

# Salesforce Project Phase-2

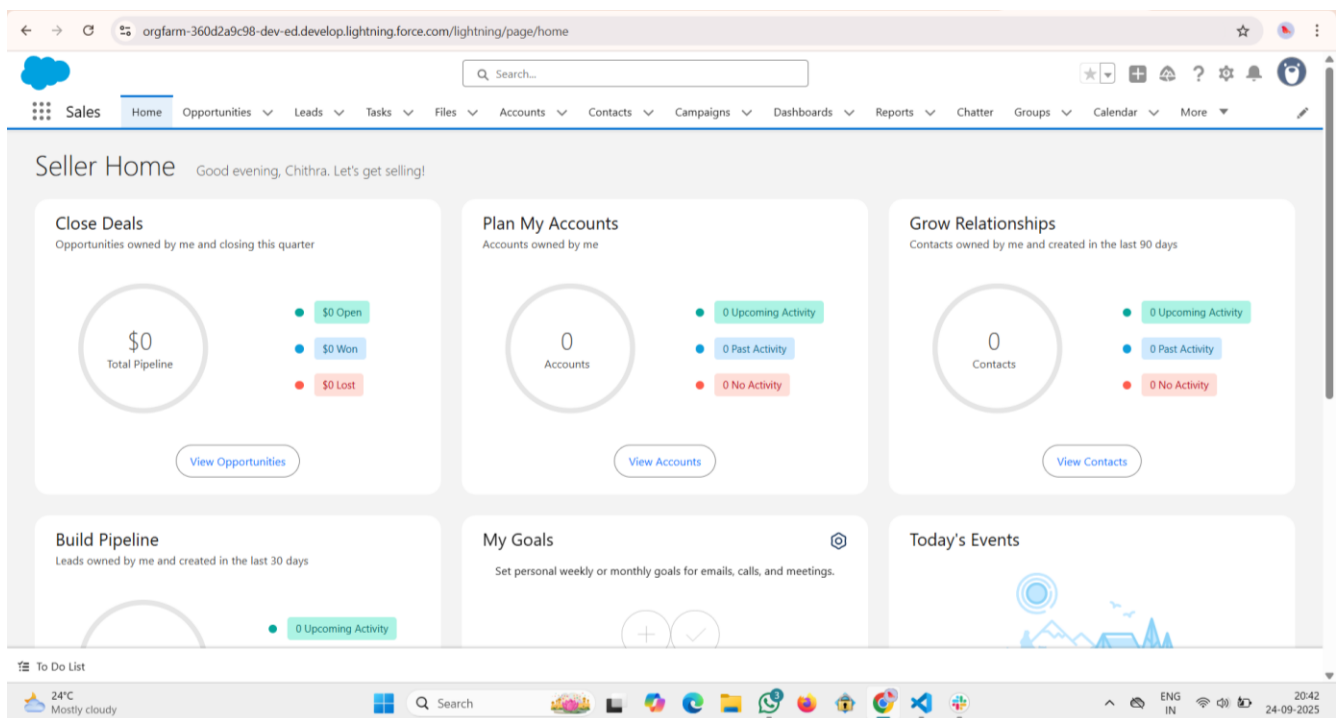
## Smart Education & E-Learning Management System

### Phase 2: Org Setup & Configuration

#### ❖ Salesforce Editions

- Used **Developer Edition** as the development environment for free practice and testing.

In a real-world deployment, **Enterprise Edition** would be recommended for multiple users, advanced features, and large-scale implementations.



