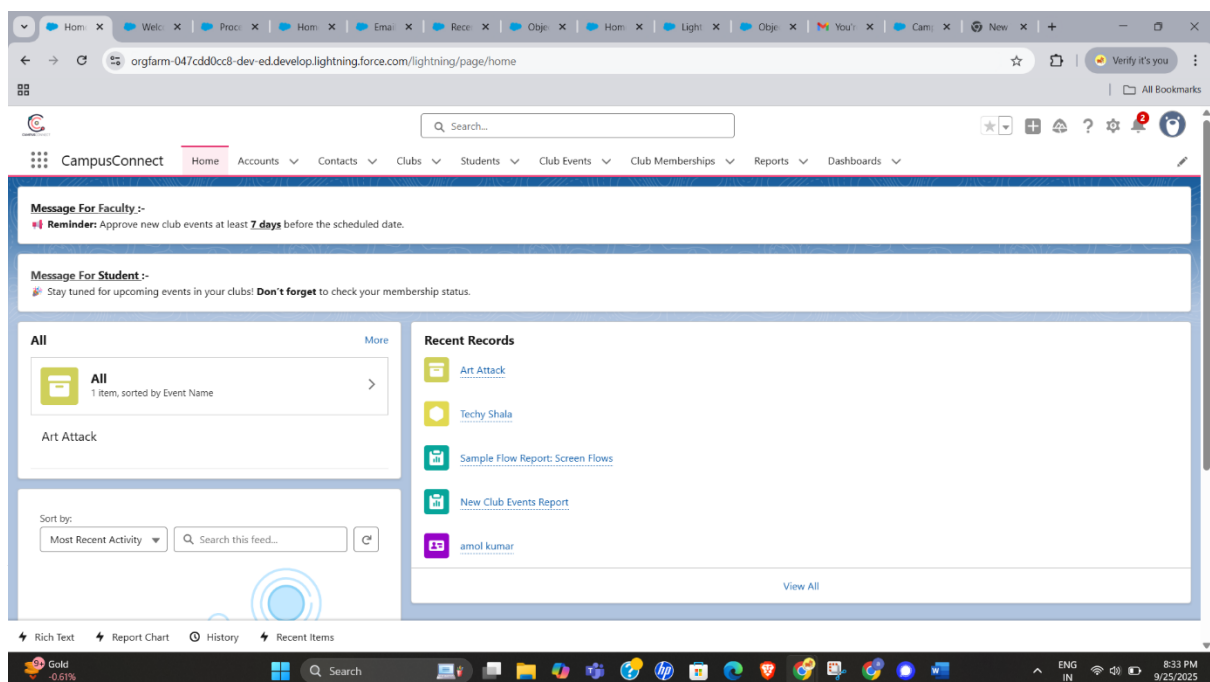
# Phase 2: Org Setup & Configuration (Campus CRM + Student Club)

