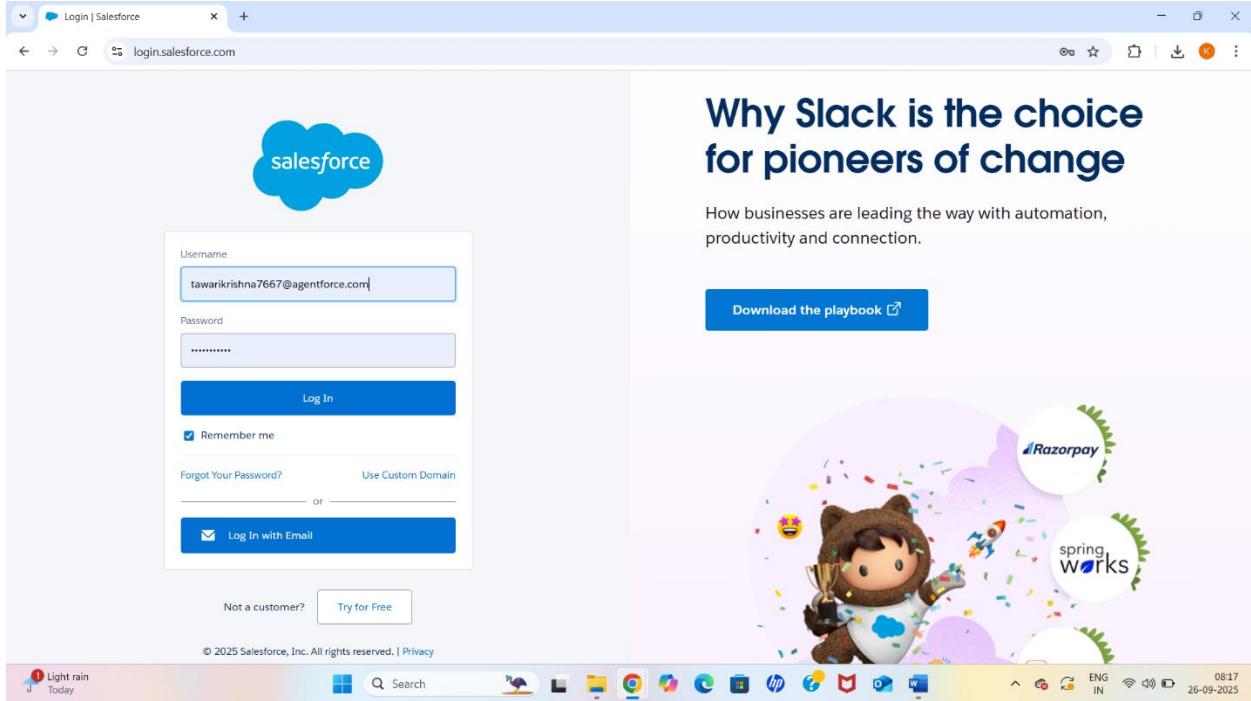


Phase 2: Org Setup & Configuration – Student Management System

1. Salesforce Edition

- **Developer Edition** (Dev Org) used for project setup.

