Phase2:OrgSetup&Configuration

☞ **Goal:** To Prepare the Salesforce environment through setup and configuration to support the Skill Development & Employment Portal.

1. SalesforceEditions

- **Edition Used:** Salesforce **Developer Edition (Dev Org)** – free, full-featured org for testing and configuration.

- (optional) ex: Rationale: Suitable for project prototyping, customizations, and testing before moving into production.

2. Company Profile Setup

- **CompanyName:** *Skill Development & Employment Portal*
- **DefaultLocale:**English(India)
- **Currency:**IndianRupee(INR)–primary,withUSDenabledforexternalpartners.
- **DefaultTimeZone:**Asia/Kolkata(IST).
- **BusinessAddress:**NGO/CompanyHQaddress(configurable).

ProcedureforMyReference:

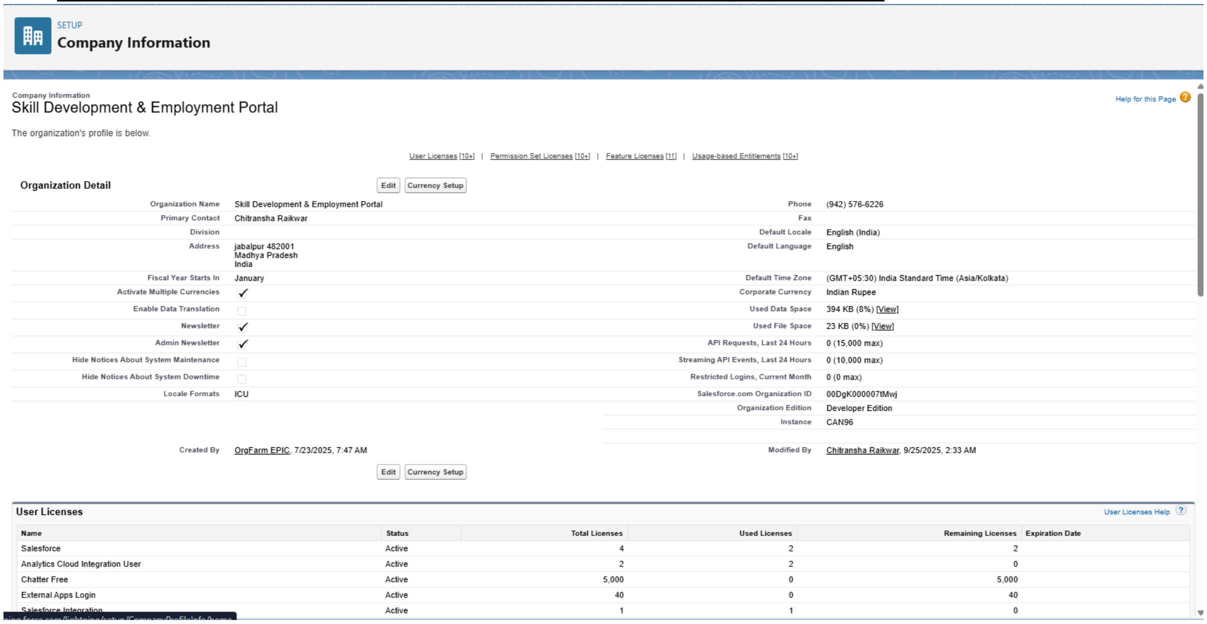
1. InSalesforce→Click⚙(Setup).
2. SearchforCompanyInformationin theQuick Findbox.
3. ClickEdit(topofthepage).
4. Fillindetails:

OrganizationName:`SkillDevelopment&EmploymentPortal`
Phone: your NGO/company contact number.
PrimaryContact:nameofAdminorNGO head.
Address: enter NGO/organization address.
Country:India🇮🇳
State/Province:selectyour state(e.g.,Andhra Pradesh).
City & Postal Code: enter accordingly.
DefaultLocale:`English(India)` Default
Language: `English`
DefaultTimeZone:`(GMT+05:30)IndiaStandardTime(Asia/Kolkata)`
CurrencyLocale:`English(India)-INR`

- ✅ If required, tick "Activate Multiple Currencies" → add INR (primary) and USD (for external employers).

2. Savechanges.

Belowisthe Screenshotof CompanyInformationaftersettingupprofile:=>



- ConfiguredOrganizationName,Locale,TimeZone,andCurrency.
- EnabledINRasprimarycurrencyforruralyouthandNGOs.
- Preparedbaseorgsettings.

3. BusinessHours&Holidays

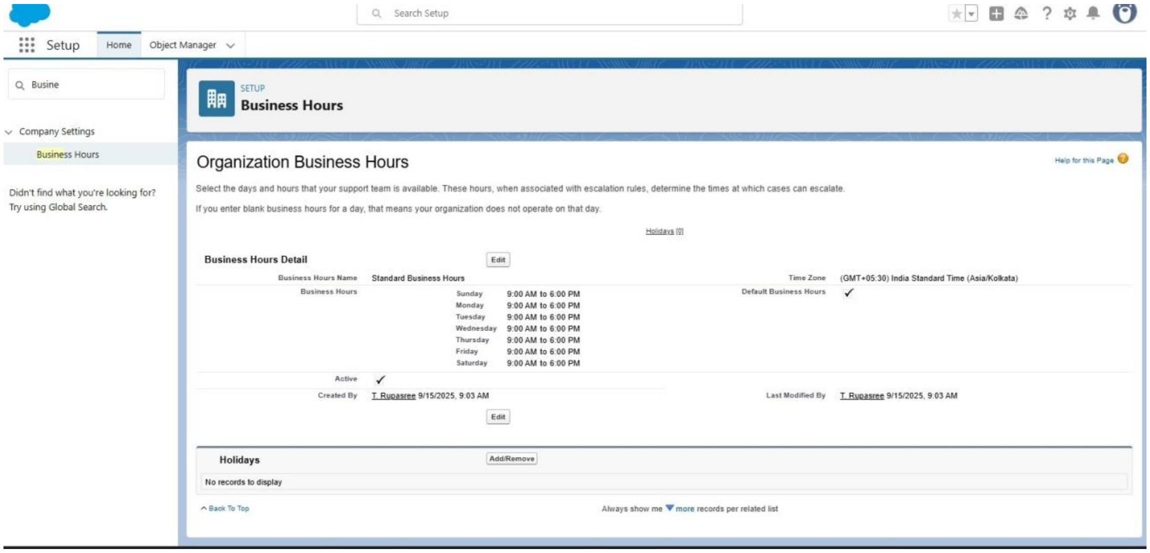
StandardBusinessHours:

- 9:00AM–6:00PMIST(Monday–Saturday).

HolidaysConfigured:

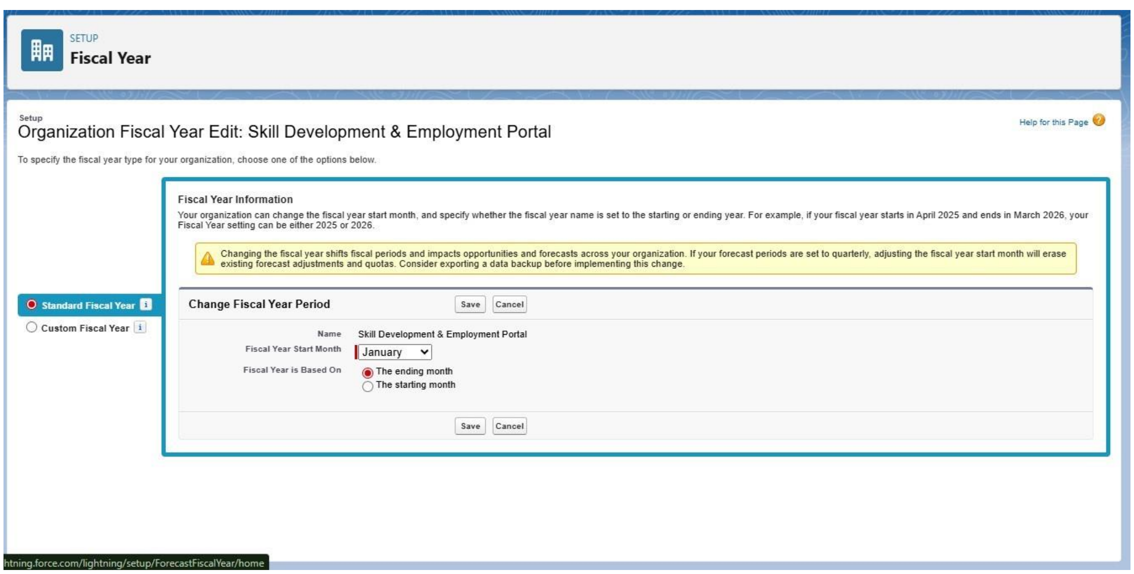
- RepublicDay(26Jan)
- IndependenceDay(15Aug)
- GandhiJayanti(2Oct)
- Diwali&LocalHolidays

Purpose:Ensures**cases,approvals,andescalations**respectrealbusinessdaysandtimings.



4. FiscalYearSettings

Type: StandardFiscalYear(Jan–Dec).
Reason: Government/NGO funding and employment reporting align better with calendar years.
Future:Customfiscalyearcanbeenabledifrequiredbyfundingagencies.



5. UserSetup&Licenses

UserTypesConfigured:

Rural Youth(CommunityUsers): Externaluserswithlimitedportalaccess. **Employers(CommunityUsers):**Can postjobs,shortlist candidates. **NGO/Training Staff (Internal Users):** Manage candidates, training modules. **Government Officers (Partner/Community Users):** Can monitor dashboards and placement reports.

SystemAdmins(Internal): ManageoverallSalesforceOrg.

Path:Setup→Users→NewUser

🔷Procedure(formyreference)

When you click New User, you will see a form. Fill like this (example for Candidateuser):

1. FirstName:Rupa(orCandidate's name)
2. LastName:Youth
3. Alias:RYOUT(auto-fills,canleaveasdefault)
4. Email:candidate@test.com(useanyvalidordummyemail)
5. Username: candidate@test.com.dev (⚠ must be unique across Salesforce,add `.dev`or similar if duplicate)
6. Nickname:Candidate
7. Role:RuralYouth(you'llcreatethisroleinRolessetup)
8. UserLicense:

- Community/ExperienceCloud(Force.comAppSubscription)→Forexternalusers (Candidate/Employer).
- SalesforcePlatform→ForNGOstaff.
- Salesforce→ForAdmin.

