**Phase 2: -**

In this Phase I have chosen the following in my project  
  
• Company Profile Setup

• Business Hours & Holidays

• Fiscal Year Settings

• User Setup & Licenses

• Profiles

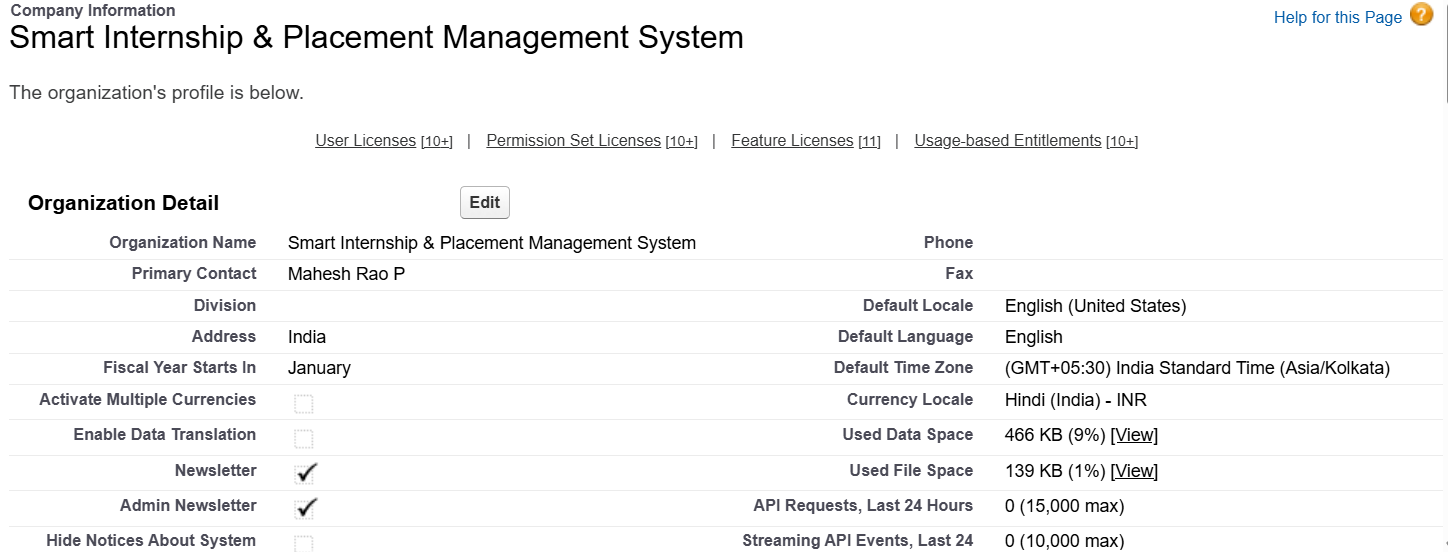
• Roles

• Permission Sets

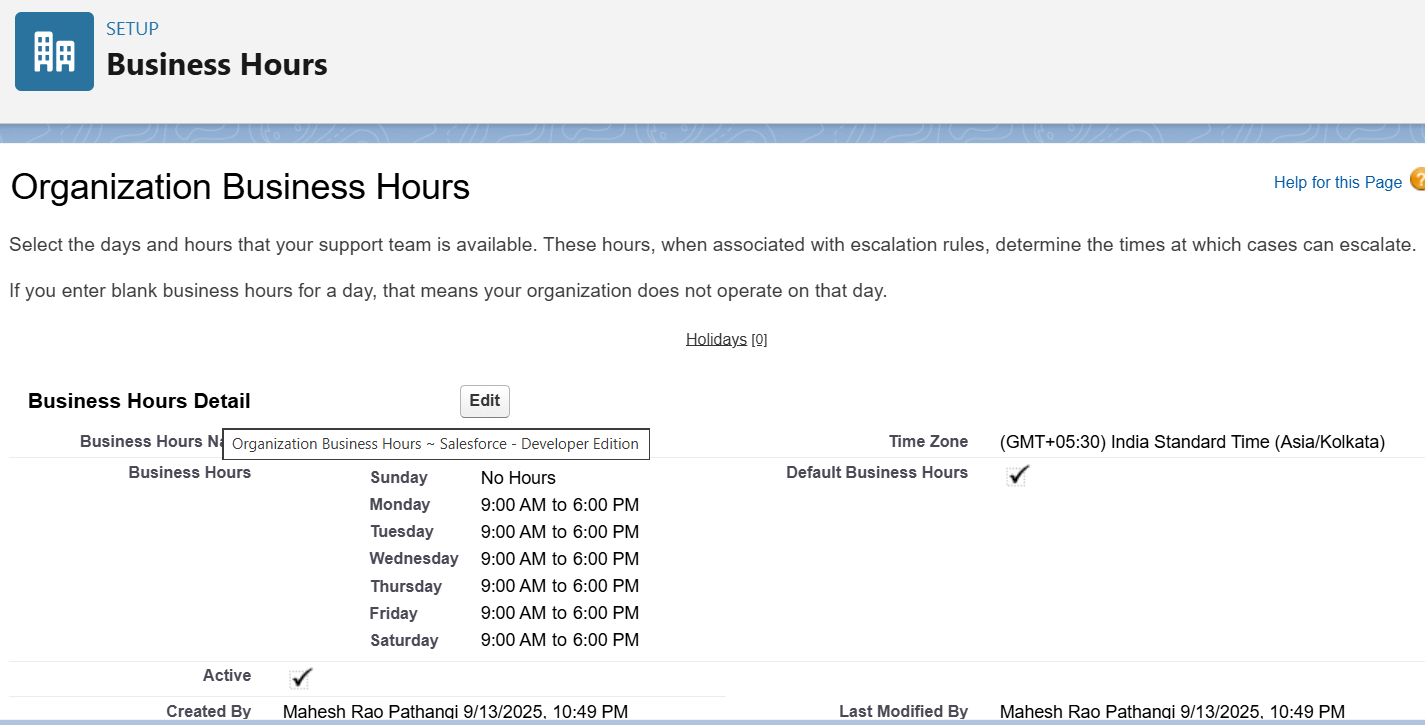
• OWD

• Login Access Policies  
  
  
  
