

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

## 1. Salesforce Editions

- Configuration
  - Edition: Developer Edition.
- Procedure
  - Verify at Setup → Company Information (Org Edition, Licenses).
- Screenshot
  - Company Information showing Developer Edition.

The screenshot shows the Salesforce Setup interface for the 'HR Recruitment Project' organization. The left sidebar contains navigation links for Setup, Home, Object Manager, and Company Settings. The main content area is titled 'Company Information' and displays the organization's profile. The profile includes details such as Organization Name, Primary Contact, Division, Address, Fiscal Year Starts In, and various system settings like Activate Multiple Currencies, Enable Data Translation, Newsletter, Admin Newsletter, Hide Notices About System Maintenance, Hide Notices About System Downtime, and Locale Formats. The 'Organization Edition' is listed as 'Developer Edition' and the 'Instance' is 'CAN08'. The page also shows links for User Licenses, Permission Set Licenses, Feature Licenses, and Usage-based Entitlements.

Organization Detail	
Organization Name	HR Recruitment Project
Primary Contact	OrgFarm EPIC
Division	
Address	United States
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 Formats	ICU

Created By: OrgFarm EPIC, 9/12/2025, 9:11 PM

Modified By: Poonam Rajal, 9/18/2025, 10:38 AM

## 2. Company Profile Setup

- Configuration
  - Company Information: Locale, Currency, Time Zone set to project standard.

- Procedure
  - Setup → Company Information → Edit; set Locale, Currency, Time Zone; upload logo if required.
- Screenshot
  - Company Information page

Setup Home Object Manager

Q company

Company Settings

Business Hours

Calendar Settings

Public Calendars and Resources

Company Information

Data Protection and Privacy

Fiscal Year

Holidays

Language Settings

My Domain

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

SETUP Company Information

Company Information

HR Recruitment Project

The organization's profile is below.

User Licenses (10) | Permission Set Licenses (10) | Feature Licenses (10) | Usage-based Entitlements (10)

Organization Detail

Organization Name: HR Recruitment Project

Primary Contact: OrgFarm EPIC

Division: United States

Address: United States

Fiscal Year Starts In: January

Activate Multiple Currencies: ☐

Enable Data Translation: ☐

Newsletter: ☒

Admin Newsletter: ☒

Hide Notices About System Maintenance: ☐

Hide Notices About System Downtime: ☐

Locale Formats: ICU

Phone

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: 354 KB (7%) [View](#)

Used File Space: 17 KB (0%) [View](#)

API Requests, Last 24 Hours: 0 (15,000 max)

Streaming API Events, Last 24 Hours: 0 (10,000 max)

Restricted Logins, Current Month: 0 (0 max)

Salesforce.com Organization ID: 00Dg1.00000000000000000000000000000000

Organization Edition: Developer Edition

Instance: CAN008

Created By: OrgFarm EPIC, 9/12/2025, 9:11 PM

Modified By: Poojam Rajh, 9/19/2025, 7:02 AM

### 3. Business Hours & Holidays

- Configuration
  - Default Business Hours created; Holidays optional for interview blackout dates.
- Procedure
  - Setup → Business Hours → New; add Holidays under Setup → Holidays.

- Screenshot
  - Business Hours detail

**Business Hours**

**Organization Business Hours**

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.

**Business Hours Detail**

Business Hours Name	Project Business Hours	Time Zone	Default Business Hours
Business Hours	Sunday No 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 No Hours	(GMT+05:30) India Standard Time (Asia/Kolkata)	✓

Active: ☒ Created By: Poonam Rajak 9/18/2025, 7:41 AM Last Modified By: Poonam Rajak 9/18/2025, 7:41 AM

## Holidays detail

**Holidays**

**Holiday Detail**

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.

**Holiday Detail**

Holiday Name	Description	Date and Time	Created By
Interview Blackout - Public Holiday		9/18/2025 All Day	Poonam Rajak 9/18/2025, 7:45 AM

Active: ☒ Created By: Poonam Rajak 9/18/2025, 7:45 AM Last Modified By: Poonam Rajak 9/18/2025, 7:45 AM

## 4. Fiscal Year Settings

- Configuration
  - Standard Fiscal Year (default) retained for this phase.
- Procedure
  - Setup → Fiscal Year → confirm Standard; note start month if changed.
- Screenshot
  - Fiscal Year settings page.

