

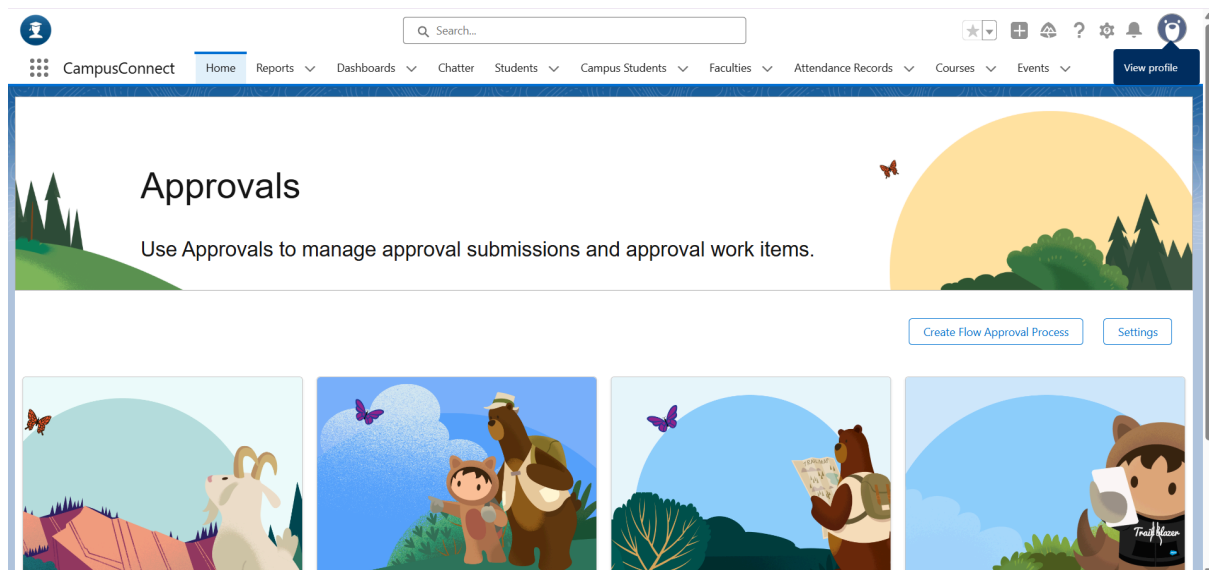
# Phase 2: Salesforce Environment Setup – CampusConnect

**Objective:** Prepare a Salesforce environment tailored for CampusConnect, enabling smooth implementation of attendance tracking, event management, and analytics.

## 1. Salesforce Edition

CampusConnect is implemented using the **Salesforce Developer Edition**, which provides a free environment for creating custom objects, fields, flows, apps, and users. This edition supports up to 2,000 custom objects and allows full testing of the proposed CRM solution without licensing costs.

**Impact:** Using Developer Edition ensures the project can be fully configured and tested while remaining cost-effective.



## 2. Company Profile

The Company Profile captures basic organizational information, time zone, and locale settings. For CampusConnect:

- **Organization Name:** CampusConnect Org
- **Locale:** English (India)
- **Time Zone:** IST (+05:30)
- **Default Currency :** INR

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "Company Information" and a list of settings including "Company Settings" and "Company Information". The main content area is titled "Company Information" and shows the organization's profile for "Prof. Ram Meghe Institute of Technology and Research". It includes links for "User Licenses (10+)", "Permission Set Licenses (10+)", "Feature Licenses (11)", and "Usage-based Entitlements (10+)". The "Organization Detail" section includes an "Edit" button and a table of settings.

Organization Detail		Edit	
Organization Name	Prof. Ram Meghe Institute of Technology and Research	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (United States)
Address	United States	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (United States) - USD
Enable Data Translation	<input type="checkbox"/>	Used Data Space	344 KB (7%) <a href="#">View</a>
Newsletter	<input checked="" type="checkbox"/>	Used File Space	638 KB (3%) <a href="#">View</a>
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00DgL000007eNJd
		Organization Edition	Developer Edition

**Impact:** Correct company settings ensure all users, dates, and currency-based calculations are consistent across the platform.

### 3. Business Hours & Holidays

**Business Hours:** Defined as **09:00 AM – 06:00 PM, Monday to Friday**, representing the college working hours.

**Holidays:** Public holidays (e.g., national holidays) were added to prevent automated workflows and approvals on these days.

**Impact:** Setting business hours and holidays ensures **time-dependent processes**, such as attendance alerts and notifications, function correctly and only during working hours.

The screenshot shows the Salesforce Setup interface for "Business Hours". The left sidebar has a search bar with "Business Hours" and a list of settings including "Company Settings" and "Business Hours". The main content area is titled "Business Hours" and shows the "Organization Business Hours" section. It includes a description of business hours and a table of settings.

