

# SkillSync – Phase 2: Org Setup & Configuration Report

**Project Title:** SkillSync- Knowledge and Expertise Management

Phase2 – Org Setup & Configuration

Date: 23 September 2025

Prepared By: SHARANYA LAKSHMI S N

## 1.Introduction

Phase 2 of the SkillSync project focused on setting up the Salesforce Developer Org, configuring the company profile, defining business hours, fiscal year, users, roles, and implementing security and access control. The purpose of this phase was to establish the technical foundation of the system, ensuring that all stakeholders (employees, project managers, mentors, and administrators) have the appropriate access, permissions, and configurations before moving into data modeling and automation in Phase 3.

## 2. Developer Org & DevOps Setup

- Salesforce Developer Edition Org created
- Tools installed and configured:
  - VS Code with Salesforce extensions
  - Salesforce CLI (SFDX) - GitHub repository created and connected
- Initial DevOps workflow established using SFDX commands and GitHub version control

## 3. Company Profile & Global Settings

- **Company Name:** SkillSync Innovations.
- **Primary Contact:** SANKU NARAYANA SWAMI GARI SHARANYA LAKSHMI
- **Currency:** Indian Ruppee.
- **Default Time Zone:** IST (GMT+5:30).
- **Locale:** English (India)

The screenshot shows the 'Company Information' setup page in Salesforce. The left sidebar contains navigation links for 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Company Information' and includes a search bar. Below the title, there's a section for 'Company Information' with a 'SkillSync' logo. The page displays various organizational details and settings, including contact information, address, fiscal year, and system preferences. The 'Organization Detail' section includes fields for Organization Name, Primary Contact, Division, Address, Phone, Fax, Default Locale, and Default Language. The 'Fiscal Year' section shows the start date and currency. The 'System' section includes options for data translation, newsletter, and API requests. The page also shows the user who created and modified the record.

**Company Information**

Company Information  
SkillSync

The organization's profile is below.

User Licenses (10) | Permission Set Licenses (10) | Feature Licenses (1) | Usage-based Entitlements (10)

**Organization Detail** [Edit](#) [Deactivate Org](#) [Currency Setup](#)

Organization Name	SkillSync	Phone	9032382010
Primary Contact	SANKU NARAYANA SWAMI GARI SHARANYA LAKSHMI	Fax	
Division		Default Locale	English (India)
Address	Kamala Nagar Anantapuram-515001 Andhra Pradesh IN	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input checked="" type="checkbox"/>	Corporate Currency	Indian Rupee
Enable Data Translation	<input type="checkbox"/>	Used Data Space	390 KB (8%) <a href="#">View</a>
Newsletter	<input checked="" type="checkbox"/>	Used File Space	21 KB (0%) <a href="#">View</a>
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00CdM000000cPoX
		Organization Edition	Developer Edition
		Instance	IND136

Created By: SANKU NARAYANA SWAMI GARI SHARANYA LAKSHMI 21/09/2025, 5:55 pm

Modified By: SANKU NARAYANA SWAMI GARI SHARANYA LAKSHMI 24/09/2025, 11:23 am

[Edit](#) [Deactivate Org](#) [Currency Setup](#)

- **Business Hours:** 9 AM – 5 PM(Mon-Fri).
- **Holidays:** Major public holidays and Weekends.

The screenshot shows the 'Business Hours' setup page in Salesforce. The left sidebar contains navigation links for 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Business Hours' and includes a search bar. Below the title, there's a section for 'Organization Business Hours'. The page displays various business hours settings, including a table for 'Business Hours Detail' with columns for Business Hours Name, Standard Business Hours, and Time Zone. The 'Holidays' section includes a table for 'Holidays' with columns for Holiday Name, Description, and Date and Time. The page also shows the user who created and modified the record.

**Business Hours**

Organization Business Hours

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 (6)

**Business Hours Detail** [Edit](#)

Business Hours Name	Standard Business Hours	Time Zone																
Business Hours	<table border="1"> <tr> <th>Day</th> <th>Hours</th> </tr> <tr> <td>Sunday</td> <td>No Hours</td> </tr> <tr> <td>Monday</td> <td>9:00 am to 5:00 pm</td> </tr> <tr> <td>Tuesday</td> <td>9:00 am to 5:00 pm</td> </tr> <tr> <td>Wednesday</td> <td>9:00 am to 5:00 pm</td> </tr> <tr> <td>Thursday</td> <td>9:00 am to 5:00 pm</td> </tr> <tr> <td>Friday</td> <td>9:00 am to 5:00 pm</td> </tr> <tr> <td>Saturday</td> <td>No Hours</td> </tr> </table>	Day	Hours	Sunday	No Hours	Monday	9:00 am to 5:00 pm	Tuesday	9:00 am to 5:00 pm	Wednesday	9:00 am to 5:00 pm	Thursday	9:00 am to 5:00 pm	Friday	9:00 am to 5:00 pm	Saturday	No Hours	(GMT+05:30) India Standard Time (Asia/Kolkata)
Day	Hours																	
Sunday	No Hours																	
Monday	9:00 am to 5:00 pm																	
Tuesday	9:00 am to 5:00 pm																	
Wednesday	9:00 am to 5:00 pm																	
Thursday	9:00 am to 5:00 pm																	
Friday	9:00 am to 5:00 pm																	
Saturday	No Hours																	
Active	<input checked="" type="checkbox"/>	Default Business Hours <input checked="" type="checkbox"/>																