## Screenshots:-

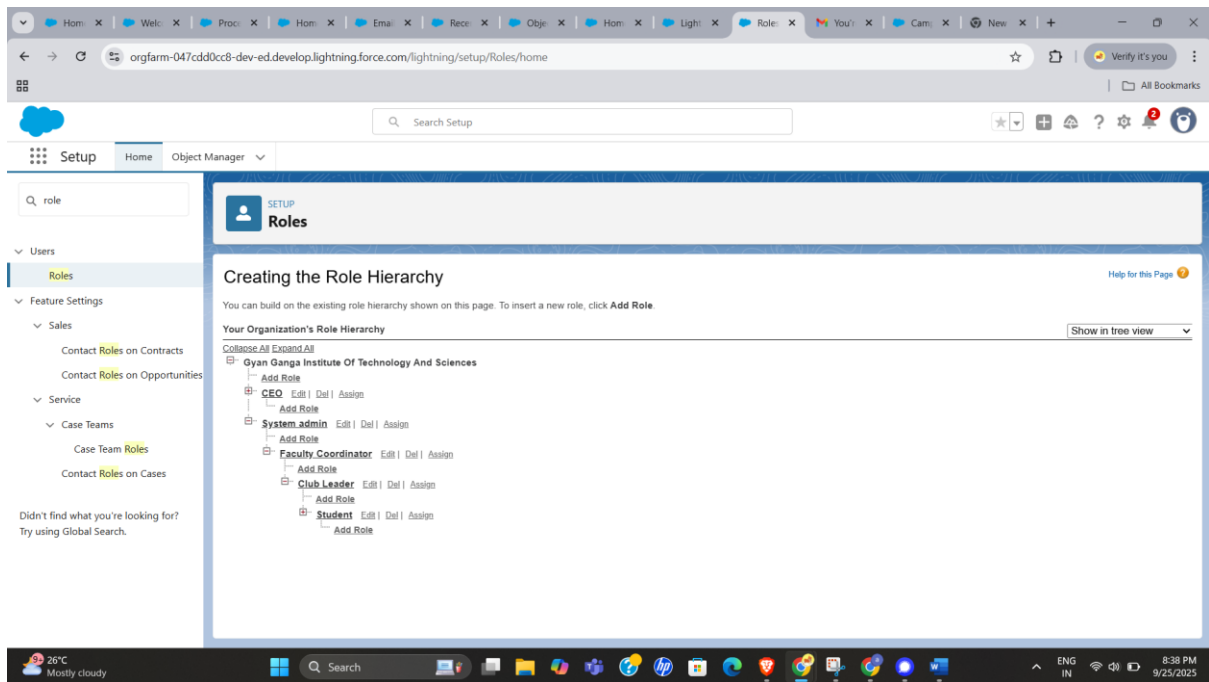
### Developer Org Setup:-



### App Is Made By Lightning App Navigation:-



## Role Hierarchy:-



## Documentation:-

### 1. Salesforce Editions

- Use a **Developer Edition (Free Dev Org)**.
- Developer Org gives you:
  - 2 licenses (Admin + 1 User).
  - Full access to Objects, Apex, Flows, LWC.
  - Sufficient for Campus CRM prototype.

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### 2. Company Profile Setup

- Setup → **Company Information**.
  - Example details:
    - Company Name: *CampusConnect CRM*
    - Address: *University Campus, Jabalpur, MP*
    - Currency: *INR*
    - Default Time Zone: *Asia/Kolkata (IST)*
-

### 3. Business Hours & Holidays

- Setup → **Business Hours** → New:
  - Name: *Campus Office Hours*
  - Monday–Saturday: 9 AM – 8 PM IST
- Setup → **Holidays** → Add University holidays (Diwali, Republic Day, Annual Fest Week).

***Automations like event reminders & mood-based suggestions can reference this.***

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### 4. Fiscal Year Settings

- Setup → **Fiscal Year**.
  - Use **Standard Fiscal Year (April–March)** for academic cycle.
  - If needed → Custom Fiscal Year to align with *Semester-based sessions*.
- 

### 5. User Setup & Licenses

- Create 3–4 test users:
  - i. **Admin (You)** – System Administrator.
  - ii. **Faculty Advisor** – Standard User.
  - iii. **Student Leader (Club Head)** – Custom profile with event management access.
  - iv. **Student Member** – Basic student access, can register for events.

***Helps demo different roles.***

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### 6. Profiles

- Profiles define what users can do.
  - Example Profiles:
    - **System Administrator** → Full access.
    - **Faculty Profile** → Can monitor clubs & approve events.
    - **Club Leader Profile** → Can create/manage student events.
    - **Student Profile** → Can view & register for events only.
-

## 7. Roles

- Roles define **data visibility hierarchy**.
  - Admin (Top)
    - Faculty Advisor
    - Club Leader
    - Student Member

*Role hierarchy ensures leaders can track their members' participation.*

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## 8. Permission Sets

- Create **extra permissions** beyond profiles.
    - “Mood Event Dashboard Access” → For students to see mood-based event suggestions.
    - “Event Analytics Access” → For faculty & club leaders to track participation.
- 

## 9. OWD (Organization-Wide Defaults)

- Setup → Sharing Settings.
  - Suggested defaults:
    - **Students** → Private.
    - **Events** → Public Read Only (anyone can see events).
    - **Mood Updates** → Private (confidential to student + admin).
    - **Club Data** → Controlled by Parent (Club Leader → Members).
- 

## 10. Sharing Rules

- Add sharing for collaboration:
    - Faculty can see all club events.
    - Club Leaders can see all student registrations for their club.
    - Students can only see **their own registrations**.
- 

## 11. Login Access Policies

- Setup → **Login Access Policies**.
- Allow users to grant temporary access to Admin for troubleshooting.

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## 12. Dev Org Setup

- Stick to **Developer Org**.
- Optional: Use **Scratch Orgs (SFDX)** if showcasing DevOps.

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## 13. Sandbox Usage

- Not available in free Dev Org.
- Can simulate by creating a **second Dev Org** as “Sandbox” If needed.

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## 14. Deployment Basics

- Use **Change Sets** for moving customizations.
- Steps:
  - i. Create Outbound Change Set (Dev Org).
  - ii. Upload to another Org (Sandbox Demo Org).
  - iii. Deploy.