#### ❖ Company Profile Setup

Company Information configured with:

- **Institution Name:** EduTech Academy
- **Default Locale:** English (India)
- **Default Time Zone:** GMT +05:30 (India Standard Time)
- **Fiscal Year:** Standard April–March (aligned with academic year)
- **Currency Locale:** INR (symbol only; Salesforce does not convert exchange rates)

The screenshot shows the Salesforce Lightning Setup interface for 'Company Information'. The left sidebar contains a search bar and a list of settings including 'Company Settings' and 'Company Information'. The main content area is titled 'Company Information' and contains several sections: 'General information' with fields for Organization Name (E-Learning System), Primary Contact (OrgFarm EPIC), Division, Phone, and Fax; 'Address' with fields for Country (United States), Street, City, State/Province (None), and Zip/Postal Code; 'Locale Settings' with fields for Default Locale (English (India)), Default Language (English), and Default Time Zone (GMT-07:00 Pacific Daylight Time (America/Los\_Angeles)); and 'Currency Settings' with a field for Currency Locale (English (United States) - USD). A yellow warning banner at the bottom 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.'

## ❖ Business Hours & Holidays

- **Business Hours:**

- Monday–Friday: 08:00 AM – 05:00 PM
- Saturday–Sunday: 08:00 AM – 04:00 PM

- **Holidays:** National holidays + institution-specific holidays

Used for SLA calculations, automated notifications, and assignment submission deadlines.

The screenshot shows the Salesforce Lightning Setup interface for 'Business Hours'. The left sidebar contains a search bar and a list of settings including 'Company Settings' and 'Business Hours'. The main content area is titled 'Business Hours' and contains a message: 'If you enter blank business hours for a day, that means your organization does not operate on that day.' Below this is the 'Business Hours Edit' section with 'Save' and 'Cancel' buttons. It includes 'Step 1. Business Hours Name' with a field for 'Business Hours Name' (School Hours) and a checkbox for 'Active' (checked). There is also a checkbox for 'Use these business hours as the default' (unchecked). 'Step 2. Time Zone' has a dropdown menu for 'Time Zone' (GMT+05:30 India Standard Time (Asia/Kolkata)). 'Step 3. Business Hours' is a table with columns for the day of the week, start time, end time, and a checkbox for '24 hours'. The table shows the following data:

Day	Start Time	End Time	24 hours
Sunday	12:00 AM	12:00 AM	<input type="checkbox"/>
Monday	12:00 AM	12:00 AM	<input type="checkbox"/>
Tuesday	12:00 AM	12:00 AM	<input checked="" type="checkbox"/>
Wednesday	12:00 AM	12:00 AM	<input checked="" type="checkbox"/>
Thursday	12:00 AM	12:00 AM	<input checked="" type="checkbox"/>
Friday	12:00 AM	12:00 AM	<input type="checkbox"/>
Saturday	12:00 AM	12:00 AM	<input type="checkbox"/>

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

## Role Hierarchy & Assignments

### Role Hierarchy:

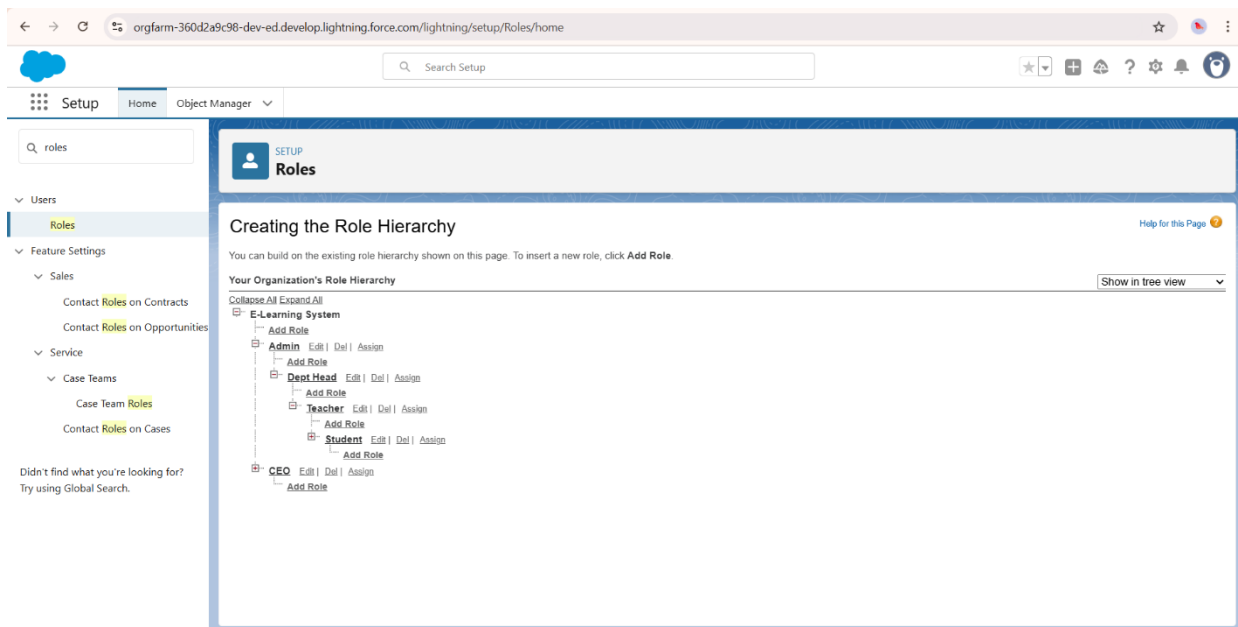
- Student → Teacher → Department Head → Admin

