

Phase 2: Org Setup & Configuration

Step 1: Open Setup

1. Login to **Salesforce Lightning**.
2. Click the **Gear (⚙)** icon in the top-right → select **Setup**.

The screenshot shows the Salesforce Setup Home page. At the top, there's a navigation bar with 'Setup' selected, followed by 'Home' and 'Object Manager'. Below the navigation is a 'Quick Find' search bar. To the right, a welcome message 'Welcome, korra' is displayed, along with a brief description: 'Manage and customize Salesforce from Setup. Browse suggestions, explore features, and more.' A 'View All' link is also present. The main content area is titled 'Achieve Popular Business Goals' and features two cards: 'Cross Cloud' under 'Connect with Sales Prospects and Customers' and 'Cross Cloud' under 'Track & Manage Customer Data'. Each card includes a list of included features and a progress bar ('3 Completed', '1 In Progress' for the first; '2 Completed', '1 In Progress' for the second). At the bottom left, there's a sidebar with links like 'Setup Home', 'Salesforce Go', 'Service Setup Assistant', etc., and sections for 'ADMINISTRATION' and 'PLATFORM TOOLS'.

Step 2: Update Company Information

1. In Setup, use **Quick Find** → type **Company Information** → open it.
2. Click **Edit**.
3. Update:
 - **Organization Name:** KSRMCE
 - **Default Time Zone:** (GMT-8:00)Pacific Standard Time(American_Angelos)
4. Click **Save**.

The screenshot shows the 'Company Information' edit page. The top navigation bar has 'SETUP' selected. The main title is 'Company Information' with 'KSRMCE' highlighted. Below the title, a message says 'The organization's profile is below.' There are tabs for 'User Licenses', 'Permission Set Licenses', 'Feature Licenses', and 'Usage-based Entitlements'. The 'Organization Detail' section contains fields for Organization Name (KSRMCE), Primary Contact (OrgFarm EPIC), Division (United States), Address (January), Fiscal Year Starts In (January), Activate Multiple Currencies (unchecked), Enable Data Translation (unchecked), Newsletter (checked), Admin Newsletter (checked), Hide Notices About System Maintenance (unchecked), Hide Notices About System Downtime (unchecked), and Locale Formats (ICU). On the right side, there are sections for Phone, Fax, Default Locale (English (United States)), Default Language (English), Default Time Zone (GMT-08:00 Pacific Standard Time (America/Los_Angeles)), Currency Locale (English (United States) - USD), Used Data Space (342 KB (7%)), Used File Space (17 KB (0%)), API Requests, Last 24 Hours (39 (15,000 max)), Streaming API Events, Last 24 Hours (0 (10,000 max)), Restricted Logins, Current Month (0 (0 max)), Salesforce.com Organization ID (00Dg50000012lmk), Organization Edition (Developer Edition), and Instance (IND168). At the bottom, it shows 'Created By' (OrgFarm EPIC, 10/28/2025, 10:14 PM) and 'Modified By' (korra sunil kumar, 11/3/2025, 6:13 AM).

Step 3: Set Business Hours

1. Quick Find → **Business Hours** → click **New**.
2. Fill in:
 - **Name:** Default Hours
 - **Hours:** 09:00 – 18:00 (or your actual business hours)
3. Click **Save**.

Why: Defines working hours for workflows, notifications, and approval processes.

The screenshot shows the 'Business Hours' setup page under 'SETUP'. The title is 'Business Hours'. Below it is a section titled 'Organization Business Hours' with a sub-section 'Business Hours Detail'. It lists 'Business Hours Name' as 'Default Hours' and 'Default Hours' as 'Sunday 24 Hours, Monday 24 Hours, Tuesday 24 Hours, Wednesday 24 Hours, Thursday 24 Hours, Friday 24 Hours, Saturday 24 Hours'. There is a checkbox for 'Default Business Hours' which is unchecked. The 'Time Zone' is set to '(GMT-08:00) Pacific Standard Time (America/Los_Angeles)'. At the bottom, it shows 'Active' with a checkbox checked, 'Created By' as 'korra_sunil_kumar 11/3/2025, 6:15 AM', and 'Last Modified By' as 'korra_sunil_kumar 11/3/2025, 6:15 AM'. There is also an 'Edit' button at the bottom.

Step 4: Add Holidays

1. Quick Find → **Holidays** → click **New**.
2. Add important dates, for example:
 - Independence Day
 - Republic Day
 - Any festivals
3. Click **Save**.

Why: Salesforce respects holidays for time-dependent automation (tasks, emails).

The screenshot shows the Salesforce Setup interface for 'Holidays'. At the top left is a blue icon of a building with three windows. To its right, the word 'SETUP' is in small blue capital letters, followed by 'Holidays' in a larger, bold black font. Below this is a light gray header bar with the word 'Holidays' in bold black. On the far right of the header bar is a blue link 'Help for this Page' with a question mark icon. The main content area has a white background. At the top left of this area is a blue 'Holidays' icon with a white outline. To its right is the word 'Holidays' in black. Further to the right is a small blue rectangular button with the word 'New' in white. Below this is a thin horizontal line. Underneath the line, there is a message 'No records to display' in a small gray font. Below this is another thin horizontal line. Underneath the line is a section titled 'Elapsed Holidays' in bold black. It contains a table with three columns: 'Action', 'Holiday Name', 'Description', and 'Date and Time'. There are four rows in the table. The first row's 'Action' column has a blue 'Clone' link underlined. The second row's 'Action' column has a blue 'Clone' link underlined. The third row's 'Action' column has a blue 'Clone' link underlined. The fourth row's 'Action' column has a blue 'Clone' link underlined.

