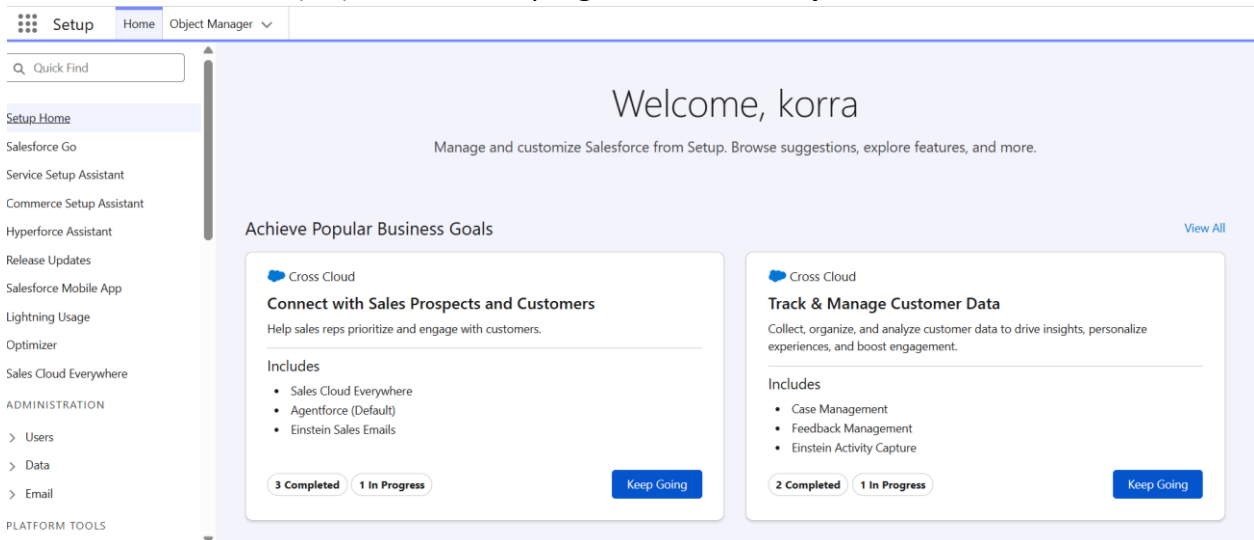


Phase 2: Org Setup & Configuration

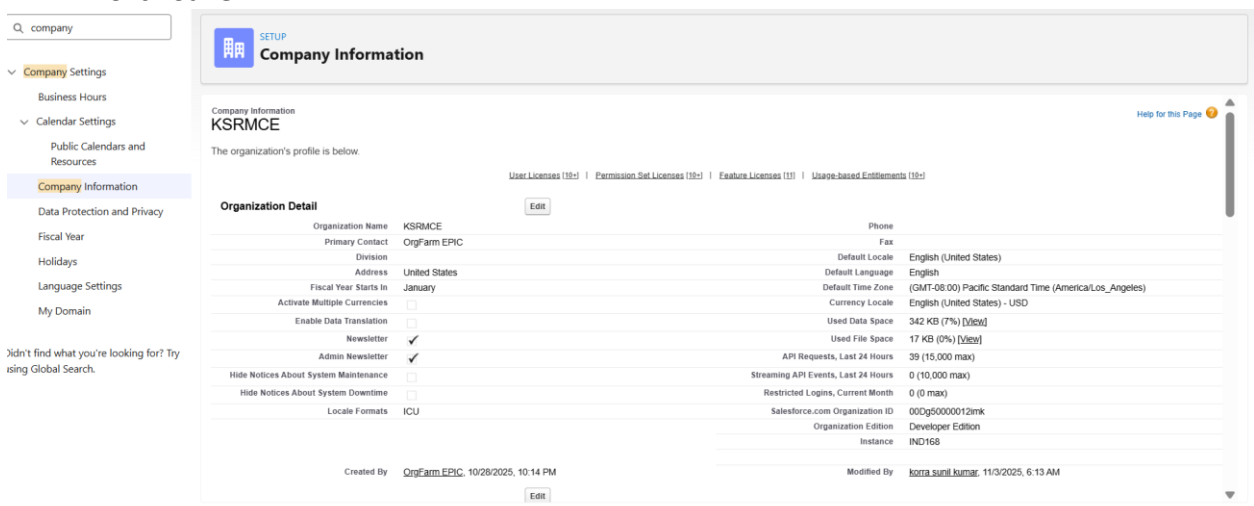
Step 1: Open Setup

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



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_Los_Angeles)
4. Click **Save**.



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.

SETUP

Users

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

New User

Reset Password(s)

Add Multiple Users

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	louth.admin@my.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Chatter_Expert	Chatter	chatty.00dg50000012imkeaa.dkus5joe1joo@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	OEPIC	epic.fdb3b92bd790@orgfarm.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	sunil kumar korra	kor	korrasunilkumar04509@agentforce.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@000dg500000012imkeaa.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User

Reset Password(s)

Add Multiple Users

Step 6: Configure Profiles (Object Permissions)

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

SETUP

Standard User

Help for this Page

Youth Field-Level Security for profile

Field Name	Field Type	Read Access	Edit Access
Created By	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Email	Text	<input type="checkbox"/>	<input type="checkbox"/>
Last Modified By	Lookup	<input checked="" type="checkbox"/>	<input 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"/>	<input type="checkbox"/>

Step 7: Create Role Hierarchy

1. Quick Find → **Roles** → click **Set Up Roles** → **Add Role**.
2. Example hierarchy:

CareerBridge

└─ NGO Manager

└─ Youth Coordinator

└─ Recruiter

3. Click **Save**.

The screenshot shows the 'Roles' setup interface. At the top, there's a header with a 'SETUP' button and the title 'Roles'. Below this, the main heading is 'Creating the Role Hierarchy'. A sub-header states: 'You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.' Below this, there's a section titled 'Your Organization's Role Hierarchy' with a 'Show in tree view' dropdown. The tree view shows a hierarchy starting with 'KSRMCE' at the root. Under 'KSRMCE', there's 'CareerBridge' (with 'Add Role' link), which has 'NGO Manager' (with 'Add Role' link), which in turn has 'Youth Admin' (with 'Add Role' link) and 'Youth Coordinator' (with 'Add Role' link'). Below 'KSRMCE' is 'CEO' (with 'Add Role' link), which has 'CareerBridge1' (with 'Add Role' link), 'CFO' (with 'Add Role' link), 'CFO1' (with 'Add Role' link), 'COO' (with 'Add Role' link), and 'Sales' (with 'Add Role' link'). Each role in the tree has 'Edit', 'Del', and 'Assign' links next to it. A 'Help for this Page' link is visible in the top right corner of the main content area.

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**:

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

Sharing Settings

Object	Controlled by Parent	Controlled by Parent	
Inventory	Controlled by Parent	Controlled by Parent	
Job	Public Read/Write	Public Read Only	✓
JobSkill	Controlled by Parent	Controlled by Parent	
Marketing Campaign	Public Read/Write	Private	✓
Skill	Public Read/Write	Private	✓
Youth	Public Read/Write	Private	✓
YouthSkill	Controlled by Parent	Controlled by Parent	

Other Settings

Manager Groups: ☐ [Help](#)

Secure guest user record access: ☒ [Help](#)

Require permission to view record names in lookup fields: ☐ [Help](#)

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.