9. Profile:

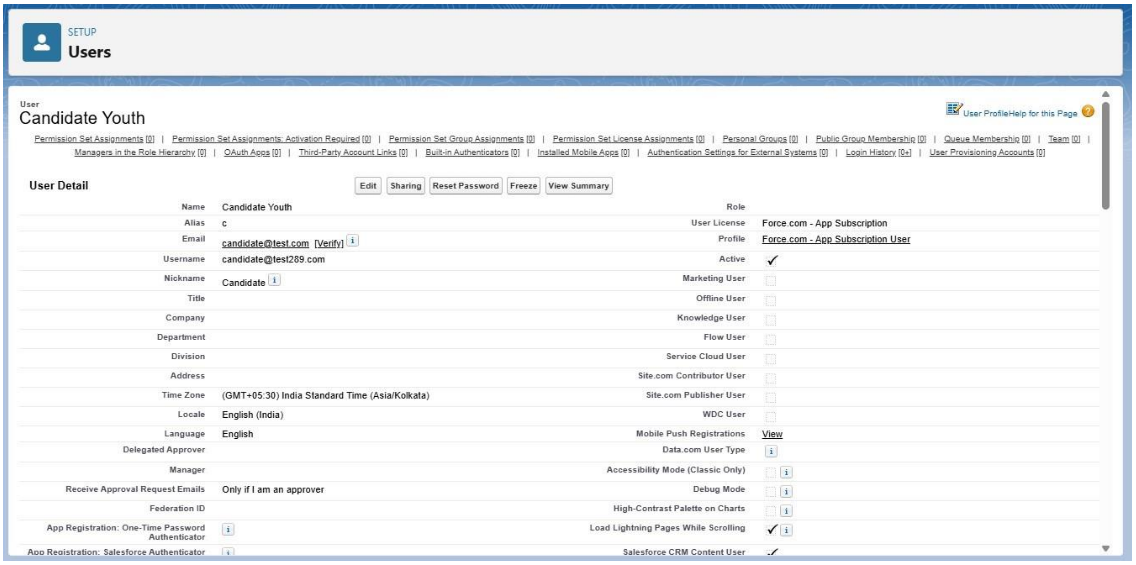
- Candidate_Profile→forRuralYouth
- Employer_Profile→forEmployers
- NGO_Profile→forNGO/Trainers
- Government_Profile→forGovernmentOfficers
- SystemAdministrator→forAdmins

10. Active:✅Check this box.

❖UserstoCreateforMyProject(SkillDevelopment& Employment Portal)

1. CandidateUser(RuralYouth)

- License:CustomerCommunityPlus/ExperienceCloud
- Profile:Candidate_Profile
- Role:RuralYouth



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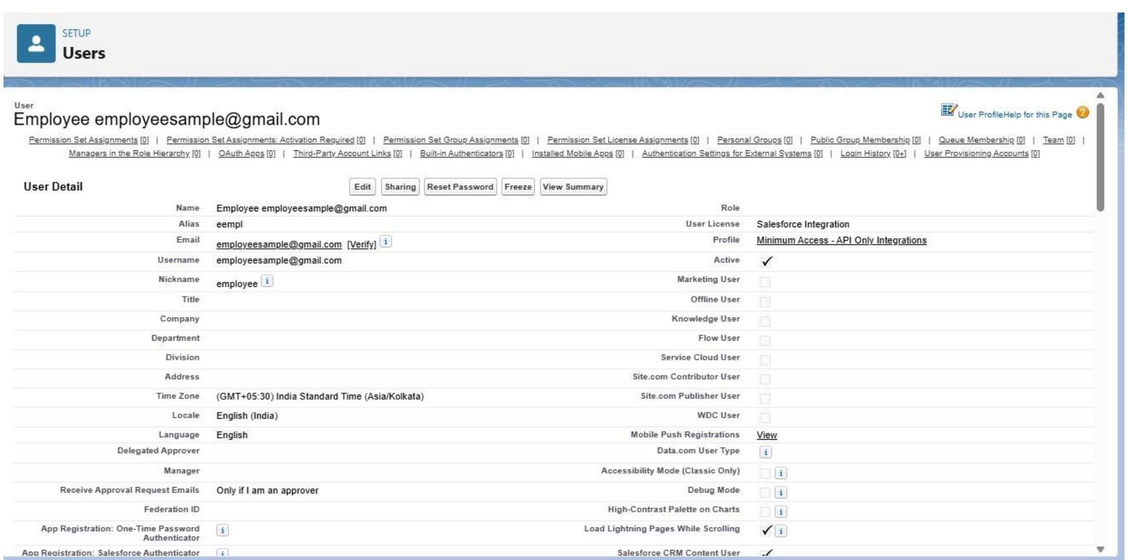
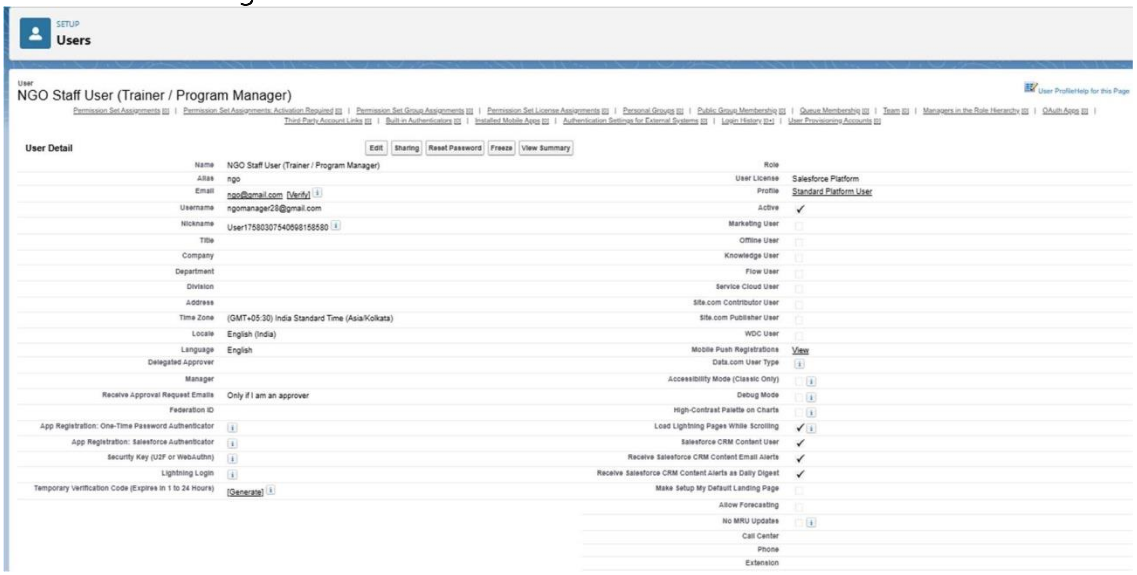
2. EmployerUser

