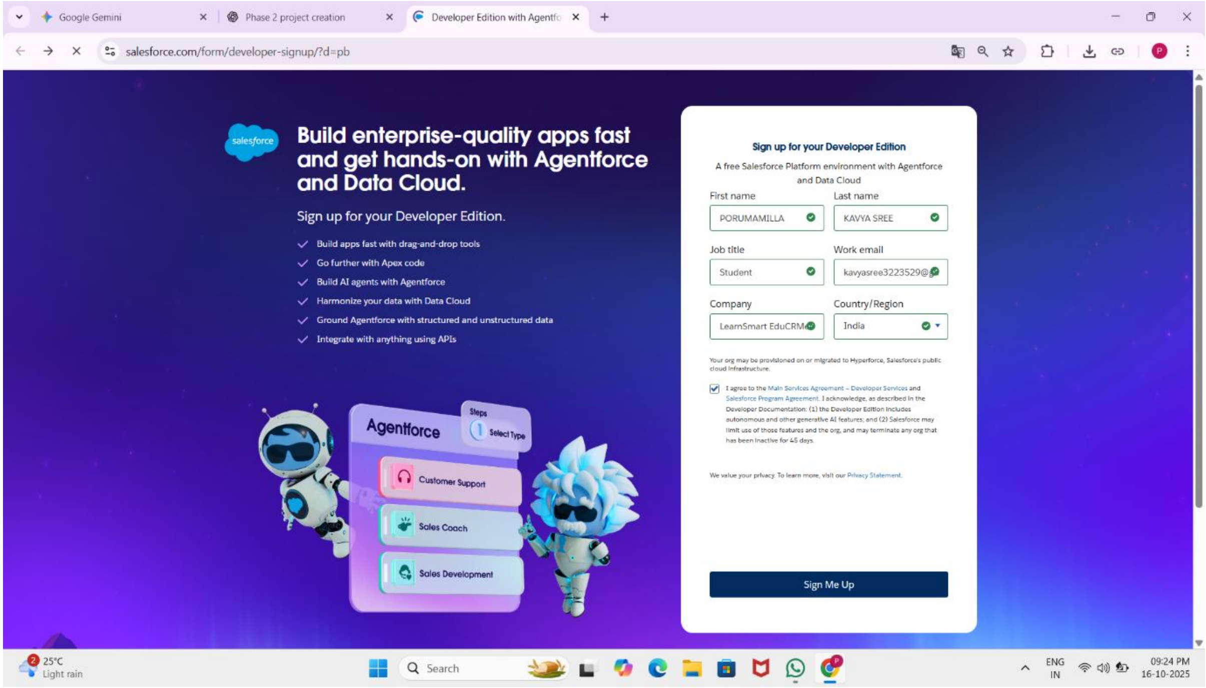
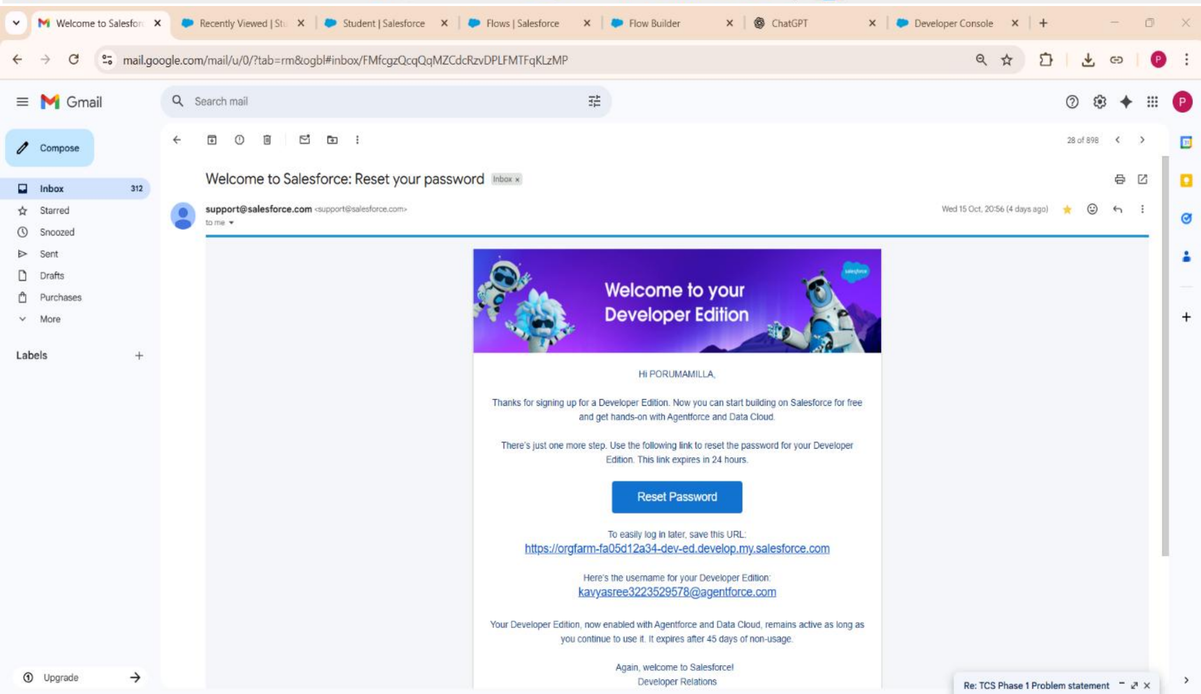
Phase 2: Org Setup & Configuration