Setup

Home

Object Manager ▾

fiscal year

Company Settings

Fiscal Year

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

SETUP  
**Fiscal Year**

Setup  
**Organization Fiscal Year Edit: HR Recruitment Project**

To specify the fiscal year type for your organization, choose one of the options below.

Fiscal Year Information

Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example,

⚠ Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are

Change Fiscal Year Period

Standard Fiscal Year ⓘ

Custom Fiscal Year ⓘ

NameHR Recruitment Project

Fiscal Year Start MonthJanuary

Fiscal Year is Based On☒ The ending month☐ The starting month

SaveCancel

SaveCancel

## 5. User Setup & Licenses

- Configuration
  - Users: HR Manager (HR Head), Recruiter, Interviewer (active).  
Appropriate standard licenses assigned.
- Procedure
  - Setup → Users → New User; assign profiles and roles per persona.
- Screenshot
  - Users list with three personas active.

Setup | Home | Object Manager

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**SETUP**

## Users

### All Users

On this page you can create, view, and manage users.

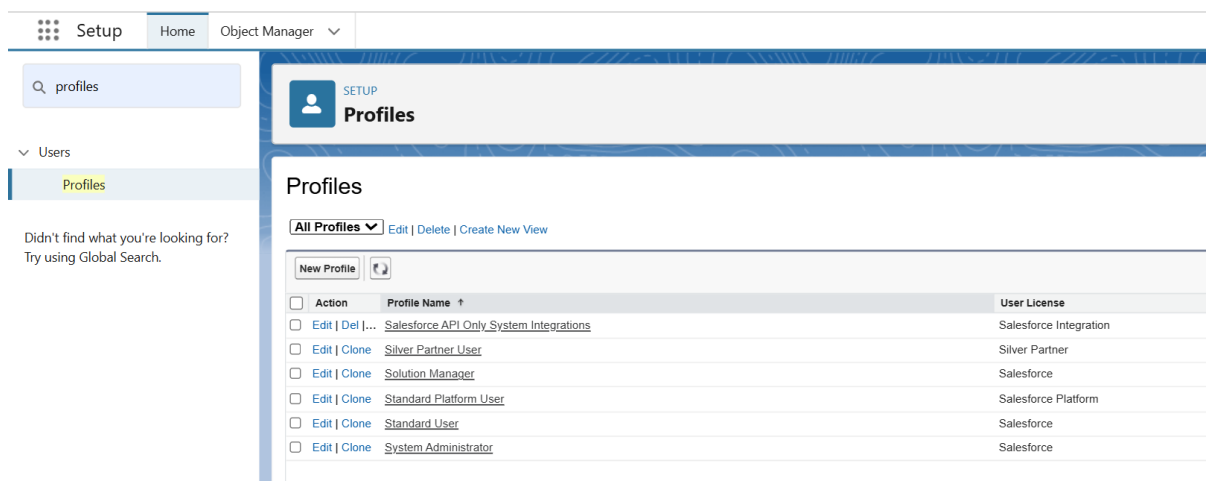
To get more licenses, use the Your Account app. [Let's Go](#)

View: Alt Users Edit Create New User

Action	Full Name ↑	Alias	Username	Role	Active	Profile
[Edit]	Chatter Expert	Chatter	chatt00d00000bhbhuah.k3ibw@rwy1@chatter.salesforce.com		<input type="checkbox"/>	Chatter Free User
[Edit] [Login]	EPIC_OrgFarm	OEPIC	epic-29c0ab71ta50@orgfarm.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
[Edit]	Rajak_Poonam	po0	poonamrajak1075273@apgentforce.com		<input checked="" type="checkbox"/>	System Administrator
[Edit] [Login]	Sharma_Anavya	asbar	anavya.sharma-hu@gmail.com	HR Head	<input checked="" type="checkbox"/>	Standard User
[Edit] [Login]	Singh_Neha	nsmg	neha.singh-interviewer@gmail.com	Interviewer	<input checked="" type="checkbox"/>	Standard Platform User
[Edit]	User Integration	inte0	integration@00d000000bhbhuah.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
[Edit]	User Security	sbc	insightssecurity@00d000000bhbhuah.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
[Edit] [Login]	Verma_Rahul	rverm	rahul.verma-recruiter@gmail.com	Recruiter	<input checked="" type="checkbox"/>	Standard User

## 6. Profiles

- Configuration
  - Minimal base profiles (e.g., Standard User / Standard Platform User) to enforce least privilege.
- Procedure
  - Setup → Profiles → confirm minimal permissions; avoid broad permissions at profile level.
- Screenshot
  - Profile assignments for each persona.



