

Phase 2: Org Setup & Configuration

1.Salesforce Edition

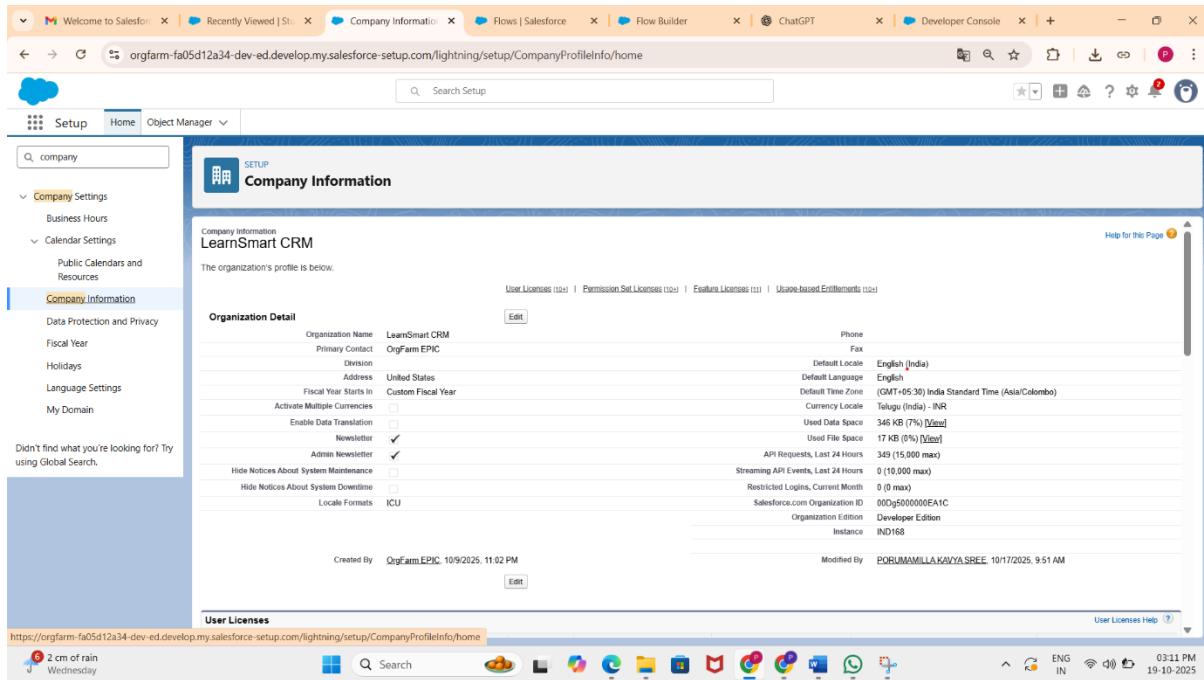
Choose the **Salesforce Developer Edition** for your project.

- Provides all tools needed for practice, development, and testing.
- Free to use, supports all key features, and is ideal for student projects.

The image shows two screenshots from a Windows 10 desktop. The top screenshot is a web browser window titled 'Developer Edition with Agentforce' showing the sign-up process for a Salesforce Developer Edition. It features a blue-themed interface with a central form for entering first name (PORUMAMILLA), last name (KAVYA SREE), job title (Student), work email (kavyasree3223529@genforce.com), company (LearnSmart EduCRM), and country/region (India). Below the form is a checkbox for agreeing to the terms and conditions. The bottom screenshot is a Gmail inbox showing an email from support@salesforce.com with the subject 'Welcome to Salesforce: Reset your password'. The email contains a welcome message from two cartoon robots, a link to reset the password ('Reset Password'), and the URL <https://orgfarm-fa05d12a34-dev-ed.develop.my.salesforce.com>. It also includes the username kavyasree3223529578@genforce.com and a note about the org being active for 45 days.

2. Company Profile Setup

- Navigate to **Setup → Company Information**.
- Update your organization details:
 - Organization Name
 - Time Zone: **GMT +05:30**
 - Currency: **INR**
 - Default Language: **English (India)**
- Confirm the main contact details.