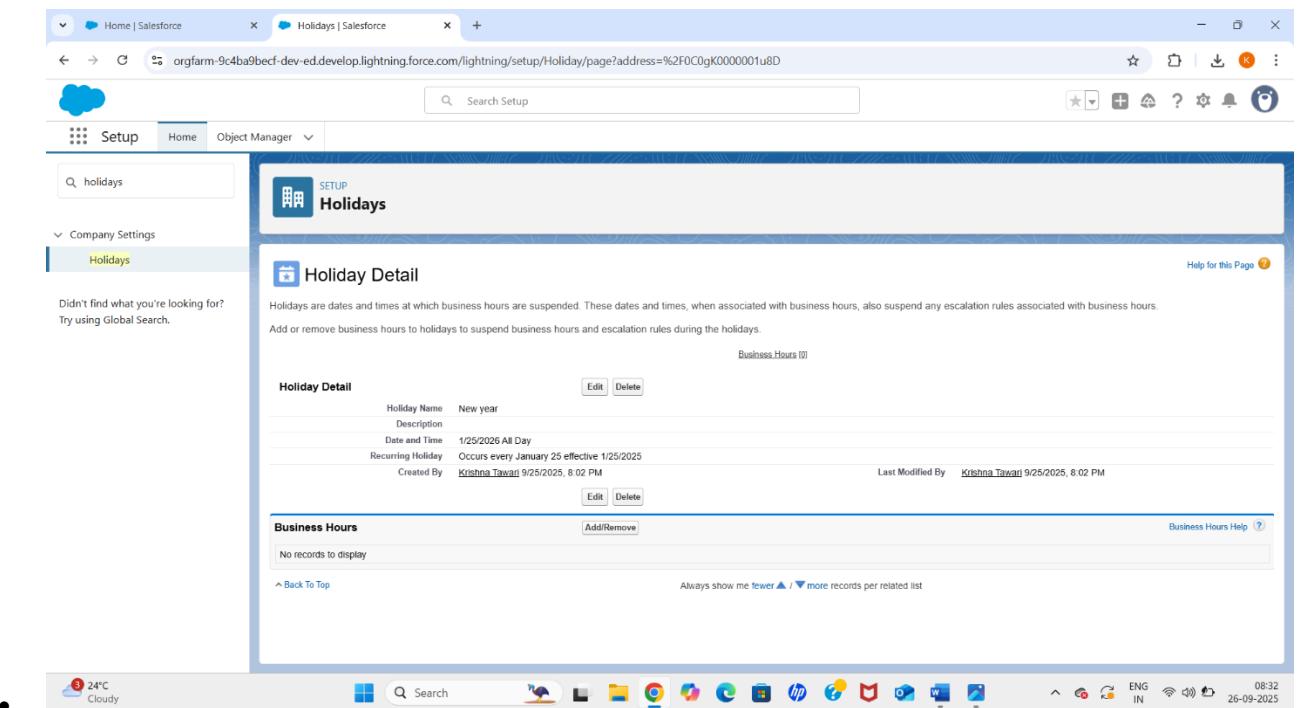


2. Company Profile Setup

- Configured Institution Name, Address, Default Time Zone, Currency, and Locale.

3. Business Hours & Holidays

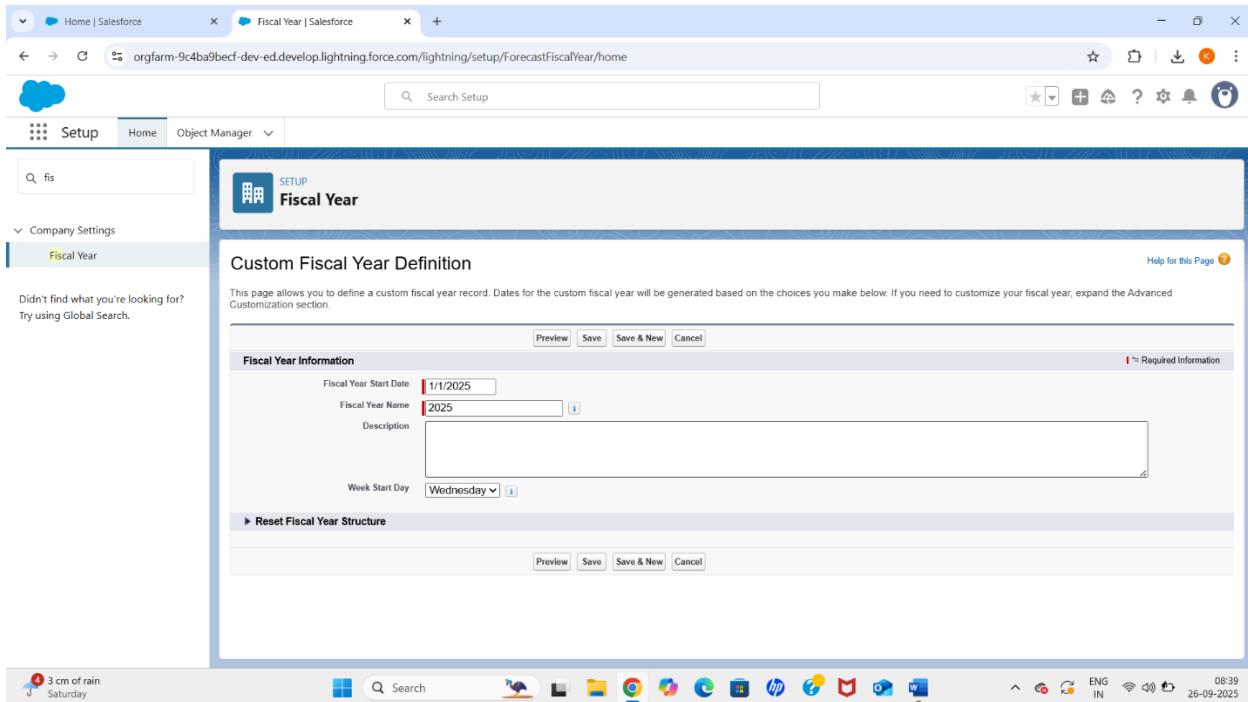
- Defined Standard Business Hours (9 AM – 4 PM, Mon–Sat)



- Added holidays (e.g. New Year).

4. Fiscal Year Settings

- Configured Standard Fiscal Year (Jan–Dec).



5. User Setup & Licenses

- Created sample users with **Salesforce licenses**:
 - **System Administrator** – Full access.
 - **Faculty User** – Limited teaching access.
 - **Student User** – Read-only/student data access.

6. Profiles

- Created/Modified Profiles:

System Administrator

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The main panel displays the 'System Administrator' profile. The 'Profile Detail' section shows the profile name is 'System Administrator', assigned to 'Salesforce' user license, and created by 'salesforce.com, Inc.' on 7/16/2025 at 8:25 PM. The 'Modified By' field shows 'Krishna Tawar' modified it on 9/25/2025 at 8:15 PM. The 'Page Layouts' section lists various standard object layouts for different objects like Global, Email Application, Home Page Layout, Account, Alternative Payment Method, and Appointment Invitation.