Step 5: Create Test Users

You need at least **3 users**: Youth Coordinator, Employer, NGO Admin.

1. Quick Find → **Users** → click **New User**.
2. Fill example details:

Name	Username	Profile	Role
Youth Coordinator	your.email+yc@sandbox.my.salesforce.com	System Administrator	Youth Coordinator
Placement	placement@admin.com	Standard User	Employer
Youth Admin	touth.admin@my.com	Standard User	NGO Manager

3. Click **Save** after each user.

All Users							Help for this Page	
On this page you can create, view, and manage users.								
To get more licenses, use the Your Account app. Let's Go								
View: All Users Edit Create New View								
<input type="checkbox"/>	Action	Full Name	+	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Edit	admin_Placement		padmi	placement@admin.com	SVP_Human Resources	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Edit	admin_Youth		yadmi	outh.admin@my.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Edit	Chatter Expert		chatty	00dg50000012imkeaa.dxus5joe1jo@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Edit	Coordinator_Youth		ycoor	youth@coordinator.com	CEO	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Edit	EPIC_OrgFarm		QEPIC	epic_fbfb992bd790@orgfarm.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Edit	sunil_kumar_korra		kor	korasanilkumar04509@agenforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Edit	User_Integration		integ	integration@00dg50000012imkeaa.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	Edit	User_Security		sec	insightssecurity@00dg50000012imkeaa.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Step 6: Configure Profiles (Object Permissions)

1. Quick Find → **Profiles** → open a profile (e.g., *Standard User*).
2. Scroll to **Object Settings** → select object Youth__c → click **Edit**.
3. Grant permissions:
 - o **Read, Create, Edit** (as required)
4. Click **Save**.

The screenshot shows the Salesforce Setup interface with the following details:

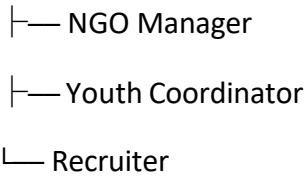
- Setup** tab is selected.
- Object Manager** is open.
- Profiles** section is selected.
- A search bar at the top left shows "profile".
- The main content area displays "Youth Field Level Security for profile Standard User".
- The table lists field-level security settings for the Youth__c object. The columns are: Field Name, Field Type, Read Access, and Edit Access.
- Fields listed include: Created By (Lookup), Email (Email), Last Modified By (Lookup), Location (Text), Owner (Lookup), Preferred Role (Picklist), Qualification (Text), and Youth ID (Auto Number).
- Checkmarks indicate which permissions are granted for each field.
- Buttons at the bottom of the table: **Edit** and **Back to Profile**.

Step 7: Create Role Hierarchy

1. Quick Find → Roles → click **Set Up Roles** → Add Role.

2. Example hierarchy:

CareerBridge



3. Click **Save**.

The screenshot shows the 'Roles' page in Salesforce. At the top, there's a 'SETUP' button and a 'Roles' tab. Below that, the title 'Creating the Role Hierarchy' is displayed. A message says, 'You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.' There are 'Collapse All' and 'Expand All' buttons. On the right, there's a 'Help for this Page' link and a 'Show in tree view' dropdown. The main area shows a hierarchical list of roles under 'Your Organization's Role Hierarchy'. The 'KSRMCE' node is expanded, showing its children: 'Add Role', 'CareerBridge', 'CEO', and 'Sales'. The 'CareerBridge' node is also expanded, showing its children: 'Add Role', 'NGO Manager', 'Youth Admin', 'Youth Coordinator', and 'CareerBridge1'. Each role node has three buttons: 'Edit | Del | Assign'. A vertical scrollbar is visible on the right side of the page.

Step 8: Permission Sets

1. Quick Find → **Permission Sets** → click **New**.

2. Label: Interview Scheduler PS → **Save**.

3. Click **Manage Assignments** → assign to users who need extra permissions.

Why: Grants additional permissions without changing profiles.

Step 9: Set Org-Wide Defaults (OWD) & Sharing

1. Quick Find → **Sharing Settings** → click **Edit**.

2. Set defaults:

Object Default Access

Youth__c	Private
Job__c	Public Read Only
Interview__c	Private

3. Create a **Sharing Rule**:

- o Scroll to **Youth__c** → click **New**.
- o Name: Share Youth to Recruiters
- o Rule Type: Owner-based
- o Shared To: Role → Recruiter
- o Click **Save**.

Object	Controlled by Parent	Access Level	Shared To
Inventory	Controlled by Parent	Public ReadWrite	✓
Job	Controlled by Parent	Public Read Only	✓
JobSkill	Controlled by Parent	Private	✓
Marketing Campaign	Controlled by Parent	Private	✓
Skill	Controlled by Parent	Private	✓
Youth	Controlled by Parent	Private	✓
YouthSkill	Controlled by Parent	Controlled by Parent	✓

Other Settings

Manager Groups:

Secure guest user record access:

Require permission to view record names in lookup fields:

Sharing Rules

Lead Sharing Rules

No sharing rules specified.

Account Sharing Rules

No sharing rules specified.

Opportunity Sharing Rules

No sharing rules specified.

Step 10: Enable Admin Login Access

1. Quick Find → **Users** → select a user → click the down-arrow → **Login**.
2. If option missing: Setup → **Login Access Policies** → enable.

Why: Admins can log in as other users for testing.