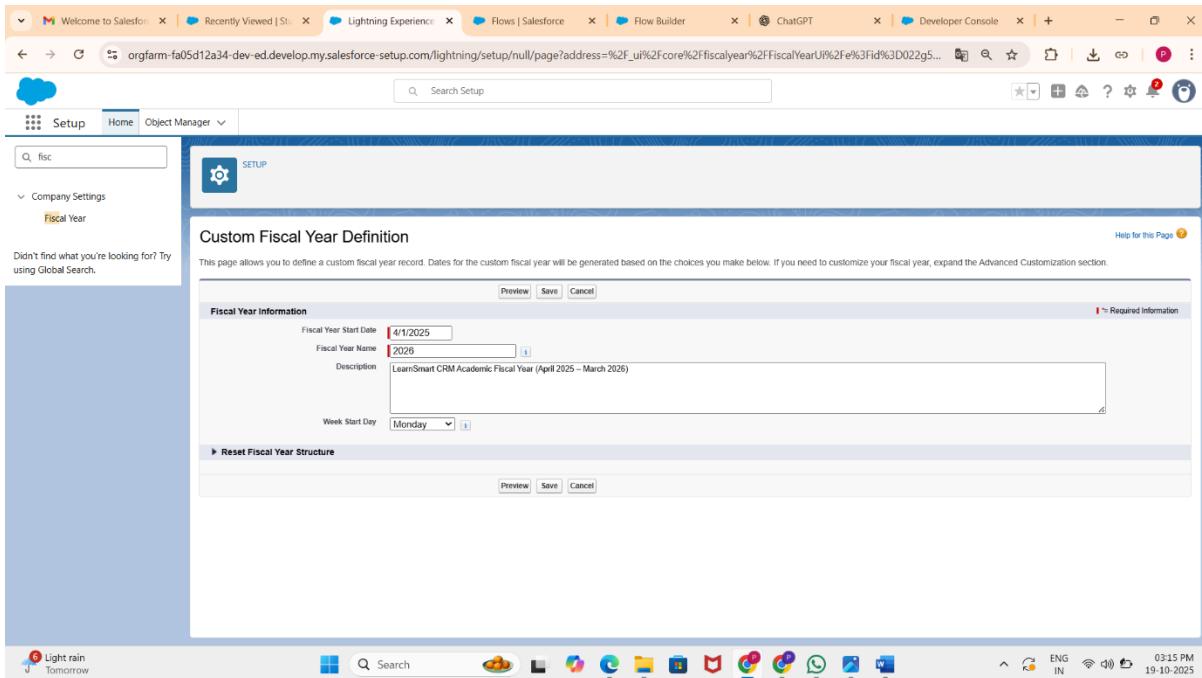
3. Business Hours & Holidays

- **Business Hours:** Setup → Business Hours → New
 - Working Days: Monday to Saturday
 - Working Hours: 9:00 AM – 6:00 PM
- **Holidays:** Setup → Holidays → New
 - Add important holidays like Independence Day and Diwali.
 - Ensures workflows and escalation rules respect non-working days.

4. Fiscal Year Settings

- Navigate to Setup → Fiscal Year
- Select Standard Fiscal Year
- Set Start Month: April, End Month: March

