

Phase2:OrgSetup&Configuration

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

1. Salesforce Editions

- **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:IndiaIN

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.

Below is the Screenshot of Company Information after setting up profile: =>

SETUP

Company Information

Company Information

Skill Development & Employment Portal

The organization's profile is below:

User Licenses (10)

Permission Set Licenses (10)

Feature Licenses (11)

User-based Entitlements (10)

Organization Detail

Edit

Currency Setup

Organization Name	Skill Development & Employment Portal	Phone	(942) 578-6226
Primary Contact	Chitransha Raiwar	Fax	
Division		Default Locale	English (India)
Address	Jabalpur 482001 Madhya Pradesh India	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input checked="" type="checkbox"/>	Corporate Currency	Indian Rupee
Enable Data Translation	<input type="checkbox"/>	Used Data Space	394 KB (8%) View
Newsletter	<input checked="" type="checkbox"/>	Used File Space	23 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	00DgK000007BMhj
		Organization Edition	Developer Edition
		Instance	CAN96
Created By	OrgFarm EPIC, 7/23/2025, 7:47 AM	Modified By	Chitransha Raiwar, 9/25/2025, 2:33 AM

Edit

Currency Setup

User Licenses

User Licenses Help

- Configured Organization Name, Locale, Time Zone, and Currency.
- Enabled INR as primary currency for rural youth and NGOs.
- Prepared base org settings.

3. Business Hours & Holidays

Standard Business Hours:

- 9:00AM–6:00PM IST (Monday–Saturday).

Holidays Configured:

- Republic Day (26 Jan)
- Independence Day (15 Aug)
- Gandhi Jayanti (2 Oct)
- Diwali & Local Holidays

Purpose: Ensures cases, approvals, and escalations respect real business days and timings.

Business Hours

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.

Business Hours Detail

Business Hours Name	Standard Business Hours	Time Zone
Business Hours	Sunday 9:00 AM to 6:00 PM Monday 9:00 AM to 6:00 PM Tuesday 9:00 AM to 6:00 PM Wednesday 9:00 AM to 6:00 PM Thursday 9:00 AM to 6:00 PM Friday 9:00 AM to 6:00 PM Saturday 9:00 AM to 6:00 PM	(GMT+05:30) India Standard Time (Asia/Kolkata)

Default Business Hours: ☒

Active: ☒

Created By: T. Ramesh 9/15/2025, 9:03 AM

Last Modified By: T. Ramesh 9/15/2025, 9:03 AM

Holidays

No records to display

Always show me [more records per related list](#)

4. FiscalYearSettings

Type:StandardFiscalYear(Jan–Dec).

Reason: Government/NGO funding and employment reporting align better with calendar years.

Future:Customfiscalyearcanbeenabledifrequiredbyfundingagencies.

Fiscal Year

Organization Fiscal Year Edit: Skill Development & Employment Portal

To specify the fiscal year type for your organization, choose one of the options below.

Fiscal Year Information

Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example, if your fiscal year starts in April 2025 and ends in March 2026, your Fiscal Year setting can be either 2025 or 2026.

Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing this change.

Change Fiscal Year Period

Name: Skill Development & Employment Portal

Fiscal Year Start Month:

Fiscal Year is Based On:

☒ The ending month

☐ The starting month

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)

