

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.

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).

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																																																																					
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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:
 - **Read, Create, Edit** (as required)

4. Click **Save**.

Setup Home Object Manager

Search Setup

profile

Users Profiles

Didn't find what you're looking for? Try using Global Search.

Youth Field Level Security for profile Standard User

Help for this Page

Field Name	Field Type	Read Access	Edit Access
Created By	Lookup	<input checked="" type="checkbox"/>	
Email	Email	<input checked="" type="checkbox"/>	
Last Modified By	Lookup	<input checked="" type="checkbox"/>	
Location	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Owner	Lookup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Preferred Role	Picklist	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Qualification	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Youth ID	Auto Number	<input checked="" type="checkbox"/>	

Edit Back to Profile

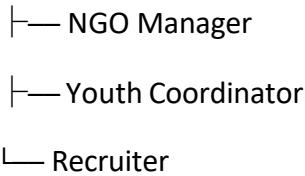
javascript:srcUrl%27%2fsetup%2flayout%2ffldetail.jsp%3fid%200eq100000498m%26ope%3d01lcl.000002and%26refURL%3D%252fd0eq100000498m%253fappLayout%2530setup%2526tour%2530%2526sotp%25301%2526frfldFrameOnOpen%2530https%25253a%25252...

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'. The 'CEO' and 'Sales' nodes also have an 'Add Role' option under them.

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	Default Access	Controlled by Parent
Inventory	Controlled by Parent	Controlled by Parent
Job	Public ReadWrite	Public Read Only
JobSkill	Controlled by Parent	Controlled by Parent
Marketing Campaign	Public ReadWrite	Private
Skill	Public ReadWrite	Private
Youth	Public ReadWrite	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**: New, Recalculate, Lead Sharing Rules Help
- No sharing rules specified.
- Account Sharing Rules**: New, Recalculate, Account Sharing Rules Help
- No sharing rules specified.
- Opportunity Sharing Rules**: New, Recalculate, Opportunity Sharing Rules Help
- 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.