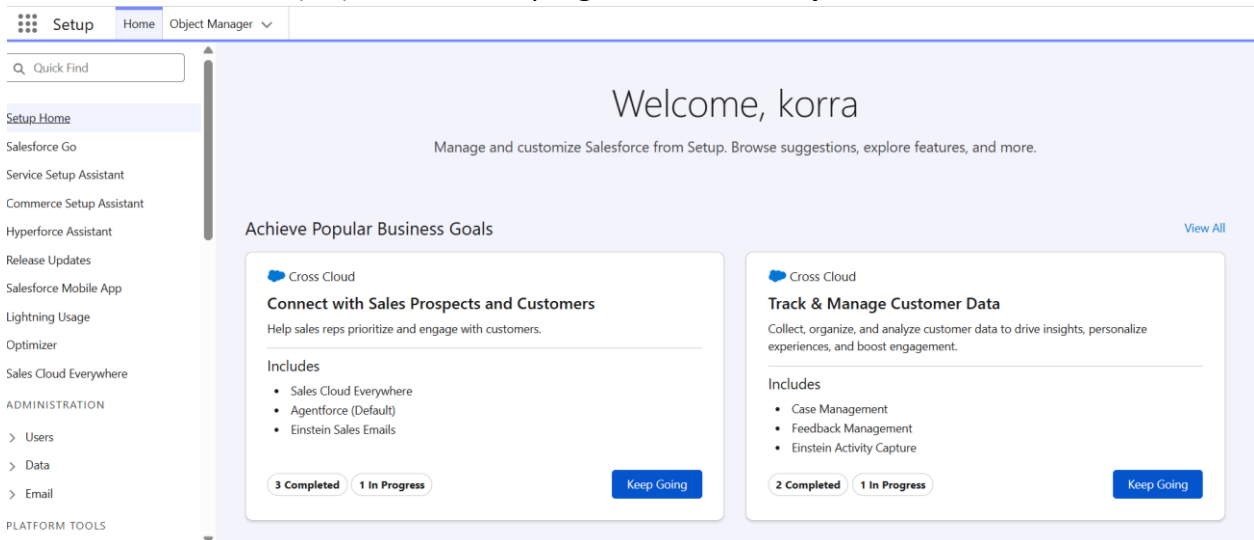


Phase 2: Org Setup & Configuration

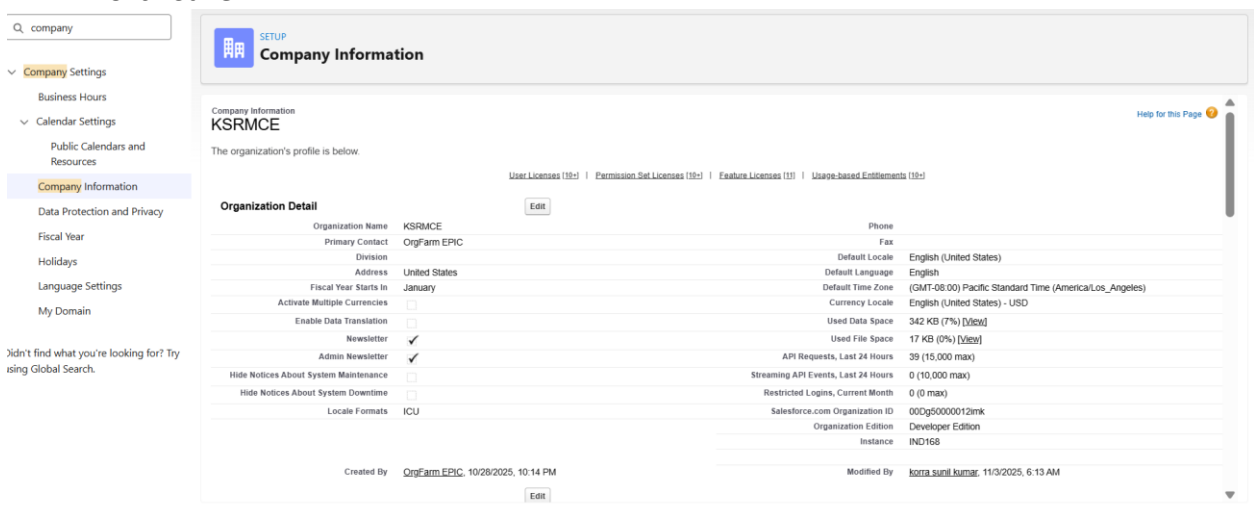
Step 1: Open Setup

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.

Organization Business Hours [Help for this Page](#)

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.

[Holidays](#)

Business Hours Detail [Edit](#)

Business Hours Name	Default Hours	Time Zone
Business Hours	Sunday 24 Hours Monday 24 Hours Tuesday 24 Hours Wednesday 24 Hours Thursday 24 Hours Friday 24 Hours Saturday 24 Hours	(GMT-08:00) Pacific Standard Time (America/Los_Angeles)

Default Business Hours ☐

Active ☐


Created By [korra.sunil.kumar](#) 11/3/2025, 6:15 AM [Edit](#)

Last Modified By [korra.sunil.kumar](#) 11/3/2025, 6:15 AM

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).



SETUP

Holidays

Holidays

[Help for this Page](#)

Holidays are dates and times at which business hours are suspended. Business hours are the days and hours that your support team is available.

