

5. Manufacturing & Logistics (Tata Motors, DHL, Mahindra)

- **Challenge:** Large blue-collar workforce recruitment, distributed across multiple plants/warehouses.
- **How Smart Recruit Helps:**
 - Region-wise recruiter assignment.
 - Candidate mobile app → easy application process for workers.
 - SMS/email alerts for interview scheduling.

6. Education (Universities & EdTech like Byju's, Coursera)

- **Challenge:** Hiring large teaching/administrative staff during academic sessions.
- **How Smart Recruit Helps:**
 - Manage separate pipelines for faculty vs administrative roles.
 - Approval workflows with academic deans for faculty selection.
 - Reports on hiring time per department.

Phase 2: Org Setup & Configuration – Smart Recruiter ATS

In this phase, the Salesforce environment for the Smart Recruiter Applicant Tracking System (ATS) was prepared and configured. The objective was to establish a secure, well-structured, and scalable foundation before implementing business processes. This setup ensures that organizational details, user management, and security controls are aligned with the recruitment workflow.

Salesforce Edition

The project was developed using a **Salesforce Developer Edition Org**, which provides access to core features like Apex, automation tools, custom objects, and AppExchange apps. Although storage and user limits are restricted, this edition is suitable for proof-of-concept and academic projects.

Company Profile Setup

The company profile was configured with the following details:

- **Company Name:** Smart Recruiter
- **Default Locale:** English (India)
- **Currency:** INR
- **Time Zone:** Asia/Kolkata

This ensures that job postings, candidate data, and reports are aligned with the organization’s region and currency standards.

The screenshot shows the 'Organization Detail' page in Salesforce. The page title is 'SmartRecruiter' and it includes a 'Help for this Page' link. Below the title, it states 'The organization's profile is below.' and provides links for 'User Licenses (1/2)', 'Permission Set Licenses (1/2)', 'Feature Licenses (1/1)', and 'Usage-based Entitlements (1/2)'. The 'Organization Detail' section has 'Edit' and 'Deactivate Org' buttons. The details are organized into two columns:

Organization Detail	
Organization Name	SmartRecruiter
Primary Contact	Ishan jataw
Division	
Address	IN
Fiscal Year Starts In	January
Activate Multiple Currencies	<input type="checkbox"/>
Enable Data Translation	<input type="checkbox"/>
Newsletter	<input checked="" type="checkbox"/>
Admin Newsletter	<input checked="" type="checkbox"/>
Hide Notices About System Maintenance	<input type="checkbox"/>
Hide Notices About System Downtime	<input type="checkbox"/>
Locale Format	ICU
Phone	
Fax	
Default Locale	English (India)
Default Language	English
Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Currency Locale	English (India) - INR
Used Data Space	340 KB (7%) View
Used File Space	13 KB (0%) View
API Requests, Last 24 Hours	34 (15,000 max)
Streaming API Events, Last 24 Hours	0 (10,000 max)
Restricted Logins, Current Month	0 (0 max)
Salesforce.com Organization ID	00DWJ00000VnOdg
Organization Edition	Developer Edition

Business Hours & Holidays

Business hours were defined as **Monday to Friday, 9:00 AM – 6:00 PM**, reflecting typical HR operations. Public holidays in India were added for demonstration purposes. These settings support time-based workflows, such as escalation rules for pending approvals.

Fiscal Year Settings

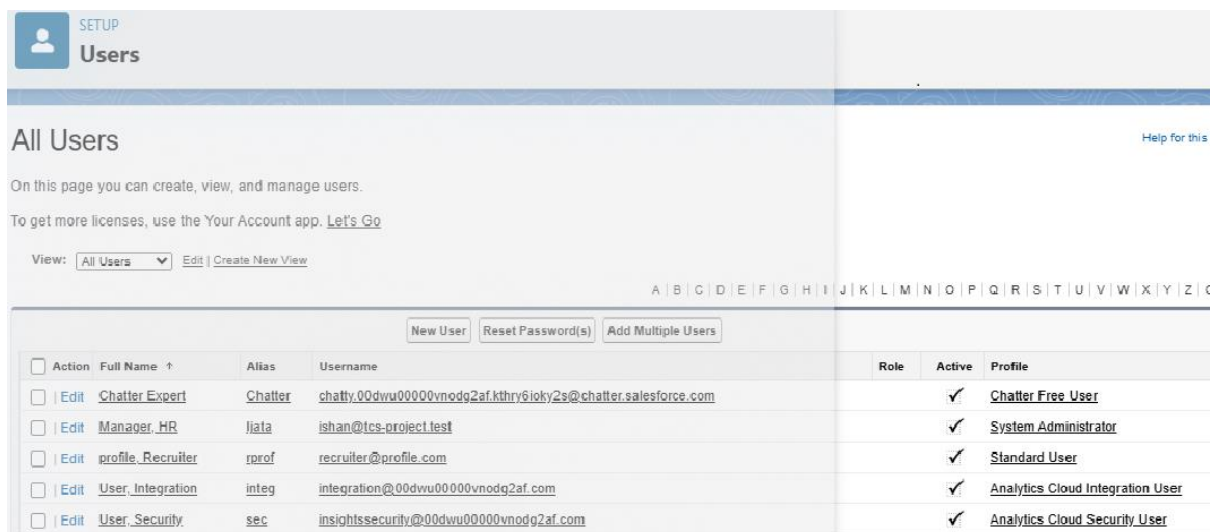
A **Standard Fiscal Year (April–March)** was enabled. This ensures that recruitment reports, such as hires per quarter or year, are synchronized with the organization’s financial reporting cycle.

