

Student Attendance & Performance Tracker

Phase 2: Org Setup & Configuration

Introduction

Phase 2 focuses on establishing the Salesforce organization and configuring core administrative settings required to support the **Student Attendance & Performance Tracker**.

These configurations ensure the system aligns with institutional policies, academic calendars, security requirements, and user access needs before application development begins.

2.1 Salesforce Editions

Use Case Explanation

To build and test the Student Attendance & Performance Tracker, a **Salesforce Developer Edition** (Education Cloud concepts applicable) was selected. This edition provides support for custom objects, automation tools, Apex development, reports, dashboards, and multiple user profiles, making it suitable for academic CRM implementation and learning purposes.

Configuration Performed

- Salesforce Developer Org was created
 - Edition supports required CRM and automation features
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2.2 Company Profile Setup

Use Case Explanation

The Company Profile represents the educational institution within Salesforce. Configuring accurate organizational details ensures consistency in reports, email alerts, and org-wide system settings.

Configuration Performed

- Entered institution name, address, and contact details
- Configured time zone and locale settings

SETUP Company Information

Company Information
Student Tracker Org

The organization's profile is below.

User Licenses (10+) | Permission Set Licenses (10+) | Feature Licenses (13) | Usage-based Entitlements (10+)

Organization Detail

Organization Name	Student Tracker Org	Phone	9876543210
Primary Contact	Siri varshini Pentakota	Fax	
Division		Default Locale	English (India)
Address	Chinthalavalees Vizianagaram vizianagaram 535005 Andhra Pradesh IN	Default Language	English
Fiscal Year Starts In	Custom Fiscal Year	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	444 KB (9%) [View]
Newsletter	<input checked="" type="checkbox"/>	Used File Space	48 KB (0%) [View]
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	00Ddm000000jOpBt
		Organization Edition	Developer Edition
		Instance	IND136

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[Edit](#) [Deactivate Org](#)

2.3 Business Hours & Holidays

Use Case Explanation

Business hours and holidays ensure that attendance tracking, automation, and notifications respect actual school working days and hours.

Configuration Performed

- Created Business Hours named “**School Hours**”
 - Monday to Friday: 9:00 AM – 3:00 PM
 - Weekends marked as non-working
- Added major academic holidays (Diwali, Christmas, Summer Break)

Organization Business Hours

Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate.

If you enter blank business hours for a day, that means your organization does not operate on that day.

Holidays

Business Hours Detail		Edit		Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Business Hours Name	College Hours	Business Hours	Sunday	No Hours	Default Business Hours <input type="checkbox"/>
			Monday	9:00 am to 3:00 pm	
			Tuesday	9:00 am to 3:00 pm	
			Wednesday	9:00 am to 3:00 pm	
			Thursday	9:00 am to 3:00 pm	
			Friday	9:00 am to 3:00 pm	
			Saturday	No Hours	

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SETUP Holidays

Holidays

Holidays are dates and times at which business hours are suspended. Business hours are the days and hours that your support team is available.

Holidays		New	
Action	Holiday Name	Description	Date and Time
Edit Del	Christmas		25/12/2025 All Day
Edit Del	Diwali		13/11/2026 All Day
Edit Del	Independence Day		15/08/2026 All Day

Elapsed Holidays			
Action	Holiday Name	Description	Date and Time
Clone	Summer Break		01/06/2025 All Day

2.4 Fiscal Year Settings

Use Case Explanation

Academic institutions follow an academic year rather than a standard calendar year. Custom fiscal year configuration ensures accurate reporting and performance analysis.

Configuration Performed

- Enabled Custom Fiscal Year
- Configured academic year:
 - Start: January 1
 - End: December 31

Fiscal Year

This page allows you to define and edit custom fiscal years, including the names used in reports and forecasts.

Click the New button to define a new fiscal year. Click Edit to edit a previously defined fiscal year.

Custom Fiscal Years		
Action	Year	New
Edit	2025-26	01/01/2025
		31/12/2025

Action	Field Label
Edit Replace	Quarter Prefix
Edit Replace	Period Prefix
Edit Replace	Quarter Name
Edit Replace	Period Name

2.5 User Setup & Licenses

Use Case Explanation

Different users require different access levels. Salesforce user setup allows secure login and role-specific access to the system.