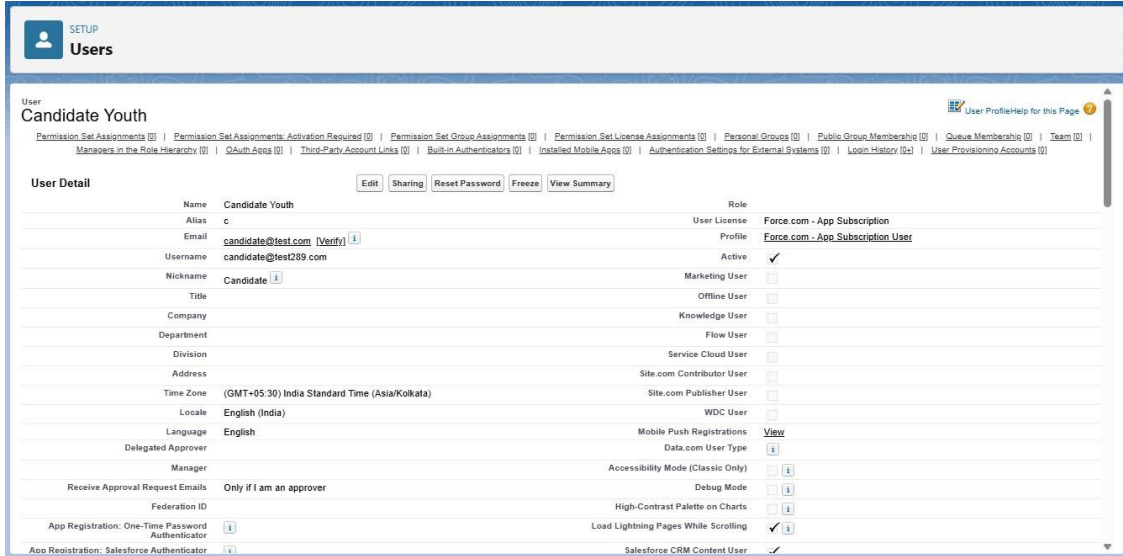
When you click New User, you will see a form. Fill like this (example for Candidateuser):

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 .devor 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



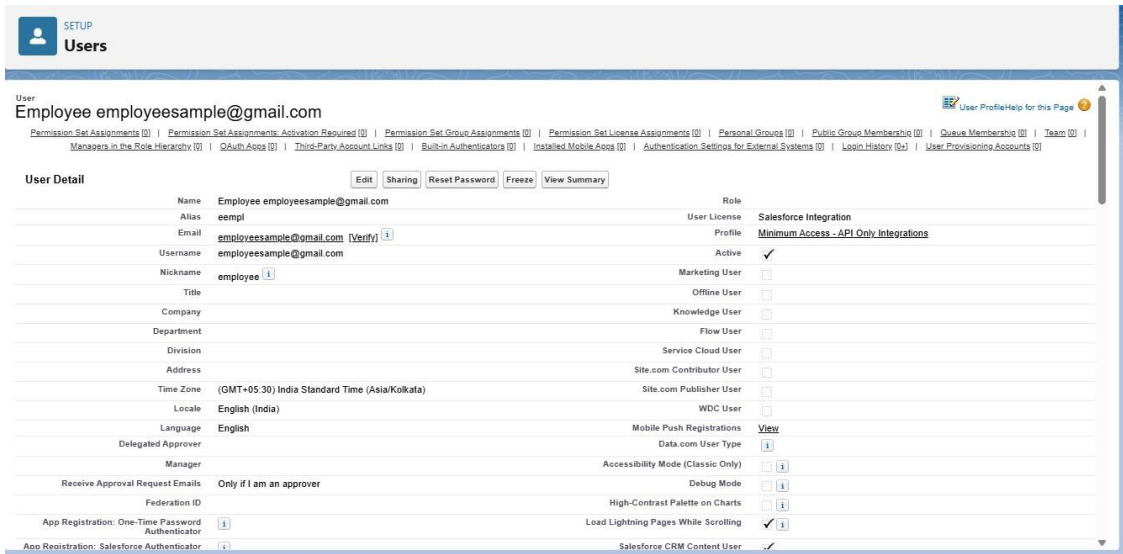
The screenshot shows the Salesforce 'Users' setup page for a user named 'Candidate Youth'. The page includes a navigation bar with 'SETUP' and 'Users' tabs. Below the navigation bar, there are links for various setup tasks like 'Permission Set Assignments', 'Activation Required', etc. The main section is titled 'User Detail' and contains a table with user information and a 'Role' section with checkboxes for various user types.