- License:CustomerCommunityPlus/ExperienceCloud
- Profile:Employer_Profile
- Role:Employer



3. NGO Staff User(Trainer/ProgramManager)

- License : Sales force Platform
- Profile: NGO_Profile
- Role : NGO Manager



4. GovernmentOfficerUser

- License: Salesforce Platform / Partner Community (depending on what you enabled)
- Profile:Government_Profile
- Role:Government

5. SystemAdminUser(You)

- License:Salesforce
- Profile:SystemAdministrator
- Role:SystemAdmin

LicensesAssigned:

- SalesforcePlatformLicense(forstaff/NGOs).
- Community/ExperienceCloudLicense(forRuralYouth&Employers).

- SalesforceAdminLicense(fordevelopers/admins).

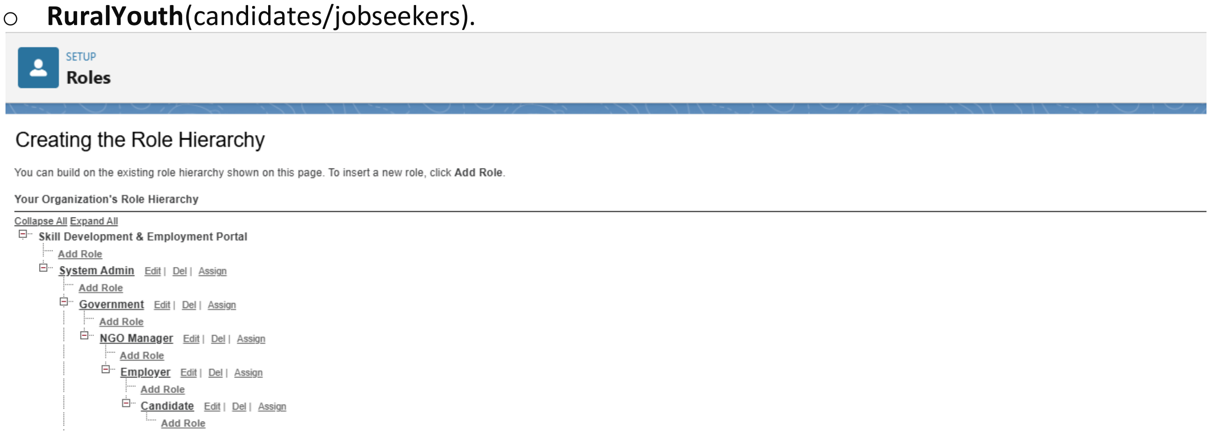
6. Profiles

- **Candidate Profile:** Limited access (view personal records, apply to jobs, track training).
- **EmployerProfile:**Canpostjobs,viewcandidateapplications.
- **NGO/TrainerProfile:**Managecourses,updateprogress&certifications.
- **GovernmentProfile:**Read-onlydashboards&reports.
- **SystemAdministrator:**orgaccess.

7. Roles

HierarchySetup:

- **SystemAdmin**(Top).
- **GovernmentAgencies**(Regulatoryaccess).
- **NGO/TrainingManagers**(managebatches,trackskills).
- **Employers**(jobproviders).
- **RuralYouth**(candidates/jobseekers).



📌Ensures **role hierarchy visibility** (e.g., NGO Manager can see all trainee data, but trainees see only their own).

8. PermissionSets

- Profiles=Base level of access (every user hasexactlyone).
- PermissionSets=Extraaccessyou"layer"ontopofprofiles,withoutchangingthe base profile.
  ☞ This is useful when multiple users need special permissions like reporting, posting jobs, or training management.

◈Step-by-Step Procedure

1. NavigatetoPermissionSets

1. Login as System Administrator.
2. Go to Setup(gear icon→Setup).
3. In the Quick Find Box,type Permission Sets.
4. Click Permission Sets.
5. Click New to create anewone.

