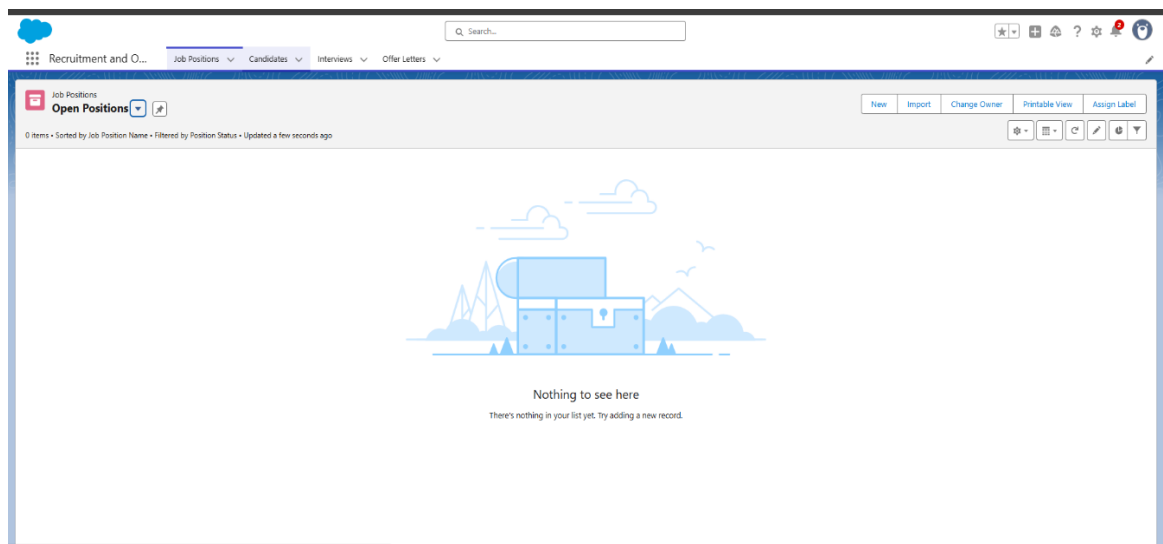


Phase 2 – Org Setup & Configuration (Recruitment & Onboarding)

1.Environment and App (Edition & org)

- **Edition:** Developer Edition.
- **App:** Recruitment & Onboarding workspace with tabs for Job Positions, Candidates, Interviews, Offer Letters.



2. Users/roles:

Users

- **HR Manager (HR Head)** (active login)
- **Recruiter** (active login)
- **Interviewer** (active login)

3.Profiles and Permission Sets :

Profile strategy: Keep the profiles basic, and give extra permissions through permission sets (HR Manager PS, Recruiter PS, Interviewer PS)

Mapping: **HR Manager PS:** Full access to recruiting objects.

Recruiter PS: Create/edit Candidates, Interviews, Offer Letters.

Interviewer PS: Read Interviews, limited fields.

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'permission sets' and a list of items including 'Users' and 'Permission Sets'. The main content area is titled 'Permission Sets' and includes a sub-header 'On this page you can create, view, and manage permission sets.' Below this is a table with one entry: 'HR Manager PS'. The table has columns for 'Action', 'Permission Set Name', and 'Description'. The 'Action' column contains a checkbox and a link 'Del | Clone'. The 'Permission Set Name' column contains 'HR Manager PS'.

Action	Permission Set Name	Description
<input type="checkbox"/> Del Clone	HR Manager PS	

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'permission sets' and a list of items including 'Users' and 'Permission Sets'. The main content area is titled 'Permission Sets' and includes a sub-header 'On this page you can create, view, and manage permission sets.' Below this is a table with two entries: 'RPAC2CPermSet' and 'Recruiter PS'. The 'Recruiter PS' entry is highlighted in yellow. The table has columns for 'Action', 'Permission Set Name', and 'Description'. The 'Action' column contains a checkbox and a link 'Del | Clone'. The 'Permission Set Name' column contains 'RPAC2CPermSet' and 'Recruiter PS'.

Action	Permission Set Name	Description
<input type="checkbox"/> Clone	RPAC2CPermSet	
<input type="checkbox"/> Del Clone	Recruiter PS	

Setup

Home

Object Manager

Q permission sets

Users

Permission Sets

Didn't find what you're looking for?

Try using Global Search.

SETUP

Permission Sets

Permission Sets

On this page you can create, view, and manage permission sets.