User Setup & Licenses

Sample users were created to represent real-world roles:

- **HR Manager** – manages approvals and oversees recruitment.
- **Recruiter** – manages job postings and candidate applications.
- **Candidate** – applies for jobs via portals or external submission.

Each user was assigned appropriate licenses and profiles to simulate practical scenarios.



The screenshot shows the Salesforce 'Users' setup page. At the top, there's a 'SETUP Users' header. Below it, the 'All Users' section includes instructions on how to create, view, and manage users, and a link to get more licenses. A 'View: All Users' dropdown is present. Below the instructions, there's a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists five users: Chatter Expert, Manager_HR, profile_Recruiter, User_Integration, and User_Security. Each user has an 'Edit' link and a checkbox. The 'Role' column shows the assigned role for each user, and the 'Active' column has a checkmark indicating they are active. The 'Profile' column shows the assigned profile for each user.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00dwu0000vnodg2af.kthry6ioky2s@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Manager_HR	liata	ishan@tcs-project.test		✓	System Administrator
<input type="checkbox"/> Edit	profile_Recruiter	rprof	recruiter@profile.com		✓	Standard User
<input type="checkbox"/> Edit	User_Integration	integ	integration@00dwu0000vnodg2af.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00dwu0000vnodg2af.com		✓	Analytics Cloud Security User

Profiles, Roles, and Permission Sets

Profiles were customized to control access to objects and fields. Roles were defined hierarchically: **HR Director** → **HR Manager** → **Recruiter**. Permission Sets were created for granting additional privileges, such as access to reporting features. This setup ensures a balance between security and operational flexibility.

Role CFO

[Help for this Page](#)

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: SmartRecruiter » [CEO](#) » CFO

Siblings: [SVP, Sales & Marketing](#), [SVP, Customer Service & Support](#), [SVP, Human Resources](#), [COO](#)

[Users in CFO Role \[1\]](#)

Role Detail

[Edit](#) [Delete](#)

Label	CFO	Role Name	CFO
This role reports to	CEO	Role Name as displayed on reports	CFO
Modified By	HR Manager , 15/09/2025, 6:29 pm	Sharing Groups	Role, Role and Internal Subordinates
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases		

Users in CFO Role				Assign Users to Role New User		Users in CFO Role Help	
Action	Full Name	Alias	Username	Activate Windows		Active	
Edit	HR Manager	ljata	ishan@tcs-project.test	Go to Settings to activate Windows.		✓	

Role COO

[Help for this Page](#)

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: SmartRecruiter » [CEO](#) » [COO](#)

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Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases		

Users in COO Role				Assign Users to Role New User		Users in COO Role Help	
Action	Full Name	Alias	Username	Activate Windows		Active	
Edit	Recruiter profile	rprof	recruiter@profile.com	Go to Settings to activate Windows.		✓	

Organization-Wide Defaults (OWD) and Sharing Rules

- **OWD** was set as follows:
 - Job Applications and Candidate records → Private
 - Job Postings → Public Read/Write
- **Sharing Rules** were implemented to allow recruiters from specific departments to collaborate on relevant applications.

This prevents unauthorized access to sensitive candidate data while enabling teamwork among HR staff.

Note -> I will be completing the OWD setup after creating my custom objects. And will establish sharing rules as per requirements.

Login Access Policies

Login restrictions were applied by IP ranges for administrators, while recruiters were granted trusted access for remote work. These measures strengthen system security.

Developer Org Setup & Sandbox Usage

The project was built on a **Developer Org**. For enterprise-level deployment, a sandbox strategy is recommended:

- **Developer Sandbox** → for building features.
- **UAT Sandbox** → for testing by HR staff.
- **Production Org** → for live usage.

Deployment Basics

Metadata and configurations were deployed using **Change Sets** and **Salesforce DX (SFDX) with VS Code**. A GitHub repository was also used for version control and collaboration, ensuring that project changes are tracked effectively.