Teacher Profile – Access to Students, Courses, Attendance, Grades.

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The main panel displays the 'Finance profile' profile. The 'Profile Detail' section shows the profile name is 'Finance profile', assigned to 'Salesforce' user license, and created by 'Krishna Tawar' on 9/25/2025 at 8:18 PM. The 'Modified By' field shows 'Krishna Tawar' modified it on 9/25/2025 at 8:18 PM. The 'Page Layouts' section lists various standard object layouts for different objects like Global, Email Application, Home Page Layout, Account, Alternative Payment Method, and Appointment Invitation.

Finance Profile – Access to Fees object.

7. Roles

Defined Role Hierarchy:

Principal (Top Role)

Teacher

Finance Officer

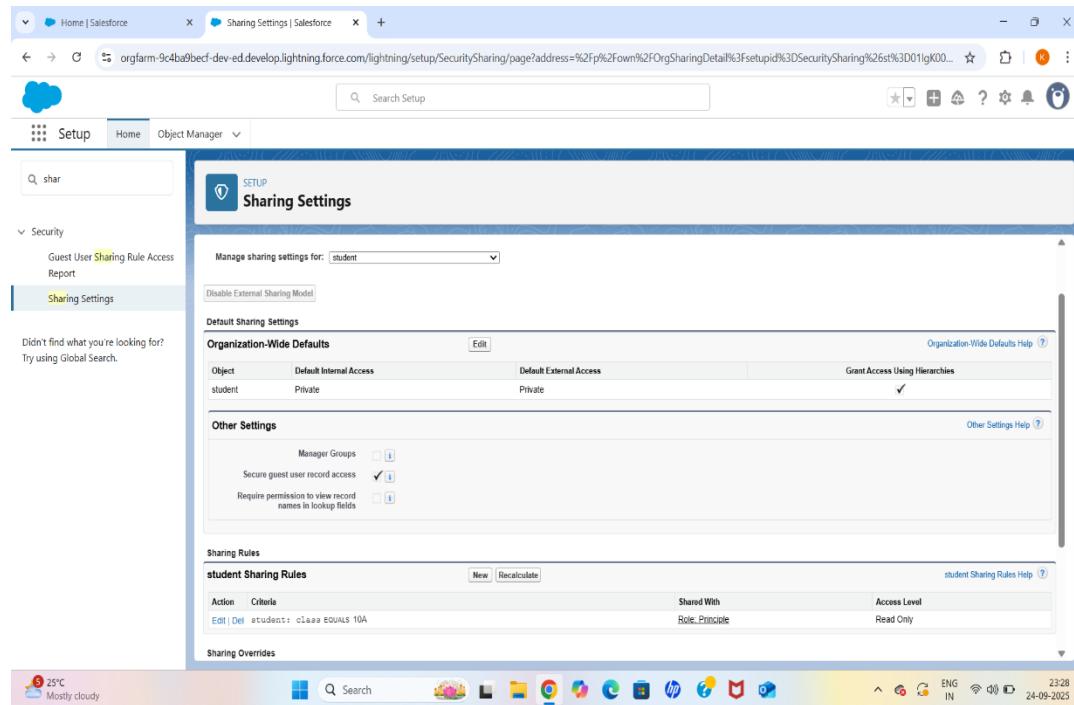
Student

The screenshot shows the Salesforce 'Roles' page under the 'Setup' menu. The left sidebar lists categories like 'Users', 'Roles', 'Feature Settings', 'Sales', 'Service', and 'Case Teams'. The 'Roles' section is expanded, showing a tree view of roles. At the top level is 'College of Engineering'. Below it are 'Professor', 'Dean', 'CEO', 'CIO', 'COO', 'Finance management', 'VP Customer Service & Support', 'Customer Support International', 'Customer Support Asia Pacific', 'Customer Support North America', 'Information Technology Services', 'VP Human Resources', 'VP Marketing', 'VP Product Marketing', 'VP International Sales', 'VP North American Sales', 'Director Channel Sales', 'Channel Sales Team', 'Director General Sales', 'Executive Sales Team', 'Marketing Team', 'Administrators', and 'Teachers'. Each role has an 'Edit' and 'Delete' link next to its name.