User Detail	
Name	Candidate Youth
Alias	c
Email	candidate@test.com [Verify]
Username	candidate@test289.com
Nickname	Candidate
Title	
Company	
Department	
Division	
Address	
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Language	English
Delegated Approver	
Manager	
Receive Approval Request Emails	Only if I am an approver
Federation ID	
App Registration: One-Time Password Authenticator	
App Registration: Salesforce Authenticator	

Role	
User License	Force.com - App Subscription
Profile	Force.com - App Subscription User
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Mobile Push Registrations	View
Data.com User Type	
Accessibility Mode (Classic Only)	<input type="checkbox"/>
Debug Mode	<input type="checkbox"/>
High-Contrast Palette on Charts	<input type="checkbox"/>
Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
Salesforce CRM Content User	<input checked="" type="checkbox"/>

2. EmployerUser

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



The screenshot shows the Salesforce 'Users' setup page for a user named 'Employee employeesample@gmail.com'. The page includes a navigation bar with 'SETUP' and 'Users' tabs. Below the navigation bar, there are links for various setup tasks like 'Permission Set Assignments', 'Activation Required', etc. The main section is titled 'User Detail' and contains a table with user information and a 'Role' section with checkboxes for various user types.

User Detail	
Name	Employee employeesample@gmail.com
Alias	eempl
Email	employeesample@gmail.com [Verify]
Username	employeesample@gmail.com
Nickname	employee
Title	
Company	
Department	
Division	
Address	
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Language	English
Delegated Approver	
Manager	
Receive Approval Request Emails	Only if I am an approver
Federation ID	
App Registration: One-Time Password Authenticator	
App Registration: Salesforce Authenticator	

Role	
User License	Salesforce Integration
Profile	Minimum Access - API Only Integrations
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Mobile Push Registrations	View
Data.com User Type	
Accessibility Mode (Classic Only)	<input type="checkbox"/>
Debug Mode	<input type="checkbox"/>
High-Contrast Palette on Charts	<input type="checkbox"/>
Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
Salesforce CRM Content User	<input checked="" type="checkbox"/>

3. NGO Staff User(Trainer/ProgramManager)

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

The screenshot shows the 'User Setup' page for a user named 'NGO Staff User (Trainer / Program Manager)'. The page is divided into two main sections: 'User Detail' and 'Permissions'. The 'User Detail' section includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, and Receive Approval Request Emails. The 'Permissions' section includes a list of permissions with checkboxes for selection. The user's role is 'Salesforce Platform' and their profile is 'Standard Platform User'. The user is active and has a marketing user role. The user's email is 'ngo@gmail.com' and their username is 'ngomanager2@gmail.com'. The user's nickname is 'User17580307540568158580'. The user's title is 'User17580307540568158580'. The user's company is 'ngo'. The user's department is 'ngo'. The user's division is 'ngo'. The user's address is 'ngo'. The user's time zone is '(GMT+05:30) India Standard Time (Asia/Kolkata)'. The user's locale is 'English (India)'. The user's language is 'English'. The user's delegated approver is 'Manager'. The user's manager is 'Manager'. The user's receive approval request emails is 'Only if I am an approver'. The user's federation ID is 'Federation ID'. The user's app registration is 'One-Time Password Authenticator'. The user's app registration is 'Salesforce Authenticator'. The user's security key is 'Security Key (U2F or WebAuthn)'. The user's lightning login is 'Lightning Login'. The user's temporary verification code is 'Generate'. The user's permissions include 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', 'WDC User', 'Mobile Push Registrations', 'Data.com User Type', 'Accessibility Mode (Classic Only)', 'Debug Mode', 'High-Contrast Palette on Charts', 'Load Lightning Pages While Scrolling', 'Salesforce CRM Content User', 'Receive Salesforce CRM Content Email Alerts', 'Receive Salesforce CRM Content Alerts as Daily Digest', 'Make Setup My Default Landing Page', 'Allow Forecasting', 'No MRU Updates', 'Call Center', 'Phone', and 'Extension'.

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).