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2. Create Permission Sets

3. You need to create four

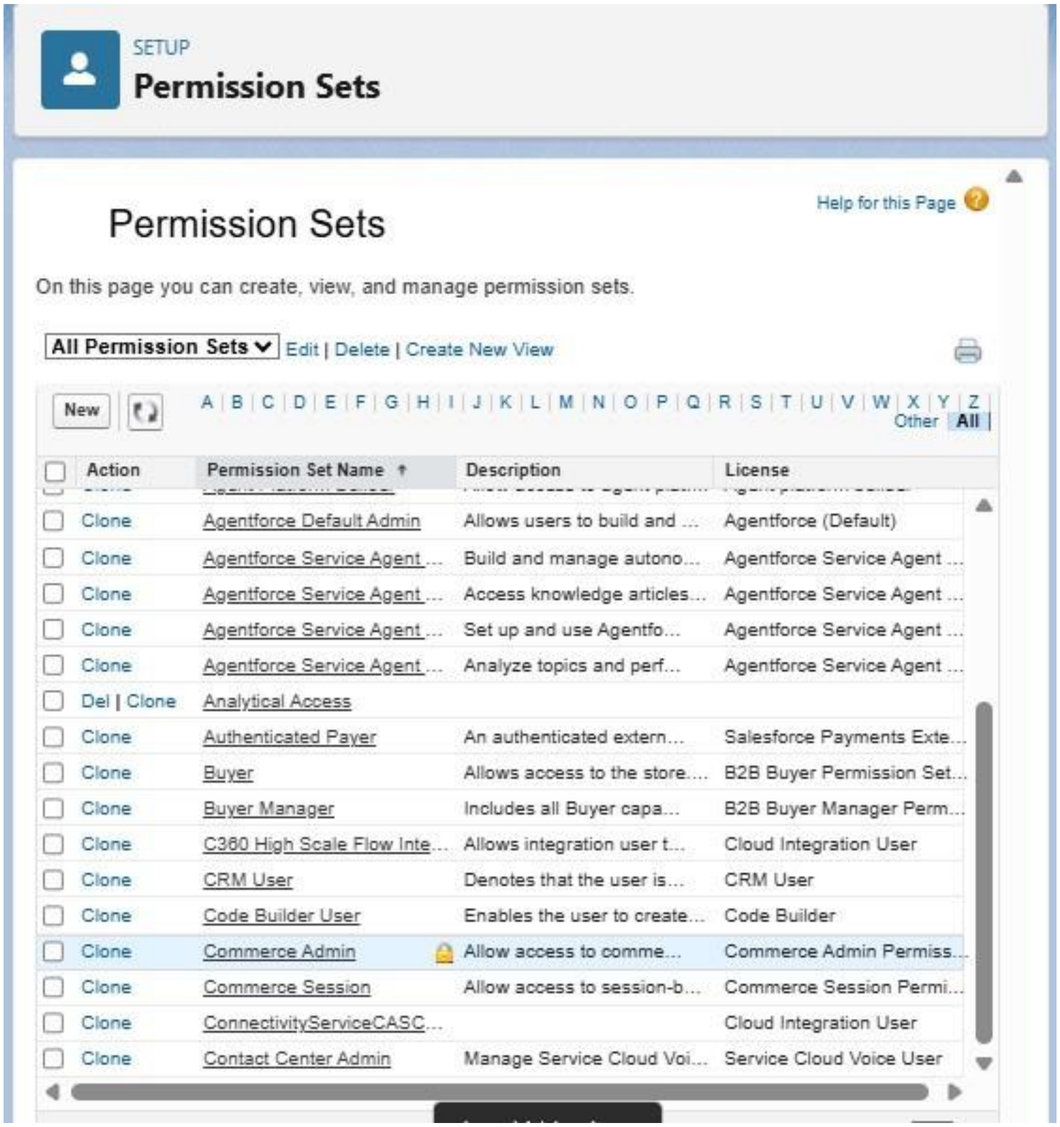
sets:

a) Reporting_Access

- Label: Reporting_Access
- API Name: Reporting_Access
- License : Choose "Salesforce"(so it works for staff users).
- Save.

➡Add Permissions:

- Under System Permissions,enable Create and Customize Reports.
- Assign to NGOStaff.

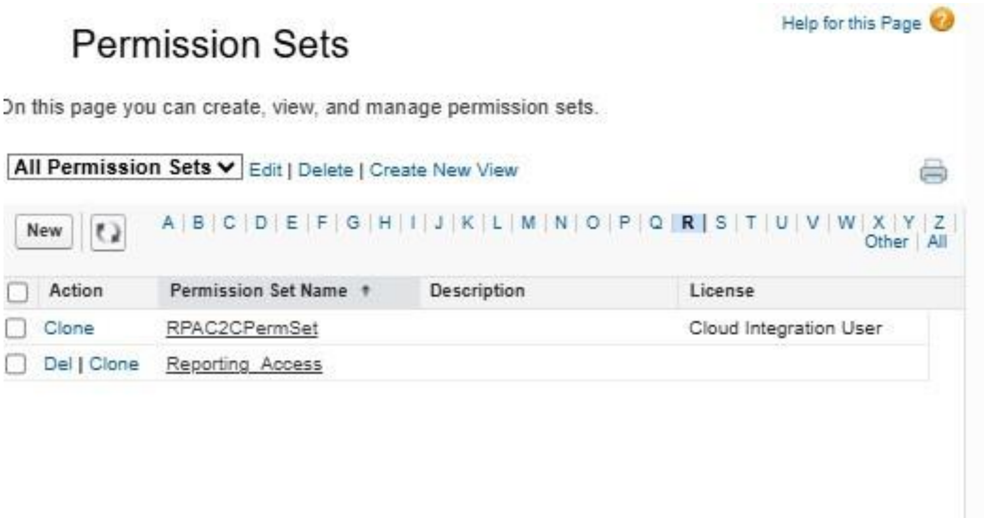


b) Analytics_Access

- Label: Analytics_Access
- Save.

➞AddPermissions:

- Under System Permissions, enable:
- “View Dash board sin Public Folders”
- “View Report sin Public Folders”
- Assign to Government Officers.



