**Project Documentation**

***Skill Development & Employment Portal for Rural Youth on Salesforce***

**Phase 1: Problem Understanding & Industry Analysis**

**Project Title:**

Skill Development & Employment Portal for Rural Youth on Salesforce

**Industry:**

Education & Employment (Social Impact)

**Project Type:**

B2C & B2B Salesforce CRM Implementation

**Target Users:**

* Rural Youth (job seekers & students)
* Training Institutes / NGOs
* Employers (Companies, SMEs)
* Government Agencies

**1.Problem Statement**

* Rural youth often lack access to skill development opportunities and structured pathways to employment.
* Traditional methods (offline job fairs, manual tracking) are slow, fragmented, and ineffective in connecting skilled youth with potential employers.

The company/NGO wants to implement a Salesforce CRM system that:

* Automates candidate registration and skill tracking
* Enables employers to post jobs and shortlist candidates
* Provides real-time dashboards for NGOs/Government monitoring
* Sends alerts (SMS/Email) for interviews, jobs, and training updates

**Proposed Solution:**

A "Skill Development & Employment Portal for Rural Youth" built on Salesforce CRM that:

* Connects rural youth with training programs and job opportunities.
* Provides real-time tracking of skill progress, certifications, and placements.
* Bridges the gap between training institutes, NGOs, industries, and job seekers.
* Uses Salesforce automation, analytics, and AI features to optimize the process.

**2. Requirement Gathering**

* Identify pain points of rural youth (lack of exposure, mentorship, placement channels).
* Identify needs of industries (skilled candidates, verified certifications, easy onboarding).
* Identify NGO/training providers' needs (student progress monitoring, fund reporting).
* Requirements from government bodies (impact reports, placement data).

**3. Stakeholder Analysis**

**Primary Stakeholders**: Rural Youth (job seekers), Employers (industries, companies).

**Secondary Stakeholders**: NGOs, Training Institutes, Skill Development Agencies.

**Tertiary Stakeholders:** Government agencies, Placement officers, Salesforce admins.

**Stakeholders =>**

* Rural Youth → Candidates
* Employers → Job Providers
* Training Institutes / NGOs → Trainers & Program Managers
* Government Agencies → Regulators/Funders
* System Admins & Developers → Technical Setup

**4. Business Process Mapping**

Current Scenario (Without Salesforce):

* Manual registration through physical forms.
* Limited or no digital skill progress tracking.
* Difficult placement coordination.

Proposed Future (With Salesforce):

* Online registration of candidates through Salesforce Community portals.
* Automated matching of skills with employer requirements.
* Real-time dashboards for tracking training completion and job placements.
* Automated email/SMS notifications for interviews, job fairs, and results.

**5. Industry-specific Use Case Analysis**

* Lead Management – Capture candidate details from portal/social media
* Skill Tracking – Manage training courses and certifications
* Employer Job Posting – Employers post job requirements
* Interview Scheduling – Schedule & notify candidates
* Placement Tracking – Update deal status once candidate is hired
* Reporting – Dashboards for job placements, skill program success

**6. AppExchange Exploration**

Potential Salesforce AppExchange solutions to leverage:

* Learning Management Apps (LMS) → To deliver training modules.
* Job Board / Recruitment Apps → For candidate-employer matching.
* Survey Apps → To collect feedback from candidates and employers.
* Analytics & Dashboards Apps → For visualizing employment outcomes.

**✅ Phase 1 Deliverable**

*By the end of Phase 1, we have:*

* A clear problem definition.
* Identified stakeholders and their needs.
* Business process mapping (current vs future).
* Industry-specific use cases.
* Possible AppExchange solutions to explore.
* This lays the foundation for moving to Phase 2: Solution Architecture & Salesforce Org Setup.

**Phase 2: Org Setup & Configuration**

👉 **Goal:** Prepare the Salesforce environment to support the Skill Development & Employment Portal.

**1.Salesforce Editions**

* **Edition Used:** Salesforce **Developer Edition (Dev Org)** – free, full-featured org for testing and configuration.
* Rationale: Suitable for project prototyping, customizations, and testing before moving into production.

**2. Company Profile Setup**

* **Company Name:** *Skill Development & Employment Portal*
* **Default Locale:** English (India)
* **Currency:** Indian Rupee (INR) – primary, with USD enabled for external partners.
* **Default Time Zone:** Asia/Kolkata (IST).
* **Business Address:** NGO/Company HQ address (configurable).