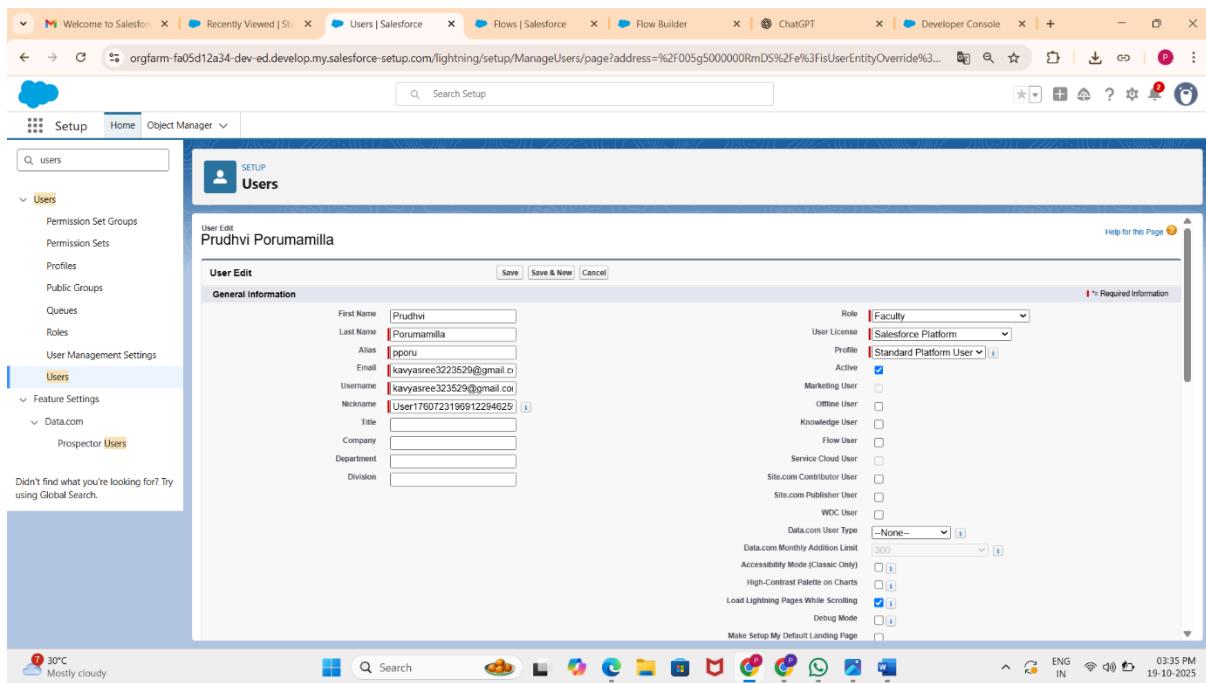
- Matches the Indian government's financial reporting cycle.



5. User Setup & Licenses

- Go to **Setup** → **Users** → **New User**
- Create accounts for:
 - **College Management**
 - **Principal**
 - **Hod**
 - **Faculty**
- Assign appropriate **Salesforce licenses** and **roles** to each user.

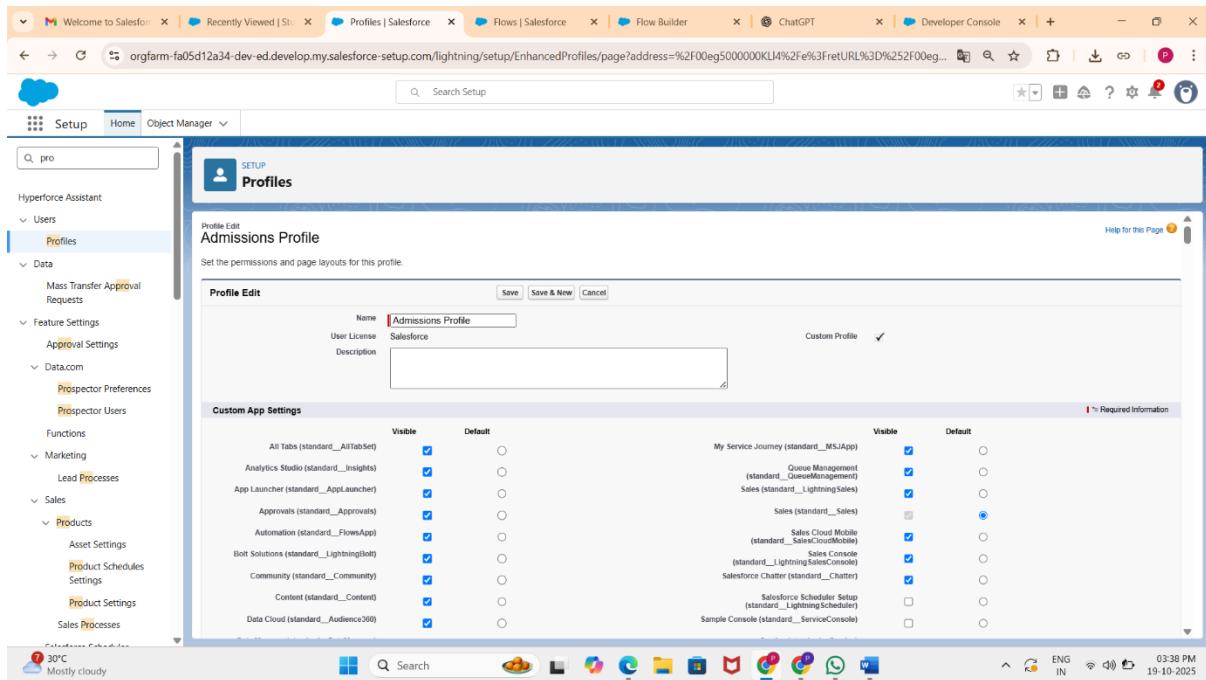
User	Role	Recommended Profile	License
Principal	Principal	Custom Principal Profile	Salesforce Platform
HOD	Hod	Custom HOD Profile	Salesforce Platform
Faculty	Faculty	Faculty Profile	Salesforce Platform