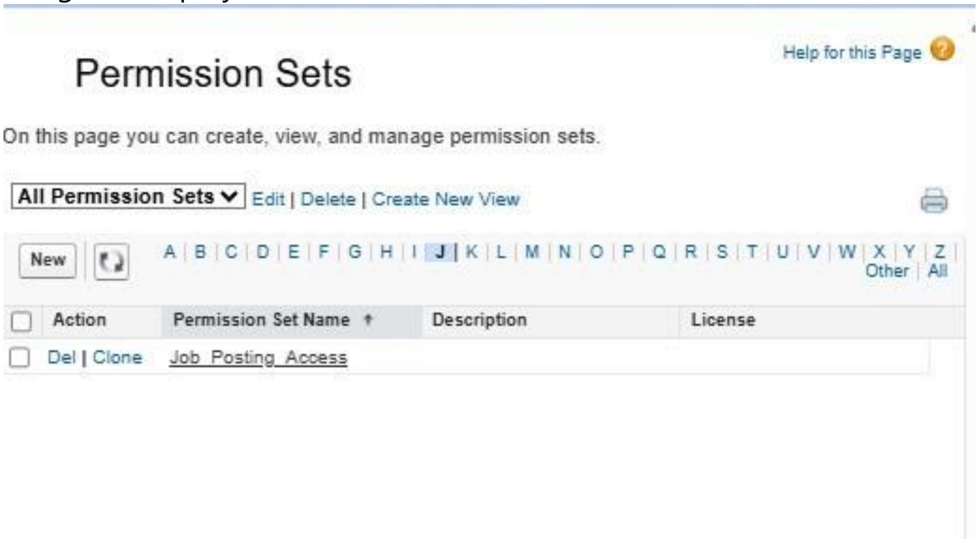
c) Job_Posting_Access

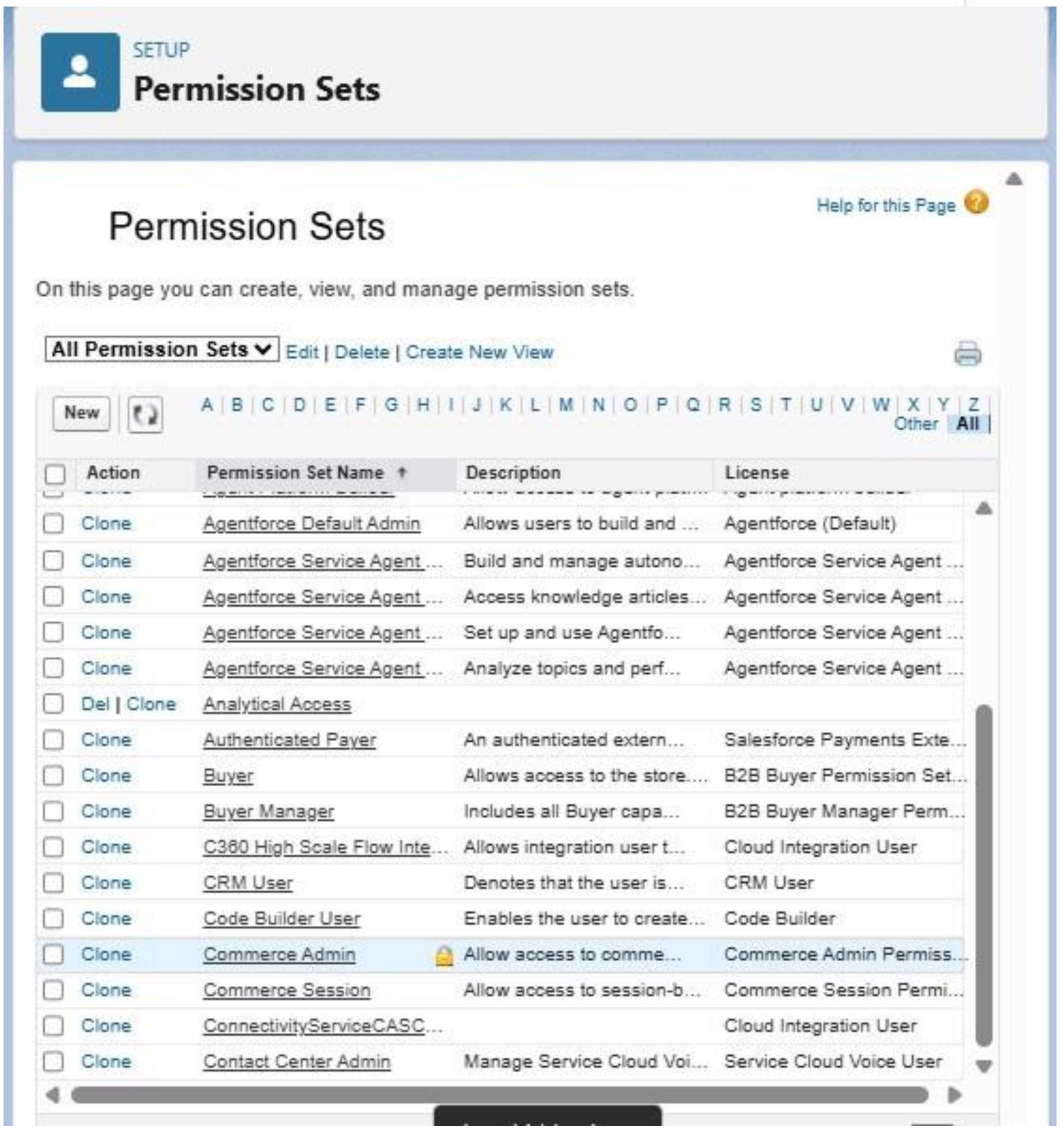
- Label:Job_Posting_Access
- Save.

➡Add Object Permissions:

- Go to Object Settings→ Job Posting(custom object).
- Give Read, Create, Edit permissions.

- Assign to Employers.