**3. Business Hours & Holidays**

**Standard Business Hours:**

* 9:00 AM – 6:00 PM IST (Monday–Saturday).

**Holidays Configured:**

* Republic Day (26 Jan)
* Independence Day (15 Aug)
* Gandhi Jayanti (2 Oct)
* Diwali & Local Holidays

Purpose: Ensures **cases, approvals, and escalations** respect real business days and timings.

**4. Fiscal Year Settings**

**Type:** Standard Fiscal Year (Jan–Dec).

**Reason:** Government/NGO funding and employment reporting align better with calendar years.

Future: Custom fiscal year can be enabled if required by funding agencies.

**5. User Setup & Licenses**

**User Types Configured:**

**Rural Youth (Community Users):** External users with limited portal access.

**Employers (Community Users):** Can post jobs, shortlist candidates.

**NGO/Training Staff (Internal Users):** Manage candidates, training modules.

**Government Officers (Partner/Community Users):** Can monitor dashboards and placement reports.

**System Admins (Internal):** Manage overall Salesforce Org.

**Licenses Assigned:**

* Salesforce Platform License (for staff/NGOs).
* Community/Experience Cloud License (for Rural Youth & Employers).
* Salesforce Admin License (for developers/admins).

**6. Profiles**

* **Candidate Profile:** Limited access (view personal records, apply to jobs, track training).
* **Employer Profile:** Can post jobs, view candidate applications.
* **NGO/Trainer Profile:** Manage courses, update progress & certifications.
* **Government Profile:** Read-only dashboards & reports.
* **System Administrator:** Full org access.

**7. Roles**

**Hierarchy Setup:**

* **System Admin** (Top).
* **Government Agencies** (Regulatory access).
* **NGO / Training Managers** (manage batches, track skills).
* **Employers** (job providers).
* **Rural Youth** (candidates/job seekers).

📌 Ensures **role hierarchy visibility** (e.g., NGO Manager can see all trainee data, but trainees see only their own).

**8. Permission Sets**

**Additional Access via Permission Sets:**

* *Reporting Access*: For NGO staff to create/modify reports.
* *Analytics Access*: For Government officers to view dashboards.
* *Job Posting Access*: For Employers to manage job-related records.
* *Training Access*: For Trainers to upload and manage learning content.

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

* **Candidate Data (Contact/Custom Object):** Private – only candidate + admins see.
* **Job Postings:** Public Read/Write for Employers + NGOs.
* **Training Records:** Controlled by Parent (linked to Candidate).
* **Placement Records:** Private – visible only to assigned employer + NGO.

**10. Sharing Rules**

* Employers can view candidates who applied for their jobs.
* NGOs can access trainee records in their program.
* Government agencies get **Read-Only access** to all placement data for monitoring.

**11. Login Access Policies**

* Restrict candidate/employer logins to **6 AM – 10 PM IST**.
* Enforce **IP restrictions** for NGO staff and admins (office IP ranges).
* Enable **2FA (Two-Factor Authentication)** for system admins.

**12. Dev Org Setup**

* Created **free Salesforce Developer Org** as baseline.
* Enabled **Experience Cloud (Community)** for portal access.
* Installed required managed packages (LMS/Job Board).

**13. Sandbox Usage**

* Since this is a prototype phase, **Developer Sandbox** will be used for testing.
* If deployed at production scale:
* **Full Sandbox** for UAT.
* **Partial Sandbox** for training data testing.

**14. Deployment Basics**

* Configurations and custom objects built in **Dev Org/Sandbox**.
* Deployment to Production via **Change Sets** (profiles, roles, flows, objects).
* Version control with GitHub (for Apex classes, Lightning components).

[System Admin]

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[Govt] [NGO] [Employer] [Rural Youth]

(Read) (Manage) (Post Jobs) (Apply/Track)

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| Profiles & Permission Sets | OWD | Sharing Rules |

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[Dev Org] → [Sandbox] → [Production]

✅ **Phase 2 Deliverable:**

By the end of Phase 2, we have:

* Configured **company setup, users, profiles, roles, and OWDs**.
* Enabled **Experience Cloud portals** for candidates and employers.
* Setup **security, login policies, and sharing models**.
* Prepared **sandbox & deployment plan**.