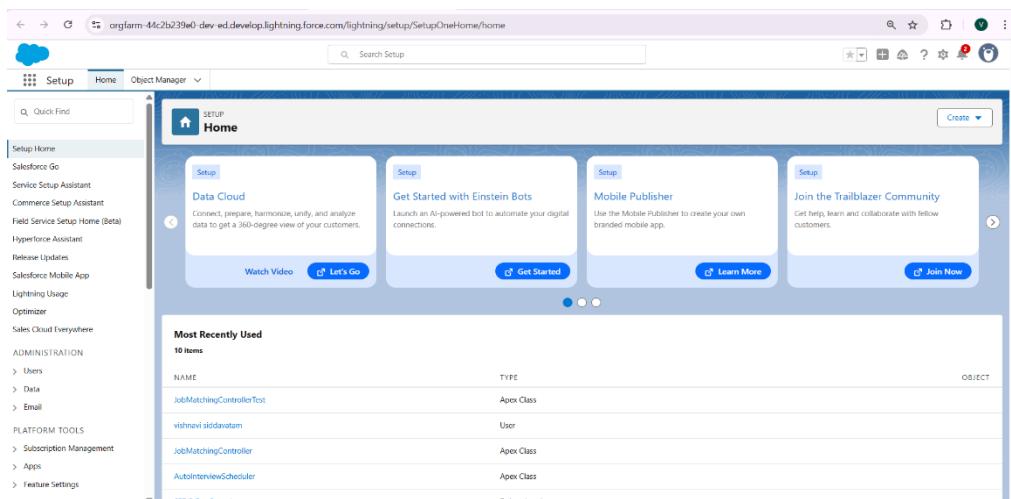


Phase 2: Org Setup & Configuration

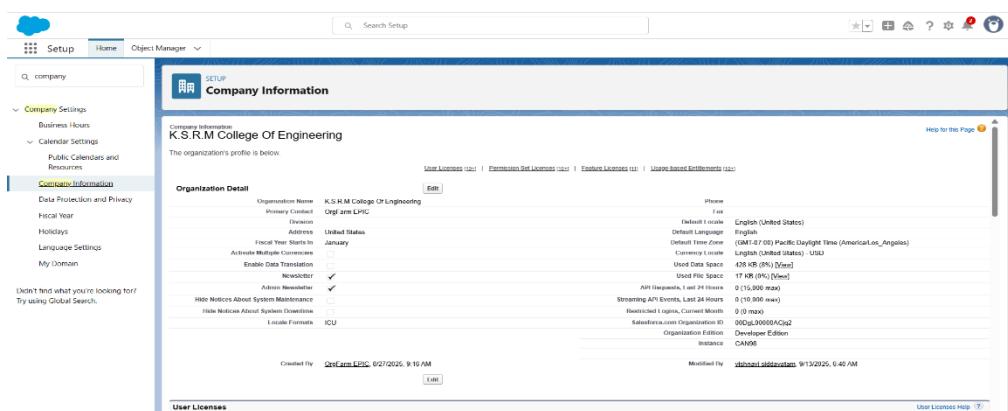
Step 1: Open Setup

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:** KSRM College of Engineering
 - **Default Time Zone:** (09:00 – 18:00)
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
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
Employer	employer@sandbox.my.salesforce.com	Standard User	Employer
NGO Admin	ngo@sandbox.my.salesforce.com	Standard User	NGO Manager

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

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 View](#)

<input type="checkbox"/> Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Admin NGO	nadmi	vishnav2009@gmail.com		<input checked="" type="checkbox"/>	System Administrator
Edit	Chatter Expert	Chatter	chatty_006@00000ac10uadfvcbodylec@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit	Coordinator_Youth	ysoot	vishnav2007@gmail.com		<input checked="" type="checkbox"/>	System Administrator
Edit	Login_OrgFarm	OEPIC	sec.e06d900556d@orgfarm.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
Edit	Mikaelson_Daniel	dmika	vishnav2005@gmail.com	Marketing	<input type="checkbox"/>	Platform 1
Edit	Mikaelson_Kol	kmika	vishnav2004@gmail.com	Inventory	<input type="checkbox"/>	Platform 1
Edit	Mikaelson_Niklaus	nmika	vishnav2003@gmail.com	Sales	<input type="checkbox"/>	Platform 1
Edit	siddhivam_vishnavi	vi	vishnav709955@salesforce.com		<input checked="" type="checkbox"/>	System Administrator
Edit	User_Employer	user	vishnav2008@gmail.com		<input checked="" type="checkbox"/>	System Administrator
Edit	User_Integration	Integ	integration@006d90000ac10uadfvcbodylec@uad.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User_Security	sec	lightningsecurity@006d90000ac10uadfvcbodylec@uad.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Show me [fewer](#) records per list page