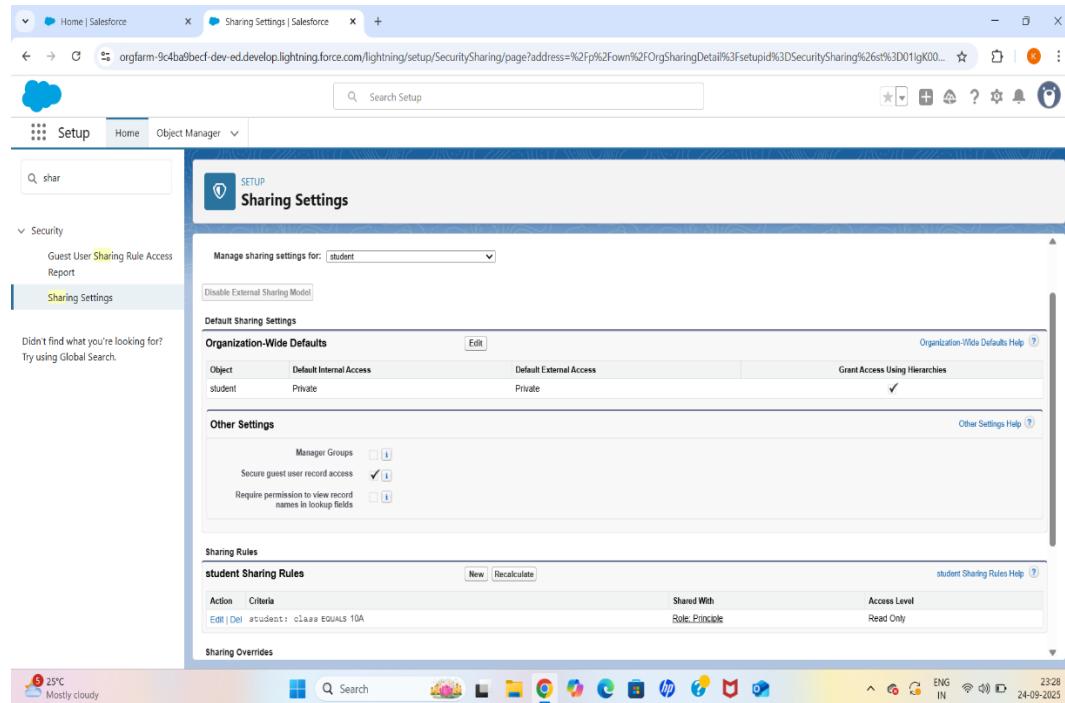
8. Permission Sets

Created Permission Sets for additional access:

Report Access – Extra reporting permissions.



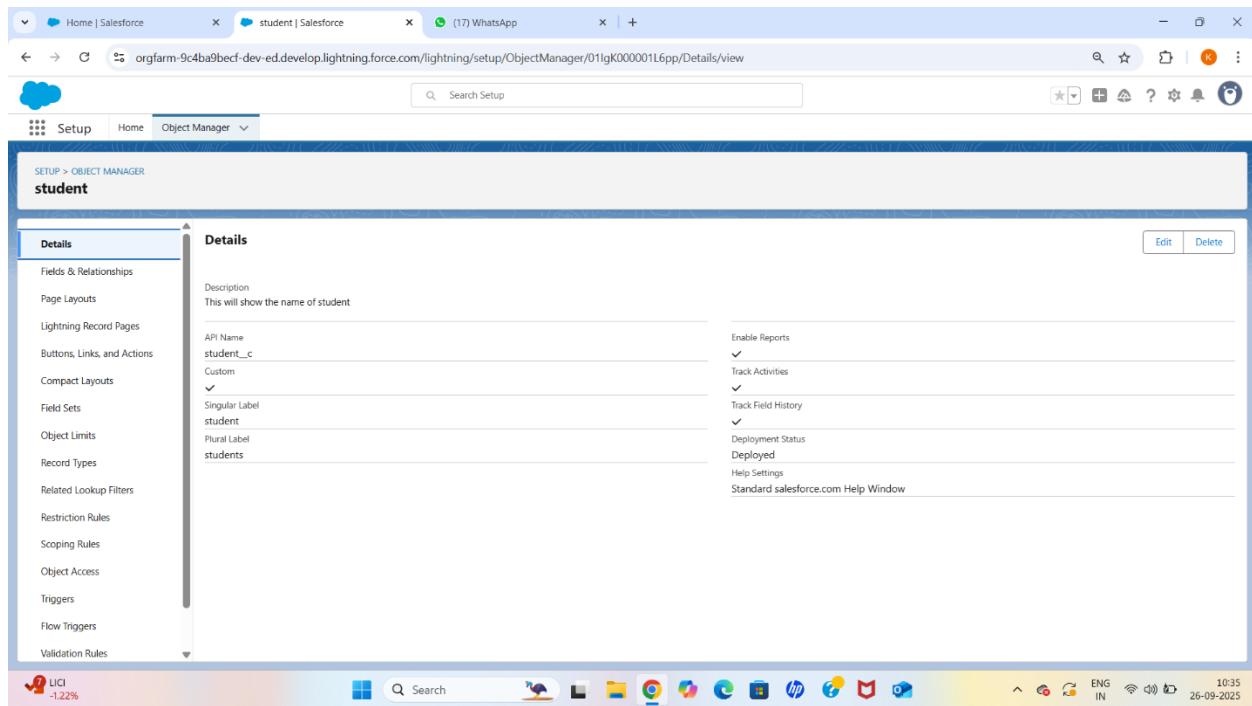
Fee Management Access – Extended access to Fees object.



9. Objects Created

- **Student (Custom Object)** – Manage student details.

- **Course (Custom Object)** – Store course information.
- **Enrollment (Junction Object)** – Relationship between Student & Course.
- **Attendance (Custom Object)** – Track daily student attendance.
- **Grades (Custom Object)** – Store marks, grades, GPA.
- **Fees (Custom Object)** – Manage payments and pending balances.