Created By: SANKU NARAYANA SWAMI GARI SHARANYA LAKSHMI 21/09/2025, 5:55 pm

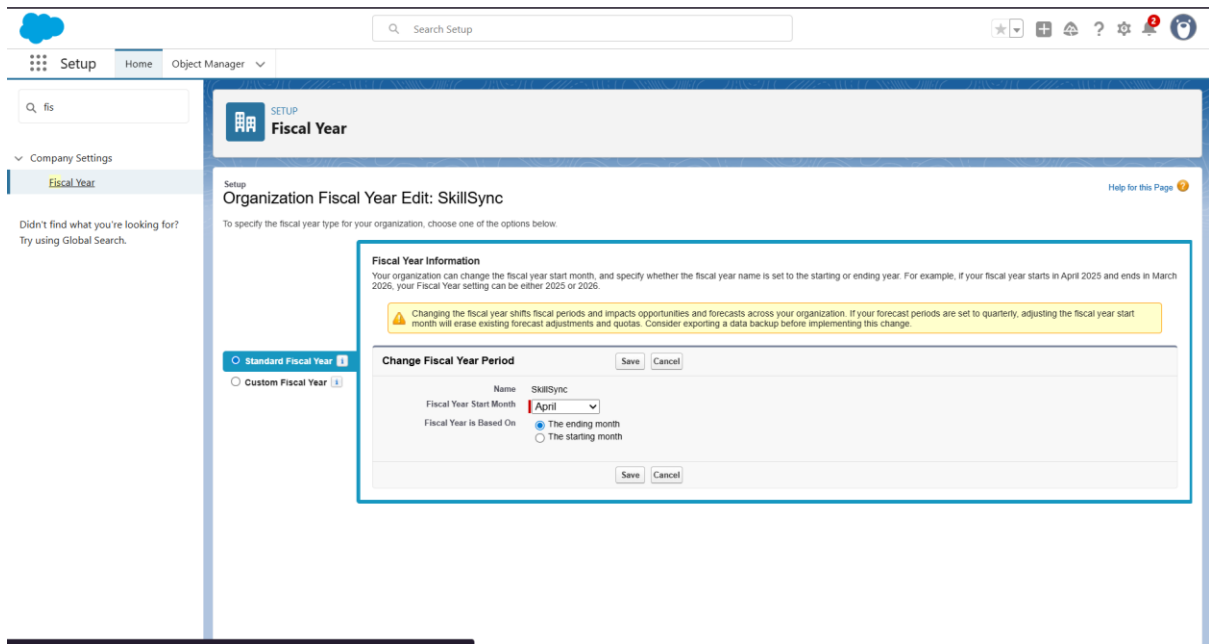
Last Modified By: SANKU NARAYANA SWAMI GARI SHARANYA LAKSHMI 24/09/2025, 11:30 am

[Edit](#)

**Holidays** [Add/Remove](#)

Holiday Name	Description	Date and Time
Gandhi Jayanti		02/10/2025 All Day <a href="#">View</a>
Independence Day		15/08/2026 All Day <a href="#">View</a>
Republic Day		26/01/2026 All Day <a href="#">View</a>
Weekend		27/09/2025 All Day <a href="#">View</a>

- **Fiscal Year:** Standard Fiscal Year, Starting April



#### 4. User Setup & Licenses

- **Admin User:** Full control (creates users, automations, dashboards, manages org setup).
- **Manager User:** Manages Projects, Tasks, and Mentorship opportunities, reviews reports and engagement logs.
- **Employee Users:** Add skills, complete tasks, join mentorships, track learning paths, and earn points & badges.
- **HR User:** Onboards new employees, manages employee records, assigns learning paths.
- **Reporting/Analytics User:** Views dashboards and reports, read-only access to analytics.

Setup

Home

Object Manager

Search Setup

Star

Share

Help

Settings

Notifications

Profile

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Feature Settings

Data.com

Prospector Users

Didn't find what you're looking for?

Try using Global Search.

