

**Project:** Student Enrollment and Onboarding System

**Technology:** Salesforce

**Industry:** Educational Institutions

**Introduction:**

The Salesforce Student Enrollment System optimises and automates student admission strategies in instructional institutions. It centralises records, automates enrollment, and fosters efficient communication. Customizable workflows, real-time analytics, and robust security features make contributions to greater operational efficiency and collaboration.

**Problem Statement:**

Current guide and decentralised student enrollment processes in academic establishments result in inefficiencies, errors, and delays. Disparate databases and paper-based systems prevent powerful management of pupil facts, inflicting redundancy and inaccuracies. The loss of streamlined workflows and communication gaps bring about prolonged enrollment timelines and a less-than-most advantageous onboarding revel in for each administrators and college students. The need for a comprehensive Student Enrollment and Onboarding System in Salesforce is obvious to deal with those challenges and provide a centralised, computerised, and user-pleasant solution for better performance and transparency for the duration of the enrollment lifecycle.

**Objective:**

The Student Enrollment and Onboarding System in Salesforce ambitions to modernise and simplify student enrollment in instructional institutions. It specialises in automating workflows, centralising statistics, and enhancing conversation for accelerated efficiency. The project prioritises customization, security, and compliance, in the long run optimising the onboarding experience for administrators and college students.

**Scope / Target Audience:**

The Salesforce Student Enrollment System optimises the complete scholar enrollment manner in academic institutions. It caters to schools, faculties, and universities, providing administrators, admissions group of workers, school, and college students a streamlined, person-friendly answer for green enrollment control.

**Features:**

**Functional Features:**

**Automated Application Processing:**

- Streamlined submission and processing of student applications.

**Centralised Student Database:**

- Unified repository for accurate and accessible student information.

**Customizable Workflows:**

- Tailorable enrollment processes for institutional flexibility.

**Communication Tools:**

- Integrated tools for seamless interaction and automated notifications.

**Real-time Analytics and Reporting:**

- Dashboards for data-driven decision-making on enrollment trends.

**Technical Features:**

**Workflow Automation:**

- Automated stages of student enrollment using Salesforce workflows.

**Data Centralization with Salesforce Objects:**

- Structured student information centralization using Salesforce objects.

**Communication Integration:**

- Integrating Salesforce communication tools for seamless user interaction.

**Real-time Analytics with Salesforce Analytics:**

- Utilising Salesforce Analytics for instant data analysis on enrollment trends.

**Assumptions and Factors:**

**User Access and Permissions:**

- Assumption that appropriate user access levels and permissions are defined to ensure data security and privacy.

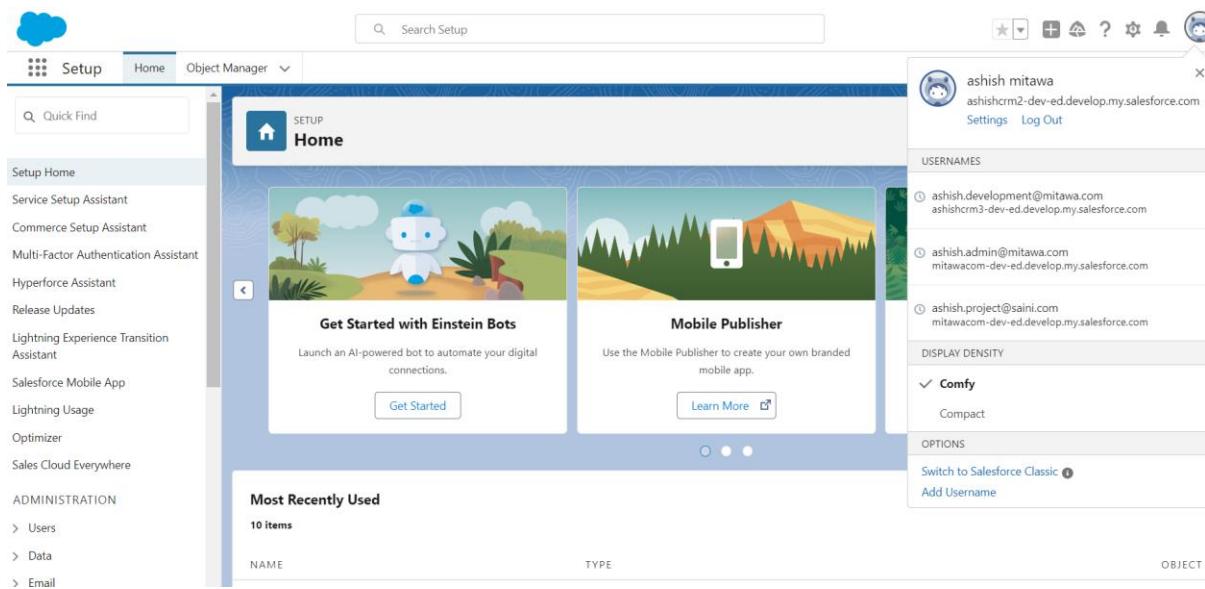
**Data Accuracy:**

- Assuming that the initial data provided for enrollment is accurate and reliable, minimising errors during the automation process.

**Data Migration:**

- The process of migrating existing student data to the new Salesforce system could impact the timeline and success of the project.