1.Salesforce Edition

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

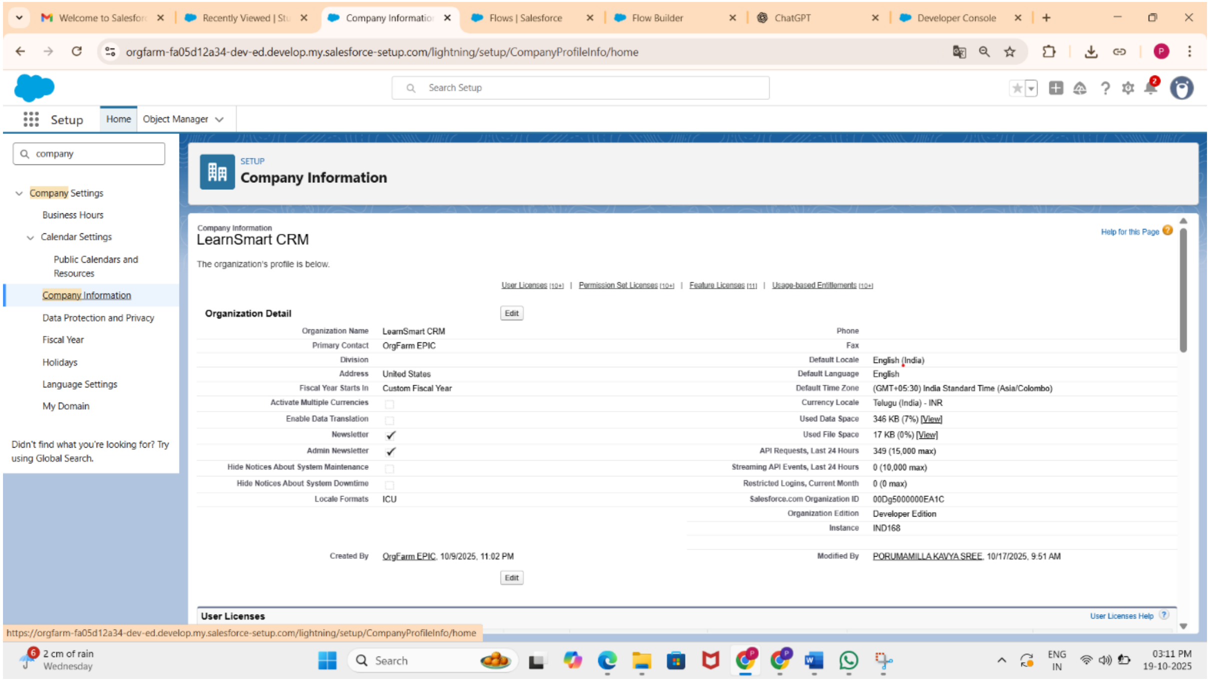
- Provides all tools needed for practice, development, and testing.
- Free to use, supports all key features, and is ideal for student projects.