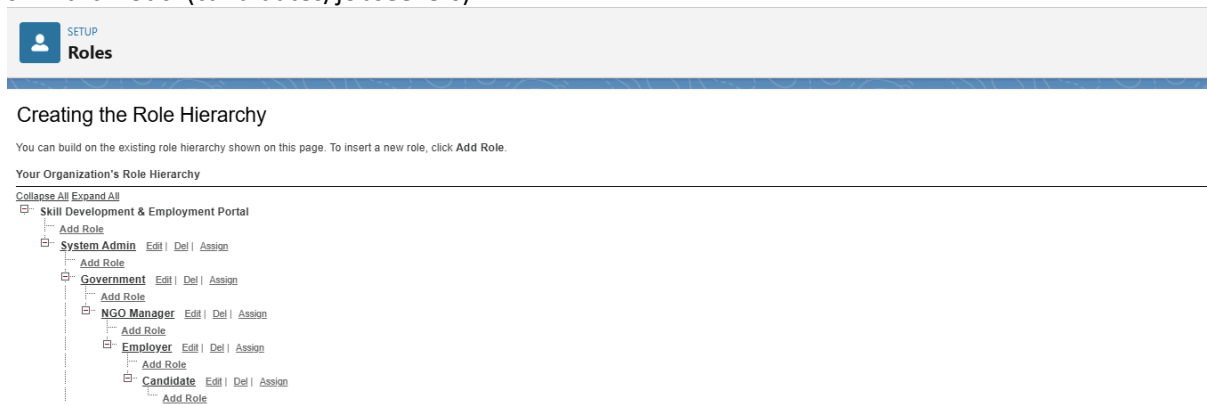
6. Profiles

- **Candidate Profile:** Limited access (view personal records, apply to jobs, track training).
- **EmployerProfile:** Can post jobs, view candidate applications.
- **NGO/TrainerProfile:** Manage courses, update progress & certifications.
- **GovernmentProfile:** Read-only dashboards & reports.
- **SystemAdministrator:** org access.

7. Roles

Hierarchy Setup:

- **SystemAdmin**(Top).
- **GovernmentAgencies**(Regulatory access).
- **NGO/TrainingManagers**(manage batches, track skills).
- **Employers**(job providers).
- **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 has exactly one).
 - Permission Sets=Extra access you "layer" on top of profiles, without changing the base profile.
- ☞ This is useful when multiple users need special permissions like reporting, posting jobs, or training management.
-

◆ Step-by-Step Procedure

1. Navigate to Permission Sets
 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 a new one.
-

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 NGO Staff.



SETUP

Permission Sets

Permission Sets

Help for this Page ?

On this page you can create, view, and manage permission sets.

All Permission Sets ▼ Edit | Delete | Create New View



New		A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	Other	All
	Action	Permission Set Name	Description	License																									
<input type="checkbox"/>	Clone	Agentforce Default Admin	Allows users to build and ...	Agentforce (Default)																									
<input type="checkbox"/>	Clone	Agentforce Service Agent ...	Build and manage autono...	Agentforce Service Agent ...																									
<input type="checkbox"/>	Clone	Agentforce Service Agent ...	Access knowledge articles...	Agentforce Service Agent ...																									
<input type="checkbox"/>	Clone	Agentforce Service Agent ...	Set up and use Agentfo...	Agentforce Service Agent ...																									
<input type="checkbox"/>	Clone	Agentforce Service Agent ...	Analyze topics and perf...	Agentforce Service Agent ...																									
<input type="checkbox"/>	Del Clone	Analytical Access																											
<input type="checkbox"/>	Clone	Authenticated Payer	An authenticated extern...	Salesforce Payments Ext...																									
<input type="checkbox"/>	Clone	Buyer	Allows access to the store...	B2B Buyer Permission Set...																									
<input type="checkbox"/>	Clone	Buyer Manager	Includes all Buyer capa...	B2B Buyer Manager Perm...																									
<input type="checkbox"/>	Clone	C360 High Scale Flow Inte...	Allows integration user t...	Cloud Integration User																									
<input type="checkbox"/>	Clone	CRM User	Denotes that the user is...	CRM User																									
<input type="checkbox"/>	Clone	Code Builder User	Enables the user to create...	Code Builder																									
<input type="checkbox"/>	Clone	Commerce Admin	Allow access to comme...	Commerce Admin Permiss...																									
<input type="checkbox"/>	Clone	Commerce Session	Allow access to session-b...	Commerce Session Permi...																									
<input type="checkbox"/>	Clone	ConnectivityServiceCASC...		Cloud Integration User																									
<input type="checkbox"/>	Clone	Contact Center Admin	Manage Service Cloud Voi...	Service Cloud Voice User																									

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.

