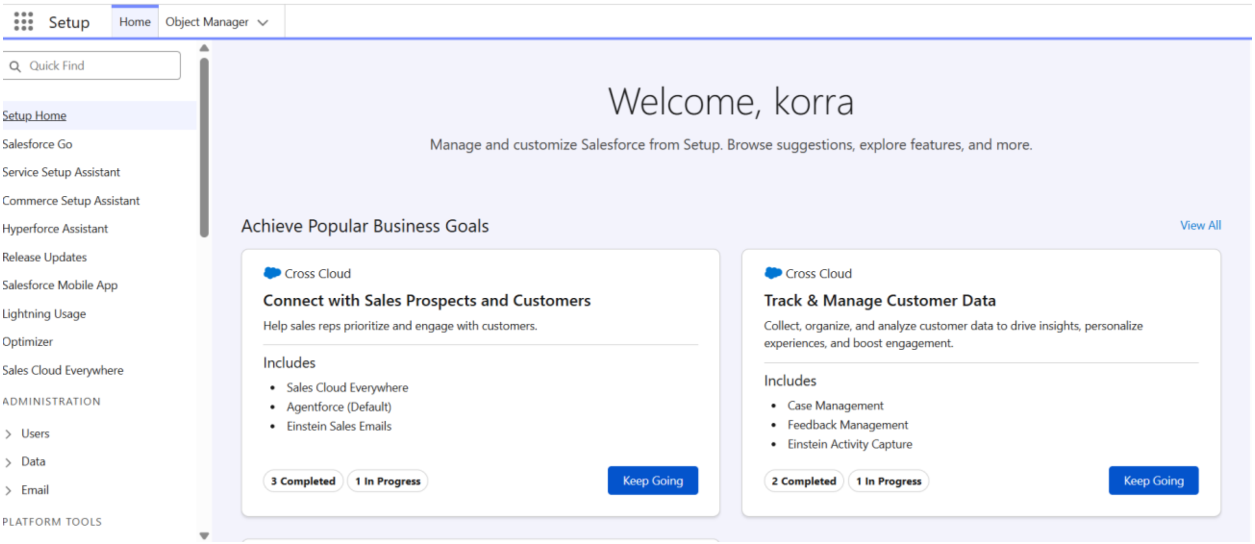
Phase 2: Org Setup & Configuration

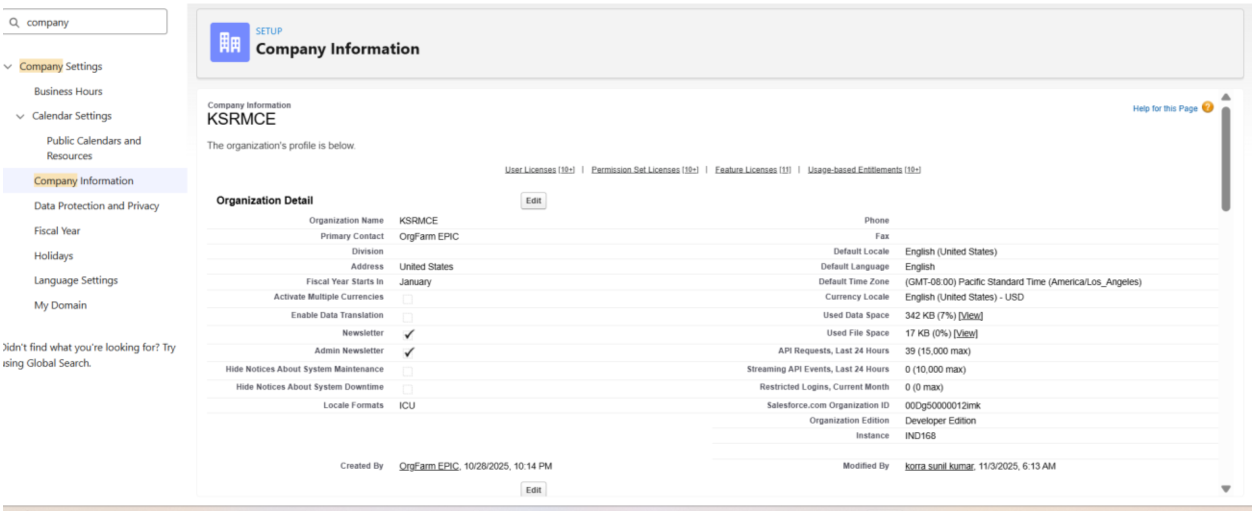
Step 1: Open Setup

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



Step 2: Update Company Information

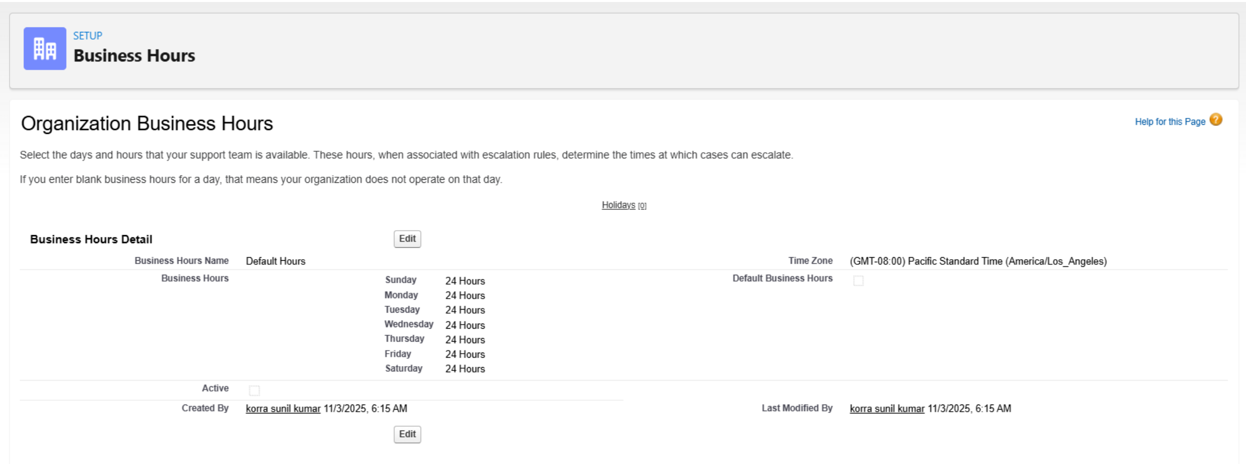
1. In Setup, use **Quick Find** → type **Company Information** → open it.
2. Click **Edit**.
3. Update:
   - **Organization Name:** KSRMCE
   - **Default Time Zone:** (GMT-8:00)Pacific Standard Time(American_Angeles)
4. Click **Save**.



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**.

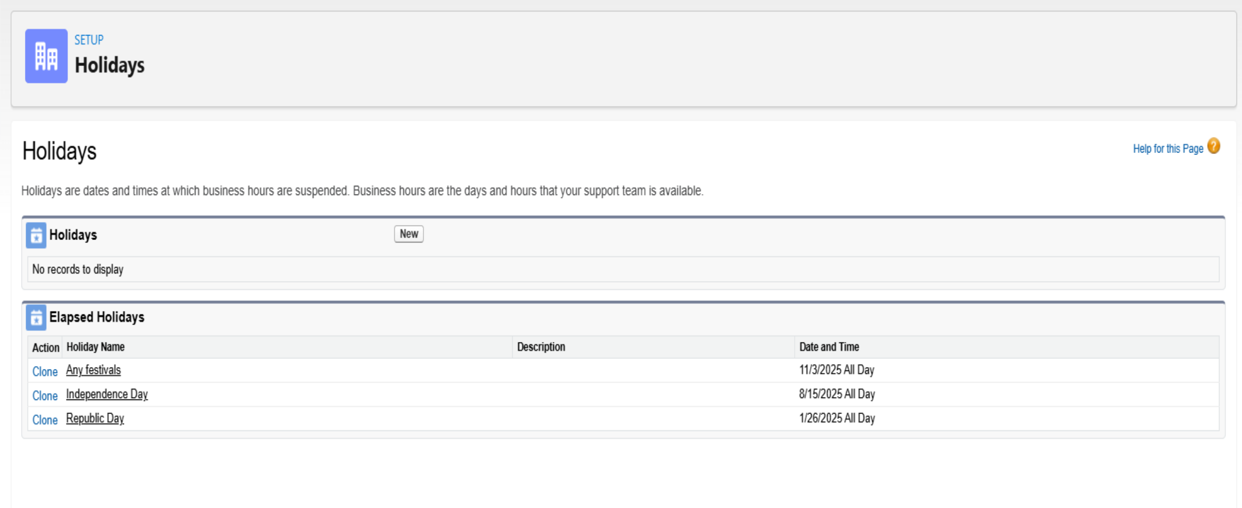
Why: Defines working hours for workflows, notifications, and approval processes.



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).