# Created an New Org. for this Project



# Created a new lightning app named

## Enrollment and Onboarding System

Lightning App Builder | App Settings | Pages | Enrollment and Onboarding System | ? Help

**App Settings**

**App Details & Branding**

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

**App Details**

\* App Name

\* Developer Name

Description

**App Branding**

Image

Primary Color Hex Value

Clear

Org Theme Options  Use the app's image and color instead of the org's custom theme

**App Launcher Preview**



Lightning App Builder | App Settings | Pages | Enrollment and Onboarding System | ? Help

**App Settings**

App Details & Branding

**App Options**

Utility Items (Desktop Only)

Navigation Items

User Profiles

**App Options**

**Navigation and Form Factor**

\* Navigation Style  
 Standard navigation  
 Console navigation

\* Supported Form Factors  
 Desktop and phone  
 Desktop

If you don't see all the form factors in this list, it's because this app contains items that prevent selection of one or more options. For example, if an app contains pages assigned to the phone form factor, you can't switch the app to be for desktop only.

**Setup and Personalization**

Setup Experience  
 Setup (full set of Setup options)  
 Service Setup

**App Personalization Settings**

Disable end user personalization of nav items in this app  
 Disable temporary tabs for items outside of this app  
 Use Omni-Channel sidebar

Lightning App Builder App Settings Pages Enrollment and Onboarding System ? Help

**App Settings**

App Details & Branding  
App Options

**Utility Items (Desktop Only)**

Navigation Items  
User Profiles

**Utility Items (Desktop Only)**

Utility Items (Desktop Only)  
Give your users quick access to productivity tools and add background utility items to your app.

Add Utility Item Utility Bar Alignment Default

**Chatter Publisher**

Notes

**PROPERTIES**  
Chatter Publisher

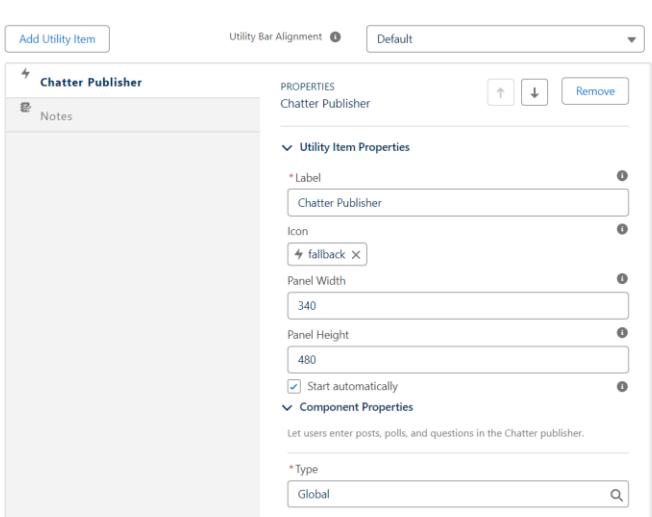
**Utility Item Properties**

\*Label Chatter Publisher  
Icon    
Panel Width 340  
Panel Height 480  
 Start automatically

**Component Properties**

Let users enter posts, polls, and questions in the Chatter publisher.

\*Type Global



Lightning App Builder App Settings Pages Enrollment and Onboarding System ? Help

**App Settings**

App Details & Branding  
App Options

Utility Items (Desktop Only)

**Navigation Items**

User Profiles

**Navigation Items**

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

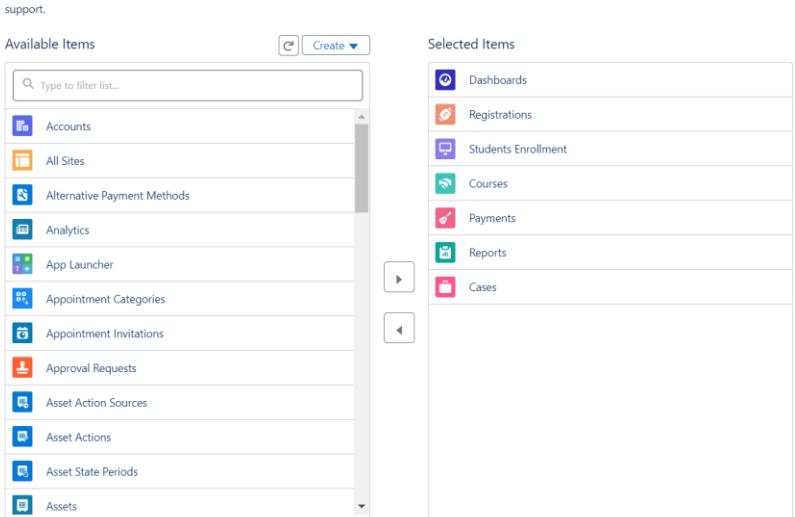
**Available Items**

Type to filter list...

- Accounts
- All Sites
- Alternative Payment Methods
- Analytics
- App Launcher
- Appointment Categories
- Appointment Invitations
- Approval Requests
- Asset Action Sources
- Asset Actions
- Asset State Periods
- Assets

**Selected Items**

- Dashboards
- Registrations
- Students Enrollment
- Courses
- Payments
- Reports
- Cases



# Create all Objects

## 1. Custom Home Page

The screenshot shows the Lightning App Builder interface with the following details:

- Header:** Includes back, forward, search, and refresh buttons, a "Desktop" view switcher, a "Shrink To View" dropdown, and a "Save" button.
- Left Sidebar:** Titled "Components" with a search bar and a "Standard (39)" section listing various components like Accordion, App Launcher, Assistant, Chatter Feed, etc.
- Central Area:** Displays a preview of the "Custom Home Page" with a title "Enablement Dashboard". The dashboard contains multiple "View Report" cards, each with a "The source report is based on a report type that is inaccessible to the dashboard's running user." message.
- Right Sidebar:** Contains fields for "Label" (Custom Home Page), "API Name" (Custom\_Home\_Page), "Page Type" (Home Page), "Template" (Standard Home Page), and a "Description" text area.

