

Phase 2: Org Setup & Configuration

Recruitment Management System (HR CRM)

1. Salesforce Edition & Org Setup

- ❖ **Salesforce Edition:** Salesforce Developer Edition (suitable for prototyping & testing).
- ❖ **Dev Org Setup:** Created a dedicated Developer Org for Recruitment CRM project.

2. Company Profile Setup

- ❖ **Company Name:** Recruitment Management CRM
- ❖ **Default Currency:** INR
- ❖ **Default Time Zone:** (GMT+05:30) India Standard Time
- ❖ **Language:** English (India)

The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Salesforce logo, a search bar labeled "Search Setup", and several utility icons. Below the navigation bar, the "Setup" menu is open, showing options like "Home" and "Object Manager". The left sidebar contains a search bar and a list of setup categories, with "Company Information" selected. The main content area displays the "Company Information" setup page. It includes a header with the "SETUP" icon and the title "Company Information". Below this, there's a section for "Edit Organization Profile" with the name "Recruitment Management CRM". A note states: "Use the form below to edit your organization profile." The form is divided into sections: "Organization Edit", "General Information", "Address", and "Locale Settings". The "General Information" section contains fields for "Organization Name" (filled with "Recruitment Management CRM"), "Primary Contact" (filled with "Apurva"), "Division", "Phone", and "Fax". The "Address" section contains fields for "Country" (filled with "United States"), "Street", "City", "State/Province" (filled with "--None--"), and "Zip/Postal Code". The "Locale Settings" section is partially visible at the bottom.

Setup

Search Setup

Company Information

Edit Organization Profile

Recruitment Management CRM

Use the form below to edit your organization profile.

Organization Edit

General Information

Organization Name: Recruitment Management CRM

Primary Contact: Apurva

Division:

Phone:

Fax:

Address

Country: United States

Street:

City:

State/Province: --None--

Zip/Postal Code:

Locale Settings

3. Business Hours & Holidays

❖ Working Hours: 9 AM – 6 PM (Mon–Fri)

The screenshot shows the 'Organization Business Hours' configuration page. The left sidebar contains a 'Setup' menu with options like 'Company Settings', 'Calendar Settings', 'Company Information', 'Data Protection and Privacy', 'Fiscal Year', 'Holidays', 'Language Settings', and 'My Domain'. The main content area is titled 'Organization Business Hours' and includes a description: '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.' Below this is a 'Business Hours Detail' table with columns for 'Business Hours Name', 'Recruitment Business Hours', and 'Time Zone'. The table shows a default business hour of 9:00 AM to 6:00 PM for Monday through Friday, and 24 hours for Sunday and Saturday. The 'Active' checkbox is checked. The 'Created By' field shows 'Apurva Rajput' and the 'Last Modified By' field also shows 'Apurva Rajput'. There is an 'Add/Remove' button at the bottom of the table.

Business Hours Name	Recruitment Business Hours	Time Zone
Business Hours	Sunday 24 Hours Monday 9:00 AM to 6:00 PM Tuesday 9:00 AM to 6:00 PM Wednesday 9:00 AM to 6:00 PM Thursday 9:00 AM to 6:00 PM Friday 9:00 AM to 6:00 PM Saturday 24 Hours	Default Business Hours (GMT+05:30) India Standard Time (Asia/Kolkata)

❖ Holidays Configured: Sundays (non-working), National holidays (Republic Day, Independence Day etc.)

The screenshot shows the 'Holiday Detail' configuration page. The left sidebar is the same as the previous screenshot. The main content area is titled 'Holiday Detail' and includes a description: 'Holidays are dates and times at which business hours are suspended. These dates and times, when associated with business hours, also suspend any escalation rules associated with business hours. Add or remove business hours to holidays to suspend business hours and escalation rules during the holidays.' Below this is a 'Holiday Detail' table with columns for 'Holiday Name', 'Description', 'Date and Time', 'Recurring Holiday', and 'Created By'. The table shows a holiday named 'Sunday' with a description 'Sunday is off' and a date '9/21/2025 All Day'. The 'Recurring Holiday' field shows 'Occurs every 1 week(s) on Sunday effective 9/21/2025'. The 'Created By' field shows 'Apurva Rajput' and the 'Last Modified By' field also shows 'Apurva Rajput'. There are 'Edit' and 'Delete' buttons for the holiday. Below the table is a 'Business Hours' section with an 'Add/Remove' button. The 'Business Hours' section shows 'No records to display'.

Holiday Name	Description	Date and Time	Recurring Holiday	Created By
Sunday	Sunday is off	9/21/2025 All Day	Occurs every 1 week(s) on Sunday effective 9/21/2025	Apurva Rajput

4. Fiscal Year Setting

❖ Select Standard Fiscal Year (Jan–Dec)

The screenshot shows the Salesforce Setup interface. On the left, the navigation menu is open, showing 'Setup' > 'Fiscal Year' under 'Company Settings'. The main content area is titled 'Organization Fiscal Year Edit: Recruitment Management CRM'. It includes a 'Fiscal Year Information' section with a warning about changing the fiscal year and a 'Change Fiscal Year Period' section. In the 'Change Fiscal Year Period' section, 'Standard Fiscal Year' is selected, and the 'Fiscal Year Start Month' is set to 'January'.