Business Hours Detail		Edit	
Business Hours Name	CampusConnect Working Hours	Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Business Hours	Sunday No Hours Monday 9:00 AM to 6:00 PM Tuesday 9:00 AM to 6:00 PM Wednesday 9:00 AM to 6:00 PM Thursday 9:00 AM to 6:00 PM Friday 9:00 AM to 6:00 PM Saturday No Hours	Default Business Hours	<input checked="" type="checkbox"/>
Active	<input checked="" type="checkbox"/>		
Created By	Gauri Garole 9/20/2025, 3:02 AM	Last Modified By	Gauri Garole 9/20/2025, 3:02 AM

## 4. Fiscal Year Settings

The fiscal year was configured as a **standard calendar year (January – December)** with standard quarters.

**Impact:** Aligning the fiscal year supports reporting and analytics on attendance, events, and course activities across the academic year.

The screenshot shows the Salesforce Setup interface for configuring the Fiscal Year. The left sidebar includes a search bar with 'Fiscal Year' entered, and a 'Company Settings' section with 'Fiscal Year' selected. The main content area is titled 'Organization Fiscal Year Edit: Prof. Ram Meghe Institute of Technology and Research'. It contains a 'Fiscal Year Information' section with a warning message about changing the fiscal year start month. Below this is a 'Change Fiscal Year Period' form with fields for 'Name' (Prof. Ram Meghe Institute of Technology and Research), 'Fiscal Year Start Month' (July), and 'Fiscal Year is Based On' (The ending month). The form has 'Save' and 'Cancel' buttons.

## 5. Users & Licenses

Two test users were created to simulate the project roles:

Name	Role	License Type	Profile	Purpose
Faculty Demo	Faculty	Salesforce	Faculty Profile	Mark attendance, create events
Student Demo	Student	Chatter Free/User	User Profile	View attendance & events

**Impact:** These users allow testing of role-based access, attendance marking, event creation, and student visibility in a controlled environment.

The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains navigation links: Setup, Home, Object Manager, Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Feature Settings, Data.com, and Prospectors. The main content area displays the 'User Detail' for 'Faculty Demo'. The user's email is gaurigarole19@gmail.com, and the username is faculty.demo@campusconnect.com. The user is active and has the role of 'Standard User'. The user's profile is 'Standard User' and their user license is 'Salesforce'. The user's time zone is '(GMT-07:00) Pacific Daylight Time (America/Los\_Angeles)' and their language is 'English'. The user's department is 'Marketing User' and their division is 'Marketing User'. The user's address is 'Site.com Contributor User' and their time zone is '(GMT-07:00) Pacific Daylight Time (America/Los\_Angeles)'. The user's locale is 'English (United States)' and their language is 'English'. The user's mobile push registrations are 'View' and their data.com user type is 'Data.com User Type'.

The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains navigation links: Setup, Home, Object Manager, Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Feature Settings, Data.com, and Prospectors. The main content area displays the 'User Detail' for 'Student Demo'. The user's email is gaurigarole19@gmail.com, and the username is student.demo@campusconnect.com. The user is active and has the role of 'Chatter Free User'. The user's profile is 'Chatter Free User' and their user license is 'Chatter Free'. The user's time zone is '(GMT-07:00) Pacific Daylight Time (America/Los\_Angeles)' and their language is 'English'. The user's department is 'Marketing User' and their division is 'Marketing User'. The user's address is 'Site.com Contributor User' and their time zone is '(GMT-07:00) Pacific Daylight Time (America/Los\_Angeles)'. The user's locale is 'English (United States)' and their language is 'English'. The user's mobile push registrations are 'View' and their data.com user type is 'Data.com User Type'.

## 6. Profiles

Two custom profiles were configured to enforce proper access control:

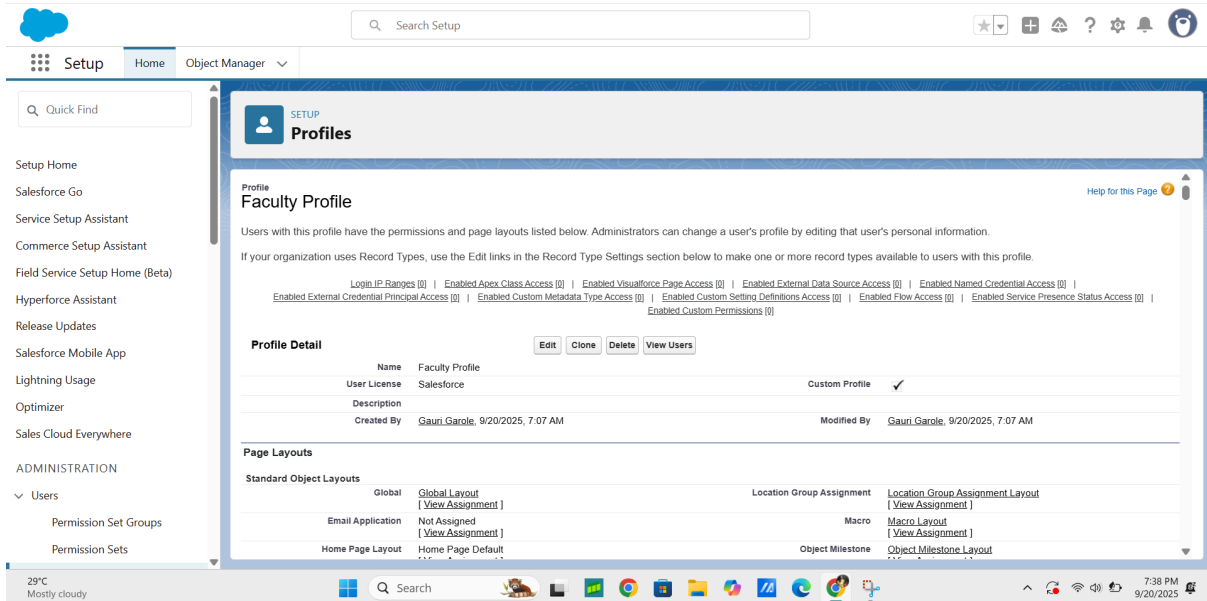
### 1. Faculty Profile (cloned from Standard User)

- Access: Read/Create/Edit for Attendance, Event, Course, Campus Student
- Tabs: Attendance, Event, Course, Campus Student
- App Access: CampusConnect Lightning App

### 2. User Profile (cloned from Chatter Free User)

- Access: Read-only Attendance and Event
- Tabs: Attendance, Event
- App Access: Student portal

**Impact:** Profiles ensure **data security** by restricting student users from modifying attendance or course data while enabling faculty to perform their responsibilities efficiently.



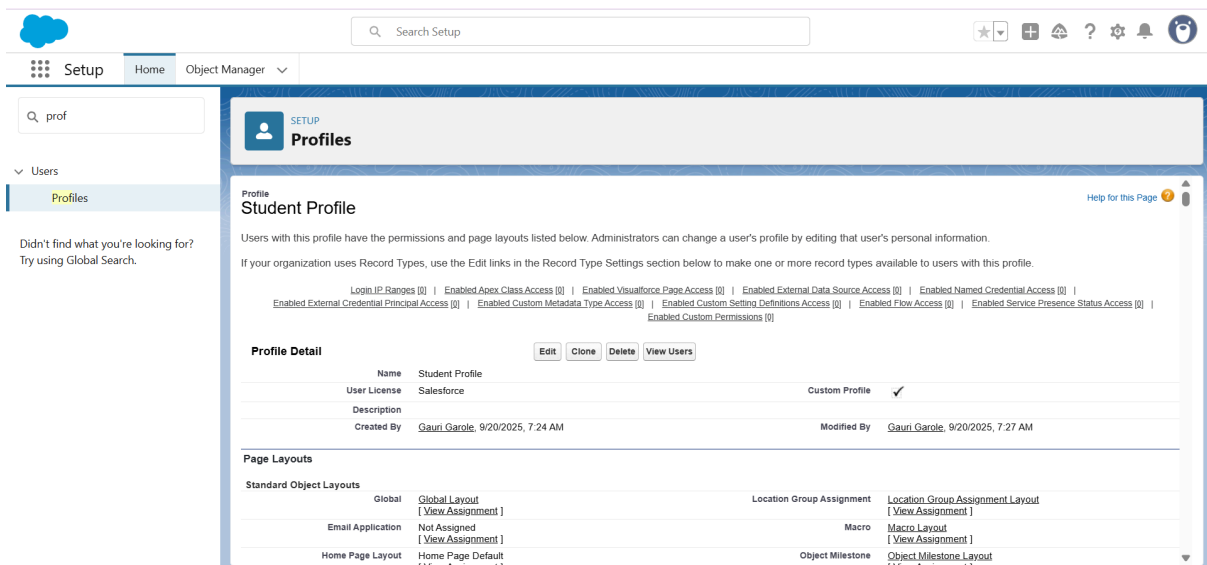
The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays the 'Faculty Profile' details. The profile is named 'Faculty Profile' and is a 'Custom Profile'. It is created by 'Gauri Garole' on 9/20/2025 at 7:07 AM. The 'Page Layouts' section shows the 'Standard Object Layouts' and 'Home Page Layout' assigned to the profile.