Home | Salesforce course | Salesforce (17) WhatsApp

orgfarm-9c4ba9becf-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK000002RMep/Details/view

Setup Home Object Manager

Search Setup

course

SETUP > OBJECT MANAGER

course

Details

Fields & Relationships

Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers

Details

Description

API Name: course_c
Custom: ✓
Singular Label: course
Plural Label: courses

Enable Reports
Track Activities
Track Field History
Deployment Status: Deployed
Help Settings
Standard salesforce.com Help Window

Edit Delete

https://orgfarm-9c4ba9becf-dev-ed.lightning.force.com/one/one.app#/setup/ObjectManager/01lgK000002RMep/FieldsAndRelationships/view

Heavy rain Today 10:37 26-09-2025 ENG IN

Home | Salesforce Fee | Salesforce (17) WhatsApp

orgfarm-9c4ba9becf-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK000002RM93/Details/view

Setup Home Object Manager

Search Setup

Fee

SETUP > OBJECT MANAGER

Fee

Details

Fields & Relationships

Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Validation Rules

Details

Description

API Name: Fee_c
Custom: ✓
Singular Label: Fee
Plural Label: Fees

Enable Reports
Track Activities
Track Field History
Deployment Status: Deployed
Help Settings
Standard salesforce.com Help Window

Edit Delete

Rainy days ahead 27°C 10:39 26-09-2025 ENG IN

Home | Salesforce Attendance | Salesforce (17) WhatsApp

orgfarm-9c4ba9becf-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgK000002RMXv/Details/view

Cloud Setup Home Object Manager Search Setup

SETUP > OBJECT MANAGER Attendance

Details

Description

API Name Attendance__c

Custom ✓

Singular Label Attendance

Plural Label Attendances

Enable Reports

Track Activities

Track Field History

Deployment Status Deployed

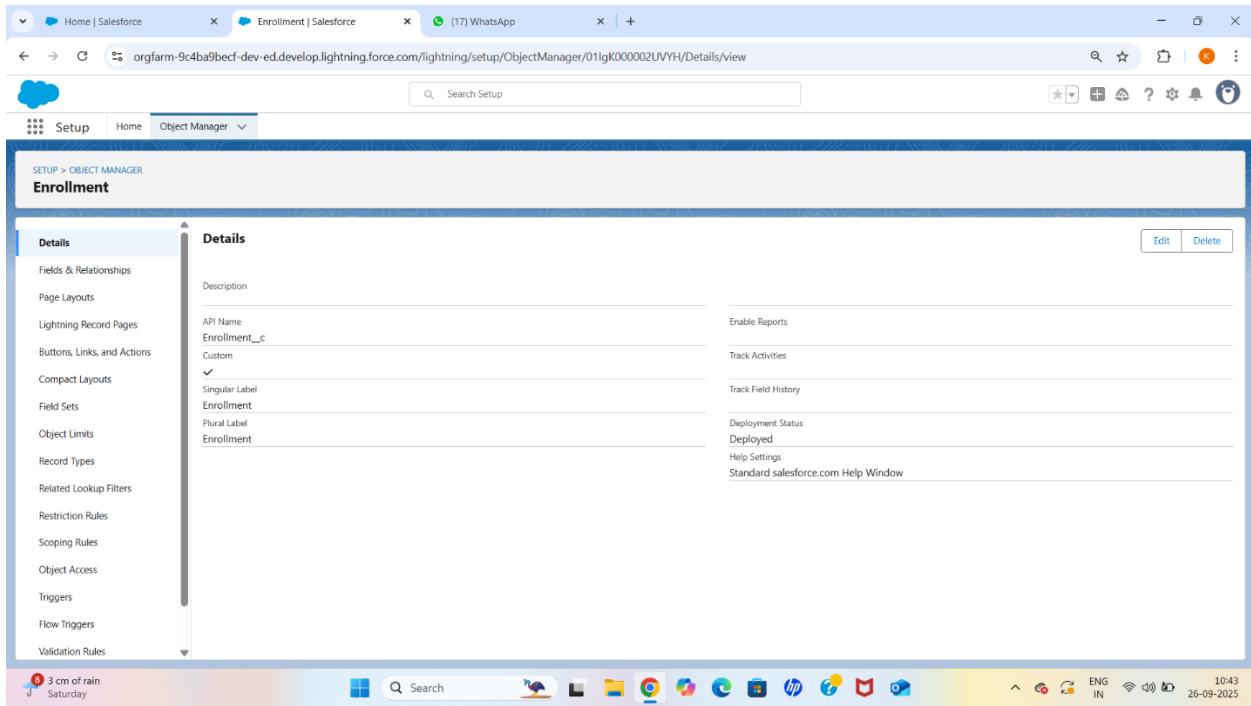
Help Settings Standard salesforce.com Help Window

Edit Delete

Rainy days ahead 27°C

Search

ENG IN 10:40 26-09-2025



10. OWD (Org-Wide Defaults)

- Student → Private
- Course → Public Read Only
- Enrollment → Private
- Attendance → Private
- Grades → Private

Fees → Private

The screenshot shows the 'Sharing Settings' page in the Salesforce Setup. The left sidebar under 'Security' has 'Sharing Settings' selected. The main area displays sharing rules for various objects, all set to 'Private'. The objects listed include Work Plan Template, Work Step Template, Work Type, Work Type Group, Attendance, Candidate, course, Department, Department1, Enrollment, Fee, Grade, Job Application, Job Category, Mentor, Position, Review, student, and Travel Approval. Below this is an 'Other Settings' section with checkboxes for Standard Report Visibility, Manual User Record Sharing, Manager Groups, Secure guest user record access, and Require permission to view record names in lookup fields. At the bottom are 'Save' and 'Cancel' buttons.