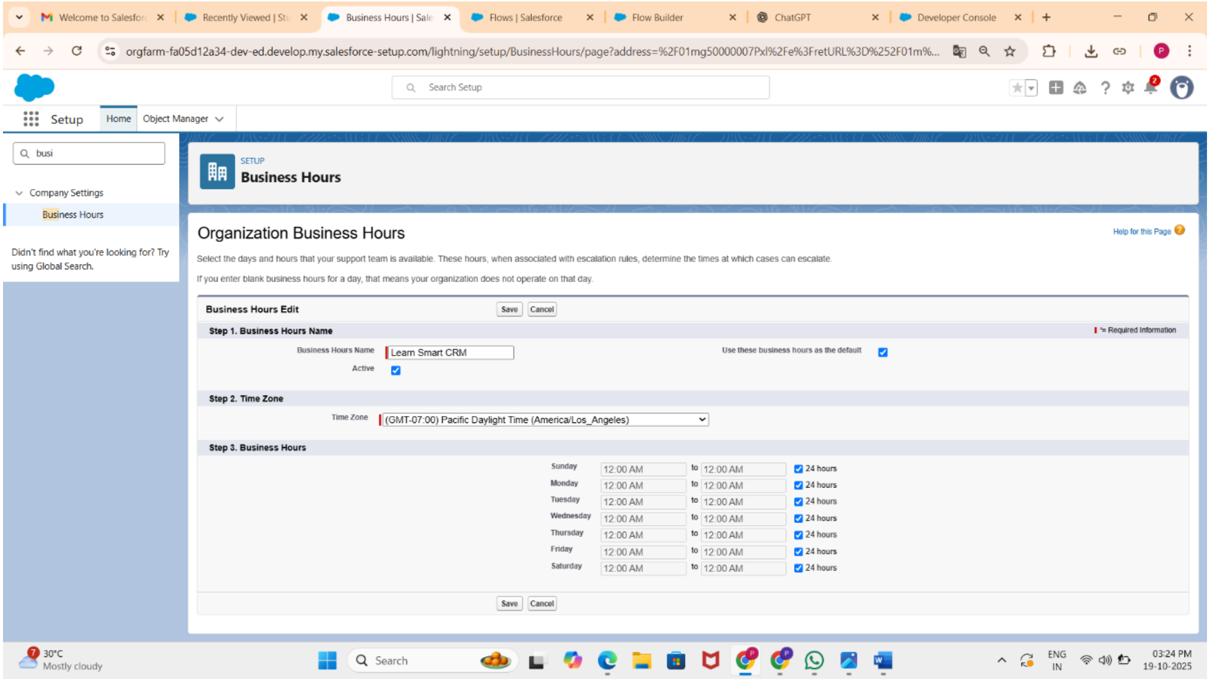
2. Company Profile Setup

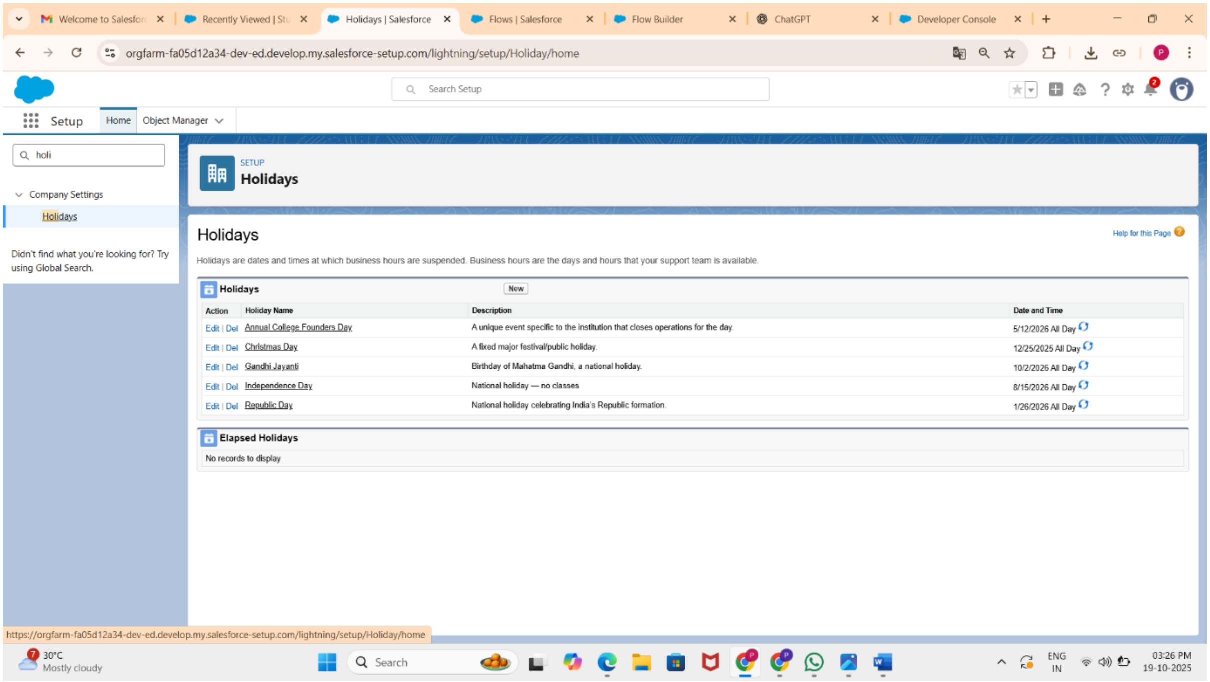
- Navigate to **Setup → Company Information**.
- Update your organization details:
  - Organization Name
  - Time Zone: **GMT +05:30**
  - Currency: **INR**
  - Default Language: **English (India)**
- Confirm the main contact details.



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.