6. Profiles

- Navigate to **Setup → Profiles**
- Clone the **Standard User** profile and rename it.
- Create profiles such as:
 - Management Profile
 - HOD Profile
 - Faculty Profile
- Assign **object-level** and **field-level permissions** according to user responsibilities.

Profile	Access Level	Permissions
Management Profile	Full	View, Create, Edit, Delete, Modify All
HOD Profile	Moderate	Manage students/faculty in dept
Faculty Profile	Limited	Mark attendance, view course/student info



7. Roles

- Go to **Setup → Roles → Set Up Roles**
- Define a data visibility hierarchy:

System Admin

→ College Management

→ Principal

→ Hod

→ Faculty

- Ensures data flows securely upward through the organization.

Role	Reports To	Data Visibility	Example User
Management	System Admin	Can see all under Principal	Management
Principal	Management	Can see all under HOD	Principal
HOD	Principal	Can see all under Faculty	HOD

Role Detail

Action	Full Name	Alias	Username	Active
Edit	Jani Mehra	jmehr	jmehra@leamsmart.com	<input type="checkbox"/>
Edit	Kavya Sree	ksree	kavysree322352@gmail.com	<input checked="" type="checkbox"/>

Your Organization's Role Hierarchy

- Collapse All Expand All
- LearnSmart CRM
 - Add Role
 - CEO Edit | Del | Assign
 - Add Role
 - COO Edit | Del | Assign
 - Add Role
 - SVP.Customer Service & Support Edit | Del | Assign
 - Add Role
 - SVP.Human Resources Edit | Del | Assign
 - Add Role
 - SVP.Sales & Marketing Edit | Del | Assign
 - Add Role
- College Management Edit | Del | Assign
 - Add Role
 - Principal Edit | Del | Assign
 - Add Role
 - Admissions Officer Edit | Del | Assign
 - Add Role
 - Department Head Edit | Del | Assign
 - Add Role

8. Permission Sets

- Navigate to **Setup → Permission Sets → New**
- Create additional privileges such as:
 - Opportunity Access
 - Data Export Access

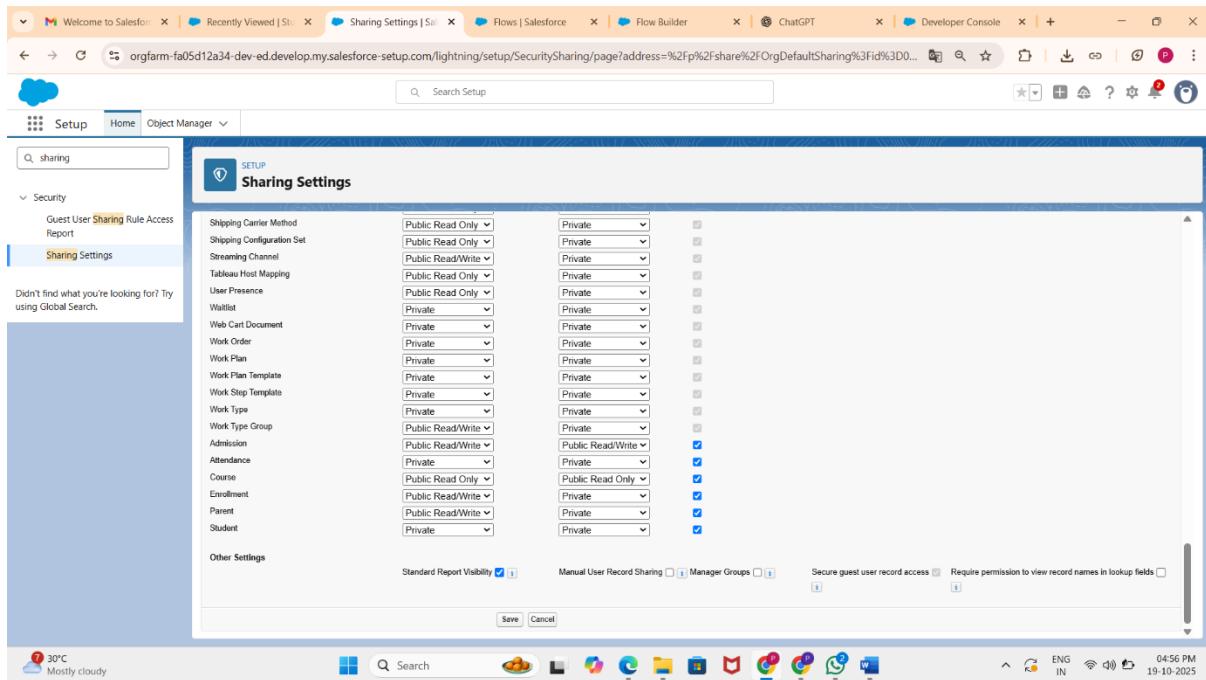
- Assign permission sets to users who require extra access without changing their profiles.