### Steps Taken:

1. Created Admin and Teacher roles at appropriate levels in hierarchy.
2. Assigned users to corresponding roles to control data visibility.
3. Higher roles (Admin, Department Head) can view records owned by subordinate roles.

### Org-Wide Defaults (OWD):

- Student\_\_c → Private
- Course\_\_c → Public Read Only
- Assignment\_\_c → Private
- Progress\_\_c → Private
- Certification\_\_c → Public Read/Write



### ❖ Sandbox Setup (Optional)

- In a **Developer Org**, Sandboxes are optional since the main org serves as both development and testing environment. Since I'm not using it here

# ❖ Deployment Basics

- Development and testing completed in Developer Org.
- Created **custom objects**: Students, Courses, Assignments, Progress, Certifications.
- Configured **profiles, roles, OWD, sharing rules, and login access policies**.
- Tested **user permissions** to ensure proper visibility, CRUD operations, and workflow automation.

## Project Snapshots:

Setup

Home

Object Manager

Search Setup

Star

Plus

Refresh

Help

Settings

Notifications

Profile

Search User

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

SETUP

Users

User

John Doe

User Profile Help for this Page

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)

Built-in Authenticators (0)

Installed Mobile Apps (0)

Authentication Settings for External Systems (0)

Login History (0+)

User Provisioning Accounts (0)

User Detail

Edit

Sharing

Reset Password

Freeze

View Summary

Name	John Doe	Role	Student
Alias	jdoe	User License	Salesforce
Email	john.doe@example.com (Verify)	Profile	Student_Profile
Username	john.doe.student@example.com	Active	<input checked="" type="checkbox"/>
Nickname	johnny	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Colombo)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	

Setup

Home

Object Manager

Search Setup

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Plus

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Search User

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User Management Settings

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Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User Verification

SETUP

Users

User

Jane Smith

User Profile Help for this Page

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 (1)

OAuth Apps (0)

Third-Party Account Links (0)

Built-in Authenticators (0)

Installed Mobile Apps (0)

Authentication Settings for External Systems (0)

Login History (0+)

User Provisioning Accounts (0)

User Detail

Edit

Sharing


Reset Password

Freeze

View Summary

Name	Jane Smith	Role	Teacher
Alias	jsmit	User License	Salesforce
Email	jane.smith@example.com (Verify)	Profile	Teacher_Profile
Username	jane.smith.teacher@example.com	Active	<input checked="" type="checkbox"/>
Nickname	jane	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Colombo)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View

- Q User
- 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

 SETUP  
Users

User

Admin User

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

User Detail

Edit | Sharing | Reset Password | Freeze | View Summary

Name	Admin User	Role	Admin
Alias	admin	User License	Salesforce Platform
Email	admin@example.com   Verify	Profile	Standard Platform User
Username	admin123@example.com	Active	<input checked="" type="checkbox"/>
Nickname	admin	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Colombo)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View