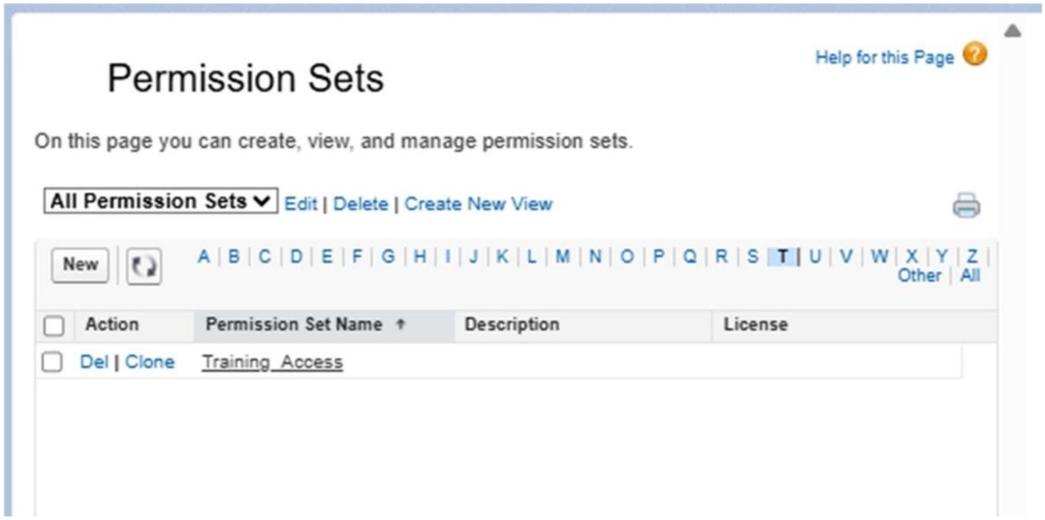




d) Training_Access

- Label:Training_Access
- Save.

➡Add Object Permissions:

- Go to Object Settings→Training Records(customobject).
- GiveRead,Create,Editpermissions.
- AssigntoNGOTrainers.
- 

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4. AssignPermissionSetstoUsers

1. OpenaUserrecord(e.g.,NGOStaffuser).
2. ScrolltoPermissionSetAssignmentsrelatedlist.
3. ClickEditAssignments.
4. Selecttheappropriatepermissionset(e.g.,Reporting_Access).
5. Save.

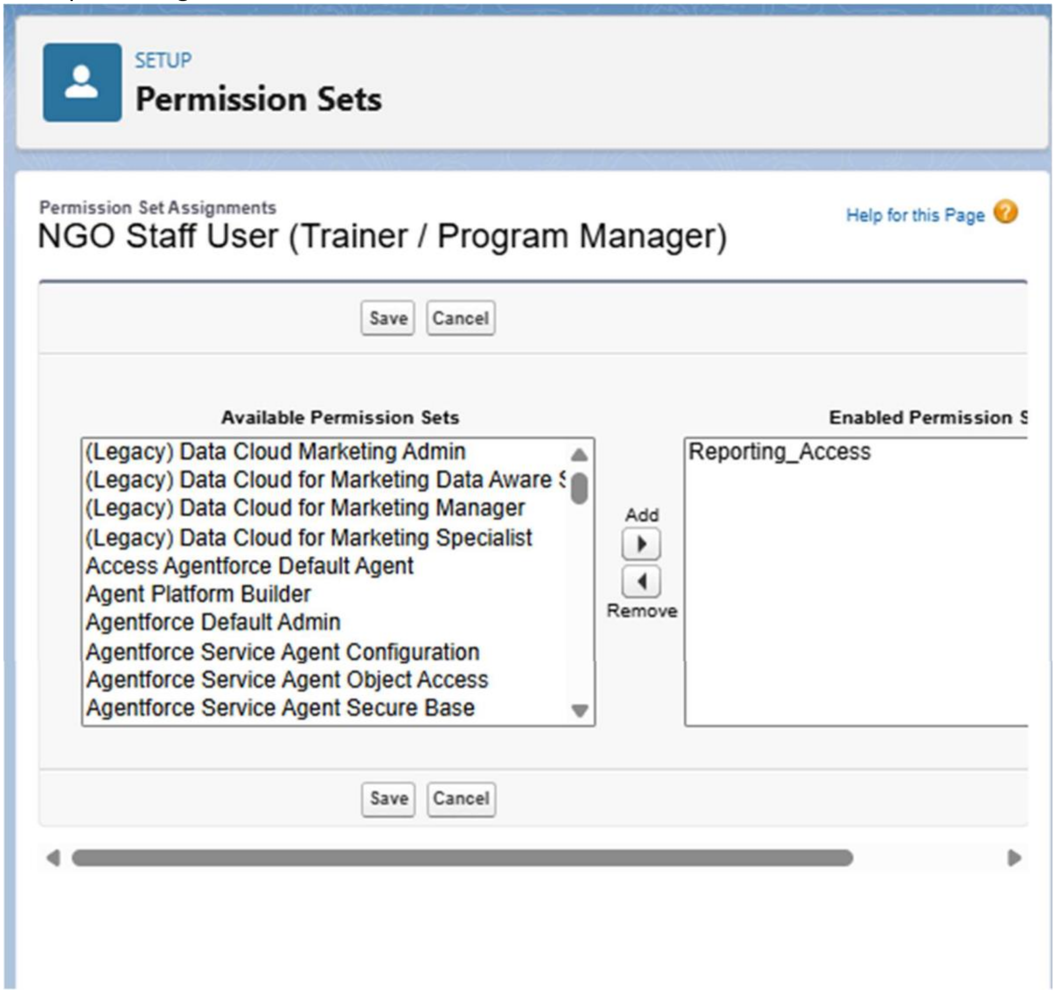
Repeatforeachusertype:

- NGOStaff→Reporting_Access
- Government→Analytics_Access
- Employer→Job_Posting_Access
- Trainer→Training_Access

AdditionalAccessviaPermissionSets:

- *ReportingAccess*:ForNGOstafftocreate/modifyreports.
- *AnalyticsAccess*:ForGovernmentofficerstoviewdashboards.
- *JobPostingAccess*:ForEmployerstomanagejob-relatedrecords.
- *TrainingAccess*:ForTrainerstouploadandmanagelearningcontent.