Permission Sets

Help for this Page ?

On this page you can create, view, and manage permission sets.

All Permission Sets  [Edit](#) | [Delete](#) | [Create New View](#) 

[New](#) 

[A](#) | [B](#) | [C](#) | [D](#) | [E](#) | [F](#) | [G](#) | [H](#) | [I](#) | [J](#) | [K](#) | [L](#) | [M](#) | [N](#) | [O](#) | [P](#) | [Q](#) | **[R](#)** | [S](#) | [T](#) | [U](#) | [V](#) | [W](#) | [X](#) | [Y](#) | [Z](#) | [Other](#) | [All](#)

<input type="checkbox"/>	Action	Permission Set Name ↑	Description	License
<input type="checkbox"/>	Clone	RPAC2CPermSet		Cloud Integration User
<input type="checkbox"/>	Del Clone	Reporting_Access		

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.


Permission Sets

On this page you can create, view, and manage permission sets.

All Permission Sets ▼ [Edit](#) | [Delete](#) | [Create New View](#)

[New](#) [Refresh](#) [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [Other](#) [All](#)

<input type="checkbox"/>	Action	Permission Set Name	Description	License
<input type="checkbox"/>	Del Clone	Job Posting Access		

 **SETUP**

Permission Sets

Permission Sets

On this page you can create, view, and manage permission sets.

All Permission Sets ▼ [Edit](#) | [Delete](#) | [Create New View](#)

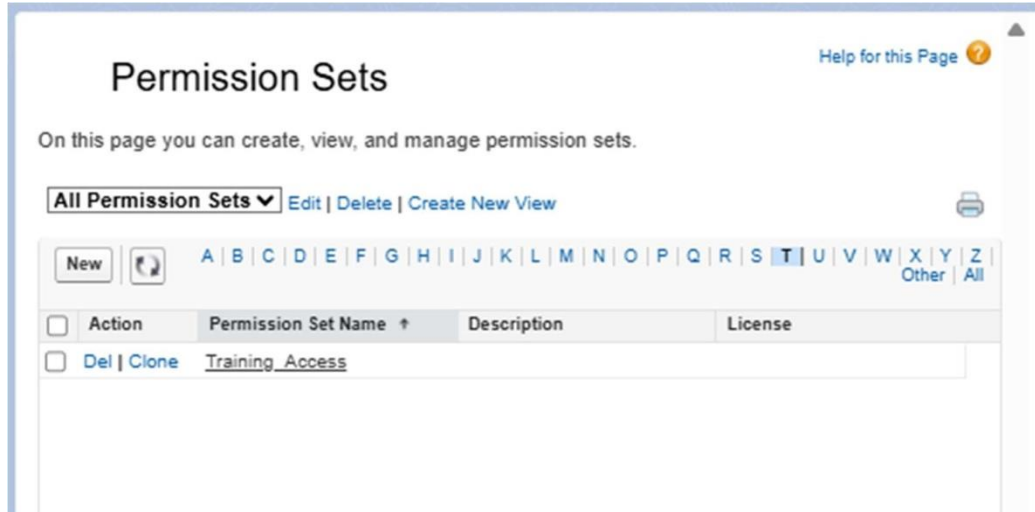
[New](#) [Refresh](#) [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [Other](#) [All](#)