11. Sharing Rules

The screenshot shows the 'Sharing Settings' page in the Salesforce Setup. The left sidebar under 'Security' has 'Sharing Settings' selected. The main area displays sharing settings for the 'course' object. It shows a warning message: 'One or more sharing operations has been initiated. See below for additional details. Certain operations may not be available.' Below this is a 'Manage sharing settings for:' dropdown set to 'course'. Under 'Default Sharing Settings', there is an 'Organization-Wide Defaults' table:

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
course	Public Read Only	Private	<input checked="" type="checkbox"/>

Below this is an 'Other Settings' section with checkboxes for Manager Groups, Secure guest user record access, and Require permission to view record names in lookup fields. At the bottom is a 'Sharing Rules' section for 'course Sharing Rules' with a note: 'A sharing rule operation is in progress. You can't create new owner-based sharing rules for courses targeting the following groups. The initiating user will receive an email when each operation finishes.' The status bar at the bottom indicates it's 10:58 on 26-09-2025.

Home | Salesforce Public Groups | Salesforce (17) WhatsApp

orgfarm-9c4ba9becf-dev-ed.lightning.force.com/lightning/setup/PublicGroups/page?address=%2Fsetup%2Fown%2Fgroupdetail.jsp%3Fid%3D00GgK0000050ihJ

SETUP Search Setup

Setup Home Object Manager

Q public

Users

Public Groups

Feature Settings

Salesforce Files

Content Deliveries and Public Links

Company Settings

Calendar Settings

Public Calendars and Resources

Group
create Faculty group

Help for this Page

Label: create Faculty group
Group Name: create_Faculty_group
Grant Access Using Hierarchies: ✓
Description:
Created By: Krishna_Tawari, 9/25/2025, 10:22 PM
Modified By: Krishna_Tawari, 9/25/2025, 10:22 PM

