Internal Job Application Management System CRM

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Phase 2 : Org Setup & Configuration

Batch : 4

1.Overview

Phase 2 established the core security model of the Job Application Tracker. With clearly defined roles, profiles, OWD, and sharing rules, the system now ensures confidentiality, controlled visibility, and compliance with CRM best practices.

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2. Salesforce Org Setup

- Developer Edition Org is created from Salesforce Developer Portal.
- This environment is free, safe for experimenting, and provides all features of Salesforce Platform.
- Setup menu is used for object creation, security settings, profiles, and roles.

3.Roles & Role Hierarchy

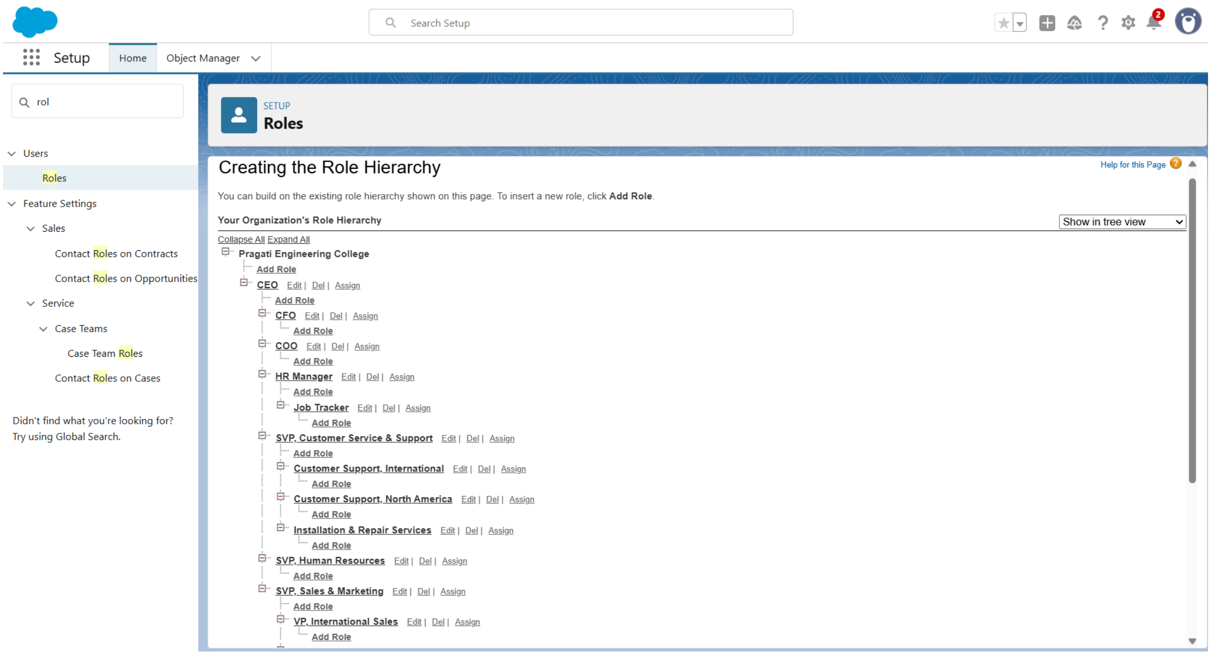
- **HR Manager (Top Role)** → Can see all Applications.
- **Job Tracker (Sub Role)** → Can see only their own Applications.

Steps to Create:

1. Setup → Quick Find → Roles → Set Up Roles.

2. Click “Add Role” → Name = **HR Manager** → Save.

3. Under HR Manager, click “Add Role” → Name = **Job Tracker** → Save



Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

Collapse All Expand All

- **Pragati Engineering College**
  - Add Role
  - **CEO** Edit | Del | Assign
    - Add Role
    - **CFO** Edit | Del | Assign
      - Add Role
    - **COO** Edit | Del | Assign
      - Add Role
    - **HR Manager** Edit | Del | Assign
      - Add Role
      - **Job Tracker** Edit | Del | Assign
        - Add Role
    - **SVP, Customer Service & Support** Edit | Del | Assign
      - Add Role
      - **Customer Support, International** Edit | Del | Assign
        - Add Role
      - **Customer Support, North America** Edit | Del | Assign
        - Add Role
      - **Installation & Repair Services** Edit | Del | Assign
        - Add Role
    - **SVP, Human Resources** Edit | Del | Assign
      - Add Role
    - **SVP, Sales & Marketing** Edit | Del | Assign
      - Add Role
      - **VP, International Sales** Edit | Del | Assign
        - Add Role

Why:

- Roles define data visibility through hierarchy.
- Higher roles automatically see records owned by lower roles.
- Roles define record visibility in Salesforce.
- HR can see and manage all applications, but Job Trackers are limited

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4. Profiles

HR Profile → Full CRUD on Application object (Create, Read, Edit, Delete).