All Permission Sets

Edit | Delete | Create New View

New

Action	Permission Set Name
<div>Del</div> <div>Clone</div>	Interviewer PS

4. Security:

Org-Wide Defaults (OWD):

Candidate = Private

Job Position = Public Read Only

Others at least-privilege defaults

Setup

Home

Object Manager

Q sharing

Security

Guest User Sharing Rule Access Report

Sharing Settings

Didn't find what you're looking for?

Try using Global Search.

SETUP

Sharing Settings

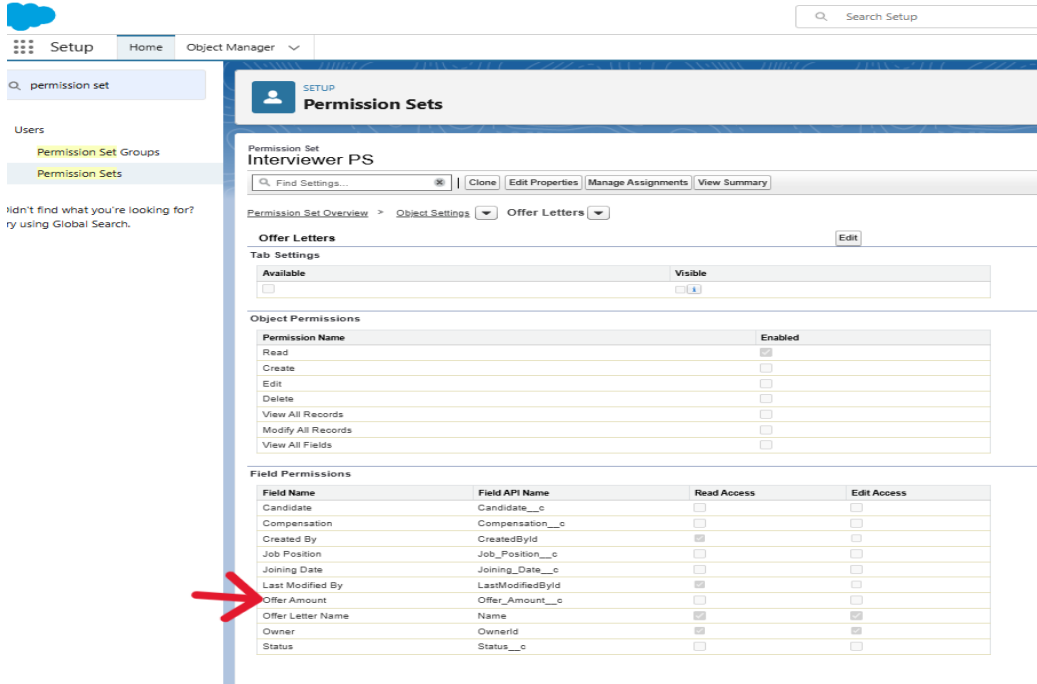
Service Contract	Private	Private	✓
Service Resource	Public ReadWrite	Private	✓
Service Territory	Public ReadWrite	Private	✓
Shift	Private	Private	✓
Shipment	Private	Private	✓
Shipping Carrier	Public Read Only	Private	✓
Shipping Carrier Method	Public Read Only	Private	✓
Shipping Configuration Set	Public Read Only	Private	✓
Streaming Channel	Public ReadWrite	Private	✓
Tableau Host Mapping	Public Read Only	Private	✓
User Presence	Public Read Only	Private	✓
User Provisioning Request	Private	Private	✓
Walllist	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 ReadWrite	Private	✓
Candidate	Private	Private	✓
Interview	Private	Private	✓
Job Position	Public Read Only	Private	✓
Offer Letter	Private	Private	✓

Other Settings

Field-Level Security (FLS):

Compensation/Offer Amount hidden for Interviewer

Visible for HR/Recruiter



The screenshot shows the 'Interviewer PS' configuration page in Salesforce Setup. The left sidebar contains a search bar with 'permission set' and a list of links: 'Users', 'Permission Set Groups', and 'Permission Sets'. The main content area is titled 'Permission Sets' and shows the configuration for 'Interviewer PS'. The 'Offer Letters' tab is selected, and the 'Available' checkbox is checked. The 'Object Permissions' table shows that 'Read', 'Create', 'Edit', 'Delete', 'View All Records', 'Modify All Records', and 'View All Fields' are all enabled. The 'Field Permissions' table shows that 'Candidate', 'Compensation', 'Created By', 'Job Position', 'Joining Date', 'Last Modified By', 'Offer Amount', 'Offer Letter Name', 'Owner', and 'Status' are all visible. A red arrow points to the 'Offer Amount' row in the 'Field Permissions' table.

