# Phase 2 Report: Org Setup & Configuration

## NextGen Recruit CRM – Salesforce Implementation

### Executive Summary

This report documents the completion of Phase 2 activities for the NextGen Recruit CRM Salesforce implementation. The focus of this phase was to establish the foundational organizational setup, user management, security, and sharing configuration required to support recruitment workflows. All core configuration elements have been successfully implemented to create a secure, scalable, and compliant platform foundation for the recruitment process.

### 1. Salesforce Edition Assessment

#### 1.1 Edition Selection

**Current Implementation:** Developer Edition - Rationale: Optimal for development, testing, and proof-of-concept phases - Key Benefits: - Full customization and automation capabilities - No user limits during development - Integration testing environment for APIs and candidate portals

**Production Recommendation:** Enterprise Edition - Business Justification: Supports multi-department recruitment processes and analytics - Key Features Required: - API access for integrations (email, calendar, resume parsing) - Workflow automation for candidate pipelines - Custom objects for Job, Candidate, Application, Interview, Offer - Reports & dashboards for HR metrics - Mobile access for recruiters and hiring managers

**Scalability Path:** - Start with Enterprise Edition for initial launch - Upgrade to Unlimited Edition for multi-location hiring or advanced AI analytics

### 2. Company Profile Setup

#### 2.1 Configuration Completed

* Company Information: Business name, address, contact info, legal details entered
* Logo Integration: Branded logo uploaded and optimized across Salesforce pages

**Impact:** - Professional presentation for recruiters, hiring managers, and candidates - Consistent visual identity across the portal and dashboards - Builds trust with candidates and internal stakeholders

#### 2.2 Business Context Alignment

* Supports HR compliance and candidate communication
* Enhances employer branding
* Provides legal and financial identification for employment agreements

### 3. Business Hours & Holiday Configuration

#### 3.1 Business Hours Setup

* Operating Schedule: Mon–Fri, 9 AM – 6 PM
* Time Zone: IST
* Rationale: Matches recruiter and hiring manager operational hours

**Business Impact:** - Interview scheduling and application review aligns with working hours - Automated notifications respect business timing - SLA calculations and escalation rules are accurate

#### 3.2 Holiday Configuration

* Holidays Added: New Year, Independence Day, Diwali (example)
* Impact: Automated processes pause during holidays; candidate communication managed

### 4. User Management & Licensing

#### 4.1 User Architecture

| User Type | License | Role | Purpose |
| --- | --- | --- | --- |
| System Administrator | Salesforce | Admin | Platform management, configuration |
| Recruiter | Salesforce | HR | Job posting, application management, candidate tracking |
| Hiring Manager | Salesforce | Manager | Review shortlisted candidates, provide feedback |
| Interview Panel | Salesforce | Panel | Conduct interviews, submit feedback |
| Candidate | Experience Cloud | Portal User | Apply for jobs, upload resume, track status |

**License Strategy:** - Start with minimal licenses - Scale using Permission Sets for additional access as needed

### 5. Security Framework Implementation

#### 5.1 Org-Wide Defaults (OWD)

| Object | Access Level | Notes |
| --- | --- | --- |
| Job Opening | Public Read Only | All users can view jobs |
| Application | Private | Only owner & manager can access |
| Interview | Private | Visible to assigned panel, recruiter, manager |
| Offer | Private | Restricted to HR users |

**Rationale:** Protects candidate data, ensures role-specific access, supports GDPR compliance

#### 5.2 Profile Configuration

* System Administrator: Full CRUD and admin access
* Recruiter: Job and candidate management, limited admin
* Hiring Manager: Read/Write on candidates, feedback submission
* Interview Panel: View assigned interviews, submit feedback only
* Candidate (Portal): Apply, upload resume, track status

#### 5.3 Role Hierarchy

* HR Head / Manager (Top)
  + Recruiters
  + Hiring Managers (department-specific)
  + Interview Panel

**Purpose:** Maintains visibility hierarchy, supports reporting, ensures secure record access

#### 5.4 Permission Sets

* Specialized Access:
  + Analytics & Reporting
  + Offer Letter Management
  + Integration / API Access
  + Mobile Access
* Benefit: Granular control without profile proliferation, scalable as organization grows

### 6. Sharing Rules Configuration

#### 6.1 Object-Specific Sharing

* Applications: Shared among recruiters working on the same job
* Interviews: Shared with recruiter, hiring manager, and assigned panel
* Offers: Restricted to HR team only

**Impact:** Enables collaboration while maintaining confidentiality

### 7. Login Access Policies

* IP restrictions for admin users
* Session timeout and password complexity enforced
* Two-factor authentication readiness for sensitive roles
* Login history and failed login monitoring enabled

### Conclusion

Phase 2 successfully established a robust organizational foundation for NextGen Recruit CRM:  
- Complete Salesforce org setup aligned with recruitment workflows  
- Comprehensive security framework protecting candidate and business data  
- Scalable user management supporting future growth  
- Integration-ready environment for Phase 3 development

**Next Steps:** Phase 3 will focus on custom object development, automation of business processes, and dashboard implementation.