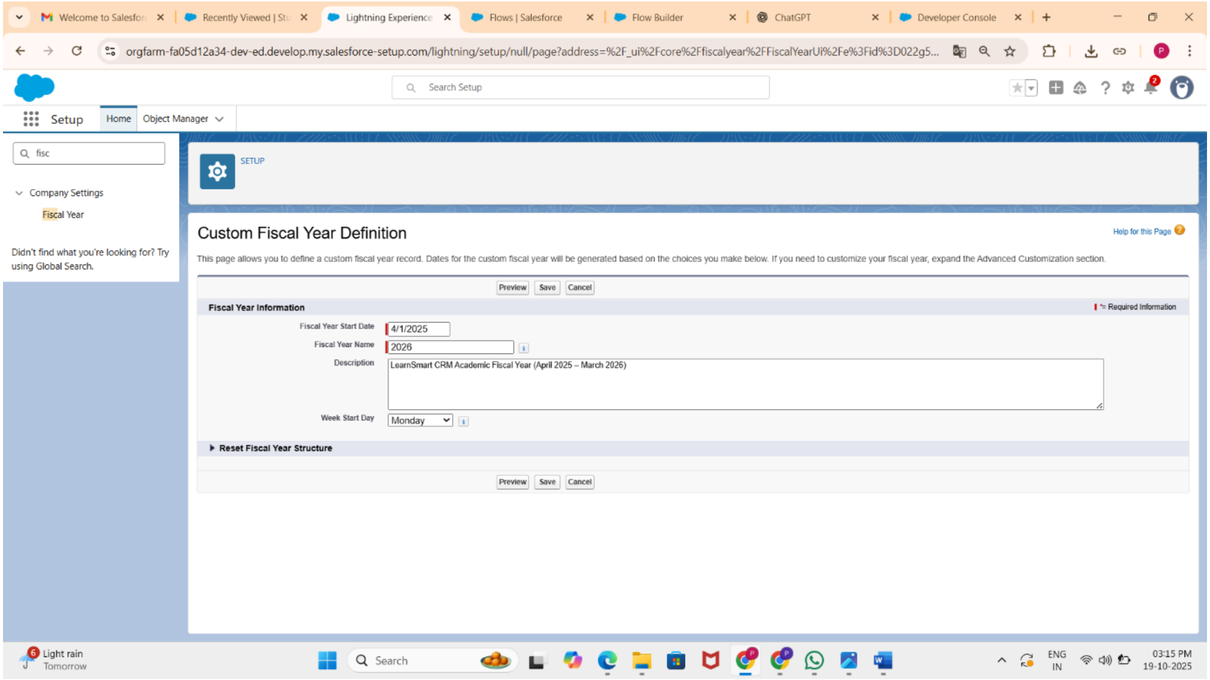




4. Fiscal Year Settings

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

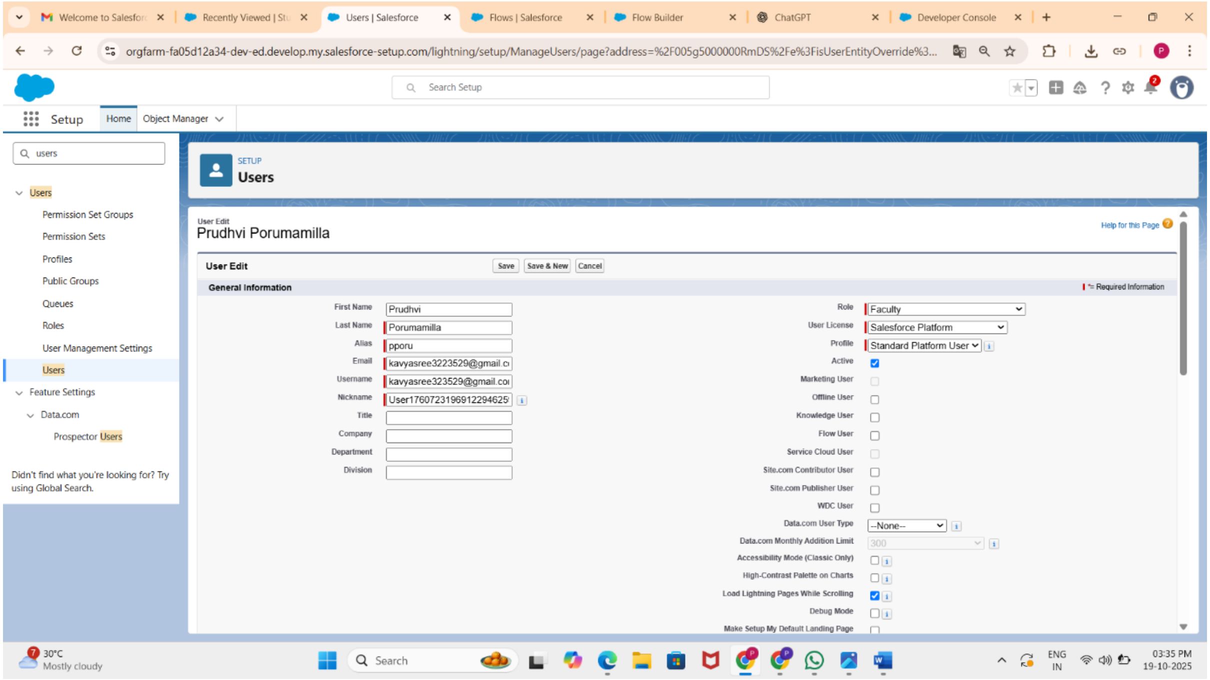
- Matches the Indian government's financial reporting cycle.



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.

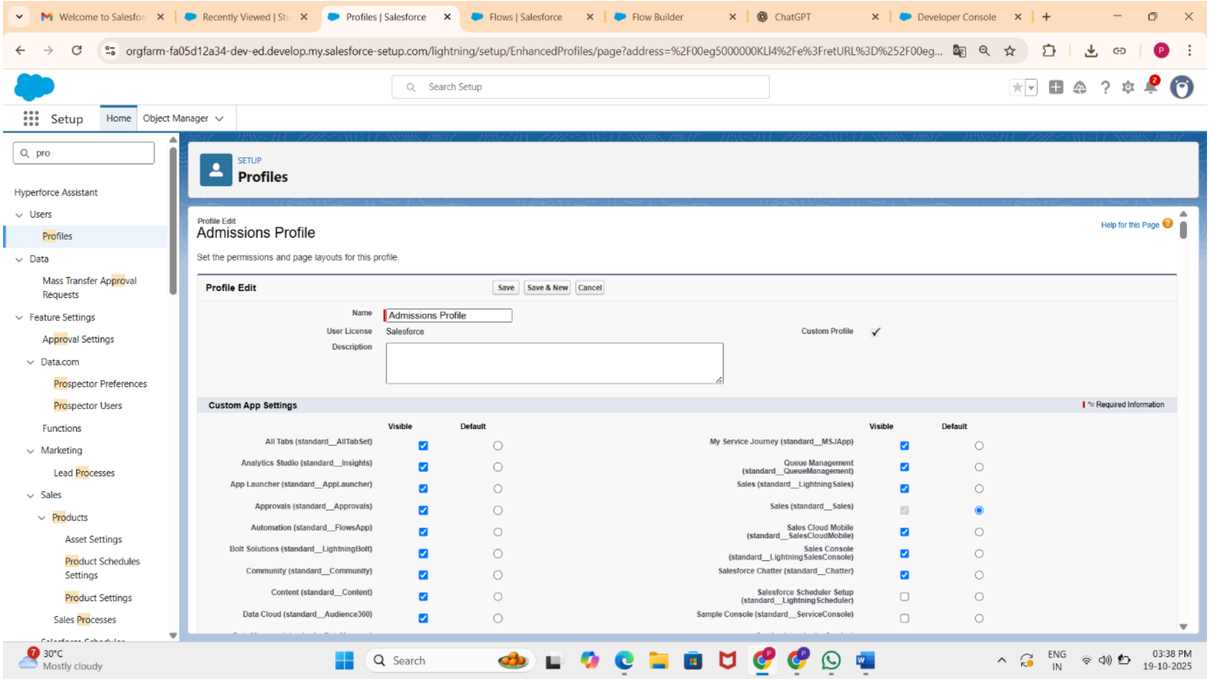
User	Role	Recommended Profile	License
Principal	Principal	Custom Principal Profile	Salesforce Platform
HOD	Hod	Custom HOD Profile	Salesforce Platform
Faculty	Faculty	Faculty Profile	Salesforce Platform