**Project:** Smart Internship & Placement Management System

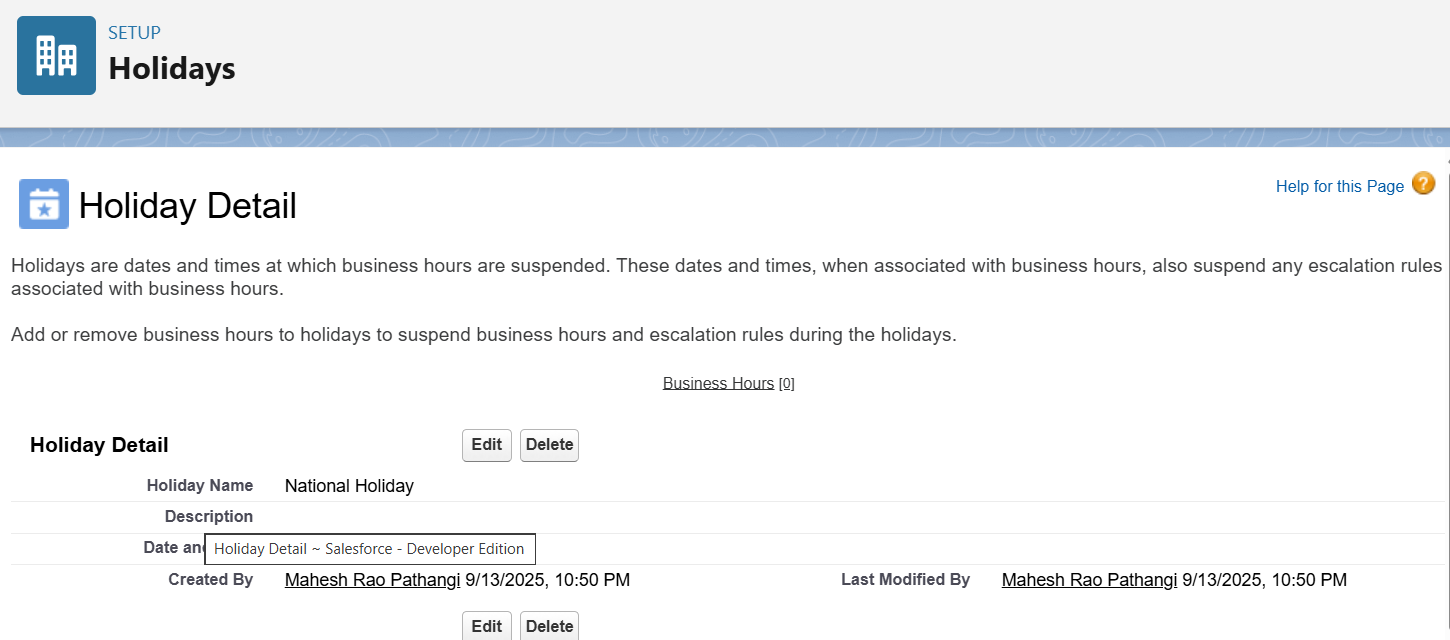
**1. Company Profile**

* **Description:** The company profile defines the **organization-wide details** such as name, currency, time zone, and fiscal year. Updating these ensures that all system activities (business hours, reports, currency fields, etc.) align with your project’s identity and regional settings.  
    
    
  

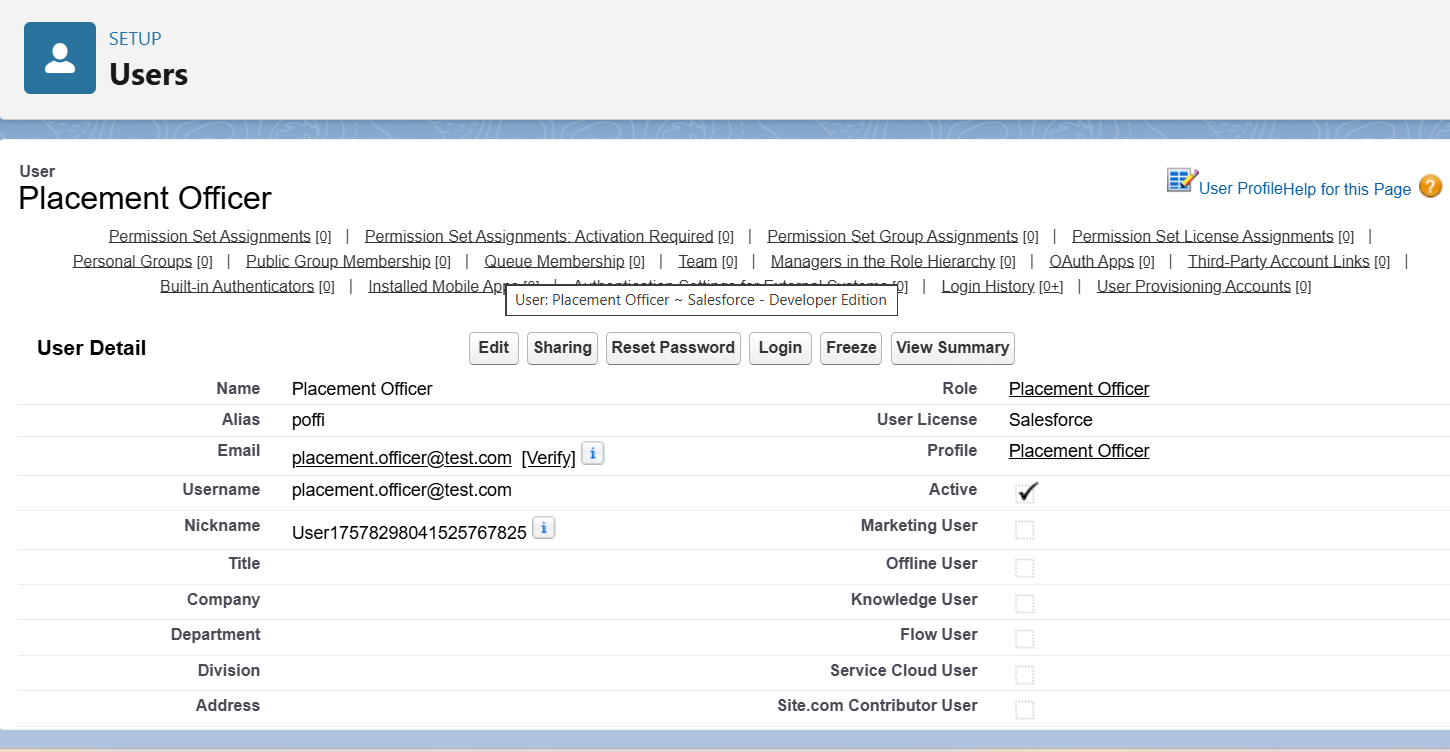
**2. Business Hours**

* **Description:** Business hours define the **working schedule** of the organization. This helps in managing response times, SLAs (Service Level Agreements), and availability tracking. For this project, business hours are set to reflect internship operations from **Monday–Saturday, 9:00 AM–6:00 PM IST**.  
    
    
  

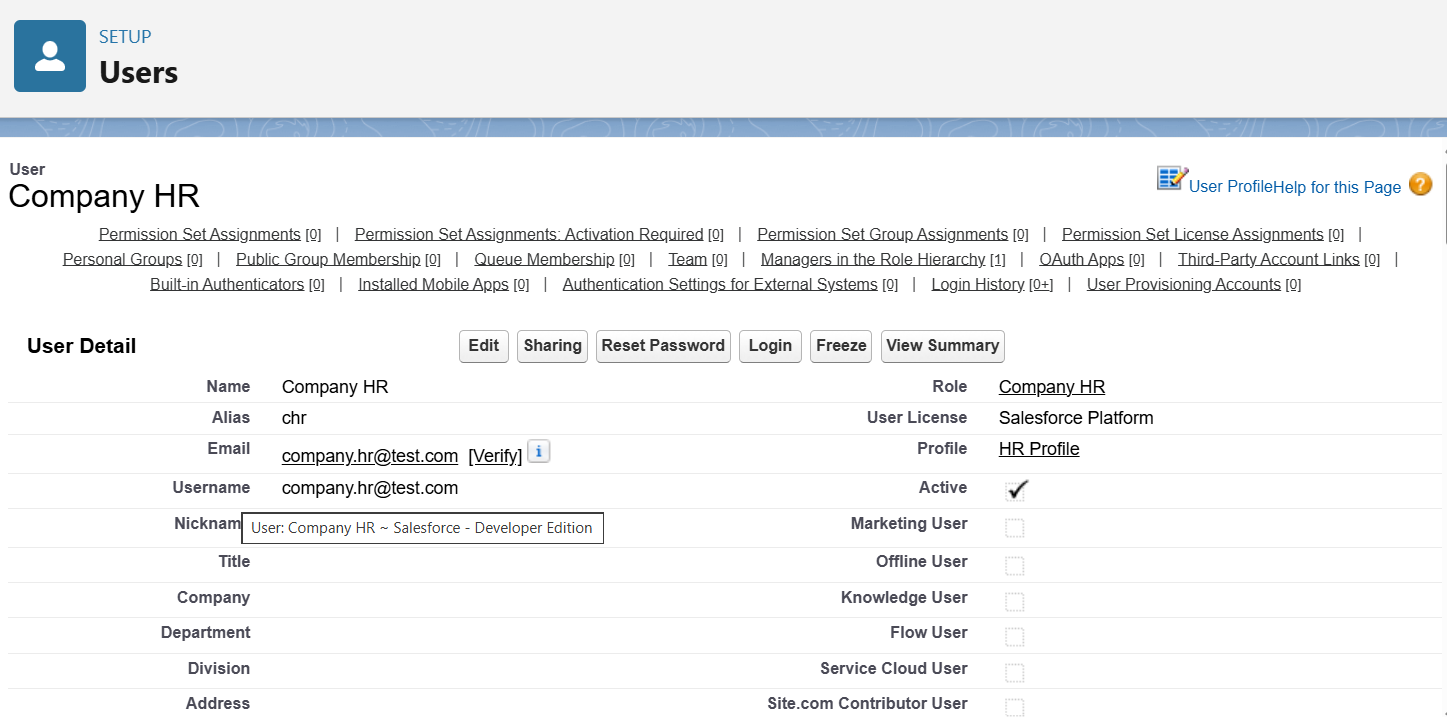
**3. Holidays (Optional)**

* **Description:** Holidays allow Salesforce to **exclude specific days** (like Independence Day, 15-Aug) from business operations. This ensures that workflows, escalations, and time-dependent activities don’t trigger on non-working days.  
    