SETUP

Users

All Users

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 User

New User

Reset Password(s)

Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Brown, HR	hrbw	sharulucky2127@gmail.com		✓	Standard Platform User
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00ddm0000dcoouau_hy0fkyoas2@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Jackson, Emp	ejack	sns2127@gmail.com		✓	Standard Platform User
<input type="checkbox"/> Edit	John, Admin	ajohn	sharanyaalakshmi21@gmail.com		✓	System Administrator
<input type="checkbox"/> Edit	Lorette, Manager	mlotr	kznagalatha16@gmail.com		✓	Standard Platform User
<input type="checkbox"/> Edit	SHARANYA LAKSHMI, SANKU NARAYANA SIVAMI GARI	SHHAR	224g1a3288@cunning-moose-qybyr9.com		✓	System Administrator
<input type="checkbox"/> Edit	User Integration	integ	integration@00ddm0000dcoouau.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00ddm0000dcoouau.com		✓	Analytics Cloud Security User

New User

Reset Password(s)

Add Multiple Users

## 5. Roles, Profiles & Permission Sets

### Roles Created:

- System Administrator
- Project & Mentorship Manager
- Employee
- HR Officer
- Analytics Officer

Setup

Home

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Search Setup

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users

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Didn't find what you're looking for?

Try using Global Search.

SETUP

Roles

Below is a list of the roles for your organization. You can view more information by clicking the role link.