**Profile Detail**

Name	Faculty Profile
User License	Salesforce
Description	
Created By	Gauri Garole, 9/20/2025, 7:07 AM
Modified By	Gauri Garole, 9/20/2025, 7:07 AM

**Page Layouts**

Standard Object Layouts	Global	Location Group Assignment	Location Group Assignment Layout
	Global Layout [View Assignment]		Location Group Assignment Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Macro	Macro Layout [View Assignment]
Home Page Layout	Home Page Default	Object Milestone	Object Milestone Layout



The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays the 'Student Profile' details. The profile is named 'Student Profile' and is a 'Custom Profile'. It is created by 'Gauri Garole' on 9/20/2025 at 7:24 AM. The 'Page Layouts' section shows the 'Standard Object Layouts' and 'Home Page Layout' assigned to the profile.

**Profile Detail**

Name	Student Profile
User License	Salesforce
Description	
Created By	Gauri Garole, 9/20/2025, 7:24 AM
Modified By	Gauri Garole, 9/20/2025, 7:27 AM

**Page Layouts**

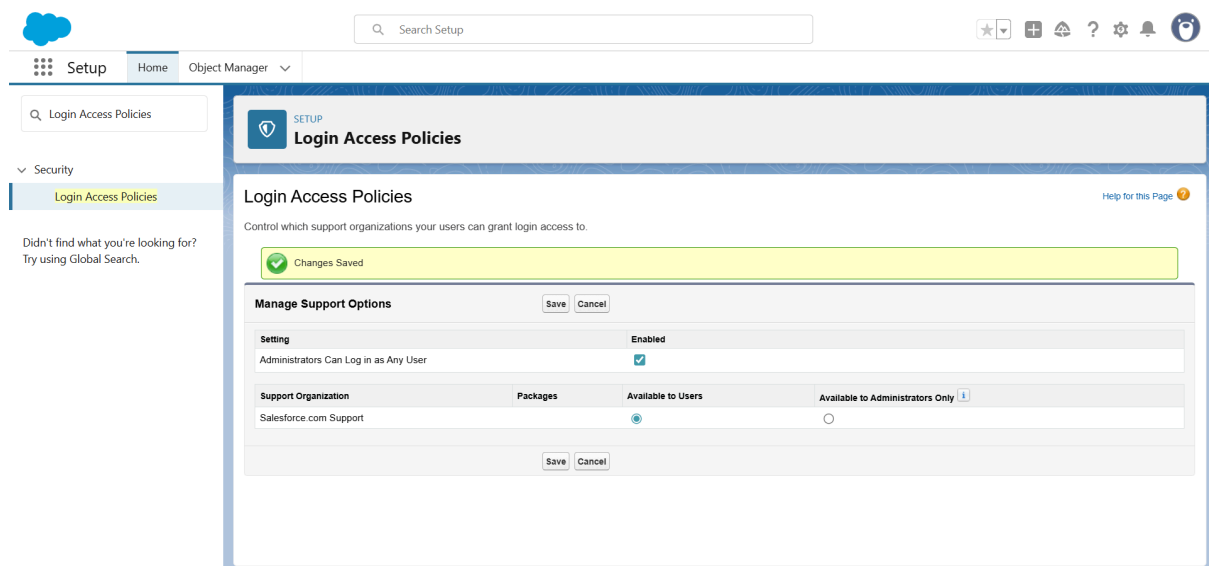
Standard Object Layouts	Global	Location Group Assignment	Location Group Assignment Layout
	Global Layout [View Assignment]		Location Group Assignment Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Macro	Macro Layout [View Assignment]
Home Page Layout	Home Page Default	Object Milestone	Object Milestone Layout

## 7.Login Access Policies

Login Access Policies define which users or support organizations can access other user accounts in Salesforce. For CampusConnect, administrators are granted the ability to log in as any user to verify role-based access, page layouts, record types, and object visibility across different profiles such as Student, Faculty, and Admin.

This ensures proper testing and troubleshooting of the application while maintaining security. In our org, the “**Administrators Can Log in as Any User**” option is enabled, making this functionality available exclusively to admins. Salesforce support is listed as the default support organization, with no additional organizations granted access.

By using this policy, admins can confirm that all configurations—such as page layouts, related lists, record types, and object access—are functioning correctly for each user type.



### Phase 2 Summary:

In Phase 2, the Salesforce environment for CampusConnect was fully prepared and configured. Custom users, profiles, and login access policies were set up to enable secure, role-based access. Business hours, holidays, and fiscal year settings were defined to align with the college operations. This phase also ensured that the Salesforce Developer Edition environment was optimized for building and testing the CRM, laying a solid foundation for the creation of custom objects, fields, relationships, layouts, and navigation in subsequent phases.