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

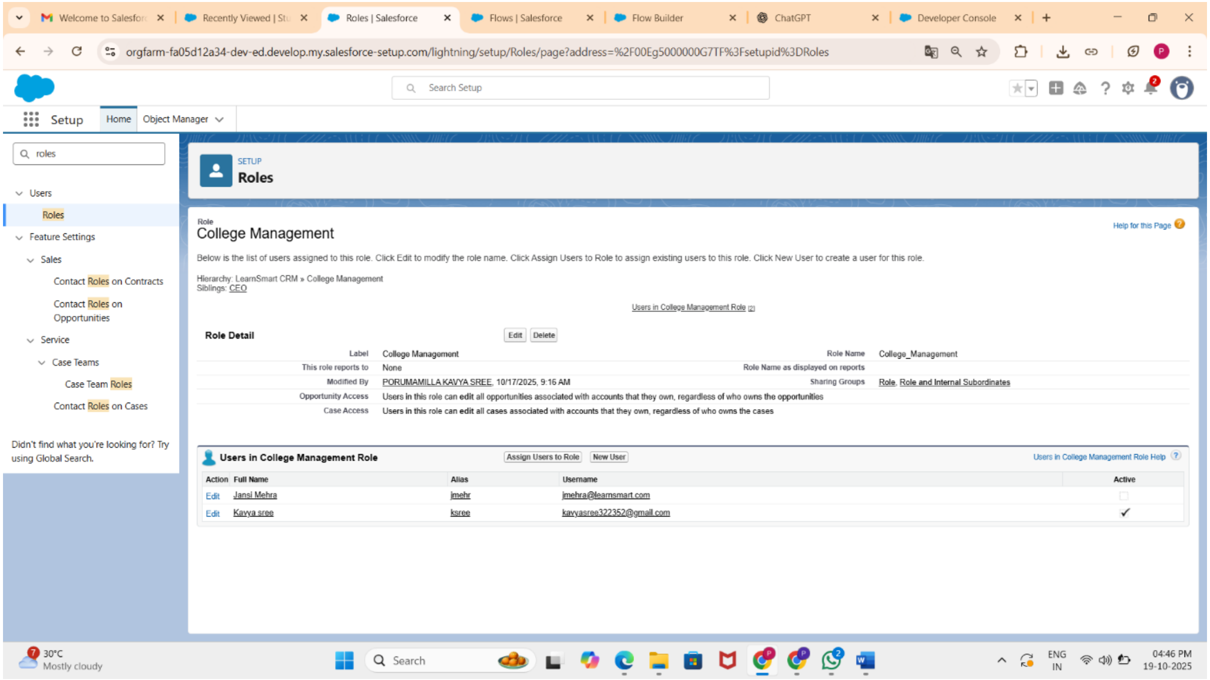
→ Principal

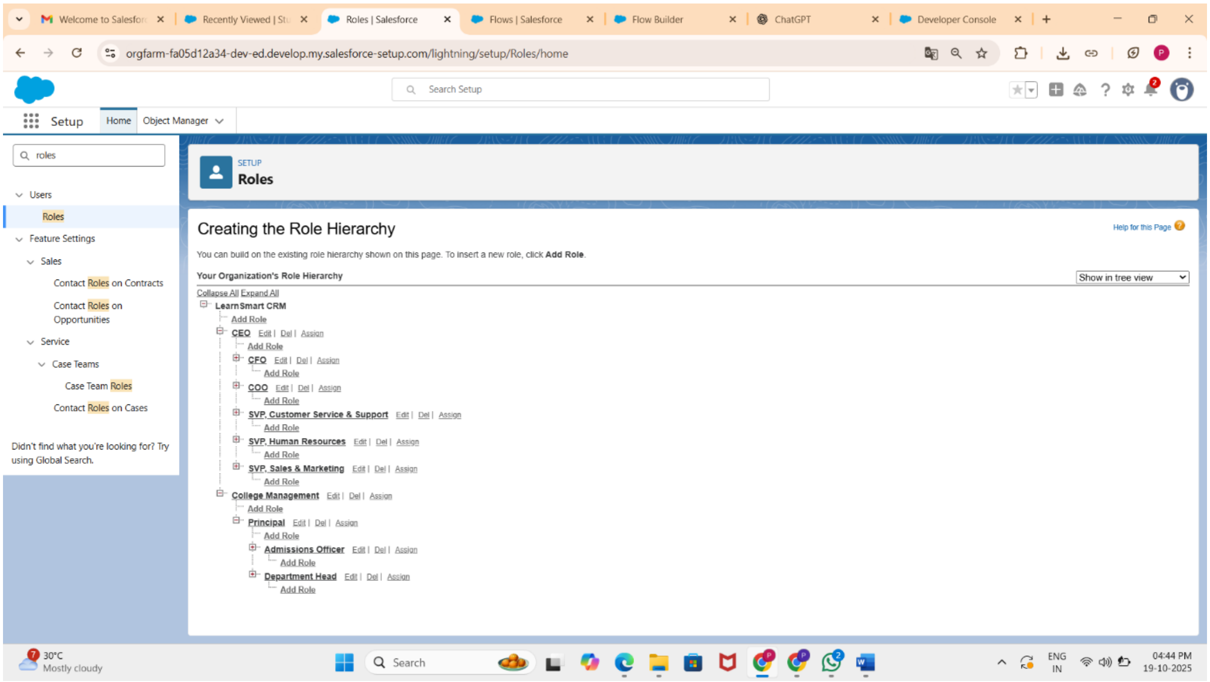
→ Hod

→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