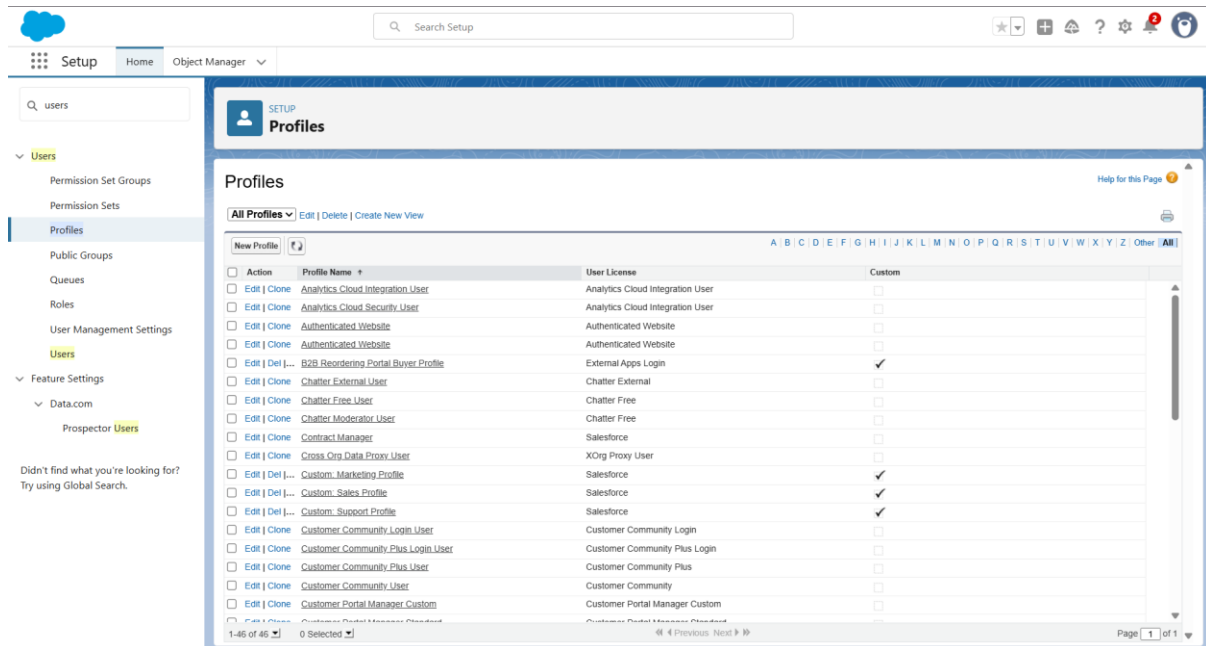
New Role

Show in list view

Action	Role	Reports To	Report Display Name
Edit   Del   Assign	CEO		CEO
Edit   Del   Assign	CEO	CEO	CFO
Edit   Del   Assign	COO	CEO	COO
Edit   Del   Assign	SVP, Customer Service & Support	CEO	SVP, Customer Service & Support
Edit   Del   Assign	Customer Support, International	SVP, Customer Service & Support	Customer Support, International
Edit   Del   Assign	Customer Support, North America	SVP, Customer Service & Support	Customer Support, North America
Edit   Del   Assign	Installation & Repair Services	SVP, Customer Service & Support	Installation & Repair Services
Edit   Del   Assign	SVP, Human Resources	CEO	SVP, Human Resources
Edit   Del   Assign	SVP, Sales & Marketing	CEO	SVP, Sales & Marketing
Edit   Del   Assign	VP, International Sales	SVP, Sales & Marketing	VP, International Sales
Edit   Del   Assign	VP, Marketing	SVP, Sales & Marketing	VP, Marketing
Edit   Del   Assign	Marketing Team	VP, Marketing	Marketing Team
Edit   Del   Assign	VP, North American Sales	SVP, Sales & Marketing	VP, North American Sales
Edit   Del   Assign	Director, Channel Sales	VP, North American Sales	Director, Channel Sales
Edit   Del   Assign	Channel Sales Team	Director, Channel Sales	Channel Sales Team
Edit   Del   Assign	Director, Direct Sales	VP, North American Sales	Director, Direct Sales
Edit   Del   Assign	Eastern Sales Team	Director, Direct Sales	Eastern Sales Team
Edit   Del   Assign	Western Sales Team	Director, Direct Sales	Western Sales Team
Edit   Del   Assign	System Administrator	CEO	
Edit   Del   Assign	Analytics Officer	System Administrator	
Edit   Del   Assign	HR Officer	System Administrator	
Edit   Del   Assign	Project & Mentorship Manager	System Administrator	
Edit   Del   Assign	Employee	Project & Mentorship Manager	

## Profiles Defined:

- System Administrator
- Manager
- Employee
- HR
- Report (Read-Only and reporting)



## Permission Sets

User	Profile	Permission Set(s)	Role	Responsibilities
Admin User	System Administrator	(Optional)	System	Full CRUD access to all objects, manage users, roles, permission sets, flows, dashboards.
		Advanced Automation Access	Administrator (Top of hierarchy)	
Manager User	Manager Profile (Custom)	Project & Mentorship Admin	Project & Mentorship Manager (Reports to Admin)	Manage Projects, Tasks, Mentorships, Engagement Logs, Reports & Dashboards.
		Employee	Employee (Reports to Manager)	Add/update Skills, complete Tasks & Learning Paths, join Mentorships, track Engagement Logs,
Employee User	Employee Profile (Custom)	Skill & Learning Enhancer	Employee (Reports to Manager)	complete Tasks & Learning Paths, join Mentorships, track Engagement Logs,

User	Profile	Permission Set(s)	Role	Responsibilities
HR User	HR Profile (Custom)	HR Operations	HR Officer (Parallel to Manager, reports to Admin)	earn Points & Badges.  Onboard Employees, manage Employee records, assign Learning Paths, limited Reports & Dashboards access.
Reporting/Analytics User	Read-Only Profile	Enhanced Analytics	Analytics Officer (Reports to Admin)	View Dashboards & Reports, filter/export analytics, no CRUD access.

The screenshot shows the Salesforce Setup interface for Permission Sets. The left sidebar contains navigation links: Setup, Home, Object Manager, Users, Profiles, Public Groups, Queues, Roles, and User Management Settings. The main content area is titled 'Permission Sets' and includes a search bar and a list of permission sets. The list has columns for Action, Permission Set Name, Description, and License. The list includes various roles like Buyer, CRM User, and Commerce Admin.

## 6. Org-Wide Defaults (OWD) & Sharing Rules

### OWD Settings:

- **Employee records:** Private
- **Projects & Tasks:** Controlled by Parent
- **Skills & Learning Paths:** Read Only

### Sharing Rules:

- **Managers:** Can view and manage their assigned Employees, Projects, and Mentorships
- **HR Users:** Can view and update Employee records, assign Learning Paths

- **Reporting/Analytics Users:** Can view dashboards and reports

## 7. Security & Login Policies

- **Password Policies:** Configured as per Salesforce standards
- **Login Access:** No IP restrictions (development phase)
- **Field-Level Security:** Restricted for sensitive fields (e.g., salary, performance data)
- **Audit Trail:** Enabled to track changes in users, roles, and objects

## 8. Deployment Workflow

- **Development Environment:** Salesforce Developer Org
- **Version Control:** Managed with GitHub
- **Metadata Deployment:** Using SFDX commands
- **Future Plan:** Use Change Sets / Packages for Sandbox → Production migration

## 9. Challenges & Learnings

- Clarified the difference between **Profiles vs Permission Sets**
- Learned the importance of **OWD & Sharing Rules** for controlling data access
- Realized **User Roles and Profiles** directly impact visibility of Projects, Tasks, and Skills

## 10. Next Steps (Phase 3: Data Modeling & Relationships)

- Create custom objects: **Employees, Skills, Projects, Tasks, Learning Paths, Mentorships, Engagement Logs**
- Define relationships between objects (**Master-Detail / Lookup**)
- Setup **Record Types, Page Layouts, and Schema Builder**
- Integrate security: Assign Profiles, Permission Sets, and OWD as per user hierarchy