5. User Setup & Licenses

➤ Users for Recruitment CRM:

- ❖ System Admin (full access)
- ❖ HR Admin (manages all recruitment processes)
- ❖ Recruiter (manages candidates & applications)
- ❖ Hiring Manager (reviews applications, approves hires)
- ❖ Interviewer (provides interview feedback)
- ❖ Candidate Portal User (external – via Experience Cloud)

- Due to Developer Org limitation (2 active users), only Admin + Recruiter will be created. Other roles defined in hierarchy for future scope.

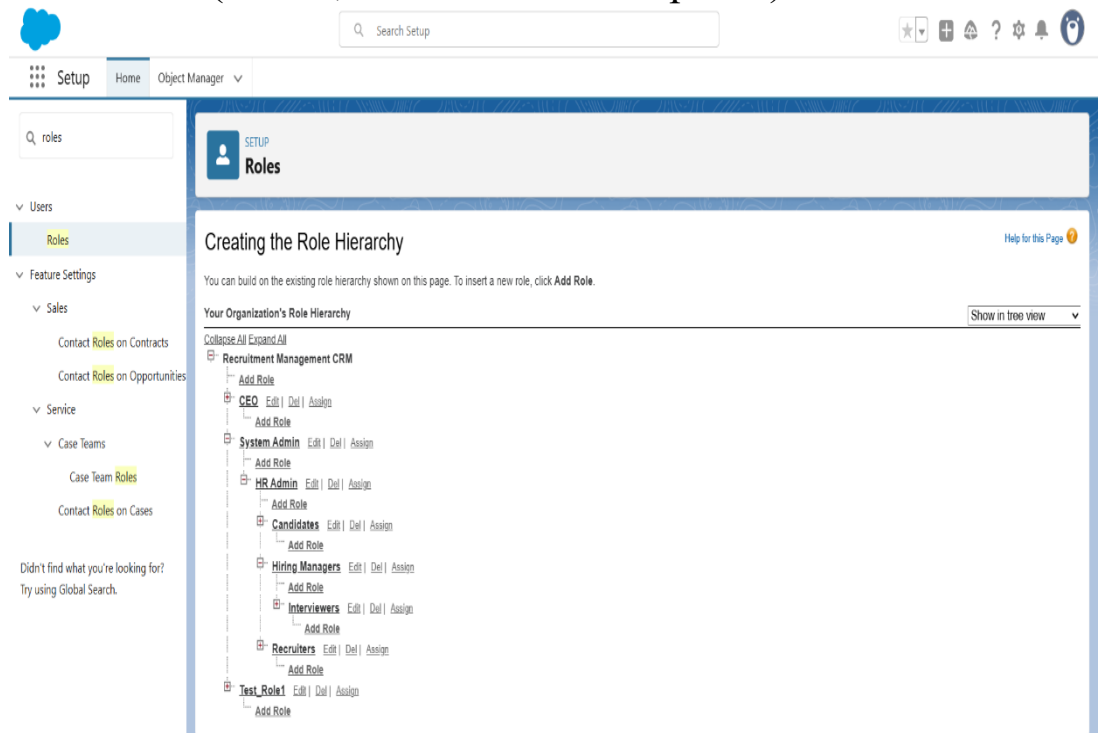
- Example (Recruiter User):

The screenshot shows the Salesforce Setup interface for creating a new user. The left navigation menu is open, showing 'Setup' > 'Users'. The main content area is titled 'User: John Recruiter'. It includes a 'User Detail' section with a table of user information. The table shows the user's name, alias, email, username, nickname, title, company, department, division, address, time zone, locale, language, and delegated approver. The user is assigned the 'SVP, Human Resources' role and the 'Salesforce System Administrator' profile. The user is active and has the 'Marketing User' checkbox checked.

User Detail	
Name	John Recruiter
Alias	jrecr
Email	john@recruitmentcrm.com [Verify]
Username	john@recruitmentcrm.com
Nickname	User17582765382743896165 [i]
Title	
Company	
Department	
Division	
Address	
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (United States)
Language	English
Delegated Approver	Manager
Role	SVP, Human Resources
User License	Salesforce
Profile	System Administrator
Active	<input checked="" type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Mobile Push Registrations	<input checked="" type="checkbox"/>
Data.com User Type	<input checked="" type="checkbox"/>
Accessibility Mode (Classic Only)	<input checked="" type="checkbox"/>