ExampleofAssignementofPermissionSetstoUser=>



9. OWD(Org-Wide Defaults)

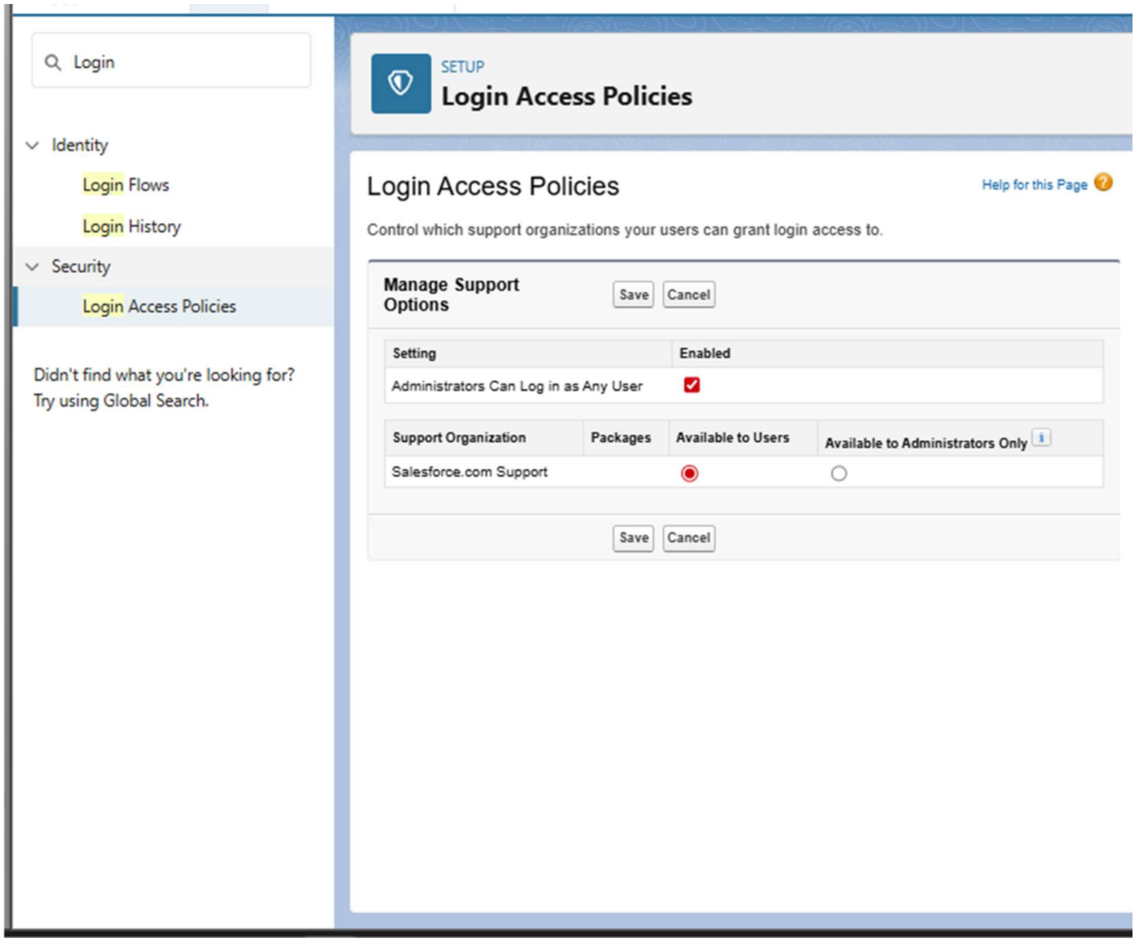
- **CandidateData(Contact/CustomObject):**Private–onlycandidate+adminssee.
- **JobPostings:**PublicRead/WriteforEmployers+NGOs.
- **TrainingRecords:**ControlledbyParent(linkedtoCandidate).
- **PlacementRecords:**Private–visibleonlytoassignedemployer+NGO.

10. SharingRules

- Employerscanviewcandidateswhoappliedfortheirjobs.
- NGOscanaccesstraineerecordsintheirprogram.
- Governmentagenciesget**Read-Onlyaccess**toallplacementdataformonitoring.

11. Login Access Policies

- Restrictcandidate/employerloginsto**6AM–10PMIST**.
- Enforce**IPrestrictions**forNGOstaffandadmins(officeIPranges).
- Enable**2FA(Two-FactorAuthentication)**forsystemadmins.



12. DevOrg Setup

- Created**freeSalesforceDeveloperOrg**(edition)asbaseline.
- Enabled**ExperienceCloud(Community)**forportalaccess.
- HadaGithubRepositoryforsourcescollection
- InstalledVSCodeandSFDXforImplementation
- Installedrequiredmanagedpackages(LMS/JobBoard).

13. SandboxUsage

- Sincethisisaprototypephase,**DeveloperSandbox**willbeusedfortesting.
- Ifdeployedatproductionscale:
- **FullSandbox**forUAT.
- **PartialSandbox**fortrainingdatatesting.

14. DeploymentBasics

- Configurationsandcustomobjectsbuiltin **Dev Org/Sandbox**.
- Deployment to Production via **Change Sets**(profiles,roles,flows,objects).
- VersioncontrolwithGitHub(forApex classes,Lightningcomponents).

```
[SystemAdmin]
        |
--------------------------------------------------------------------------
|              |            |            |
[Govt]      [NGO]     [Employer]    [RuralYouth]

(Read)     (Manage)   (PostJobs)     (Apply/Track)
   |
--------------------------------------------------------------------------
|Profiles&PermissionSets       |    OWD|     SharingRules|
   |
[DevOrg]→[Sandbox]→[Production]
```

✅**Phase2 Deliverable:**

<u>BytheendofPhase2,wehave:</u>

- Configured **company setup, users, profiles, roles, and OWDs**.
- Enabled **Experience Cloud portals** for candidates and employers.
- Setup **security, login policies, and sharing models**.
- Prepared **sandbox & deployment plan for up coming phases**.