  

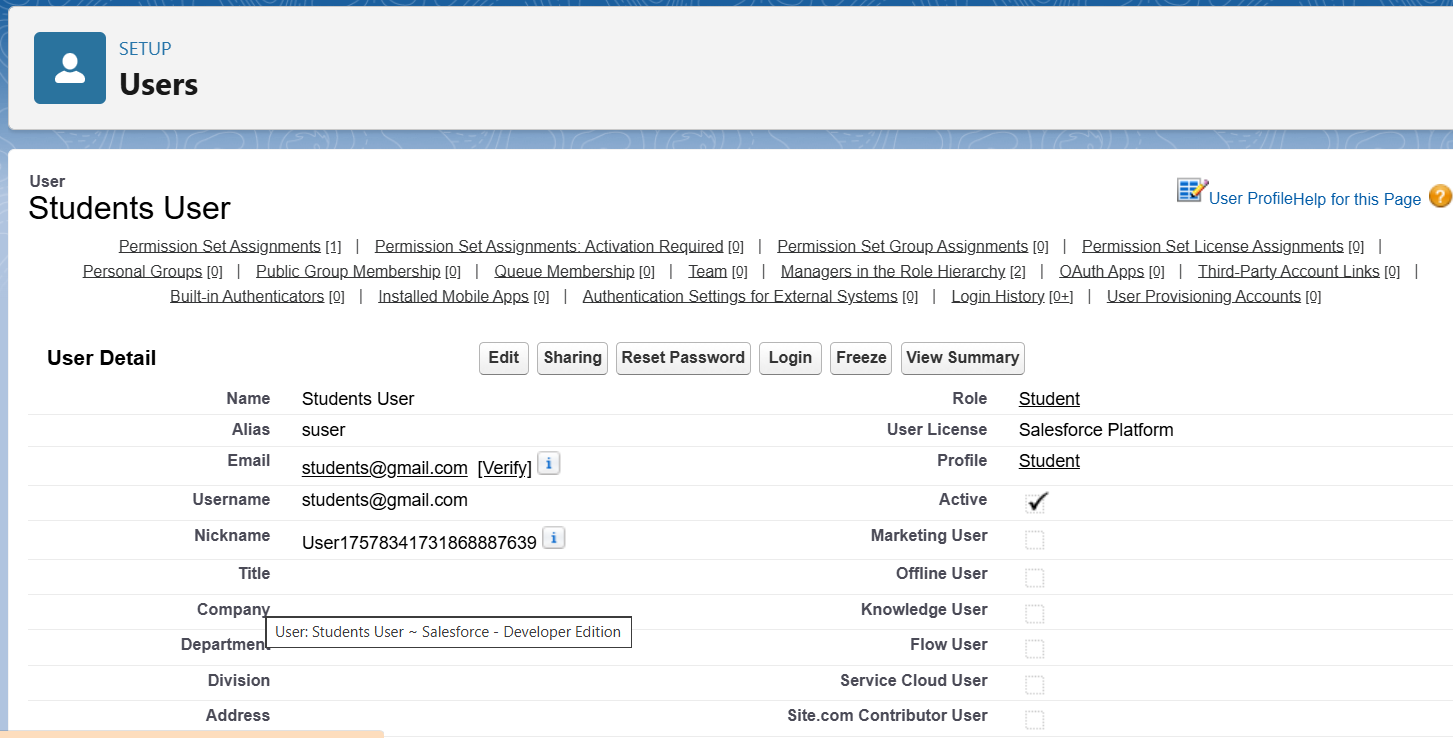
**4. Create User: Placement Officer**

* **Description:** This user represents the **Placement Officer** in the system, who oversees internship postings, manages company relations, and reviews student applications. A **System Administrator profile** is assigned so they can configure and monitor the platform.  
    
  

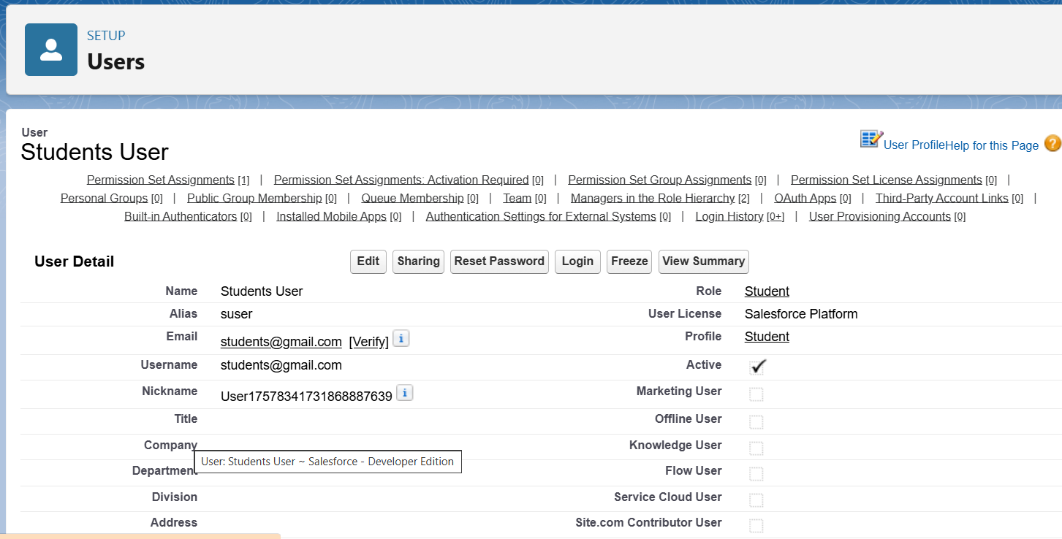
**5. Create User: Company HR**

* **Description:** The **Company HR user** is responsible for posting internship/job opportunities and reviewing student applications. A **Standard User profile** is provided with an HR-specific role to limit access only to relevant data.  
    
  