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page open. The left sidebar shows navigation options like 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Permission Sets' and shows a permission set named 'Grade Manager'. It includes fields for 'API Name' (Grade_Manager), 'Namespace Prefix', 'Created By' (PORUMAMILLA KAVYA SREE), and 'Last Modified By' (PORUMAMILLA KAVYA SREE). Below this, there's a section for 'Apps' with various settings like 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings', 'App Permissions', 'Apex Class Access', 'Visualforce Page Access', 'External Data Source Access', and 'Flow Access'. At the bottom of the page, there's a note: 'Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform'.

9. Organization-Wide Defaults (OWD)

- Go to **Setup** → **Sharing Settings** → **Edit**
- Configure default record access:
 - Management: **Private**
 - Principal: **Private**
 - Hod: **Private**
 - Student: **Controlled by Parent**
- Ensures data security and proper sharing control.

Object	Default Internal Access	Purpose
Management	Private	Restrict access to Management data
Principal	Private	Restrict access to Principal data
HOD	Private	Restrict access to HOD data
Student	Controlled by Parent	Student inherits access from parent



10. Sharing Rules

- Navigate to **Setup** → **Sharing Settings** → **New Rule**
- Create sharing rules for collaboration:
 - Share **Management** records with **Principal** (Read Only)
 - Share **Principal** with **Faculty** (Read/Write)
- Allows teamwork without compromising data security.

Rule 1: Share Management records with Principal (Read Only)

- Object: **Management**
- Rule Type: **Based on record owner**
- Select “Records owned by users in” → choose **Management Role**.
- Share with → select **Principal Role**.
- Access Level → **Read Only**.
- Click **Save** and **Recalculate** if prompted.

Rule 2: Share Principal records with Faculty (Read/Write)

- Scroll to the **Principal** object section.
- Click **New** under **Sharing Rules**.
- Rule Type: **Based on record owner**.
- Select “Records owned by users in” → choose **Principal Role**.
- Share with → select **Faculty Role**.
- Access Level → **Read/Write**.

- Click Save and Recalculate.

Object	Access Type	Setting
Waitlist	Private	
Web Cart Document	Private	
Work Order	Private	
Work Plan	Private	
Work Plan Template	Private	
Work Step Template	Private	
Work Type	Private	
Work Type Group	Public ReadWrite	
Admission	Public ReadWrite	
Attendance	Private	
Course	Public Read Only	
Enrollment	Public ReadWrite	
Parent	Public ReadWrite	
Student	Private	

Other Settings

- Manager Groups:
- Secure guest user record access:
- Require permission to view record names in lookup fields:

Sharing Rules | Lead Sharing Rules | New | Recalculate | Lead Sharing Rules Help ?

11. Login Access Policies

- Go to Setup → Login Access Policies
- Enable Grant Login Access to Administrators
- Helps administrators troubleshoot login or data issues while maintaining transparency.