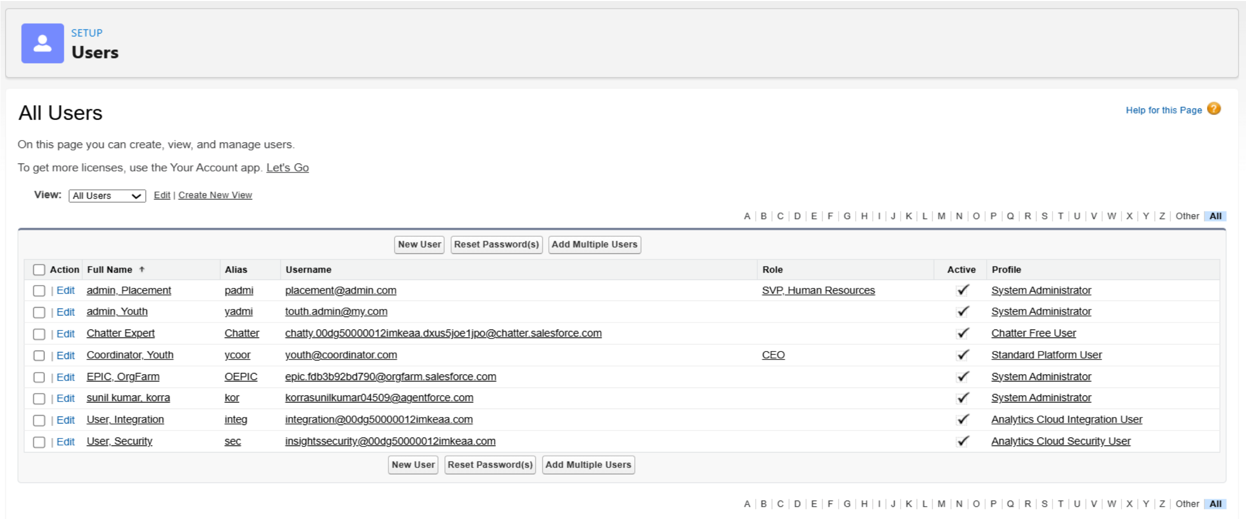
Step 5: Create Test Users

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

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

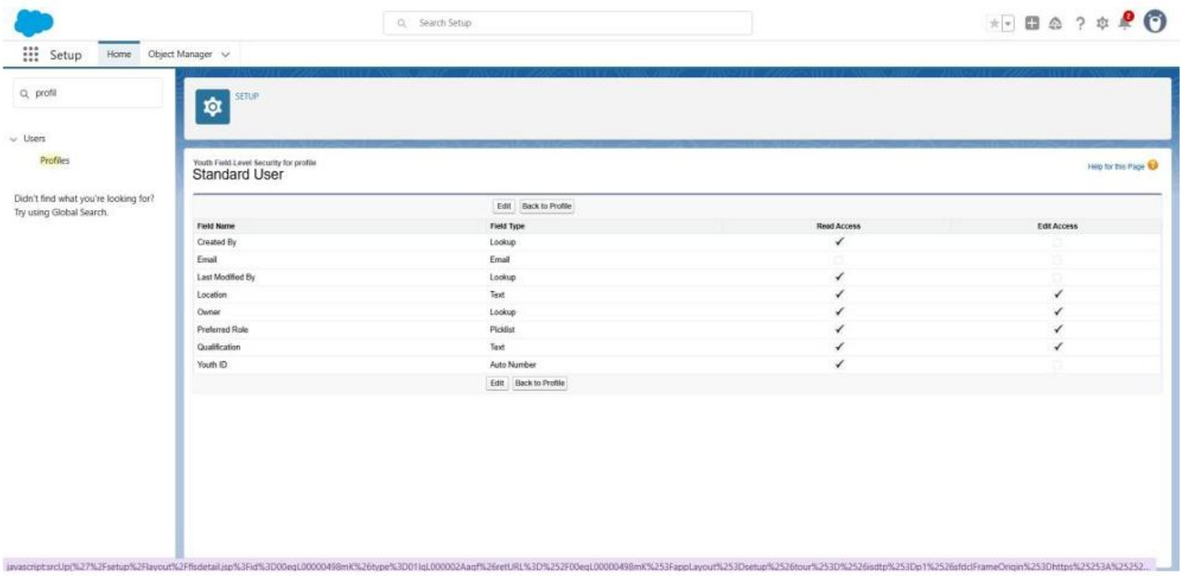
Name	Username	Profile	Role
Youth Coordinator	your.email+yc@sandbox.my.salesforce.com	System Administrator	Youth Coordinator
Placement	placement@admin.com	Standard User	Employer
Youth Admin	touth.admin@my.com	Standard User	NGO Manager

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



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**.