**6. Create User: Student**

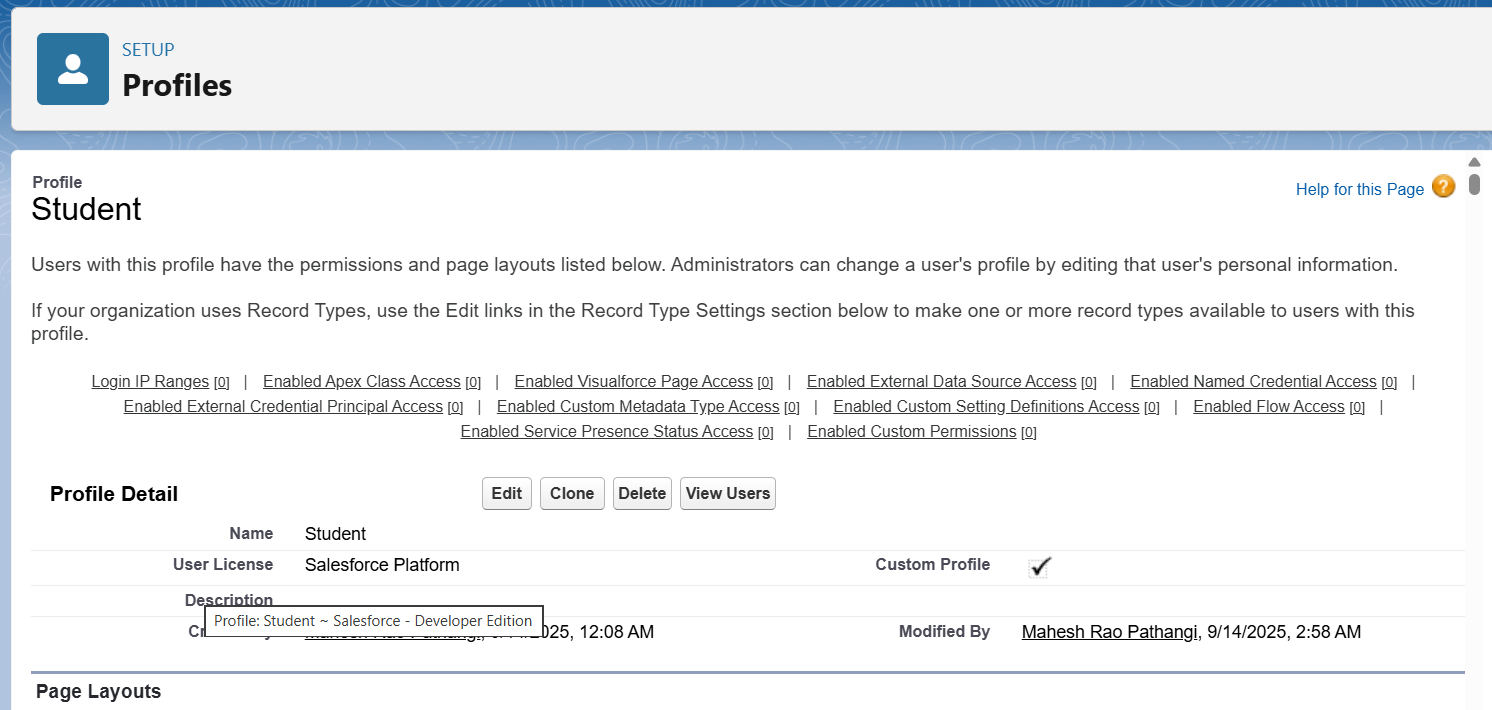
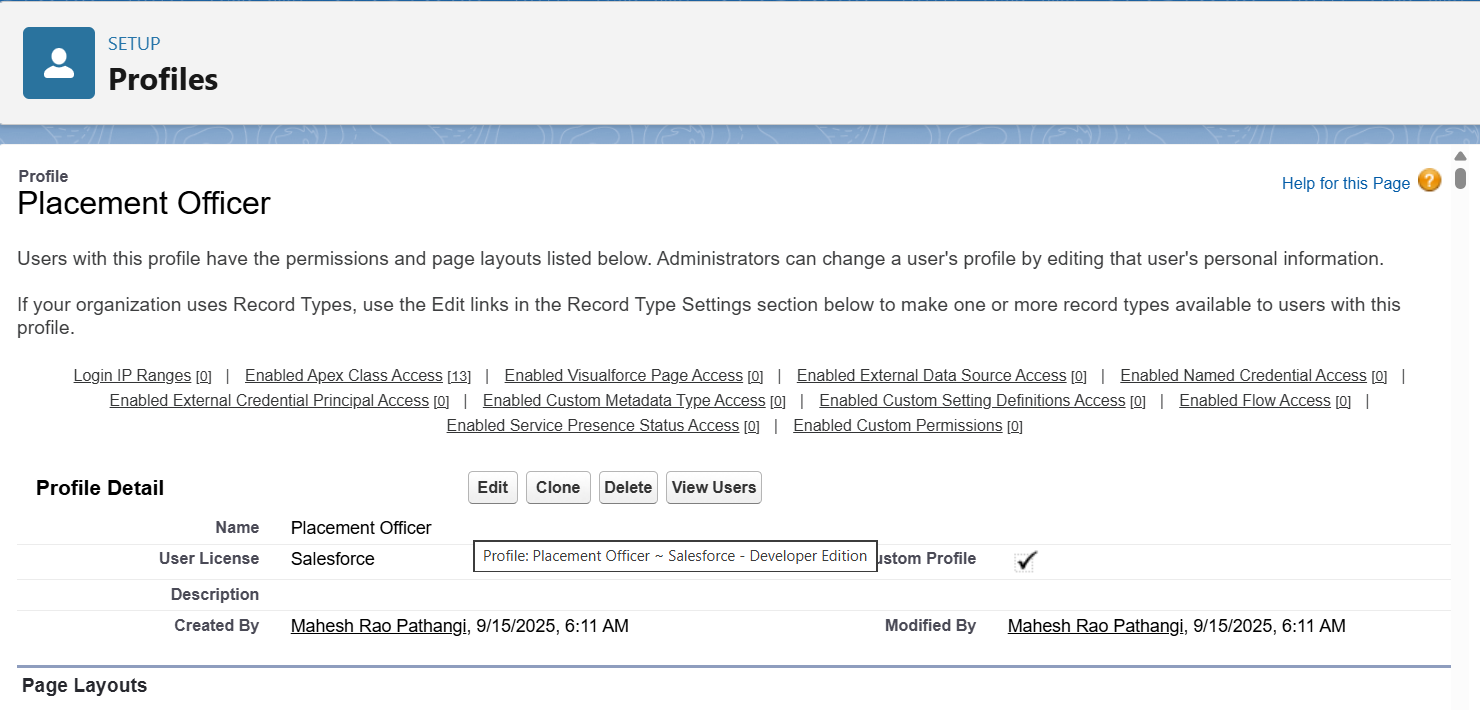
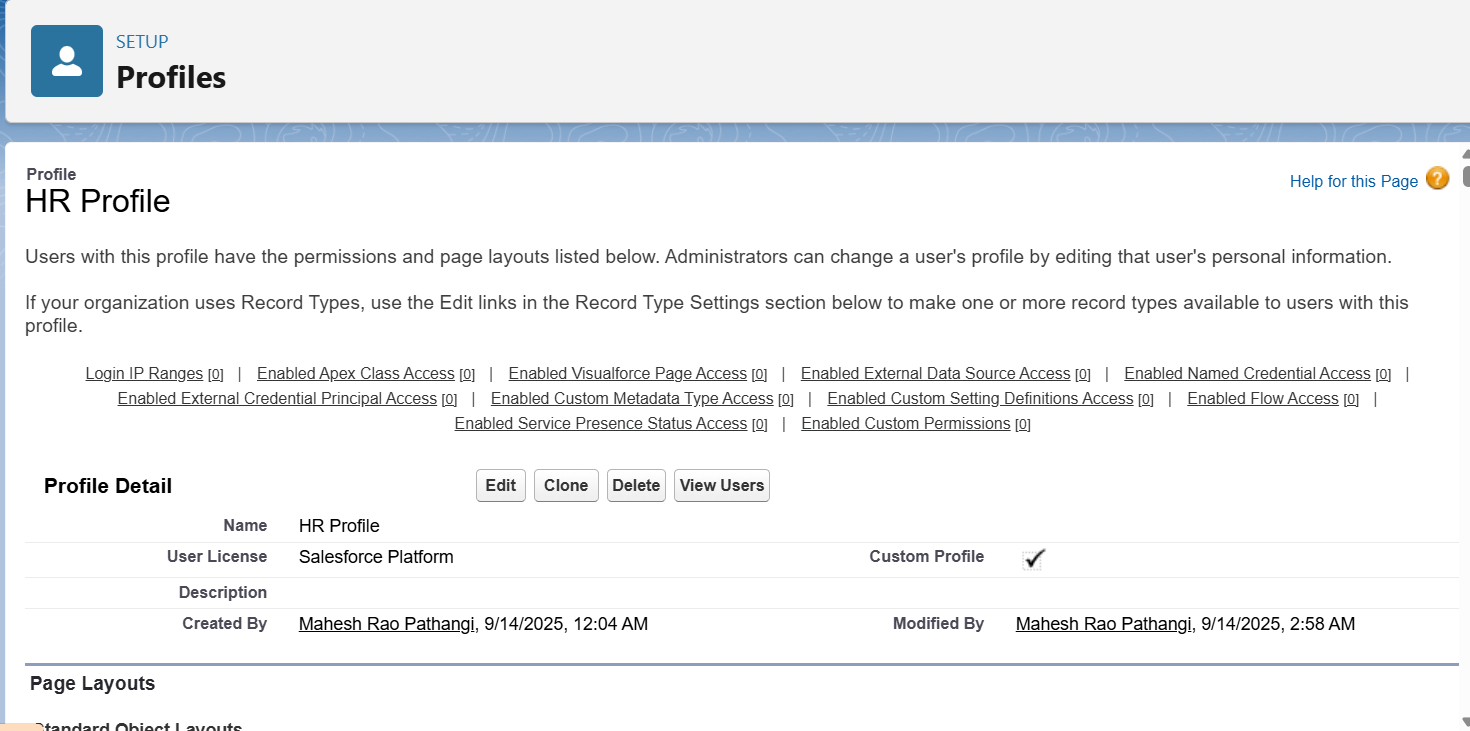
* **Description:** The **Student user** represents candidates applying for internships. They are given limited access (via Standard User + Permission Set) to view opportunities, apply, and give feedback, but not manage system-wide settings.  
    