View All Users

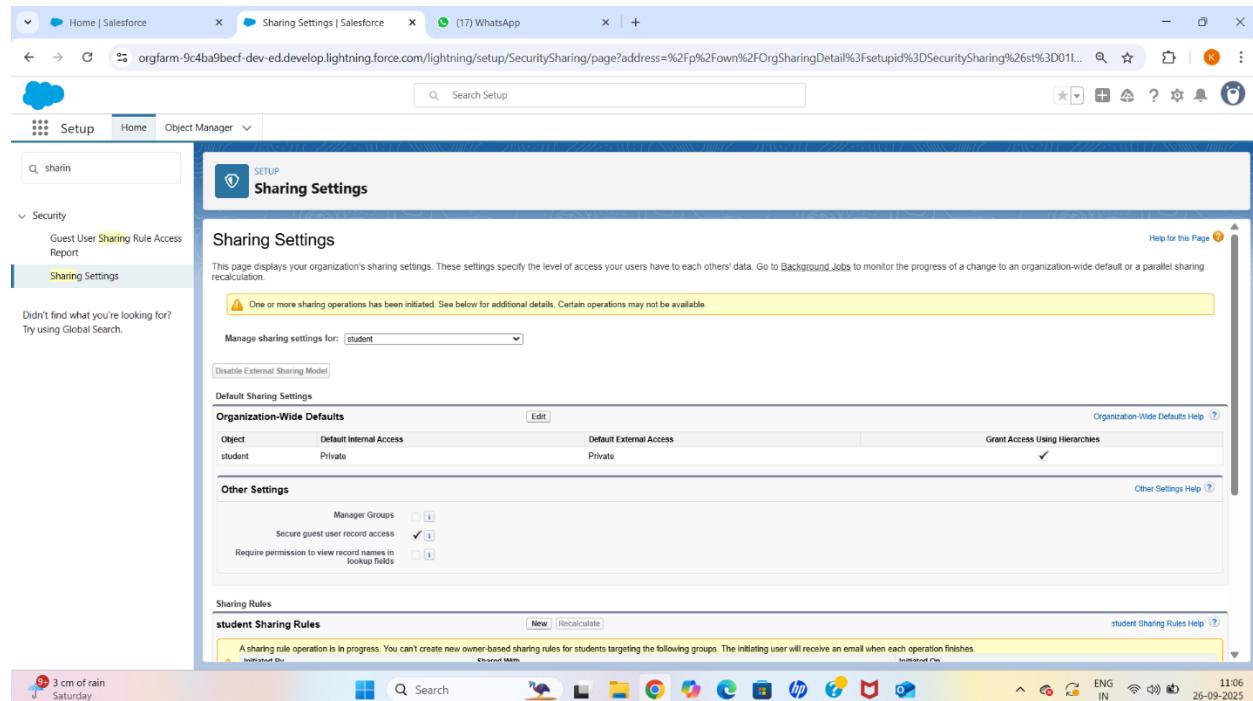
Name: jyoti.sharafat Type: User

INFY -1.37%

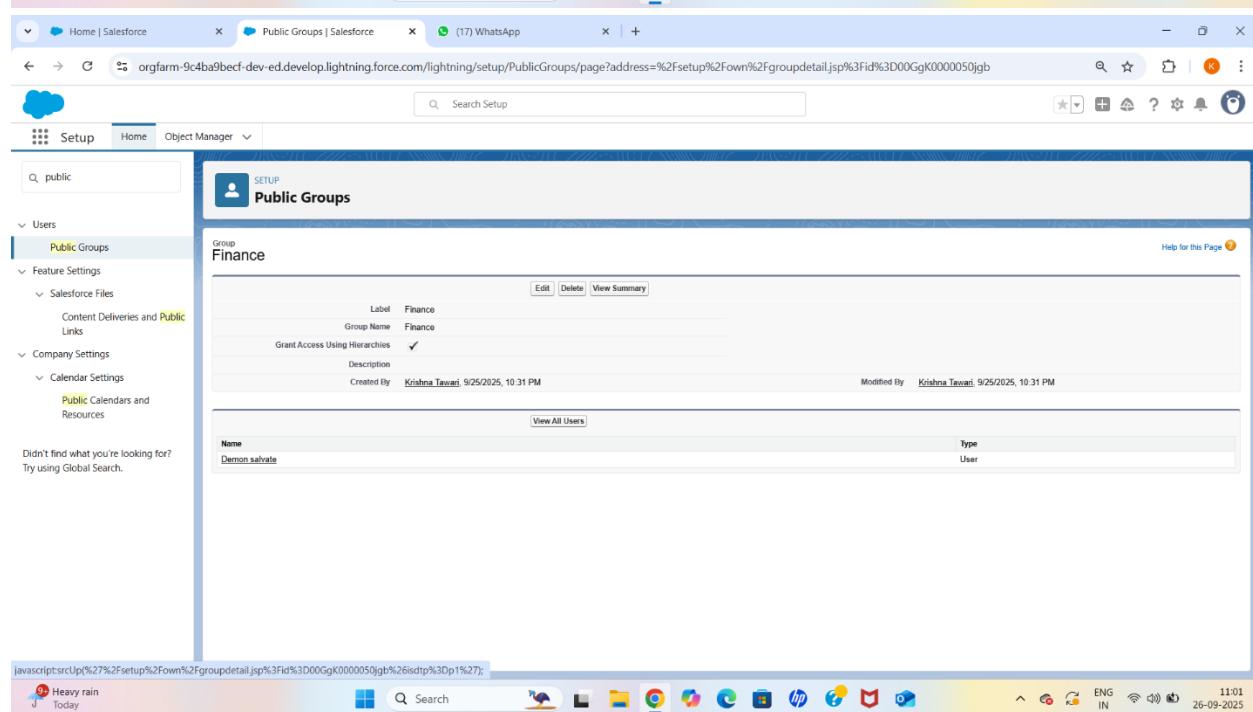
Search

10:59 ENG IN 26-09-2025

Shared Courses with all Faculty.



The screenshot shows the 'Sharing Settings' page in the Salesforce Setup. The 'Sharing Settings' section displays organization-wide defaults for the 'student' object, setting both internal and external access to 'Private'. Under 'Other Settings', 'Secure guest user record access' is checked. A note indicates a sharing rule operation is in progress. The 'Sharing Rules' section shows a 'student Sharing Rules' tab with a note about a sharing rule operation in progress.



The screenshot shows the 'Public Groups' page in the Salesforce Setup. It displays a single group named 'Finance' with a label 'Finance', group name 'Finance', and 'Grant Access Using Hierarchies' checked. The group was created by 'Krishna Tawari' on 9/25/2025 at 10:31 PM and modified by the same user on 9/25/2025 at 10:31 PM. A table below lists a user named 'Demon salvate' with type 'User'.

Shared Student Records read-only with Faculty (except Finance objects). Finance users granted access to **Fees object**.

Sharing Settings

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: Fee

Default Sharing Settings

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Fee	Private	Private	<input checked="" type="checkbox"/>

Other Settings

Manager Groups	<input type="checkbox"/>
Secure guest user record access	<input checked="" type="checkbox"/>
Require permission to view record names in lookup fields	<input type="checkbox"/>

Sharing Rules

Fee Sharing Rules

A sharing rule operation is in progress. You can't create new owner-based sharing rules for Fees targeting the following groups. The initiating user will receive an email when each operation finishes.

12. Login Access Policies

- Enabled Administrators Can Log in as Any User.
- Configured Trusted IP Ranges for secure login.