<input type="checkbox"/>	Action	Permission Set Name	Description	License
<input type="checkbox"/>	Clone	Agentforce Default Admin	Allows users to build and ...	Agentforce (Default)
<input type="checkbox"/>	Clone	Agentforce Service Agent	Build and manage autono...	Agentforce Service Agent ...
<input type="checkbox"/>	Clone	Agentforce Service Agent	Access knowledge articles...	Agentforce Service Agent ...
<input type="checkbox"/>	Clone	Agentforce Service Agent	Set up and use Agentfo...	Agentforce Service Agent ...
<input type="checkbox"/>	Clone	Agentforce Service Agent	Analyze topics and perf...	Agentforce Service Agent ...
<input type="checkbox"/>	Del Clone	Analytical Access		
<input type="checkbox"/>	Clone	Authenticated Payer	An authenticated extern...	Salesforce Payments Exte...
<input type="checkbox"/>	Clone	Buyer	Allows access to the store...	B2B Buyer Permission Set...
<input type="checkbox"/>	Clone	Buyer Manager	Includes all Buyer capa...	B2B Buyer Manager Perm...
<input type="checkbox"/>	Clone	C360 High Scale Flow Inte...	Allows integration user t...	Cloud Integration User
<input type="checkbox"/>	Clone	CRM User	Denotes that the user is...	CRM User
<input type="checkbox"/>	Clone	Code Builder User	Enables the user to create...	Code Builder
<input type="checkbox"/>	Clone	Commerce Admin	Allow access to comm...	Commerce Admin Permiss...
<input type="checkbox"/>	Clone	Commerce Session	Allow access to session-b...	Commerce Session Permi...
<input type="checkbox"/>	Clone	ConnectivityServiceCASC...		Cloud Integration User
<input type="checkbox"/>	Clone	Contact Center Admin	Manage Service Cloud Voi...	Service Cloud Voice User

- d) Training_Access
- Label:Training_Access
- Save.

→Add Object Permissions:

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



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

Example of Assignment of Permission Set to User =>

SETUP
Permission Sets

Permission Set Assignments [Help for this Page](#)

NGO Staff User (Trainer / Program Manager)

Save Cancel

Available Permission Sets		Enabled Permission Sets
(Legacy) Data Cloud Marketing Admin	Add ▶ Remove ◀	Reporting_Access
(Legacy) Data Cloud for Marketing Data Awareness		
(Legacy) Data Cloud for Marketing Manager		
(Legacy) Data Cloud for Marketing Specialist		
Access Agentforce Default Agent		
Agent Platform Builder		
Agentforce Default Admin		
Agentforce Service Agent Configuration		
Agentforce Service Agent Object Access		
Agentforce Service Agent Secure Base		

Save Cancel

9. OWD(Org-Wide Defaults)

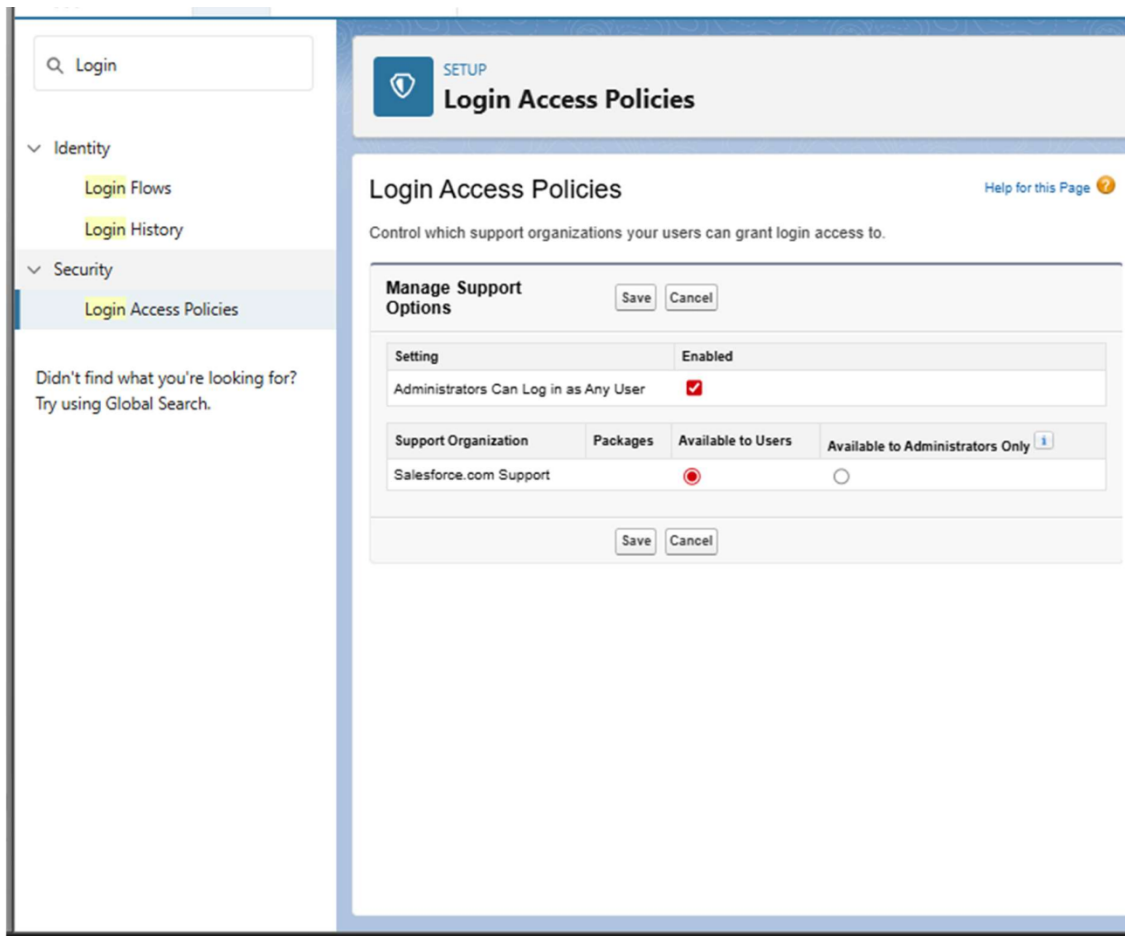
- **CandidateData(Contact/CustomObject):** Private—only candidate + admin sees.
- **Job Postings:** Public Read/Write for Employers + NGOs.
- **Training Records:** Controlled by Parent (linked to Candidate).
- **Placement Records:** Private—visible only to assigned employer + NGO.