  

**7. Create Roles**

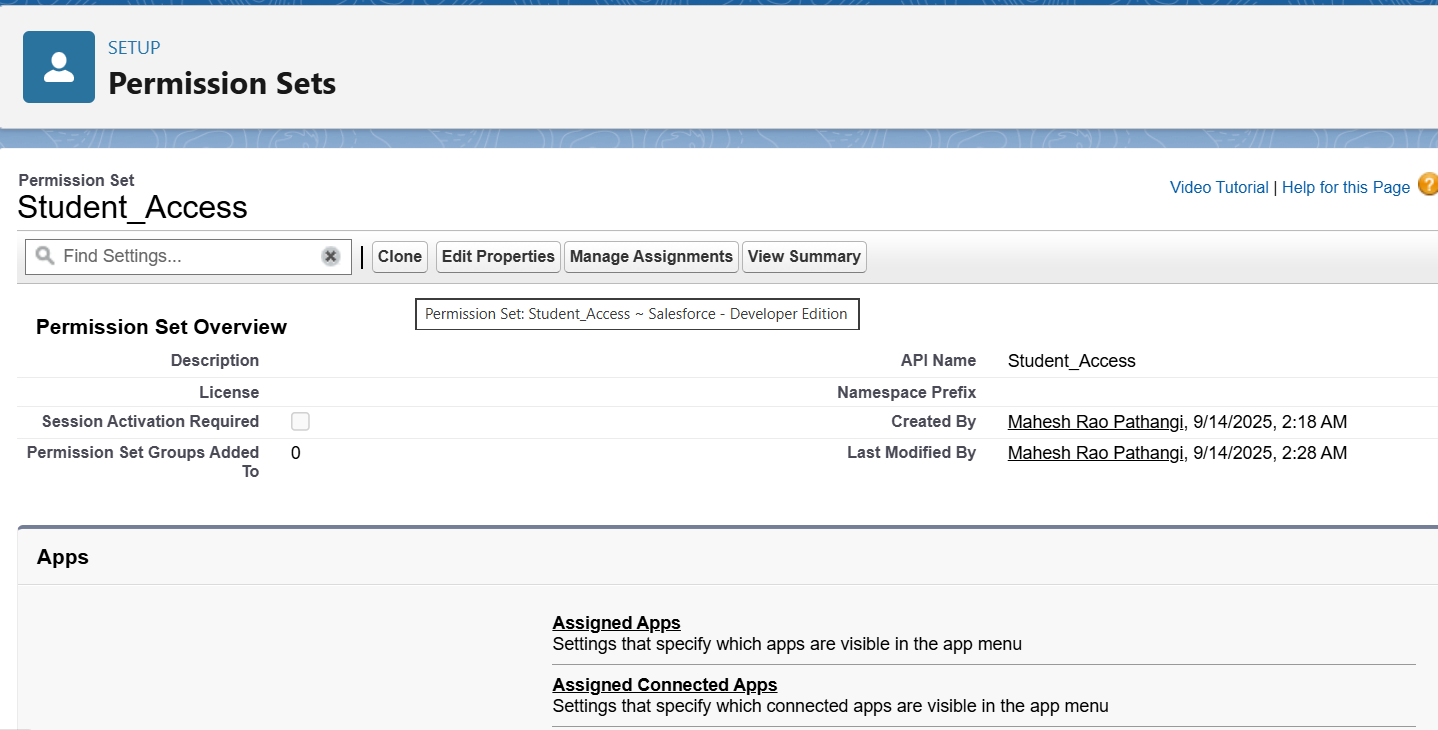
* **Description:** Roles define the **hierarchy of data visibility** in Salesforce. Placement Officer is at the top, followed by Company HR, then Student. This ensures:
  + Placement Officer can see everything
  + HR can see their company data + student applications  
      
    Students see only their own records  
      
    

Before Creating Profiles, I have already started the phase 3 in which I Created a custom object which are necessary for My project. The following are the custom Objects I have created : -  
1. Student\_\_c  
2. Company\_\_c  
3. Internship\_\_c  
4. Application\_\_c  
5. Feedback\_\_c

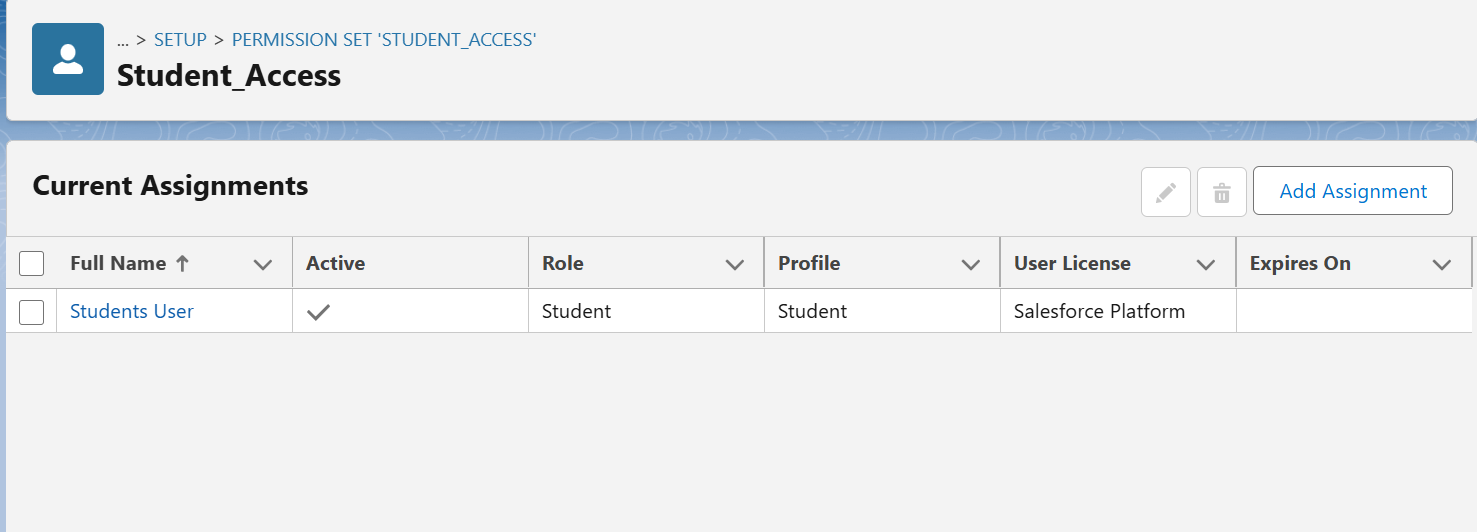
**8. Profiles**

* **Description:** Profiles control **object-level and field-level permissions**.
  + Placement Officer → System Administrator (full access)
  + Student → Standard User (restricted access)
  + Company HR → Custom profile cloned from Standard User with added permissions on Company, Internship, and Application objects.  
      