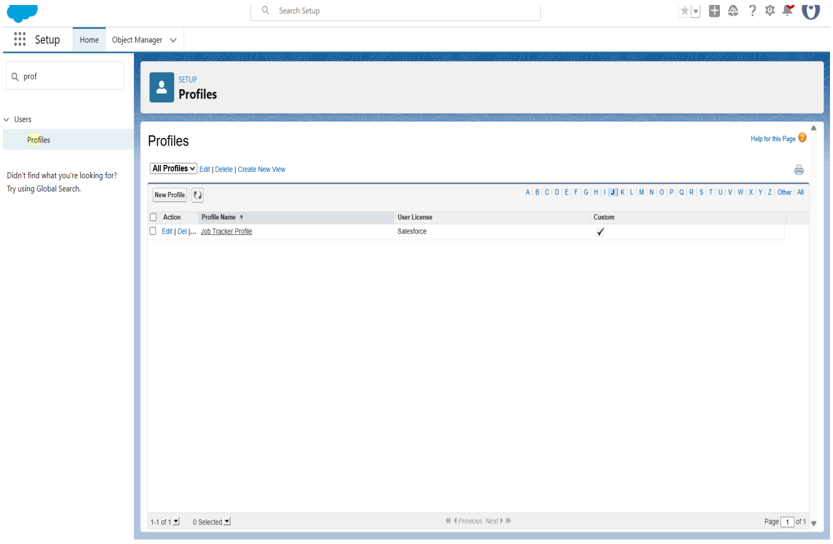
Job Tracker Profile → Limited access (Create & Read only for Application).

- **Steps to Create:**

    1. Setup → Profiles → Clone **Standard User Profile**.

2. Name it **HR Profile** → give full CRUD on Application__c.

3. Clone again → Name it **Job Tracker Profile** → give Create & Read access only


Search Setup
Setup
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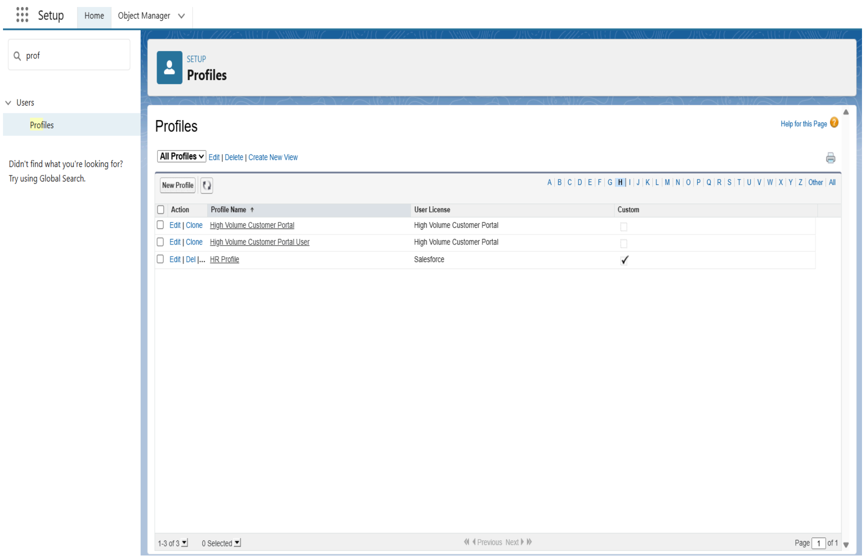
Didn't find what you're looking for?
Try using Global Search.
SETUP
Profiles
Help for this Page
All Profiles
Edit | Delete | Create New View
New Profile
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Profiles

☐ Action	Profile Name ↑	User License	Custom
☐ Edit | Del |...	Job Tracker Profile	Salesforce	✓

1-1 of 1   0 Selected   Previous Next   Page 1 of 1


Setup
Home
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Didn't find what you're looking for?
Try using Global Search.
SETUP
Profiles
Help for this Page
All Profiles
Edit | Delete | Create New View
New Profile
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Profiles

☐ Action	Profile Name ↑	User License	Custom
☐ Edit | Clone	High Volume Customer Portal	High Volume Customer Portal	☐
☐ Edit | Clone	High Volume Customer Portal User	High Volume Customer Portal	☐
☐ Edit | Del |...	HR Profile	Salesforce	✓

1-3 of 3   0 Selected   Previous Next   Page 1 of 1

Why:

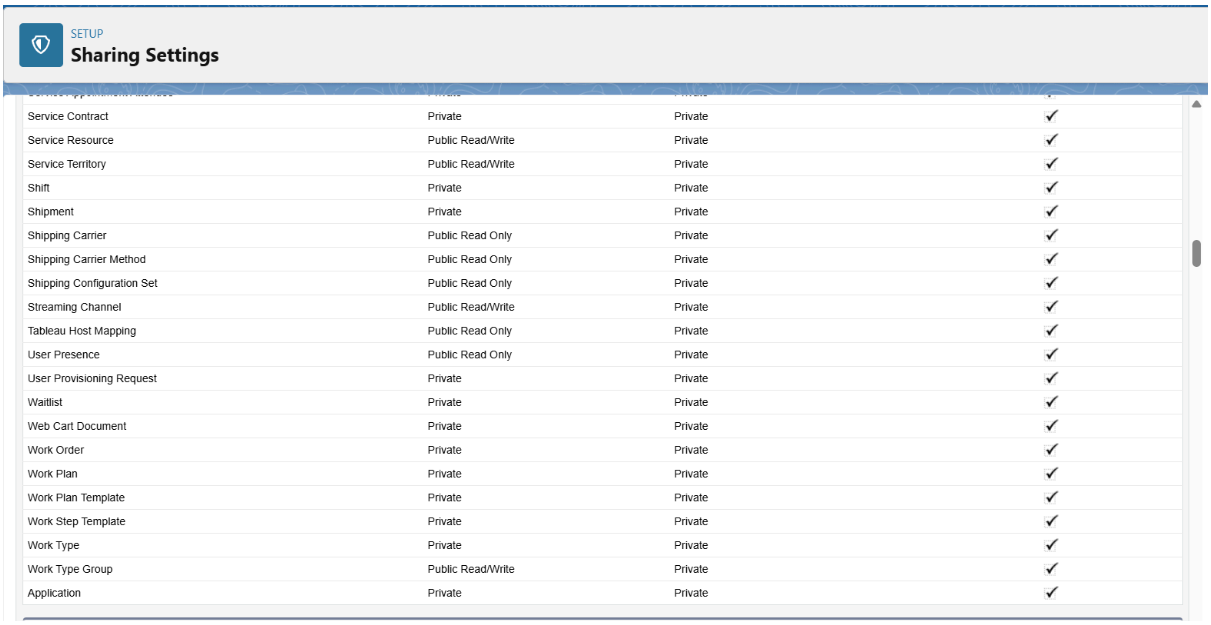
- Profiles control **object-level permissions (CRUD)**, field access, and system rights.
- To ensure HR can manage all application records, while Job Tracker has restricted permissions.
- Ensures that Job Trackers can't delete or edit sensitive data.

4. Org-Wide Defaults (OWD)

- For **Application__c**, set OWD to **Private**.
- **Steps to Configure:**

  1. Setup → Sharing Settings.

  2. Under "Organization-Wide Defaults," set **Application__c = Private**.
  3. Save.



SETUP

Sharing Settings

Service Contract	Private	Private	✓
Service Resource	Public Read/Write	Private	✓
Service Territory	Public Read/Write	Private	✓
Shift	Private	Private	✓
Shipment	Private	Private	✓
Shipping Carrier	Public Read Only	Private	✓
Shipping Carrier Method	Public Read Only	Private	✓
Shipping Configuration Set	Public Read Only	Private	✓
Streaming Channel	Public Read/Write	Private	✓
Tableau Host Mapping	Public Read Only	Private	✓
User Presence	Public Read Only	Private	✓
User Provisioning Request	Private	Private	✓
Waitlist	Private	Private	✓
Web Cart Document	Private	Private	✓
Work Order	Private	Private	✓
Work Plan	Private	Private	✓
Work Plan Template	Private	Private	✓
Work Step Template	Private	Private	✓
Work Type	Private	Private	✓
Work Type Group	Public Read/Write	Private	✓
Application	Private	Private	✓

Why:

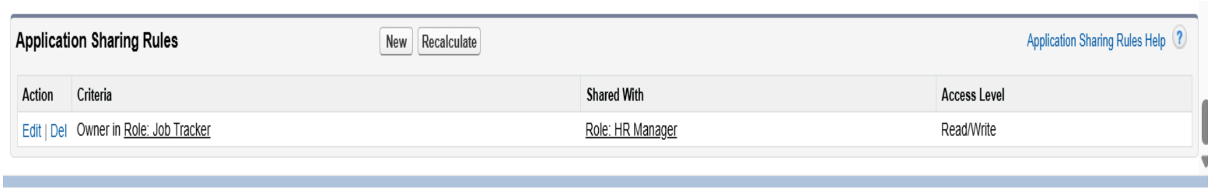
- OWD is the **baseline access level** for records.
- This means no user can see others' applications unless granted by roles or sharing rules.
- Protects candidate data from being exposed to all users.
- By default, no candidate application should be visible to others unless explicitly shared

5. Sharing Rules

- **Application__c Sharing Rule**
  - Owned by: Job Tracker
  - Shared With: HR Manager
  - Access: Read/Write.