6. Profiles & Roles

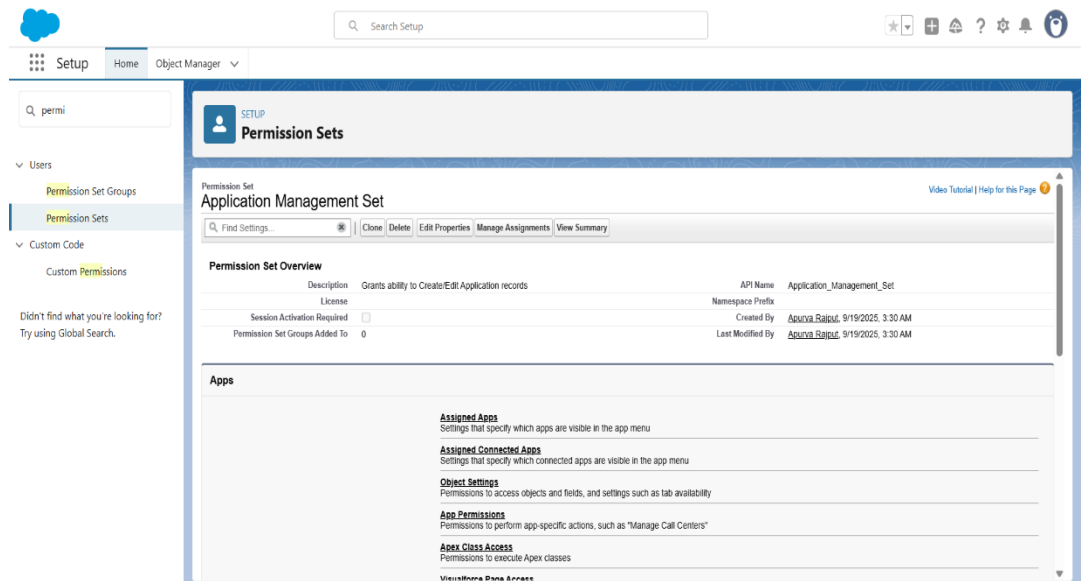
- Role Hierarchy:
 - ❖ System Admin (top)
 - ❖ HR Admin
 - ❖ Recruiters
 - ❖ Hiring Managers
 - ❖ Interviewers
 - ❖ Candidates (lowest, limited access via portal)



- Profiles:
 - ❖ HR Admin Profile
 - ❖ Recruiter Profile
 - ❖ Hiring Manager Profile
 - ❖ Interviewer Profile
 - ❖ Candidate Profile

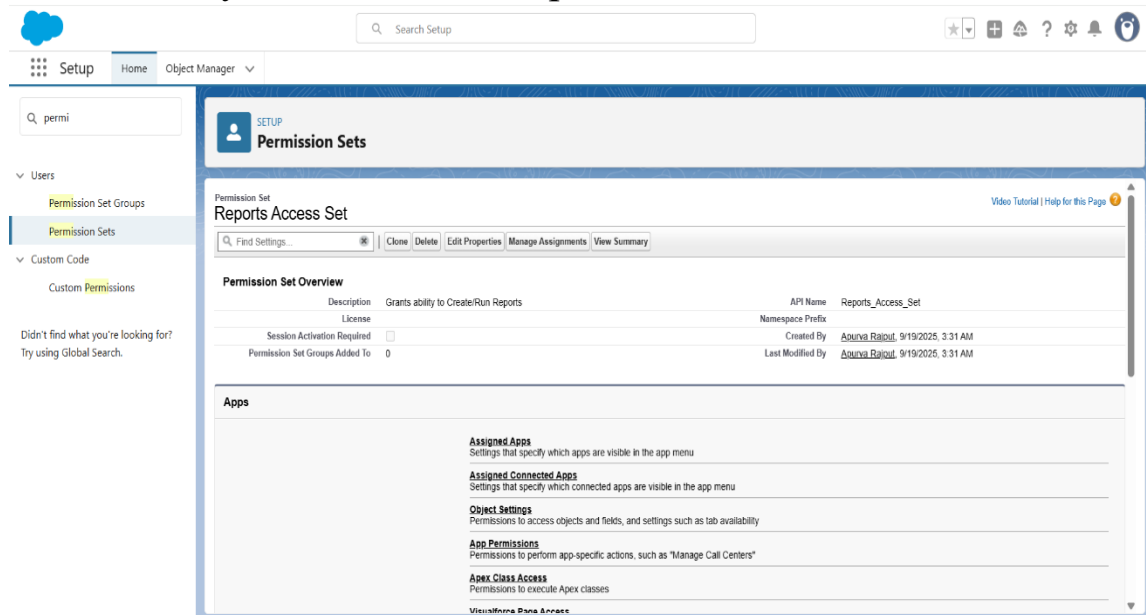
7. Permission Sets

- **Application Management Set (for Recruiters)**
 - ❖ Label: Application Management Set
 - ❖ Grants ability to Create/Edit Application records



➤ Reports Access Set (for HR Admins & Managers)

- ❖ Label: Reports Access Set
- ❖ Grants ability to Create/Run Reports



- (Objects will be created in Phase 3; these permission sets will be assigned later.)

8. Organization-Wide Defaults (OWD)

- Will be configured in **Phase 3** after objects (Job Post, Candidate, Application, Interview) are created.

9. Sharing Rules

- Will be configured in **Phase 3** after objects are created.

10.Login & Access Policies

- ❖ Enable: **Force re-login after session timeout**
- ❖ Save

11.Sandbox Usage & Deployment Basics

- ❖ Sandbox is used for testing automation and Apex before deployment.
- ❖ Deployment from Sandbox → Production will be done using Change Sets or SFDX.