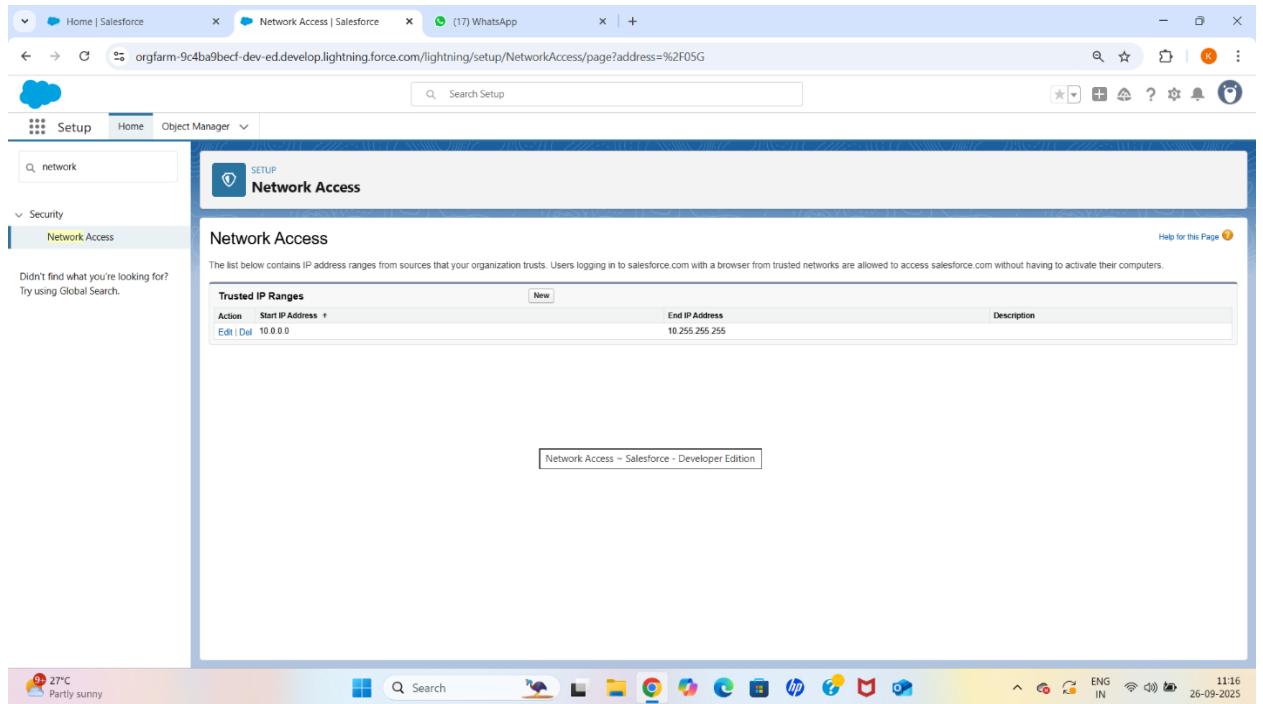
Login Access Policies

Control which support organizations your users can grant login access to.

Manage Support Options

Setting	Enabled
Administrators Can Log in as Any User	<input checked="" type="checkbox"/>

Support Organization	Packages	Available to Users	Available to Administrators Only
Salesforce.com Support	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>



13. Dev Org Setup

- Enabled **Dev Hub** in Developer Org.
- Connected CLI:
 - sf org login web --set-default-dev-hub --alias DevHub

14. Sandbox Usage

- **Not available** in Developer Edition.
- Documented sandbox usage for real-world projects (Dev, Test, UAT).

The screenshot shows the Visual Studio Code interface with the title bar "student record system". The Explorer sidebar on the left shows a project structure under "STUDENT RECORD SYSTEM" with files like "hello.apex", "studentservice.cls", and ".forceignore". The Terminal tab is active, displaying the following command and output:

```
PS C:\Users\tawar\OneDrive\Documents\student record system> sf org list
```

	Type	Alias	Username	Org Id	Status
	DevHu...	DevHub	tawarik...	00DgK...	Conne...

Legend: = Default DevHub, = Default Org Use --all to see expired and deleted scratch orgs

```
PS C:\Users\tawar\OneDrive\Documents\student record system>
```

The status bar at the bottom shows "Rainy days ahead" and "26°C".

The screenshot shows the Visual Studio Code interface with the title bar "student record system". The Explorer sidebar on the left shows a project structure under "STUDENT RECORD SYSTEM" with files like "hello.apex", "studentservice.cls", and ".forceignore". The Terminal tab is active, displaying the following command and error message:

```
system> sf org login web --set-default-dev-hub --alias DevHu
```

Error (2): Nonexistent flag: --alias
See more help with --help

```
PS C:\Users\tawar\OneDrive\Documents\student record system> sf org login web --set-default-dev-hub as DevHub
```

Successfully authorized tawarikrishna7667.com with org ID 00DgK000007X9TVUA0

```
PS C:\Users\tawar\OneDrive\Documents\student record system>
```

A "Snipping Tool" window is open in the foreground, showing a screenshot of the terminal output. The window has a "Mark-up and share" button.

The status bar at the bottom shows "Heavy rain" and "Today".