Steps to Configure:

1. Setup → Sharing Settings → Scroll to Application Sharing Rules.
2. Click **New Rule** → Rule Type = Based on Roles.
3. Owned by = Job Tracker → Share With = HR Manager → Access = Read/Write.
4. Save.



Application Sharing Rules

Action	Criteria	Shared With	Access Level
Edit | Del	Owner in Role: Job Tracker	Role: HR Manager	Read/Write

Why:

- This ensures HR always has full visibility into candidate applications.
- Sharing Rules allow exceptions to OWD for specific roles or groups.

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6. Users Creation

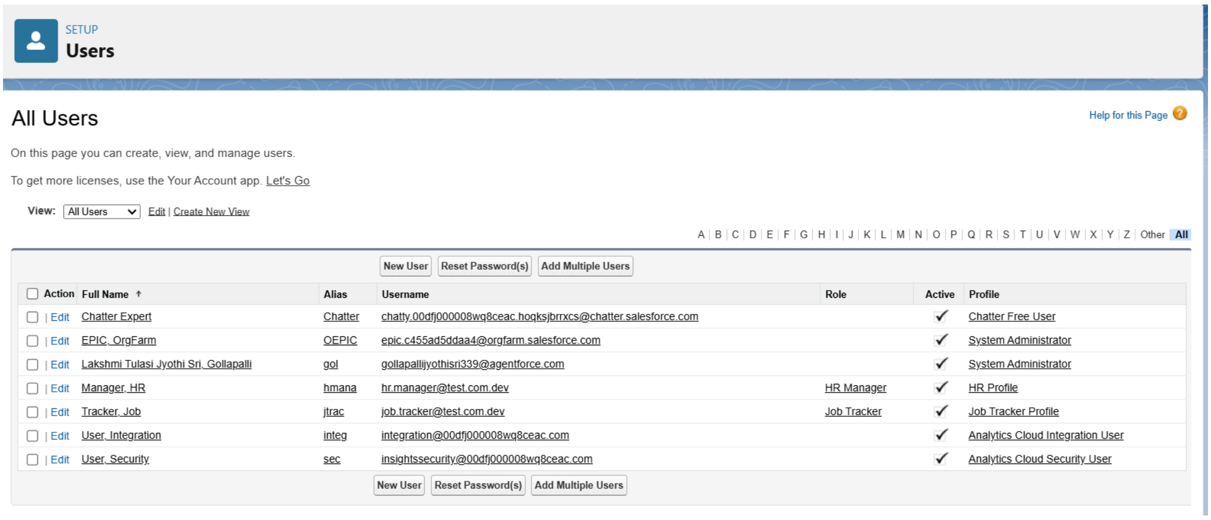
- Create **HR User** with HR Profile & HR Role.
- Create **Job Tracker User** with Job Tracker Profile & Role.

Steps to Create:

1. Setup → Users → New User.

2. HR User → Assign **HR Profile + HR Manager Role**.

3. Job Tracker User → Assign **Job Tracker Profile + Job Tracker Role**.



All Users

Help for this Page

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

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All
New User | Reset Password(s) | Add Multiple Users

□ Action	Full Name ↑	Alias	Username	Role	Active	Profile
□ | Edit	Chatter Expert	Chatter	chatty.00dfj000008wq8ceac.hoqksjbrrxcs@chatter.salesforce.com		✓	Chatter Free User
□ | Edit	EPIC, OrgFarm	OEPIC	epic.c455ad5ddaa4@orgfarm.salesforce.com		✓	System Administrator
□ | Edit	Lakshmi Tulasi Jyothi Sri, Gollapalli	gol	gollapallijyothisri339@agentforce.com		✓	System Administrator
□ | Edit	Manager, HR	hmana	hr.manager@test.com.dev	HR Manager	✓	HR Profile
□ | Edit	Tracker, Job	jtrac	job.tracker@test.com.dev	Job Tracker	✓	Job Tracker Profile
□ | Edit	User, Integration	integ	integration@00dfj000008wq8ceac.com		✓	Analytics Cloud Integration User
□ | Edit	User, Security	sec	insightssecurity@00dfj000008wq8ceac.com		✓	Analytics Cloud Security User

Why:

- Used for testing security rules and ensuring correct access.
- To simulate HR and Job Tracker roles in our project
- Users represent real people logging into Salesforce
- This allows real-time testing of record-level access.

Phase 2 Outcome

We now have a **secure Salesforce org foundation**:

- **Roles** establish visibility hierarchy.

- **Profiles** control CRUD permissions.

- **OWD + Sharing Rules** secure application data.

- **Test Users** validate real-world scenarios.

This ensures confidentiality and prepares the system for automation in **Phase 3**.