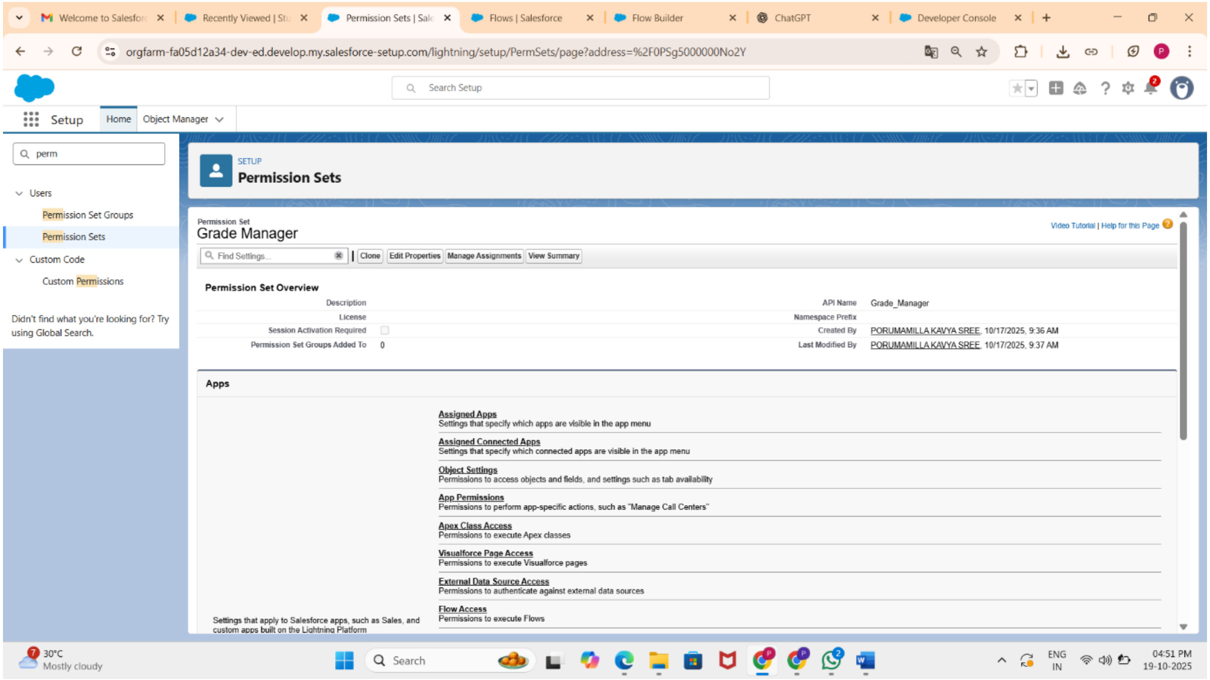




8. Permission Sets

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

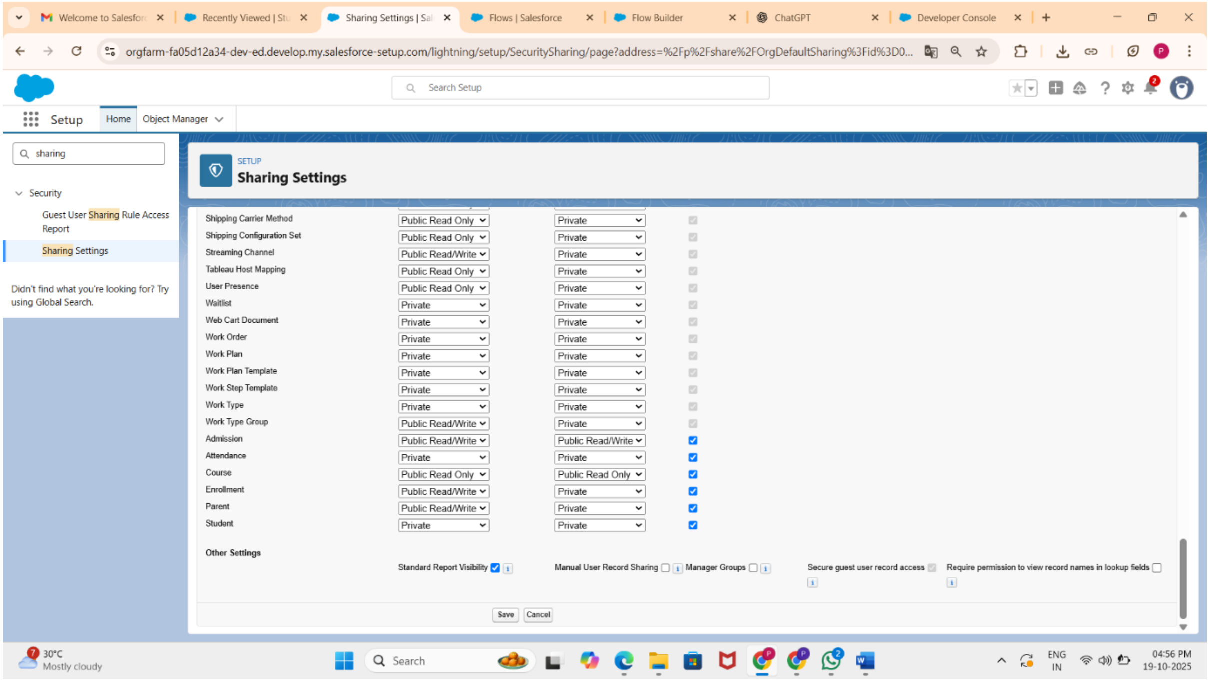
- Assign permission sets to users who require extra access without changing their profiles.