## 7. Roles

- Configuration
  - Role hierarchy: HR Head → Recruiter → Interviewer.
- Procedure
  - Setup → Roles → Set Up Roles; create HR Head, Recruiter, Interviewer; assign to users accordingly.

- Screenshot
  - Role Hierarchy tree showing the three roles and their relationships.

**HR Manager (HR Head)** → Top of hierarchy

**Recruiter** → Reports to HR Manager

**Interviewer** → Reports to Recruiter

The screenshot shows the Salesforce Setup interface with the 'Roles' page selected. The left sidebar contains navigation links for Users, Feature Settings, Sales, Service, and Case Teams. The main content area displays a role hierarchy tree. At the top is the 'HR Head' role, which has a 'Recruiter' role as a child. The 'Recruiter' role has an 'Interviewer' role as a child. The tree also includes various other roles such as 'Customer Support, International', 'Customer Support, North America', 'Installation & Repair Services', 'SVP, Human Resources', 'SVP, Sales & Marketing', 'VP, International Sales', 'VP, Marketing', 'Marketing Team', 'VP, North American Sales', 'Director, Channel Sales', 'Channel Sales Team', 'Director, Direct Sales', 'Eastern Sales Team', 'Western Sales Team', and 'HR Head'.

**Roles Hierarchy Tree:**

- HR Head (Edit | Del | Assign)
  - Add Role
  - Recruiter (Edit | Del | Assign)
    - Add Role
    - Interviewer (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
- VP, Marketing (Edit | Del | Assign)
  - Add Role
  - Marketing Team (Edit | Del | Assign)
    - Add Role
- VP, North American Sales (Edit | Del | Assign)
  - Add Role
- Director, Channel Sales (Edit | Del | Assign)
  - Add Role
  - Channel Sales Team (Edit | Del | Assign)
    - Add Role
- Director, Direct Sales (Edit | Del | Assign)
  - Add Role
- Eastern Sales Team (Edit | Del | Assign)
  - Add Role
- Western Sales Team (Edit | Del | Assign)
  - Add Role

## 8. Permission Sets

- Configuration
  - HR Manager PS: Full on recruiting objects (R/C/U/D; View All as needed).
  - Recruiter PS: Create/Read/Update on Candidate, Interview, Offer Letter; read Job Position.
  - Interviewer PS: Read on Interview only; restricted fields.
- Procedure
  - Setup → Permission Sets → New → configure object permissions and field permissions per persona; assign to users; validate with Login-As.
- Screenshots
  - Each permission set

The screenshot shows the Salesforce 'Permission Sets' setup page. The top navigation bar includes the Salesforce logo, a search bar labeled 'Search Setup', and tabs for 'Setup', 'Home', and 'Object Manager'. The left sidebar contains a search bar with 'permission sets' and a list of items under 'Users', with 'Permission Sets' highlighted. The main content area is titled 'Permission Sets' and includes a sub-header 'SETUP Permission Sets'. Below this, a message states: 'On this page you can create, view, and manage permission sets.' There is a dropdown menu for 'All Permission Sets' with links for 'Edit', 'Delete', and 'Create New View'. A 'New' button is visible. Below these elements is a table with columns for 'Action', 'Permission Set Name', and 'Description'. The table contains one entry: 'HR Manager PS'.

Action	Permission Set Name	Description
<a href="#">Del</a>   <a href="#">Clone</a>	HR Manager PS	

Setup Home Object Manager

permission sets

Users

Permission Sets

Don'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
Clone	RPAC2CPermSet
Del   Clone	Recruiter PS

Setup Home Object Manager

permission sets

Users

Permission Sets

Don'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
Del   Clone	Interviewer PS

## 9. Org-Wide Defaults (OWD)

- Configuration
  - Candidate = Private; Job Position = Public Read Only; Interview = Private; Offer Letter = Private.
- Procedure
  - Setup → Sharing Settings → edit OWD; save and verify rows.



- Screenshot
  - Sharing Settings showing OWD rows for all four objects clearly.