## 2. Registration

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Includes a cloud icon, "Setup", "Home", "Object Manager", and a search bar.
- Left Sidebar:** Titled "SETUP > OBJECT MANAGER" and lists various object types: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Triggers, and Flow Triggers.
- Central Area:** Titled "Registration" and displays the "Details" page for the object.
  - Left Panel:** Shows sections for "Fields & Relationships", "Page Layouts", "Lightning Record Pages", "Buttons, Links, and Actions", "Compact Layouts", "Field Sets", "Object Limits", "Record Types", "Related Lookup Filters", "Search Layouts", "List View Button Layout", "Restriction Rules", "Scoping Rules", "Triggers", and "Flow Triggers".
  - Right Panel:** Shows the "Details" section with fields:
    - Description:** A text input field.
    - API Name:** Registration\_c
    - Custom:** A dropdown menu showing "Custom" selected.
    - Singular Label:** Registration
    - Plural Label:** Registrations
    - Enable Reports:** A checkbox.
    - Track Activities:** A checkbox.
    - Track Field History:** A checkbox.
    - Deployment Status:** Deployed
    - Help Settings:** Standard salesforce.com Help Window

**Registration**

**Fields & Relationships**  
11 Items. Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Course	Course_c	Lookup(Course)		✓
Created By	CreatedById	Lookup(User)		▼
DOB	DOB_c	Date		▼
Email	Email_c	Email		▼
Father's Name	Father_s_Name_c	Text(50)		▼
Gender	Gender_c	Picklist		▼
Last Modified By	LastModifiedById	Lookup(User)		▼
Mobile Nmber	Mobile_Nmber_c	Phone		▼
Owner	OwnerId	Lookup(User,Group)		✓
Registration Id	Name	Auto Number		✓
Stdudent Name	Stdudents_c	Text(50)		▼

### 3. Student Enrollment

**Student Enrollment**

**Details**

Description	Enable Reports
API Name <u>Student_Enrollment_c</u>	Track Activities
Custom	Track Field History
✓	Deployment Status
Singular Label <u>Student Enrollment</u>	Deployed
Plural Label <u>Students Enrollment</u>	Help Settings
	Standard salesforce.com Help Window

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** SETUP > OBJECT MANAGER
- Page Title:** Student Enrollment
- Left Sidebar:** Fields & Relationships
- Table:** Fields & Relationships (17 items)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address_c	Text Area(255)		
Course Name	Course_Name_c	Lookup(Course)		✓
Created By	CreatedById	Lookup(User)		
Date of Birth	Date_of_Birth_c	Formula (Date)		
Document	Document_c	Picklist (Multi-Select)		
Email	Email_c	Formula (Text)		
Enrollment Date	Enrollment_Date_c	Formula (Date)		
Enrollment Id	Enrollment_Id_c	Auto Number		
Last Modified By	LastModifiedById	Lookup(User)		
Last Qualification	Last_Qualification_c	Text(20)		
Owner	OwnerId	Lookup(User,Group)		✓

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** SETUP > OBJECT MANAGER
- Page Title:** Student Enrollment
- Left Sidebar:** Fields & Relationships
- Table:** Fields & Relationships (17 items)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Enrollment Date	Enrollment_Date_c	Formula (Date)		
Enrollment Id	Enrollment_Id_c	Auto Number		
Last Modified By	LastModifiedById	Lookup(User)		
Last Qualification	Last_Qualification_c	Text(20)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone Number	Phone_Number_c	Formula (Text)		
Registration Id	Registration_Id_c	Lookup(Registration)		✓
Status	Status_c	Picklist		
Student Name	Student_Name_c	Formula (Text)		
Student Enrollment Name	Name	Text(80)		✓
Student Id	Student_Id_c	Auto Number		

## 4. Courses

The screenshot shows the Salesforce Setup interface for the 'Course' object. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. The main area displays the 'Details' tab for the 'Course' object. On the left, a sidebar lists various setup categories like 'Fields & Relationships', 'Page Layouts', and 'Buttons, Links, and Actions'. The 'Details' tab contains fields such as API Name (Course\_\_c), Singular Label (Course), Plural Label (Courses), and Deployment Status (Deployed). Buttons for 'Edit' and 'Delete' are located at the top right of the details section.