Configuration Performed

- Created users for:
 - Admin
 - Faculty
 - Students
 - Parents
- Assigned appropriate licenses (Salesforce / Salesforce Platform)
- Activated login access for all users

The screenshot shows the Salesforce Setup - Users page. At the top, there's a header with a user icon, 'SETUP', and 'Users'. Below the header, a section titled 'All Users' displays a list of users. The list includes columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The users listed are:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty_00ddm00000pbtuai.fuw.3xmhangx@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit Login	Parent	Parent	parent@mvgr.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	Pentakota_Siri varshini	SPent	sirivarshini.pentakota@curious-wolf-rfn1ji.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit Login	Student 1	stud1	student1@mvgr.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit Login	Student 2	stud2	student2@mvgr.com		<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit Login	Teacher Teacher	Teacher	teacher@mvgr.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User_Integration	integ	integration@00ddm00000j0pbtuai.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightsecurity@00ddm00000pbtuai.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

At the bottom of the list, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

2.6 Profiles

Use Case Explanation

Profiles control what users can see and do within Salesforce. Custom profiles ensure users only access features relevant to their role.

Configuration Performed

- Cloned standard profiles to create:
 - Admin Profile
 - Teacher Profile
 - Student Profile
 - Parent Profile
- Configured object permissions and system access

The screenshot shows the Salesforce Setup - Profiles page. At the top, there's a header with a user icon, 'SETUP', and 'Profiles'. Below the header, a section titled 'Profiles' displays a list of profiles. The list includes columns for Action, Profile Name, User License, and Role. The profile listed is:

Action	Profile Name	User License	Role
<input type="checkbox"/> Edit Del ...	Teacher Profile	Salesforce	<input checked="" type="checkbox"/>

At the bottom of the list, there are buttons for 'New Profile', 'Edit', 'Delete', and 'Create New View'.

2.7 Roles

Use Case Explanation

Roles define data visibility in a hierarchical structure, matching the institution's organizational flow.

Configuration Performed

- Created role hierarchy:
 - Admin (Top)
 - Teacher
 - Student
 - Parent

The screenshot shows a software interface for managing roles. At the top, there is a header with a user icon and the text "SETUP" followed by "Roles". Below the header, the title "Creating the Role Hierarchy" is displayed. A sub-instruction below the title says, "You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**". Underneath this, the heading "Your Organization's Role Hierarchy" is shown, followed by a hierarchical tree structure. The tree starts with "Student Tracker Org" which is collapsed. Underneath it, "Admin", "Teacher", "Parent", and "Student" are listed as expanded nodes. Each of these nodes has an "Edit | Del | Assign" link next to its name, and an "Add Role" link below it. Ellipses between "Teacher" and "Parent" indicate that more roles exist but are not fully visible in the screenshot.

2.8 Permission Sets

Use Case Explanation

Permission Sets provide flexible access control without modifying core profiles.

Configuration Performed

- Created permission sets for:
 - Attendance Management
 - Report Access

- Assigned permission sets to relevant users

The screenshot shows the Salesforce 'Permission Sets' page under the 'SETUP' tab. A specific permission set named 'Attendance_Marker' is selected. The page includes a toolbar with 'Find Settings...', 'Clone', 'Delete', 'Edit Properties', 'Manage Assignments', and 'View Summary'. Below this is a 'Permission Set Overview' section with the following details:

Description	Create/Edit Attendance records	API Name	Attendance_Marker
License		Namespace Prefix	
Session Activation Required	<input type="checkbox"/>	Created By	Siri varshini Pentakota, 19/12/2025, 1:13 pm
Permission Set Groups Added To	0	Last Modified By	Siri varshini Pentakota, 19/12/2025, 1:14 pm

2.9 Organization-Wide Defaults (OWD)

Use Case Explanation

OWD defines default record access to protect sensitive student data.

Configuration Performed

- Set **Student** and **Attendance** objects to Private
- Set **Course** object to Public Read Only

2.10 Sharing Rules

Use Case Explanation

Sharing rules extend access where necessary without compromising security.

Configuration Performed

- Teachers can view only assigned students
- Parents can view only their child's records

Student Sharing Rules		New	Recalculate	Student Sharing Rules Help
Action	Criteria	Shared With	Access Level	
Edit Del	Student: Teacher NOT EQUAL TO Blank	Group: Teachers	Read Only	

2.11 Login Access Policies

Use Case Explanation

Login policies enhance system security and control access timing.

Configuration Performed

- Configured login hours
- Enabled admin login access for troubleshooting

2.12 Dev Org Setup

- Provisioned Developer Org or Sandbox environment for safe development and testing.
 - Prepared to build and customize objects, workflows, and user interfaces without impacting production data.
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2.13 Sandbox Usage

- Created sandbox copies to test new features, automation, and changes in isolation from production.
 - Used sandbox for validation before deploying changes live.
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2.14 Deployment Basics

- Planned deployment strategy using Change Sets and/or Salesforce DX for moving changes from sandbox to production.
 - Established version control and backup routines to safeguard org changes
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Conclusion

Phase 2 establishes a secure, scalable, and institution-aligned Salesforce foundation. Proper org configuration ensures that all future development phases operate efficiently, securely, and in accordance with academic workflows.