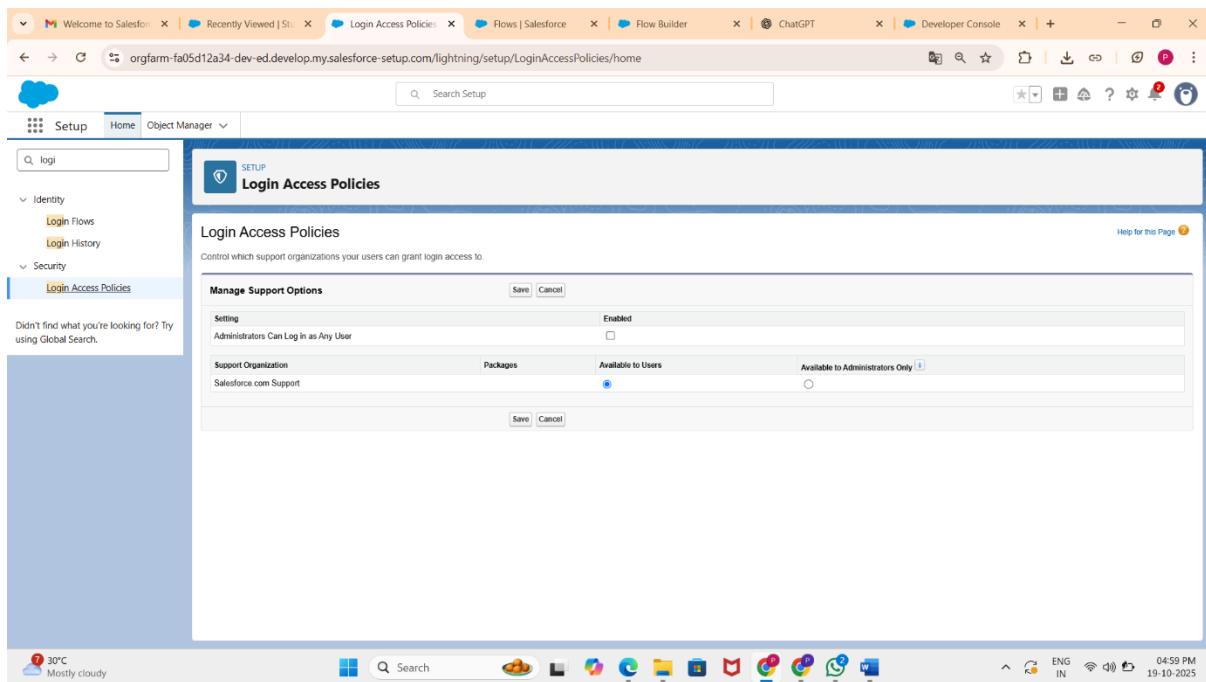
Administrators can temporarily log in as a user to troubleshoot:

- Data visibility issues
- Permission or record access problems
- Login or profile-related errors
- All such logins are **logged by Salesforce** to ensure **accountability and transparency**.

Grant Login Access to Administrators is enabled, allowing secure troubleshooting by system administrators without compromising user data privacy.

✓ Outcome:

- Administrators can log in as users for troubleshooting.
- All login activities are tracked for transparency and security.



12. Developer Org Setup

- Sign up for a free **Salesforce Developer Org** at developer.salesforce.com
- Navigate to **Setup → App Manager → New Lightning App**
- Create your app named **LearnSmart CRM**
- This serves as the main environment for customization and testing.

✓ Outcome:

- A **LearnSmart CRM app** is now created in your Developer Org.
- The environment is ready for:
 - Custom objects
 - Workflows and Flows
 - Sharing rules and permissions
 - Testing automation and reports
 - Safe Testing Environment
 - Customization Flexibility
 - User Role Simulation
 - Automation & Workflow Testing
 - Data Integration Practice

The screenshot shows a CRM interface for a student named PORUMAMILLA KAVYA SREE. The top navigation bar includes tabs for Welcome to Salesforce, PORUMAMILLA KAVYA, Login Access Policies, Flows | Salesforce, Flow Builder, ChatGPT, and Developer Console. The main header has a search bar and various icons. The left sidebar menu includes LearnSmart CRM, Students, Courses, Attendances, Admissions, Reports, and Enrollments. The main content area displays the student's details: Name (PORUMAMILLA KAVYA SREE), Admission Number (3,939), Date of Birth (10/3/2007), Grade (XII), Gender (Female), Phone number ((798) 902-8257), Email (kavyasree3223529@gmail.com), and Student Status (Applied). The last modified information is also shown. On the right, there is an 'Activity' section with a list of filters (All time, All activities, All types), a refresh button, and a link to 'View All'. Below this, sections for 'Upcoming & Overdue' and 'Past activity' are present, both indicating no items.