The screenshot shows the Salesforce Setup interface for the 'Course' object, specifically the 'Fields & Relationships' tab. The top navigation bar is identical to the previous screenshot. The main area displays a table of fields, with 9 items sorted by Field Label. The table columns include FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. Key fields listed include Course Id (Name, Auto Number), Course Name (Course\_Name\_\_c, Picklist), Created By (CreatedByld, Lookup(User)), Description (Description\_\_c, Text Area(255)), Duration (Duration\_\_c, Number(5, 0)), End Session In year(Expected) (End\_Session\_In\_year\_Expected\_\_c, Number(4, 0)), Last Modified By (LastModifiedByld, Lookup(User)), Owner (OwnerId, Lookup(User,Group)), and Start Session In year (Start\_Session\_In\_year\_\_c, Number(4, 0)). A 'Quick Find' search bar and buttons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking' are visible at the top of the table.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Course Id	Name	Auto Number		✓
Course Name	Course_Name__c	Picklist		▼
Created By	CreatedByld	Lookup(User)		▼
Description	Description__c	Text Area(255)		▼
Duration	Duration__c	Number(5, 0)		▼
End Session In year(Expected)	End_Session_In_year_Expected__c	Number(4, 0)		▼
Last Modified By	LastModifiedByld	Lookup(User)		▼
Owner	OwnerId	Lookup(User,Group)	✓	
Start Session In year	Start_Session_In_year__c	Number(4, 0)		▼

## 5. Payment

The screenshot shows the Salesforce Object Manager interface for the 'Payment' object. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. The main area displays the 'Details' tab for the 'Payment' object. On the left, a sidebar lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Triggers, and Flow Triggers. The 'Fields & Relationships' section on the right contains fields for Description, API Name (Payment\_\_c), Singular Label (Payment), Plural Label (Payments), Enable Reports, Track Activities, Track Field History, Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). Action buttons 'Edit' and 'Delete' are located at the top right of the details section.

The screenshot shows the 'Fields & Relationships' section of the Salesforce Object Manager for the 'Payment' object. The top navigation bar is identical to the previous screenshot. The main area displays a table titled 'Fields & Relationships' with 12 items, sorted by Field Label. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data is as follows:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Currency(10, 2)		
Created By	CreatedBy	Lookup(User)		
Description(Optional)	Description_Optional__c	Text Area(255)		
Due Payment	Due_Payment__c	Currency(10, 2)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)	✓	
Payment Date	Payment_Date__c	Formula (Date/Time)		
Payment for	Payment_for__c	Lookup(Course)	✓	
Payment Id	Payment_Id__c	Auto Number		
Payment Mode	Payment_Mode__c	Picklist		
Payment Name	Name	Text(80)	✓	

**SETUP > OBJECT MANAGER**

**Payment**

**Fields & Relationships**

12 Items. Sorted by Field Label

Field Label	API Name	Type
Created By	CreatedBy	Lookup(User)
Description(Optional)	Description_Optional_c	Text Area(255)
Due Payment	Due_Payment_c	Currency(10, 2)
Last Modified By	LastModifiedBy	Lookup(User)
Owner	OwnerId	Lookup(User,Group)
Payment Date	Payment_Date_c	Formula (Date/Time)
Payment for	Payment_for_c	Lookup(Course)
Payment Id	Payment_Id_c	Auto Number
Payment Mode	Payment_Mode_c	Picklist
Payment Name	Name	Text(80)
Payment Status	Payment_Status_c	Picklist

## 6. Case

**SETUP > OBJECT MANAGER**

**Case**

**Details**

Description	Enable Reports
API Name Case	Track Activities
Custom	Track Field History
Singular Label Case	Deployment Status
Plural Label Cases	Help Settings Standard salesforce.com Help Window

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Search Setup, Home, Object Manager
- Breadcrumbs:** SETUP > OBJECT MANAGER
- Section:** Case
- Left Sidebar:** Details, Fields & Relationships (selected), Case Page Layouts, Case Close Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Hierarchy Columns, Scoping Rules, Triggers.
- Table:** Fields & Relationships (35+ Items, Sorted by Field Label)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account Name	AccountId	Lookup(Account)		✓
Asset	AssetId	Lookup(Asset)		✓
Business Hours	BusinessHoursId	Lookup(Business Hours)		
Case Number	CaseNumber	Auto Number		✓
Case Origin	Origin	Picklist		
Case Owner	OwnerId	Lookup(User,Group)		✓
Case Reason	Reason	Picklist		
Case Source	SourceId	Lookup>Email Message,Messaging Session		✓
Closed When Created	IsClosedOnCreate	Checkbox		
Contact Email	ContactEmail	Email		
Contact Fax	ContactFax	Phone		
Contact Mobile	ContactMobile	Phone		
Contact Name	ContactId	Lookup(Contact)		✓

# Create all Profiles

## 1. Principal

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. A search bar at the top contains 'profil'. The main content area displays the 'Principal' profile details. The profile name is 'Principal', user license is 'Salesforce', and it is a 'Custom Profile'. The 'Page Layouts' section lists various standard object layouts and their assignments. For example, 'Global' layout is assigned to 'Email Application', 'Home Page Layout', 'Account', 'Alternative Payment Method', and 'Appointment Invitation'. Other layouts like 'Macro', 'Object Milestone', 'Operating Hours', 'Opportunity', 'Opportunity Product', and 'Order' are also listed with their respective assignments.

## 2. HOD

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. A search bar at the top contains 'profil'. The main content area displays the 'HOD' profile details. The profile name is 'HOD', user license is 'Salesforce', and it is a 'Custom Profile'. The 'Page Layouts' section lists various standard object layouts and their assignments. For example, 'Global' layout is assigned to 'Email Application', 'Home Page Layout', 'Account', 'Alternative Payment Method', and 'Appointment Invitation'. Other layouts like 'Macro', 'Object Milestone', 'Operating Hours', 'Opportunity', 'Opportunity Product', and 'Order' are also listed with their respective assignments.