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.

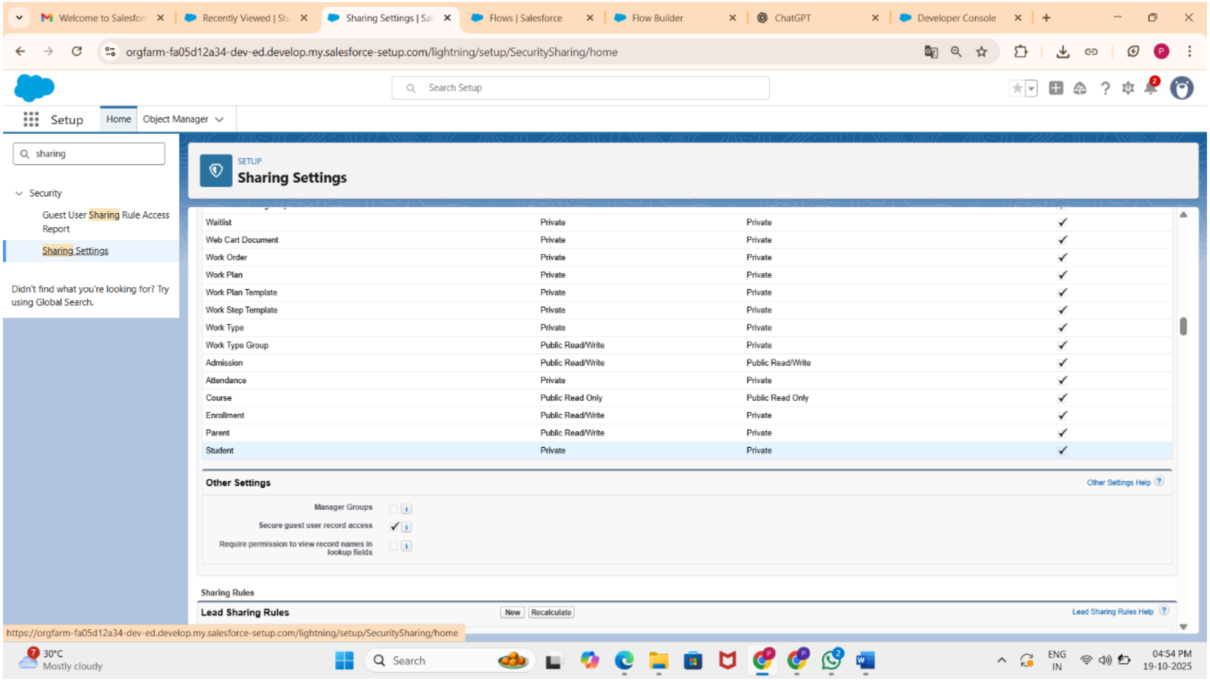
Rule 1: Share Management records with Principal (Read Only)

- 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**.



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.