Holidays

New

No records to display

Elapsed Holidays

Action	Holiday Name	Description	Date and Time
Clone	Any Festivals		11/3/2025 All Day
Clone	Independence Day		8/15/2025 All Day
Clone	Republic Day		1/26/2025 All Day

Step 5: Create Test Users

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

- Quick Find → **Users** → click **New User**.
- 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

- 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@admi.com	SVP_Human Resources	✓	System Administrator
<input type="checkbox"/> Edit	admin_Youth	yadmi	touth.admi@my.com		✓	System Administrator
<input type="checkbox"/> Edit	Chatter_Expert	Chatter	chatty.00dg50000012imkeaa.dxs5joe1jpo@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Coordinator_Youth	ycoor	youth@coordinator.com	CEO	✓	Standard Platform User
<input type="checkbox"/> Edit	EPIC_OrgFarm	OEPIG	epic.fdb3b92bd790@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/> Edit	sunil.kumar.korra	kor	korrasunilkumar04509@agentforce.com		✓	System Administrator
<input type="checkbox"/> Edit	User_Integration	integ	integration@00dg50000012imkeaa.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00dg50000012imkeaa.com		✓	Analytics Cloud Security User

New User

Reset Password(s)

Add Multiple Users

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

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

Users

Search Setup

Star

Share

Help

Refresh

Close

Setup

Home

Object Manager

Q: profil

Users

Profiles

Didn't find what you're looking for?

Try using Global Search.

SETUP

YOUTH Field Level Security for profile

Standard User

Help for this Page

Edit

Back to Profile

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

Edit

Back to Profile

javascript:srcUp%2F%2FSetup%2FLayout%2FDetail.asp%3Fid%3D000eqL00000498mK%26type%3D01%3D01%3D000002Aa%26retURL%3D%2F00eqL00000498mK%2653FappLayout%253DSetup%2526our%253D%2526sdtr%253Dp1%2526rddFrameOrqn%253Dhttps%25253A%25252...

Step 7: Create Role Hierarchy

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

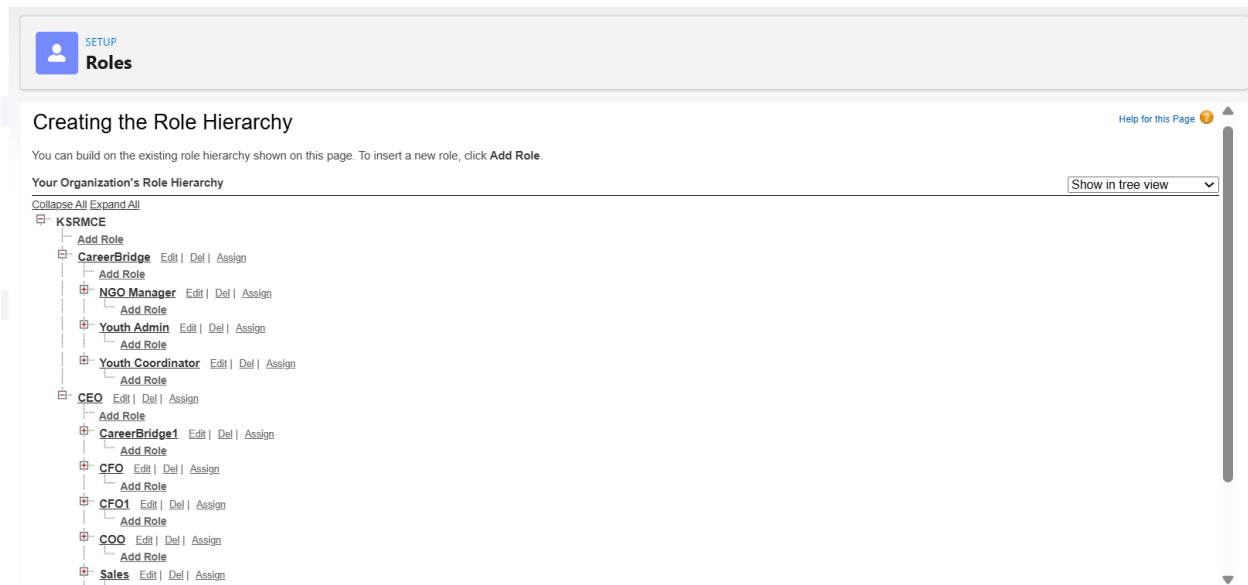
CareerBridge

└─ NGO Manager

└─ Youth Coordinator

└─ Recruiter

3. Click **Save**.



The screenshot shows the 'Roles' setup page in a system. The page title is 'Creating the Role Hierarchy'. Below the title, there is a note: 'You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.' The main section is titled 'Your Organization's Role Hierarchy' and includes a 'Show in tree view' dropdown. The tree view shows a hierarchy starting with 'KSRMCE' at the top. Under 'KSRMCE', there is an 'Add Role' button and a list of roles: 'CareerBridge', 'NGO Manager', 'Youth Admin', and 'Youth Coordinator'. Each role has an 'Add Role' button and links for 'Edit', 'Del', and 'Assign'. Below this, there is a 'CEO' role with an 'Add Role' button and a list of roles: 'CareerBridge1', 'CFO', 'CFO1', 'COO', and 'Sales'. Each of these roles also has an 'Add Role' button and links for 'Edit', 'Del', and 'Assign'.

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.