### 3. Professor

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Search bar with "Search Setup", a gear icon, and a bell icon.
- Left Navigation:** "Setup" icon, "Home", "Object Manager", and a search bar with "profil". Below it, a "Users" section with a "Profiles" tab selected.
- Main Content:**
  - Profile Name:** Professor
  - Description:** Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.
  - Permissions:** A list of enabled permissions including Login IP Ranges, Apex Class Access, Visualforce Page Access, External Data Source Access, Named Credential Access, External Credential Principal Access, Custom Metadata Type Access, Custom Setting Definitions Access, Flow Access, Service Presence Status Access, and Custom Permissions.
  - Profile Detail:** A table with columns for Name (Professor), User License (Salesforce), Description, Created By (ashish mitawa, 16/08/2024, 1:42 am), and Modified By (ashish mitawa, 16/08/2024, 10:00 pm). A "Custom Profile" checkbox is checked.
  - Page Layouts:** A grid showing Standard Object Layouts and Location Group Assignment Layouts for various objects like Global, Email Application, Home Page Layout, Account, Alternative Payment Method, Appointment Invitation, Asset, Asset Action, Location Group Assignment, Macro, Object Milestone, Operating Hours, Opportunity, Opportunity Product, Order, and Order Record.

# Create all Users

## 1. Shivani Principal

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. A search bar at the top contains the text 'user'. The left sidebar has 'User Management Settings' expanded, with 'Users' selected. The main content area displays the 'User Detail' page for a user named 'Shivani Principal'. The 'Role' is set to 'Principal'. Other details include:

Field	Value
Name	Shivani Principal
Alias	sprin
Email	ashishmtawa123@gmail.com [Verify]
Username	shivani.principal123@gmail.com
Nickname	User17237520905067241934
Title	
Company	
Department	
Division	
Address	
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Language	English
Delegated Approver	
Manager	
Receive Approval Request Emails	Only if I am an approver
Federation ID	
App Registration: One-Time Password Authenticator	
App Registration: Salesforce Authenticator	

## 2. Angli HOD

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. A search bar at the top contains the text 'user'. The left sidebar has 'User Management Settings' expanded, with 'Users' selected. The main content area displays the 'User Detail' page for a user named 'Angli HOD'. The 'Role' is set to 'HOD'. Other details include:

Field	Value
Name	Angli HOD
Alias	ahod
Email	ashishmtawa123@gmail.com [Verify]
Username	angli.hod123@gmail.com
Nickname	User17237522972736416529
Title	
Company	
Department	
Division	
Address	
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Language	English
Delegated Approver	
Manager	
Receive Approval Request Emails	Only if I am an approver
Federation ID	
App Registration: One-Time Password Authenticator	
App Registration: Salesforce Authenticator	

### 3. Jya Professor

The screenshot shows the Salesforce Setup interface with the following details:

**User Detail** for **Jya Professor**

**General Information:**

- Name: Jya Professor
- Alias: jprof
- Email: ashishmitawa123@gmail.com [Verify]
- Username: jya.professor123@gmail.com
- Nickname: User1237527661331015346

**Role:** Professor

**User License:** Salesforce

**Profile:** Professor

**Active:**

**Marketing User:**

**Offline User:**

**Knowledge User:**

**Flow User:**

**Service Cloud User:**

**Site.com Contributor User:**

**Site.com Publisher User:**

**WDC User:**

**Mobile Push Registrations:**

**Data.com User Type:**

**Accessibility Mode (Classic Only):**

**Debug Mode:**

**High-Contrast Palette on Charts:**

**Load Lightning Pages While Scrolling:**

**Salesforce CRM Content User:**

**Delegated Approver:**

**Manager:**

**Receive Approval Request Emails:** Only if I am an approver

**Federation ID:**

**App Registration: One-Time Password Authenticator:**

**App Registration: Salesforce Authenticator:**

**Other Fields:**

- Company:
- Department:
- Division:
- Address:
- Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)
- Locale: English (India)
- Language: English

**Links:**

- Permission Set Assignments (0)
- Permission Set Assignments: Activation Required (0)
- Permission Set Group Assignments (0)
- Permission Set License Assignments (0)
- Personal Groups (0)
- Public Group Membership (0)
- Queue Membership (0)
- Team (0)
- Managers in the Role Hierarchy (2)
- OAuth Apps (0)
- Third-Party Account Links (0)
- Installed Mobile Apps (0)
- Authentication Settings for External Systems (0)
- Login History (0)
- User Provisioning Accounts (0)

# Security Level Distribution

## 1. Object Level Security

The screenshot shows the Salesforce Setup interface with the following details:

- Left Navigation:** Shows the navigation bar with "Setup" selected, followed by "Home" and "Object Manager". Below "Object Manager" is a search bar with "user" typed in.
- Current Page:** The main content area is titled "SETUP Profiles". It displays a grid of object permissions for "user".
- Grid Headers:** The columns represent various objects: "Gateway Provider Payment Method Types", "Guest User Anomaly Event Stores", "Ideas", "Images", "Incidents", "Individuals", "Inventory Reservations", "Invoices", "Labels", "Leads", "Legal Entities", "Locations", "Location Groups", "Location Group Assignments", "Macros", "Stores", "Store Buyer Groups", "Store Catalogs", "Streaming Channels", "User External Credentials", "Waitlists", "Web Cart Documents", "Web Store Inventory Sources", "Work Orders", "Work Plans", "Work Plan Templates", "Work Step Templates", "Work Types", and "Work Type Groups".
- Grid Data:** Each cell contains a checkbox or a checkmark. For example, "Individuals" has checkmarks in the "Ideas", "Labels", "Leads", and "Work Types" columns.
- Custom Object Permissions:** Below the main grid, there are two sections for "Courses" and "Payments". Each section has two tables: "Basic Access" and "Data Administration".
- Session Settings:** At the bottom of the main content area, it shows "Session Times Out After" set to "2 hours of inactivity" and "Session Security Level Required at Login".