    

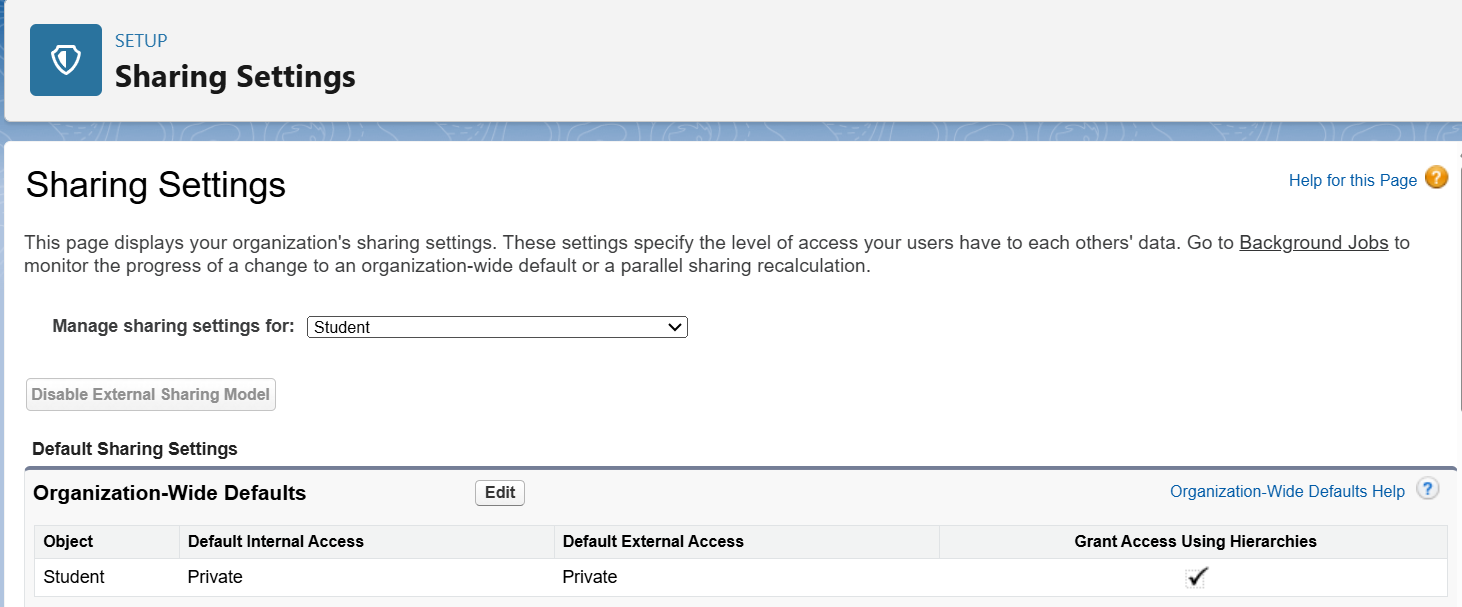
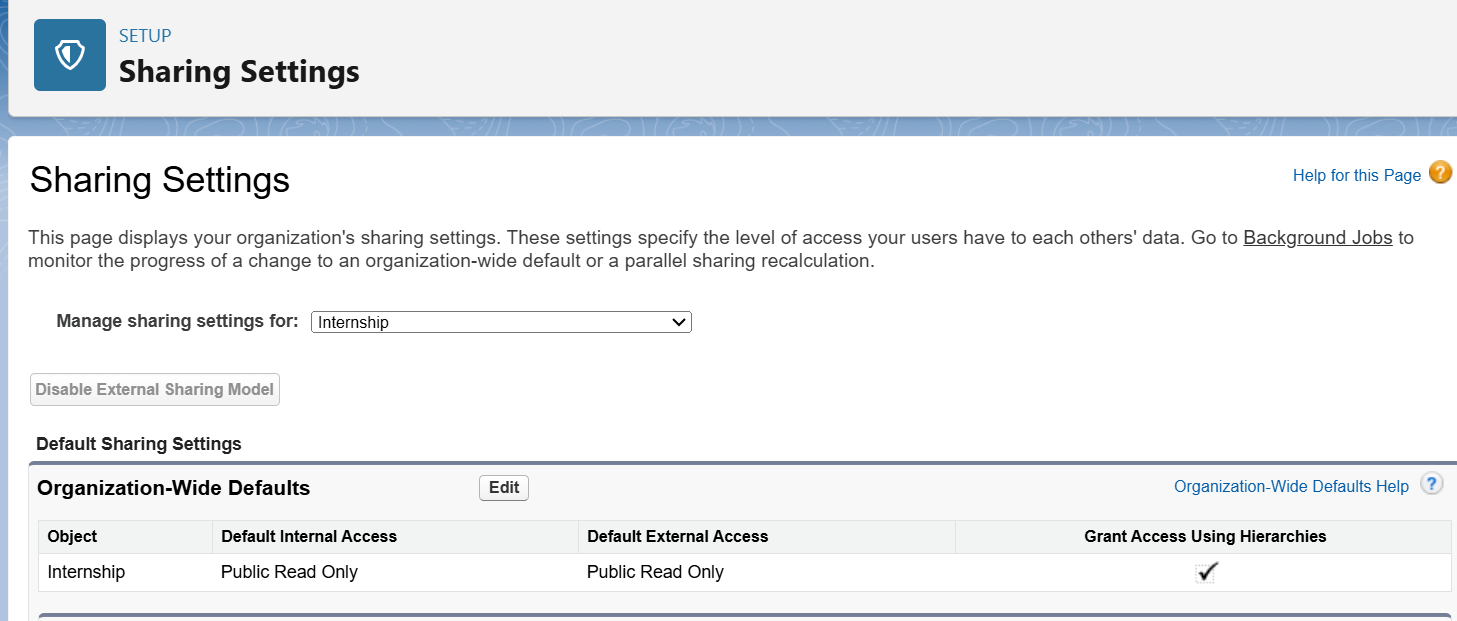
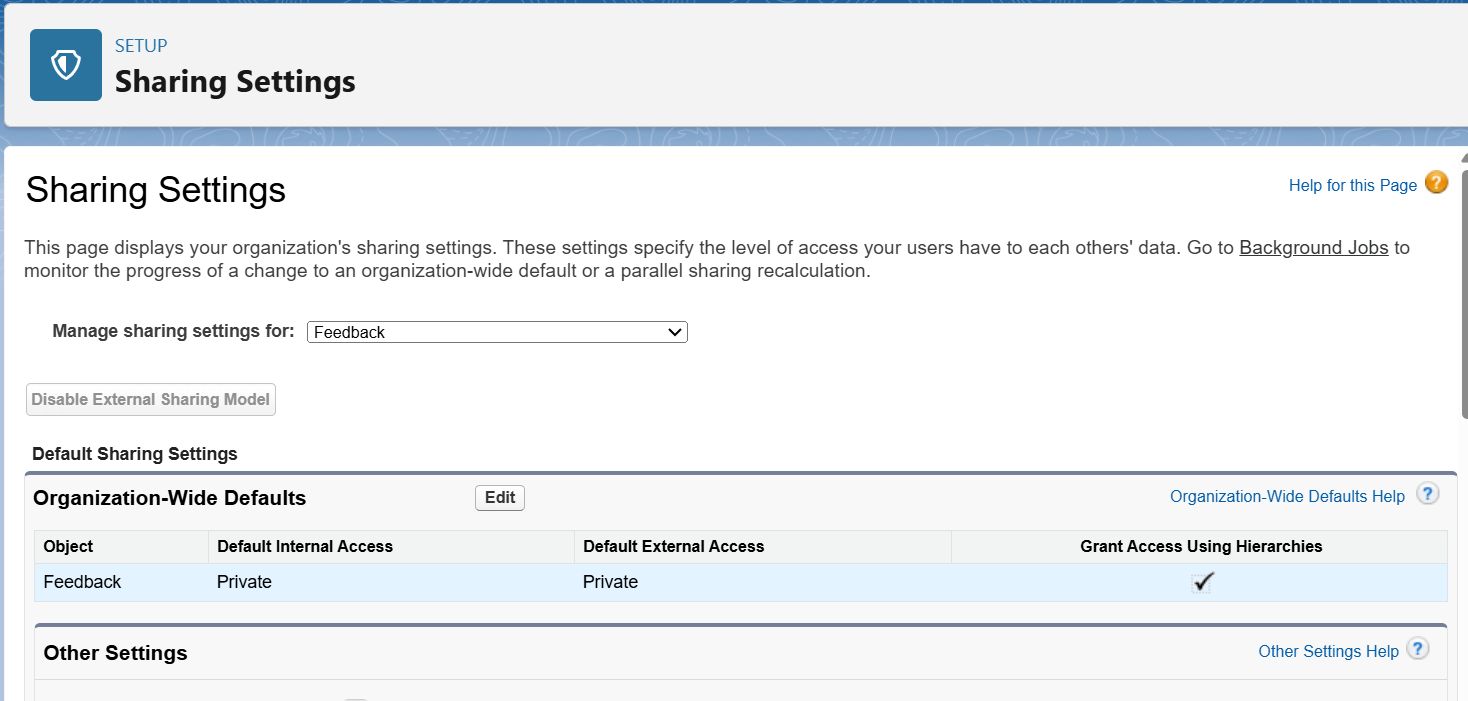