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

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.**

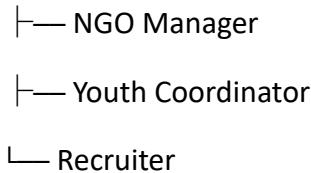
Youth Field-Level Security for profile Standard User

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

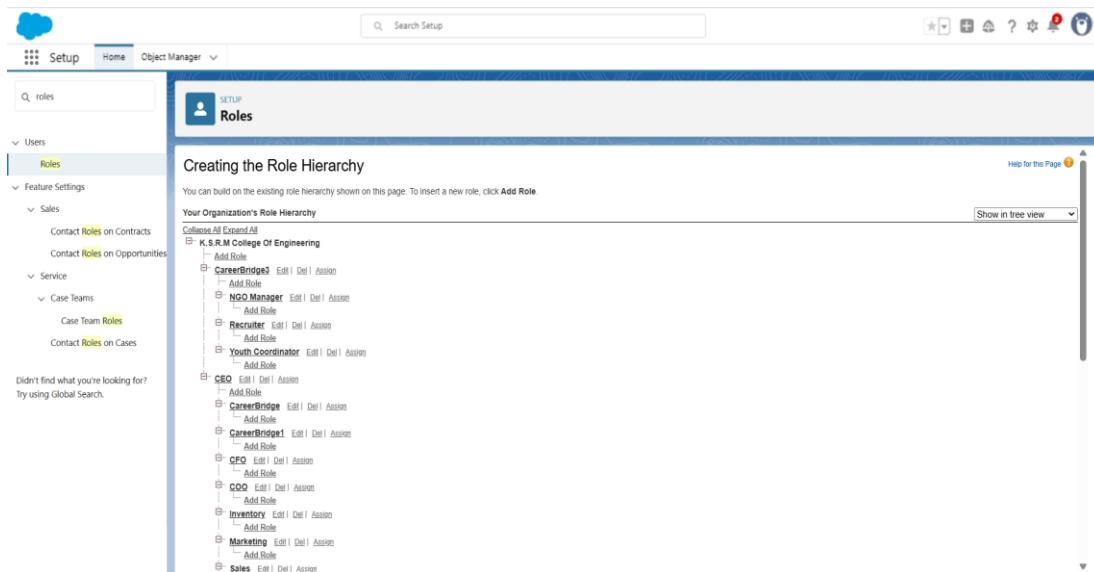
Step 7: Create Role Hierarchy

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

CareerBridge



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

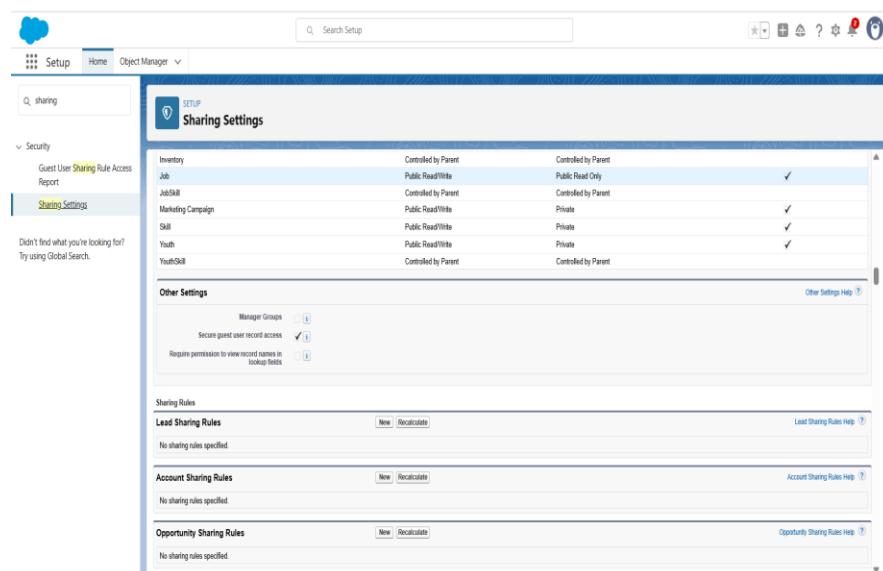
Youth__c Private

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.