This screenshot is identical to the one above, showing the "Profiles" page in the Salesforce Setup interface. The main difference is in the "Session Settings" section at the bottom:

- Session Times Out After:** Set to "2 hours of inactivity".
- Session Security Level Required at Login:** Set to "None".

**Profiles**

	Incidents	Individuals	Inventory Reservations	Invoices	Labels	Leads	Legal Entities	Locations	Location Groups	Location Group Assignments	Macros	User External Credentials	Waitlists	Web Cart Documents	Work Orders	Work Plans	Work Plan Templates	Work Step Templates	Work Types	Work Type Groups
Incidents	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Individuals	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
Inventory Reservations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Invoices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Labels	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
Leads	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
Legal Entities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Locations	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Location Groups	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Location Group Assignments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Macros	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

**Custom Object Permissions**

Object	Basic Access					Data Administration						
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
Courses	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>								
Payments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Registrations	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Payments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Students Enrollment	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Session Settings**

Session Times Out After	2 hours of inactivity	Session Security Level Required at	Login
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**Password Policies**

User passwords expire in	90 days	Enforce password history	2 consecutive characters
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## 2. Field Level Security

**Payment Field-Level Security for profile Professor**

Field Name	Field Type	Read Access	Edit Access
Amount	Currency	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Created By	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Description(Optional)	Text Area	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Due Payment	Currency	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Last Modified By	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Owner	Lookup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Payment Date	Date/Time	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Payment for	Lookup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Payment Id	Auto Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Payment Mode	Picklist	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Payment Name	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Payment Status	Picklist	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

The screenshot shows the Salesforce Setup interface with the sidebar expanded. The sidebar includes sections for Users, Feature Settings, Data.com, Service, Embedded Service, and User Interface. Under the User section, 'User Management Settings' is selected. The main content area displays the 'Registration Field-Level Security for profile Professor'. The table shows the following fields and their access levels:

Field Name	Field Type	Read Access	Edit Access
Course	Lookup	✓	✓
Created By	Lookup	✓	□
DOB	Date	✓	✓
Email	Email	✓	✓
Father's Name	Text	✓	✓
Gender	Picklist	✓	✓
Last Modified By	Lookup	✓	□
Mobile Number	Phone	✓	✓
Owner	Lookup	✓	✓
Registration Id	Auto Number	✓	□
Student Name	Text	✓	✓

At the bottom of the page are 'Edit' and 'Back to Profile' buttons.

The screenshot shows the Salesforce Setup interface with the sidebar expanded. The sidebar includes sections for Users, Feature Settings, Data.com, Service, Embedded Service, and User Interface. Under the User section, 'User Management Settings' is selected. The main content area displays the 'Student Enrollment Field-Level Security for profile Professor'. The table shows the following fields and their access levels:

Field Name	Field Type	Read Access	Edit Access
Address	Text Area	✓	✓
Course Name	Lookup	✓	✓
Created By	Lookup	✓	□
Date of Birth	Date	✓	□
Document	Picklist (Multi-Select)	✓	✓
Email	Text	✓	□
Enrollment Date	Date	✓	□
Enrollment Id	Auto Number	✓	□
Last Modified By	Lookup	✓	□
Last Qualification	Text	✓	✓
Owner	Lookup	✓	✓
Phone Number	Text	✓	□
Registration Id	Lookup	✓	✓
Status	Picklist	✓	✓
Student Name	Text	✓	□
Student Enrollment Name	Text	✓	✓
Student Id	Auto Number	✓	□

At the bottom of the page are 'Edit' and 'Back to Profile' buttons.

The screenshot shows the Salesforce Setup interface. The left sidebar is expanded, showing the 'Users' section under 'User Management Settings'. The main content area displays the 'Course Field-Level Security for profile Professor'. The page title is 'Professor' and there is a 'Help for this Page' link. The table lists fields and their permissions:

Field Name	Field Type	Read Access	Edit Access
Course Id	Auto Number	✓	□
Course Name	Picklist	✓	✓
Created By	Lookup	✓	□
Description	Text Area	✓	✓
Duration	Number	✓	✓
End Session In year(Expected)	Number	✓	✓
Last Modified By	Lookup	✓	□
Owner	Lookup	✓	✓
Start Session In year	Number	✓	✓

Buttons at the bottom include 'Edit' and 'Back to Profile'.

The screenshot shows the Salesforce Setup interface. The left sidebar is expanded, showing the 'Users' section under 'User Management Settings'. The main content area displays the 'Course Field-Level Security for profile HOD'. The page title is 'HOD' and there is a 'Help for this Page' link. The table lists fields and their permissions:

Field Name	Field Type	Read Access	Edit Access
Course Id	Auto Number	✓	□
Course Name	Picklist	✓	✓
Created By	Lookup	✓	□
Description	Text Area	✓	✓
Duration	Number	✓	✓
End Session in year(Expected)	Number	✓	✓
Last Modified By	Lookup	✓	□
Owner	Lookup	✓	✓
Start Session In year	Number	✓	✓

Buttons at the bottom include 'Edit' and 'Back to Profile'.