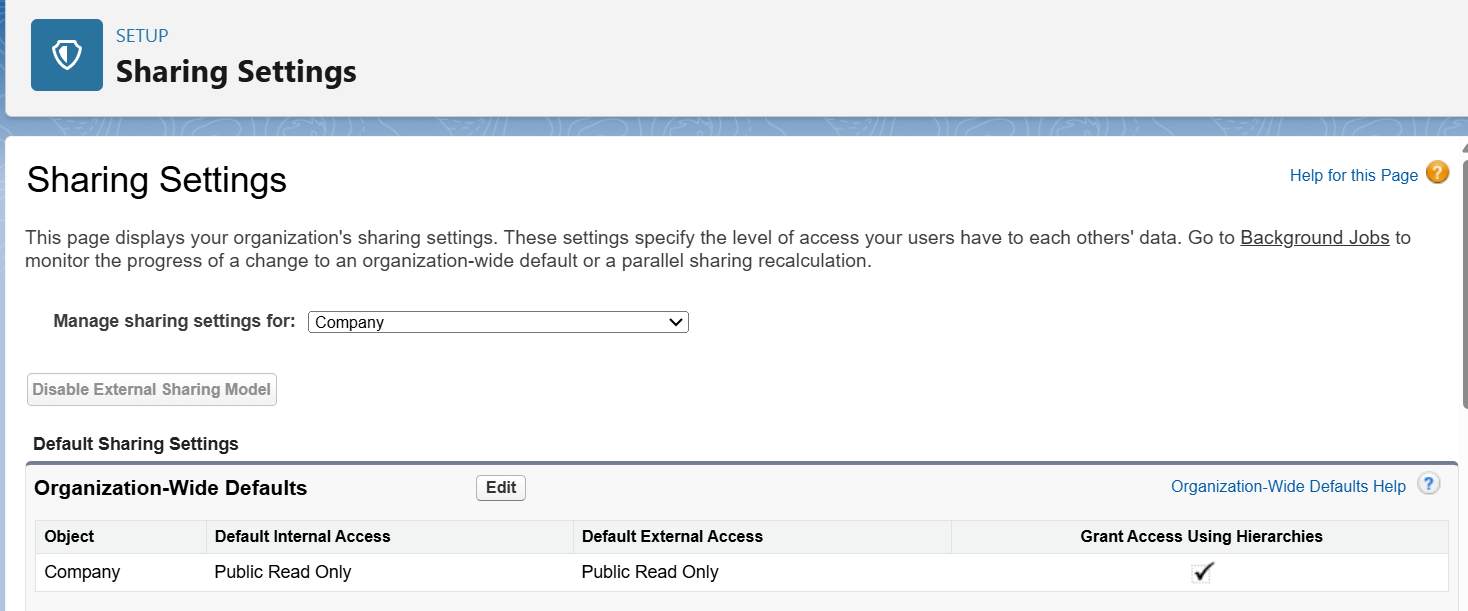
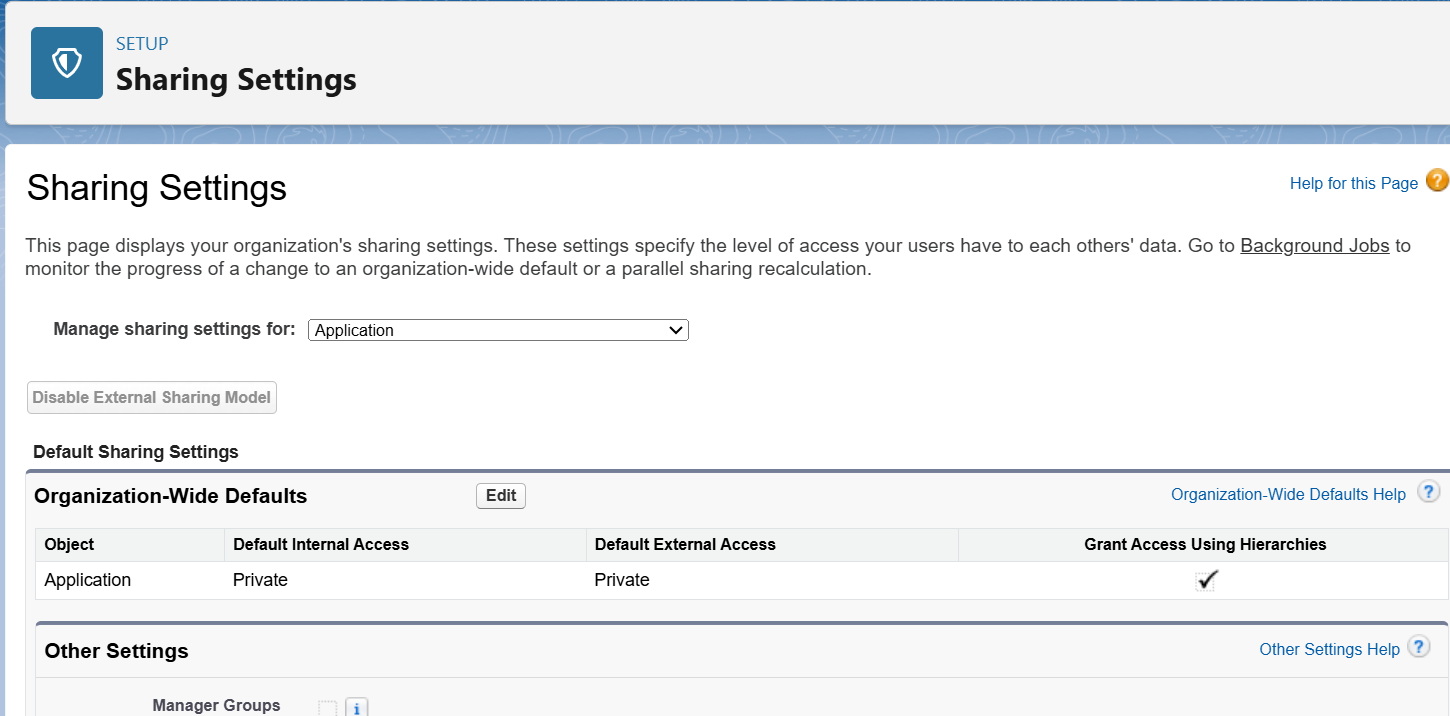
**9. Permission Set (Student\_Access)**