Setup Home Object Manager

permission set

Users

Permission Set Groups

Permission Sets

Didn't find what you're looking for? Try using Global Search.

SETUP

Permission Sets

Permission Set Interviewer PS

Find Settings... Clone Edit Properties Manage Assignments View Summary

Permission Set Overview > Object Settings Offer Letters

Offer Letters Edit

Tab Settings

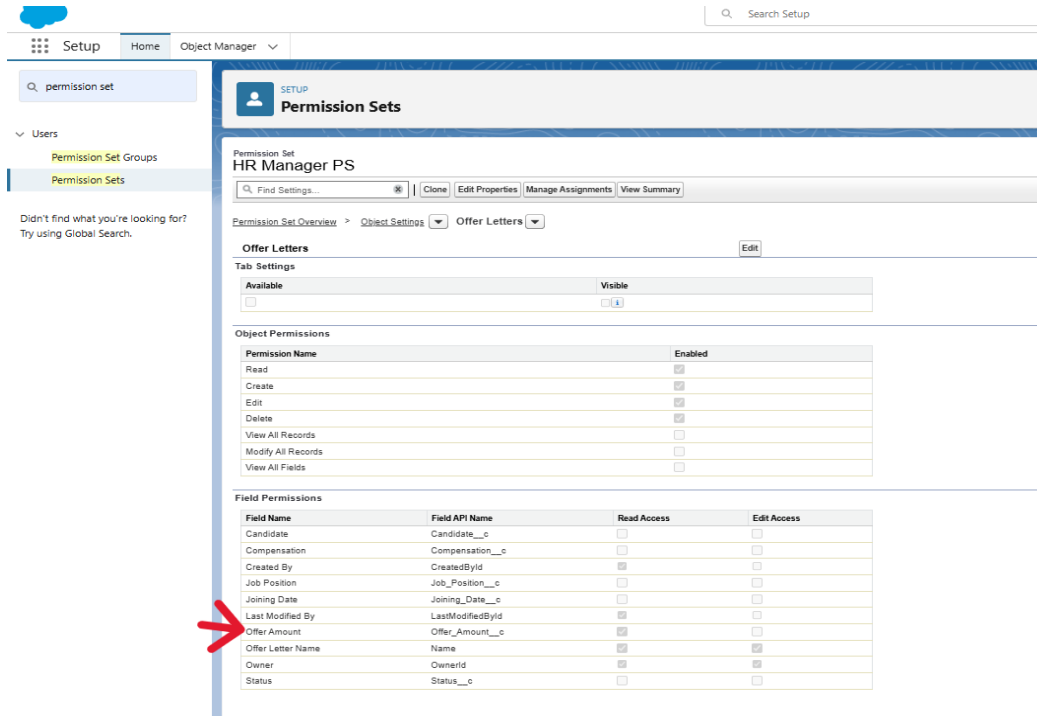
Available	Visible
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input checked="" type="checkbox"/>
View All Records	<input checked="" type="checkbox"/>
Modify All Records	<input checked="" type="checkbox"/>
View All Fields	<input checked="" type="checkbox"/>

Field Permissions

Field Name	Field API Name	Read Access	Edit Access
Candidate	Candidate__c	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Compensation	Compensation__c	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Created By	CreatedById	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Job Position	Job_Position__c	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Joining Date	Joining_Date__c	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Last Modified By	LastModifiedById	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Offer Amount	Offer_Amount__c	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Offer Letter Name	Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Owner	OwnerId	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Status	Status__c	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



The screenshot shows the 'HR Manager PS' configuration page in Salesforce Setup. The left sidebar contains a search bar with 'permission set' and a list of links: 'Users', 'Permission Set Groups', and 'Permission Sets'. The main content area is titled 'Permission Sets' and shows the configuration for 'HR Manager PS'. The 'Offer Letters' tab is selected, and the 'Available' checkbox is checked. The 'Object Permissions' table shows that 'Read', 'Create', 'Edit', 'Delete', 'View All Records', 'Modify All Records', and 'View All Fields' are all enabled. The 'Field Permissions' table shows that 'Candidate', 'Compensation', 'Created By', 'Job Position', 'Joining Date', 'Last Modified By', 'Offer Amount', 'Offer Letter Name', 'Owner', and 'Status' are all visible. A red arrow points to the 'Offer Amount' row in the 'Field Permissions' table.