10. Sharing Rules

- Employers can view candidates who applied for their jobs.
- NGOs can access trainee records in their program.
- Government agencies get **Read-Only** access to all placement data for monitoring.

11. Login Access Policies

- Restrict candidate/employer login to **6AM–10PM IST**.
- Enforce **IP Restrictions** for NGO staff and admins (official Pranges).
- Enable **2FA (Two-Factor Authentication)** for system admins.



12. DevOrg Setup

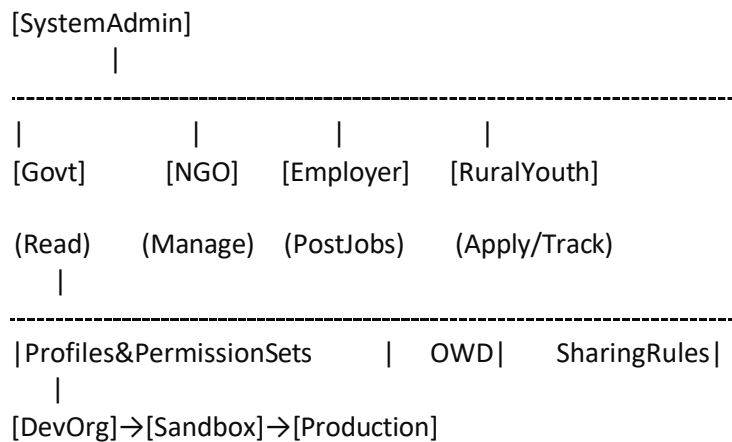
- Created **free Salesforce Developer Org** (edition) as baseline.
- Enabled **Experience Cloud (Community)** for portal access.
- Had a **GitHub Repository** for source collection
- Installed **VS Code** and **SFDX** for implementation
- Installed required managed packages (LMS/Job Board).

13. Sandbox Usage

- Since this is a prototype phase, **Developer Sandbox** will be used for testing.
- If deployed at production scale:
- **Full Sandbox** for UAT.
- **Partial Sandbox** for training data testing.

14. Deployment Basics

- Configurations and custom objects built in **Dev Org/Sandbox**.
- Deployment to Production via **Change Sets** (profiles, roles, flows, objects).
- Version control with GitHub (for Apex classes, Lightning components).



✓ Phase 2 Deliverable:

By the end of Phase 2, we have:

- ❖ 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**.