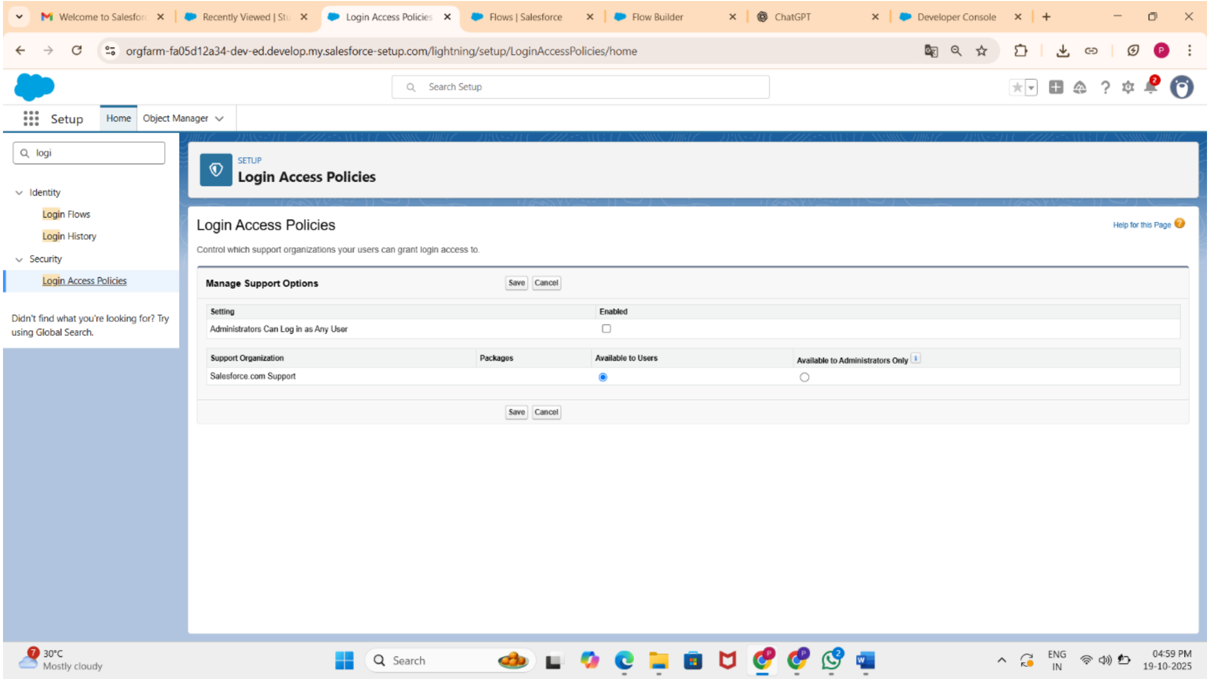
Administrators can temporarily log in as a user to troubleshoot:

- 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.

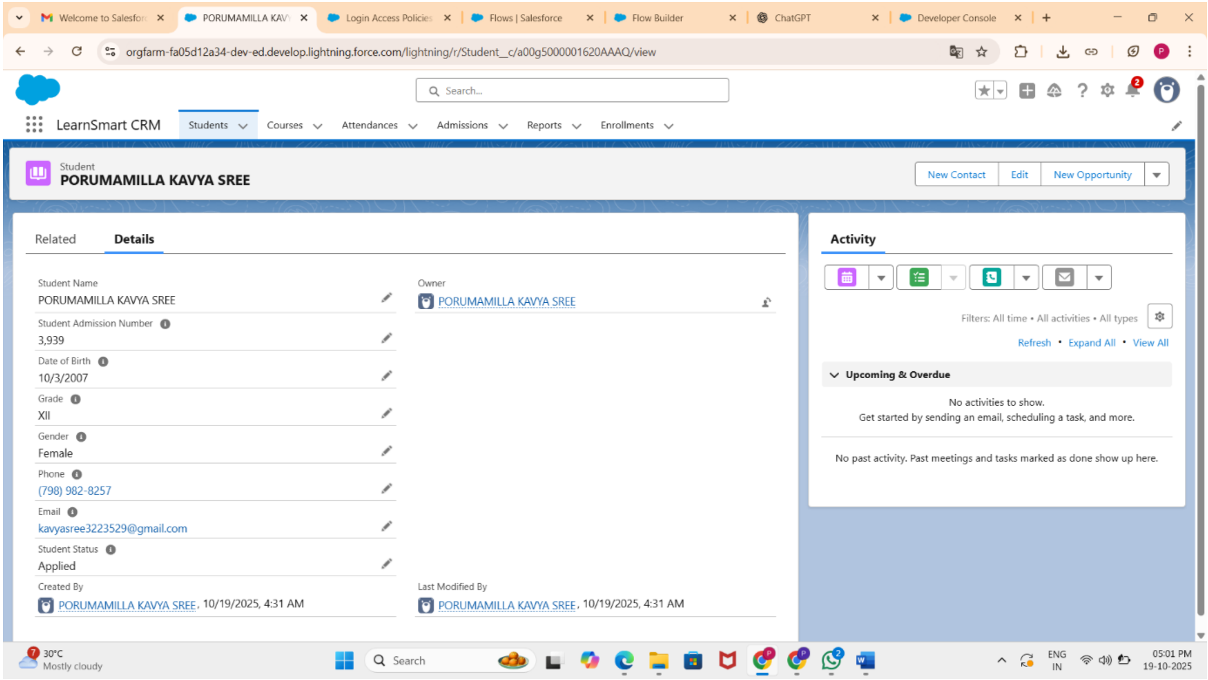


12. Developer Org Setup

- 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



Welcome to Salesfor
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Login Access Policies
Flows | Salesforce
Flow Builder
ChatGPT
Developer Console
orgfarm-fa05d12a34-dev-ed.develop.lightning.force.com/lightning/r/Student__c/a00g5000001620AAAQ/view
Search...
LearnSmart CRM
Students
Courses
Attendances
Admissions
Reports
Enrollments
Student
PORUMAMILLA KAVYA SREE
New Contact
Edit
New Opportunity
Related
Details
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PORUMAMILLA KAVYA SREE
Owner
PORUMAMILLA KAVYA SREE
Student Admission Number
3,939
Date of Birth
10/3/2007
Grade
XII
Gender
Female
Phone
(798) 982-8257
Email
kavyasree3223529@gmail.com
Student Status
Applied
Created By
PORUMAMILLA KAVYA SREE, 10/19/2025, 4:31 AM
Last Modified By
PORUMAMILLA KAVYA SREE, 10/19/2025, 4:31 AM
Activity
Filters: All time • All activities • All types
Refresh • Expand All • View All
Upcoming & Overdue
No activities to show.
Get started by sending an email, scheduling a task, and more.
No past activity. Past meetings and tasks marked as done show up here.
30°C
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