Setup Home Object Manager

permission set

Users

Permission Set Groups

Permission Sets

Didn't find what you're looking for? Try using Global Search.

SETUP

Permission Sets

Permission Set HR Manager PS

Find Settings... Clone Edit Properties Manage Assignments View Summary

Permission Set Overview > Object Settings Offer Letters

Offer Letters Edit

Tab Settings

Available	Visible
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Object Permissions

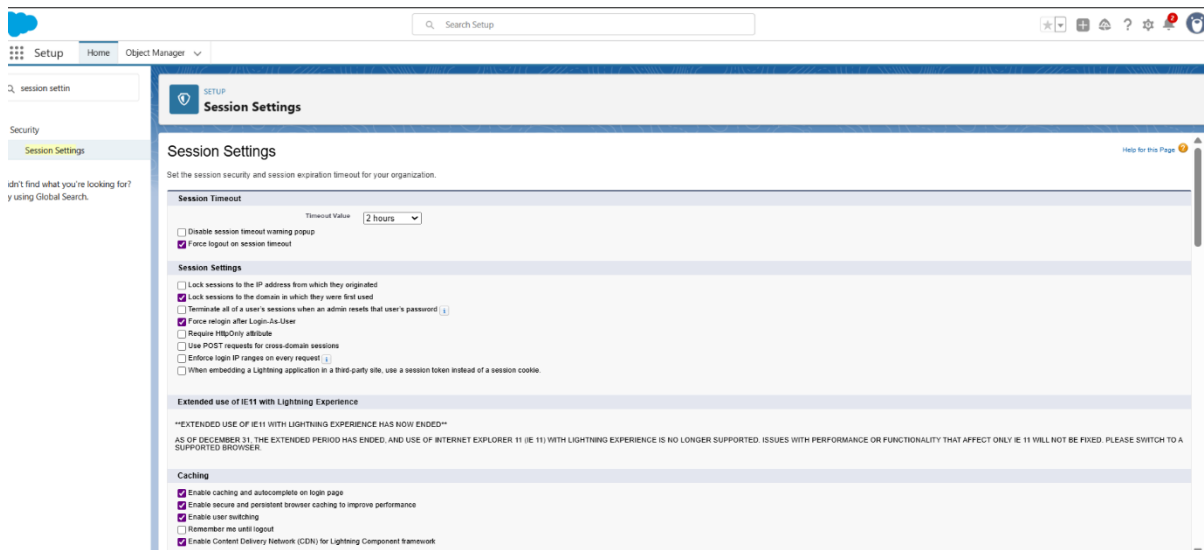
Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input checked="" type="checkbox"/>
View All Records	<input checked="" type="checkbox"/>
Modify All Records	<input checked="" type="checkbox"/>
View All Fields	<input checked="" type="checkbox"/>

Field Permissions

Field Name	Field API Name	Read Access	Edit Access
Candidate	Candidate__c	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Compensation	Compensation__c	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Created By	CreatedById	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Job Position	Job_Position__c	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Joining Date	Joining_Date__c	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Last Modified By	LastModifiedById	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Offer Amount	Offer_Amount__c	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Offer Letter Name	Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Owner	OwnerId	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Status	Status__c	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

5.Policies

- Session policies: Session timeout configured per org standards.



- Network policy: Optional IP range prepared for Recruiters (documented; can enable later)

6.Deployment:

Unmanaged package or change set planned; CI/CD out of scope for this phase.

Executive Summary :

- Set up a dedicated Recruitment & Onboarding app in a Developer Edition org with tabs for Job Positions, Candidates, Interviews, and Offer Letters to centralize hiring.
- Enforced least privilege by keeping profiles minimal and granting access via focused Permission Sets for HR Manager, Recruiter, and Interviewer.
- Aligned the role hierarchy (HR Head → Recruiter → Interviewer) with the hiring process to control record visibility appropriately.
- Secured data with OWDs (Candidate = Private, Job Position = Public Read Only) and FLS to hide Offer Amount from Interviewers.
- Standardized governance with session timeout, documented recruiter IP ranges, and planned deployment via unmanaged package/change set