* **Description:** Permission Sets allow giving **extra access** without changing profiles. Here, *Student\_Access* enables students to create and manage their own applications, view internships, and submit feedback.  
    
  Application (Read/Write), Feedback (Read/Write), Internship (Read), Company (Read), Student (Read/Edit Own)  
    
    
    
    
  

**10. Assign Permission Set**

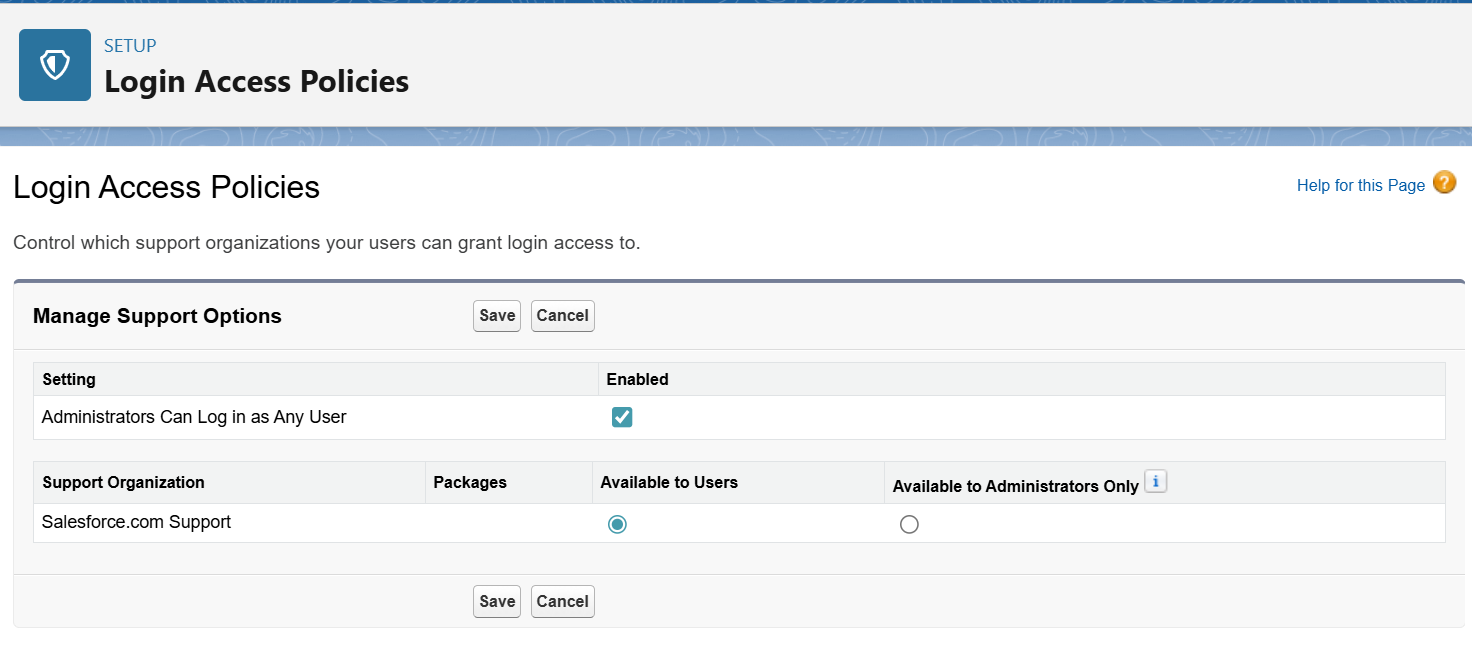
* **Description:** The Student\_Access Permission Set is **assigned to the Student user** to provide additional privileges beyond the Standard User profile. This ensures flexibility without needing multiple custom profiles.  
    
  

**11. OWD (Organization-Wide Defaults)**

* **Description:** OWD defines the **baseline security model** for data.
  + Student & Application → Private (students only see their own)
  + Company & Internship → Public Read Only (all can view, only owners/editors can modify)
  + Feedback → Private (only creator and Placement Officer can view)  
    This ensures data confidentiality and compliance with role hierarchy.  
      
    

**13. Login Access Policies**

* **Description:** Enabling login access policies allows **admins to log in as any user** (Placement Officer, HR, or Student) for testing. This is crucial for validating role-based permissions and debugging issues.

  
  
  
  
  
 **Phase 2 – Procedure Document**

**Smart Internship & Placement Management System (Salesforce Project)**

**1. Company Profile**

**Path:** Setup → Company Information → Edit  
**Steps:**

1. From Setup, search for **Company Information**.
2. Click **Edit**.
3. Fill in the fields:
   * Organization Name: Smart Internship & Placement Management System
   * Primary Contact:
   * Default Locale: English (India)
   * Currency: INR
   * Time Zone: IST (GMT+5:30)
   * Fiscal Year: Standard (Jan–Dec)
4. Click **Save**.  
   **Expected Output:** Organization details updated with project information.

**2. Business Hours**

**Path:** Setup → Business Hours → New  
**Steps:**

1. Search for **Business Hours** in Setup.
2. Click **New Business Hours**.
3. Enter:
   * Name: Internship Business Hours
   * Default: Checked
   * Time Zone: IST (GMT+5:30)
   * Working Days: Mon–Sat (9:00 AM – 6:00 PM)
   * Sun: Closed
4. Click **Save**.  
   **Expected Output:** Business Hours defined.

**3. Holidays (Optional)**

**Path:** Setup → Holidays → New  
**Steps:**

1. Search for **Holidays** in Setup.
2. Click **New Holiday**.
3. Enter:
   * Name: National Holiday
   * Date: 15-Aug-2025
4. Click **Save**.  
   **Expected Output:** Holiday added to calendar.

**4. Create Users**

**Path:** Setup → Users → New User

**Placement Officer**

* First Name: Placement
* Last Name: Officer
* Username: [placement.officer@test.com](mailto:placement.officer@test.com)
* Role: Placement Officer (will create in Step 7)
* Profile: Placement Officer Profile (custom, cloned from Standard User – not System Admin)

**Company HR**

* First Name: Company
* Last Name: HR
* Username: [company.hr@test.com](mailto:company.hr@test.com)
* Role: Company HR
* Profile: HR Profile (custom, cloned from Standard User)

**Student**

* First Name: Test
* Last Name: Student
* Username: [student.user@test.com](mailto:student.user@test.com)
* Role: Student
* Profile: Student (Standard User)

**Expected Output:** Three users created.

**5. Create Roles**

**Path:** Setup → Roles → Set Up Roles → Add Role  
**Steps:**

1. From Setup, go to **Roles**.
2. Click **Set Up Roles**.
3. Add roles:
   * Placement Officer (Top Role)
   * Company HR (Parent = Placement Officer)
   * Student (Parent = Company HR)
4. Save hierarchy.  
   **Expected Output:** Role hierarchy created (Placement Officer → HR → Student).

**6. Profiles**

**Path:** Setup → Profiles

* Student → Standard User (default)
* HR → Clone Standard User → Name it HR Profile
* Placement Officer → Clone Standard User → Name it Placement Officer Profile

**Object Permissions Setup (in Profile → Object Settings):**

| **Object** | **Student** | **HR** | **Placement Officer** |
| --- | --- | --- | --- |
| Student | Read | Read | Read/Edit |
| Company | Read | Read/Edit | Read/Edit |
| Internship | Read | Read/Edit | Read/Edit |
| Application | Read/Edit | Read | Read/Edit |
| Feedback | Read | Read/Edit | Read/Edit |

**Expected Output:** Access controlled through profiles.

**7. Permission Set**

**Path:** Setup → Permission Sets → New  
**Steps:**

1. Click **New Permission Set**.
2. Enter:
   * Label: Student\_Access
   * License: Leave default
3. Save.
4. Under **Object Settings**, set permissions:
   * Application → Read/Write
   * Feedback → Read/Write
   * Internship → Read
   * Company → Read
   * Student → Read/Edit (Own records)

**Expected Output:** Student\_Access permission set created.

**8. Assign Permission Set**

**Path:** Setup → Permission Sets → Manage Assignments  
**Steps:**

1. Open Student\_Access permission set.
2. Click **Manage Assignments** → Add Assignment.
3. Select Student User → Save.  
   **Expected Output:** Student has extra access.

**9. OWD (Organization-Wide Defaults)**

**Path:** Setup → Sharing Settings → Edit Defaults  
**Steps:**

1. Go to **Sharing Settings**.
2. Set defaults:
   * Student: Private
   * Application: Private
   * Company: Public Read Only
   * Internship: Public Read Only
   * Feedback: Private
3. Save.  
   **Expected Output:** OWD configured.

**10. Sharing Rule (Optional)**

**Path:** Setup → Sharing Settings → Application → New Rule  
**Steps:**

1. Go to **Sharing Settings**.
2. Under Application Sharing Rules, click **New**.
3. Fill in:
   * Rule Name: Share Applications with HR
   * Criteria: Internship.Company = HR’s Company
   * Share With: Role = Company HR
   * Access Level: Read/Write
4. Save.  
   **Expected Output:** HR can view and edit applications from their company.

**11. Login Access Policies**

**Path:** Setup → Login Access Policies  
**Steps:**

1. Search for **Login Access Policies** in Setup.
2. Check: Administrators can log in as any user.
3. Save.  
   **Expected Output:** Admin can test system as Student/HR users.

**Final Deliverables**

* Company Information, Business Hours, Roles, Profiles, Permission Sets, and OWD are all configured.
* Placement Officer has a custom profile (not System Admin).
* Data security is enforced via OWD and Sharing Rules.
* Students have additional access via Permission Set.