The screenshot shows the Salesforce Setup interface. The left sidebar is expanded, showing categories like Users, Feature Settings, and User Interface. Under the Users category, 'User Management Settings' is selected, and 'Users' is highlighted. The main content area displays the 'Payment Field-Level Security for profile HOD'. The page title is 'Payment Field-Level Security for profile HOD'. It includes a 'Help for this Page' link. Below the title is a table with columns: Field Name, Field Type, Read Access, and Edit Access. The table lists fields such as Amount (Currency), Created By (Lookup), Description(Optional) (Text Area), Due Payment (Currency), Last Modified By (Lookup), Owner (Lookup), Payment Date (Date/Time), Payment for (Lookup), Payment Id (Auto Number), Payment Mode (Picklist), Payment Name (Text), and Payment Status (Picklist). Most fields have 'Read Access' checked, while 'Edit Access' is mostly unchecked except for a few like 'Owner' and 'Payment Mode'.

Field Name	Field Type	Read Access	Edit Access
Amount	Currency	✓	□
Created By	Lookup	✓	□
Description(Optional)	Text Area	✓	✓
Due Payment	Currency	✓	✓
Last Modified By	Lookup	✓	□
Owner	Lookup	✓	✓
Payment Date	Date/Time	✓	□
Payment for	Lookup	✓	✓
Payment Id	Auto Number	✓	□
Payment Mode	Picklist	✓	✓
Payment Name	Text	✓	✓
Payment Status	Picklist	✓	✓

This screenshot is identical to the one above, showing the 'Payment Field-Level Security for profile HOD' page. The layout, table structure, and data values are the same, indicating no changes were made to this specific profile.

Setup Home Object Manager

Search Setup

**SETUP**

Student Enrollment Field-Level Security for profile  
HOD

Help for this Page

Field Name	Field Type	Read Access	Edit Access
Address	Text Area	✓	✓
Course Name	Lookup	✓	✓
Created By	Lookup	✓	□
Date of Birth	Date	✓	□
Document	Picklist (Multi-Select)	✓	✓
Email	Text	✓	□
Enrollment Date	Date	✓	□
Enrollment Id	Auto Number	✓	□
Last Modified By	Lookup	✓	□
Last Qualification	Text	✓	✓
Owner	Lookup	✓	✓
Phone Number	Text	✓	□
Registration Id	Lookup	✓	✓
Status	Picklist	✓	✓
Student Name	Text	✓	□
Student Enrollment Name	Text	✓	✓
Student Id	Auto Number	✓	□

Edit Back to Profile

Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users

Feature Settings

- Data.com
- Prospector Users
- Service
- Embedded Service
- Messaging for In-App and Web User Verification

User Interface

- Action Link Templates
- Actions & Recommendations

Add Menu

Setup Home Object Manager

Search Setup

**SETUP**

Course Field-Level Security for profile  
Professor

Help for this Page

Field Name	Field Type	Read Access	Edit Access
Course Id	Auto Number	✓	□
Course Name	Picklist	✓	✓
Created By	Lookup	✓	□
Description	Text Area	✓	✓
Duration	Number	✓	✓
End Session In year(Expected)	Number	✓	✓
Last Modified By	Lookup	✓	□
Owner	Lookup	✓	✓
Start Session In year	Number	✓	✓

Edit Back to Profile

Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users

Feature Settings

- Data.com
- Prospector Users
- Service
- Embedded Service
- Messaging for In-App and Web User Verification

User Interface

- Action Link Templates
- Actions & Recommendations

Add Menu

The screenshot shows the Salesforce Setup interface. The left sidebar navigation includes: Setup, Home, Object Manager, and a search bar labeled "Search Setup". Under the "Users" section, "User Management Settings" is expanded, showing "User Management Settings", "Users", "Feature Settings" (with "Data.com", "Prospector Users", "Service", and "Embedded Service" sub-sections), and "User Interface" (with "Action Link Templates", "Actions & Recommendations", and "App Menu"). The main content area displays the "Payment Field-Level Security for profile Professor". The page title is "Payment Field-Level Security for profile Professor". It includes a "Help for this Page" link. A table lists fields and their access levels:

Field Name	Field Type	Read Access	Edit Access
Amount	Currency	✓	□
Created By	Lookup	✓	□
Description(Optional)	Text Area	✓	✓
Due Payment	Currency	✓	✓
Last Modified By	Lookup	✓	□
Owner	Lookup	✓	✓
Payment Date	Date/Time	✓	□
Payment for	Lookup	✓	✓
Payment Id	Auto Number	✓	□
Payment Mode	Picklist	✓	✓
Payment Name	Text	✓	✓
Payment Status	Picklist	✓	✓

Buttons at the bottom include "Edit" and "Back to Profile".

The screenshot shows the Salesforce Setup interface. The left sidebar navigation includes: Setup, Home, Object Manager, and a search bar labeled "Search Setup". Under the "Users" section, "User Management Settings" is expanded, showing "User Management Settings", "Users", "Feature Settings" (with "Data.com", "Prospector Users", "Service", and "Embedded Service" sub-sections), and "User Interface" (with "Action Link Templates", "Actions & Recommendations", and "App Menu"). The main content area displays the "Registration Field-Level Security for profile Professor". The page title is "Registration Field-Level Security for profile Professor". It includes a "Help for this Page" link. A table lists fields and their access levels:

Field Name	Field Type	Read Access	Edit Access
Course	Lookup	✓	✓
Created By	Lookup	✓	□
DOB	Date	✓	✓
Email	Email	✓	✓
Father's Name	Text	✓	✓
Gender	Picklist	✓	✓
Last Modified By	Lookup	✓	□
Mobile Nmber	Phone	✓	✓
Owner	Lookup	✓	✓
Registration Id	Auto Number	✓	□
Stdudent Name	Text	✓	✓

Buttons at the bottom include "Edit" and "Back to Profile".

