Salesforce Project Phase-2

Phase 2: Org Setup & Organization

❖ Salesforce Editions

Used Developer Edition as a development environment , as it is free to use and practice , if the product would have been in the real world , it would need Enterprise Edition

❖ Company Profile Setup

Company Information configured with:
- Company Name: Enclave
- Default Locale: English(India)
- Default Time Zone: (GMT +05:30) India Standard Time (Asia/Kokalta)
- Currency Locale: USD (As I have learned that Salesforce only changes the Symbol, it does not do currency rate conversion)

❖ Business Hours & Holidays :

Business Hours: Monday - Friday (09:00 AM - 06:00 PM)
Saturday & Sunday - (8:00 AM - 4:00 PM)
Holidays: National Holidays and any Academic-specific holidays
Used for escalations, Service Level Agreement(SLA), and
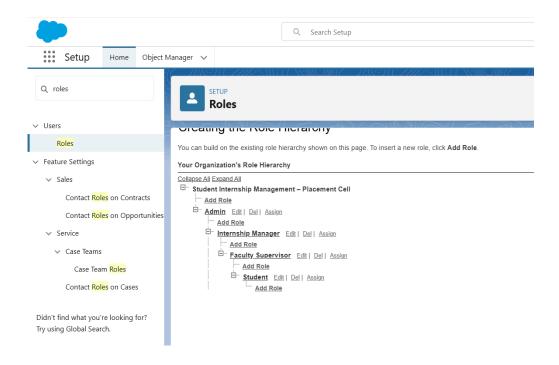appointment reminders.

❖ Fiscal Year Settings :
Standard Fiscal Year (April – March, aligned with Indian financial year). Enables reporting on yearly patient engagement and revenue trends.

❖ User Setup & Licenses

User	Licenses	Profiles
Alice Admin	Salesforce (Full)	Admin
Billie Student	Salesforce Platform	Student
Carol Coordinator	Salesforce Platform	Placement Officer
Dave ComapanyRep	Salesforce Platform	Company Rep

❖ Roles:

➢ Role Hierarchy created as:
- Admin (top)
- Internship Manager
- Faculty Supervisor
- Student
- Company Representative

OWD
Student (Contact) → Private
Internship__c → Public Read Only
Application__c → Private
Company__c (Account) → Public Read/Write
Placement_Officer__c → Public Read Only

Login Access Policies:

Configured to allow Admins to log in as users for troubleshooting

➤ **Dev Org Setup:**

We created a **Salesforce Developer Org** and configured it for our **Student Internship Tracking & Recommendation System** project. Custom objects were created and configured, such as **Students, Internship Applications, Companies, Placement Officers, and Feedback**.

A **Lightning App** named "Internship Tracker" was created. We assigned **profiles and users**, set **Org-Wide Defaults (OWD)**, created **sharing rules**, and tested **login access policies** to ensure proper visibility and permissions for different roles like students, placement officers, and companies.

➤ **Sandbox Usage :**
- Since we are working with a **Salesforce Developer Org**, **Sandboxes are not available**.
- The Developer Org itself acts as both the **development and testing environment** for our project.

➤ **Deployment Basics:**
- All development and testing are done **directly in the main Developer Org**.
- Custom objects like **Students, Internship Applications, Companies, Placement Officers, and Feedback** are created and configured here.
- **Profiles, Roles, OWD, Sharing Rules, and Login Access Policies** are applied to simulate real-world access control for different users.
- **Test Users** are created to verify permissions, visibility, and workflow automation, ensuring smooth operation of the internship tracking and recommendation processes.

Project Screenshot :

User
alice admin

User ProfileHelp for this Page

User Detail

Edit **Sharing** **Reset Password** **Freeze** **View Summary**

Name	alice admin	Role	Admin
Alias	aadmi	User License	Salesforce
Email	aliceadmin@test.com [Verify]	Profile	Admin
Username	aliceadmin@test.com	Active	✓
Nickname	User17586312371395383980	Marketing User	☐
Title		Offline User	☐
Company		Knowledge User	☐
Department		Flow User	☐

User
Billie Eilish

User ProfileHelp for this Page

User Detail

Edit **Sharing** **Reset Password** **Freeze** **View Summary**

Name	Billie Eilish	Role	Student
Alias	beili	User License	Salesforce Platform
Email	billi1997@test.com [Verify]	Profile	Student Profile
Username	billi1997s1@test.com	Active	✓
Nickname	User17586250139923135775	Marketing User	☐
Title		Offline User	☐
Company		Knowledge User	☐
Department		Flow User	☐
Division		Service Cloud User	☐
Address		Site.com Contributor User	☐

User
Harshita Shrivastava

User ProfileHelp for this Page

User Detail

Edit **Sharing** **Change Password** **View Summary**

Name	Harshita Shrivastava	Role	
Alias	har	User License	Salesforce
Email	harshitashrivastava57@gmail.com [Verified]	Profile	System Administrator
Username	harshitashrivastava57908@agentforce.com	Active	✓
Nickname	User17586135586802721903	Marketing User	☐
Title		Offline User	☐

User
mansha chopra

User ProfileHelp for this Page

User Detail

Edit **Sharing** **Reset Password** **Freeze** **View Summary**

Name	mansha chopra	Role	Faculty Supervisor
Alias	mchop	User License	Salesforce Platform
Email	manshachf1@test.com [Verify]	Profile	Standard Platform User
Username	manshachf1@test.com	Active	✓
Nickname	User17586268750955447352	Marketing User	☐
Title		Offline User	☐
Company		Knowledge User	☐
Department		Flow User	☐