Step 7: Create Role Hierarchy

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

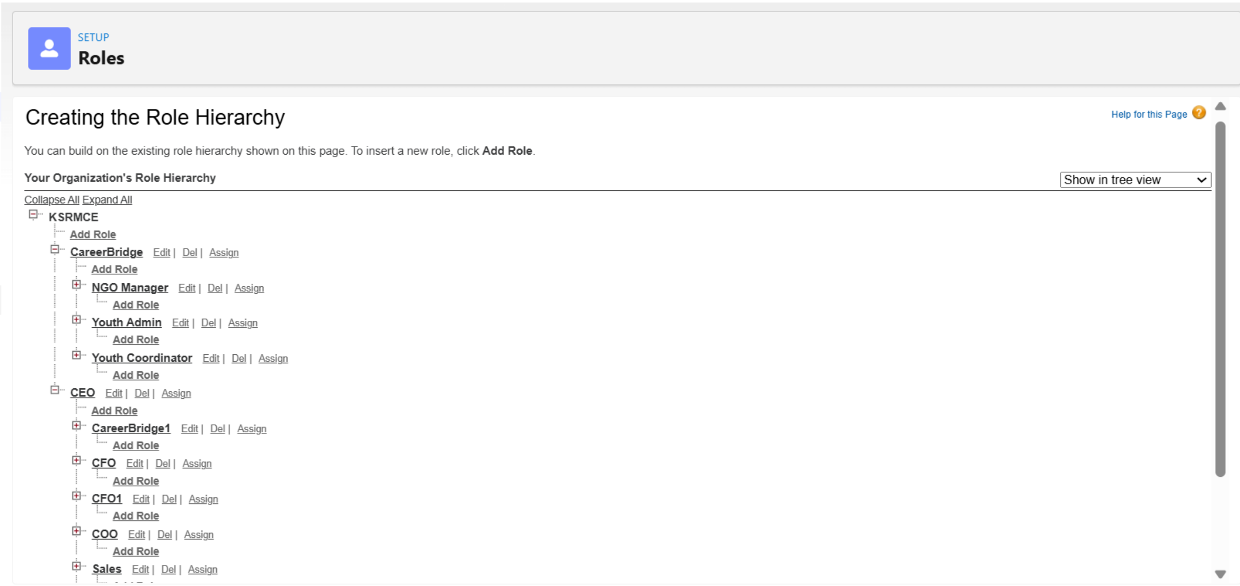
CareerBridge

├── NGO Manager

├── Youth Coordinator

└── Recruiter

3. Click **Save**.



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.

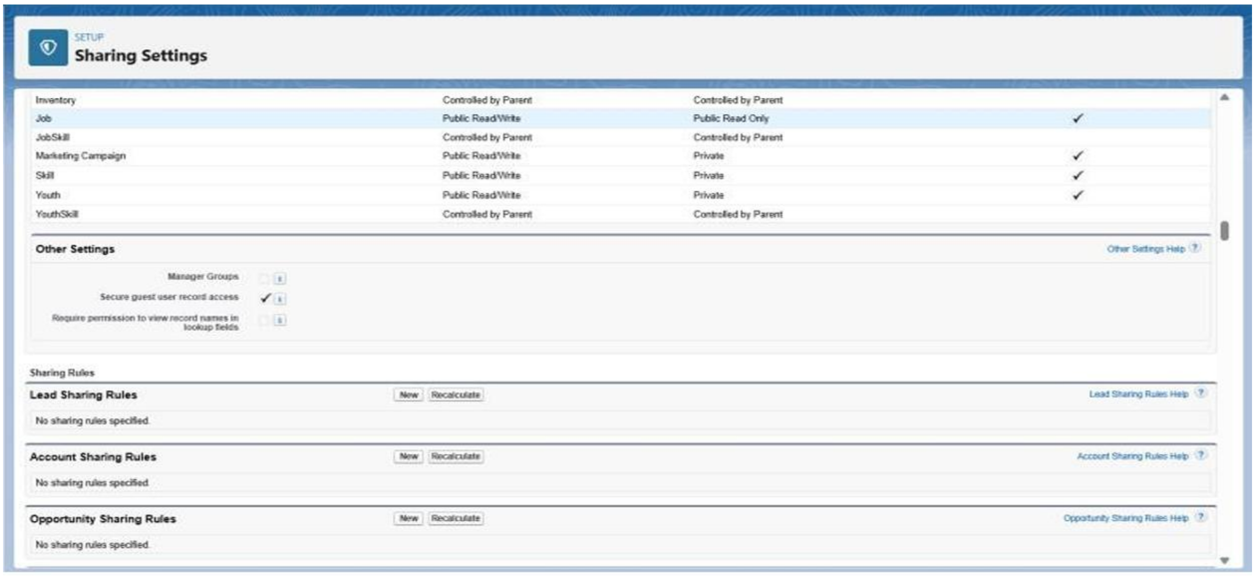
Why: Grants additional permissions without changing profiles.

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**.



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.