The screenshot shows the Salesforce Setup interface with the following details:

**Setup** tab selected in the top left.

Search bar: Search Setup

Top right icons: Home, Object Manager, Help, Notifications, and User Profile.

Left sidebar navigation:

- Users
  - Permission Set Groups
  - Permission Sets
  - Profiles
  - Public Groups
  - Queues
  - Roles
  - User Management Settings
    - Users
- Feature Settings
  - Data.com
    - Prospector Users
  - Service
    - Embedded Service
      - Messaging for In-App and Web User Verification
  - User Interface
    - Action Link Templates
    - Actions & Recommendations
- Add Menu

Main content area:

**SETUP** icon

Section: Student Enrollment Field-Level Security for profile **Professor**

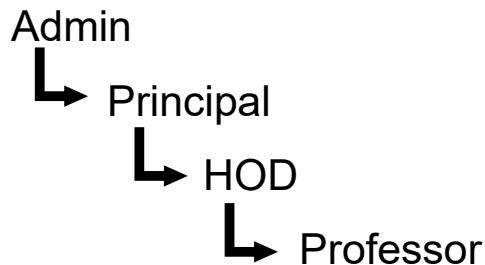
Help for this Page ?

Table: Field Name, Field Type, Read Access, Edit Access

Field Name	Field Type	Read Access	Edit Access
Address	Text Area	✓	✓
Course Name	Lookup	✓	✓
Created By	Lookup	✓	□
Date of Birth	Date	✓	□
Document	Picklist (Multi-Select)	✓	✓
Email	Text	✓	□
Enrollment Date	Date	✓	□
Enrollment Id	Auto Number	✓	□
Last Modified By	Lookup	✓	□
Last Qualification	Text	✓	✓
Owner	Lookup	✓	✓
Phone Number	Text	✓	□
Registration Id	Lookup	✓	✓
Status	Picklist	✓	✓
Student Name	Text	✓	□
Student Enrollment Name	Text	✓	✓
Student Id	Auto Number	✓	□

Buttons: Edit, Back to Profile

# Role of Hierarchy



The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Search Setup, Home, Object Manager.
- Left Sidebar:** A navigation tree with sections like Users, Feature Settings, Data.com, Service, Embedded Service, and User Interface. The "Roles" section under "Users" is currently selected.
- Central Content:** The "Roles" page titled "Creating the Role Hierarchy". It displays the "Your Organization's Role Hierarchy" tree:
  - Root: Ashish CRM
    - Add Role
      - CEO
    - Principal
      - Add Role
        - HOD
      - Professor
- Buttons and Links:** Add Role, Help for this Page, Show in tree view.

The screenshot shows the Salesforce Setup interface with the 'Roles' page open. The left sidebar is collapsed, and the main content area displays the 'Principal' role details.

**Role Detail:**

Label	Principal	Role Name	Principal
This role reports to	None	Role Name as displayed on reports	
Modified By	ashish.mitawa 16/08/2024, 10:11 pm	Sharing Groups	Role, Role and Internal Subordinates
Opportunity Access	Users in this role can <b>edit</b> all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can <b>edit</b> all cases associated with accounts that they own, regardless of who owns the cases		

**Users in Principal Role:**

Action	Full Name	Alias	Username	Active
Edit	Shivani Principal	scrin	shivani.principal123@gmail.com	<input type="checkbox"/>

The screenshot shows the Salesforce Setup interface with the 'Roles' page open. The left sidebar is collapsed, and the main content area displays the 'HOD' role details.

**Role Detail:**

Label	HOD	Role Name	HOD
This role reports to	Principal	Role Name as displayed on reports	
Modified By	ashish.mitawa 16/08/2024, 10:15 pm	Sharing Groups	Role, Role and Internal Subordinates
Opportunity Access	Users in this role can <b>edit</b> all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can <b>edit</b> all cases associated with accounts that they own, regardless of who owns the cases		

**Users in HOD Role:**

Action	Full Name	Alias	Username	Active
Edit	Angil.HOD	ahod	angil.hod123@gmail.com	<input type="checkbox"/>

The screenshot shows the Salesforce Setup interface with the following details:

**Setup** Home Object Manager

Search Setup: user

**SETUP Roles**

**Role Professor**

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: Ashish CRM > Principal > HOD > Professor

[Users in Professor Role](#)

**Role Detail**

	Label	Role Name
This role reports to	HOD	Role Name as displayed on reports
Modified By	ashish.mitawa	Sharing Groups
Opportunity Access	Users in this role can <b>edit</b> all opportunities associated with accounts that they own, regardless of who owns the opportunities	Role, Role and Internal Subordinates
Case Access	Users in this role can <b>edit</b> all cases associated with accounts that they own, regardless of who owns the cases	

**Users in Professor Role**

Action	Full Name	Alias	Username	Active
Edit	Iva Professor	iprof	iva.professor123@gmail.com	<input type="checkbox"/>

[Users in Professor Role Help](#)