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

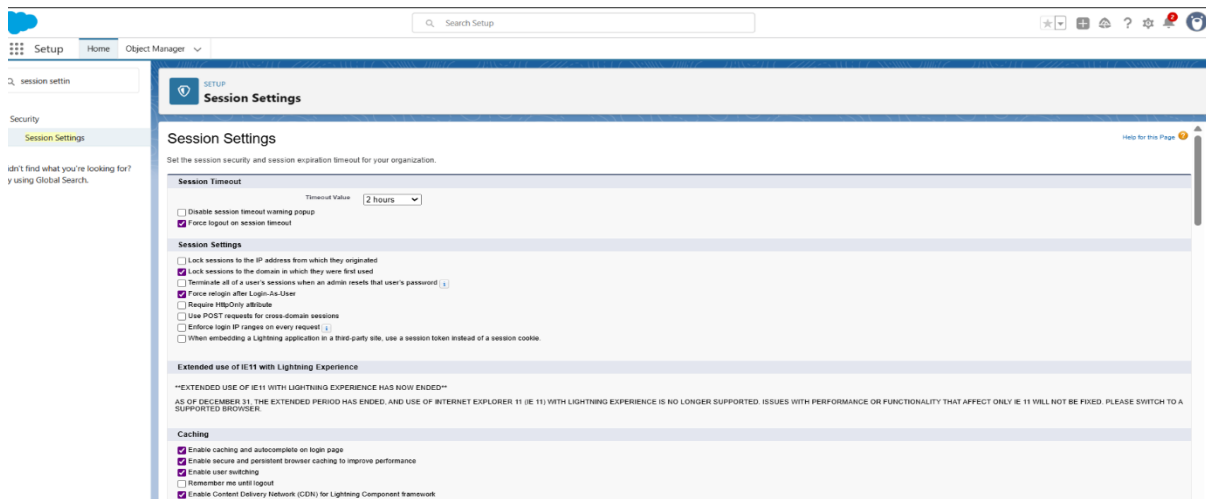
**Other Settings**

## 10.Sharing Rules

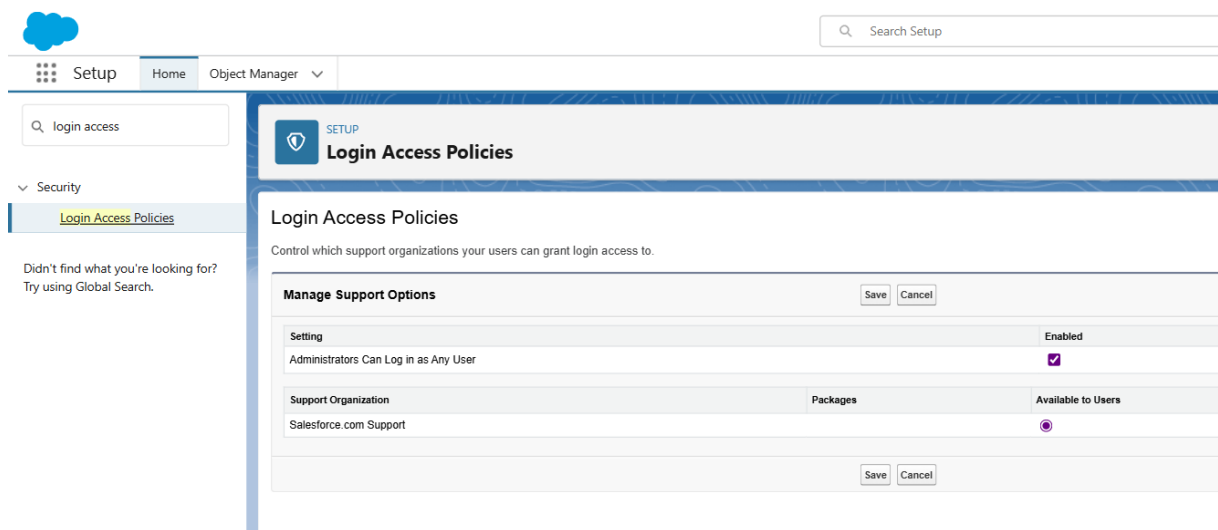
- Configuration
  - No additional sharing rules required in Phase 2; least-privilege enforced by OWD and roles.
- Procedure
  - N/A for this phase; note rationale: not needed due to role-based visibility and permission sets.

## 11.Login Access Policies

- Configuration
  - Session timeout per org standard; optional “Force logout on browser close”; admin login access allowed for troubleshooting.
- Procedure
  - Setup → Session Settings → set timeout and behavior; Setup → Login Access Policies → enable admin login access if permitted.
- Screenshot
  - Session Settings

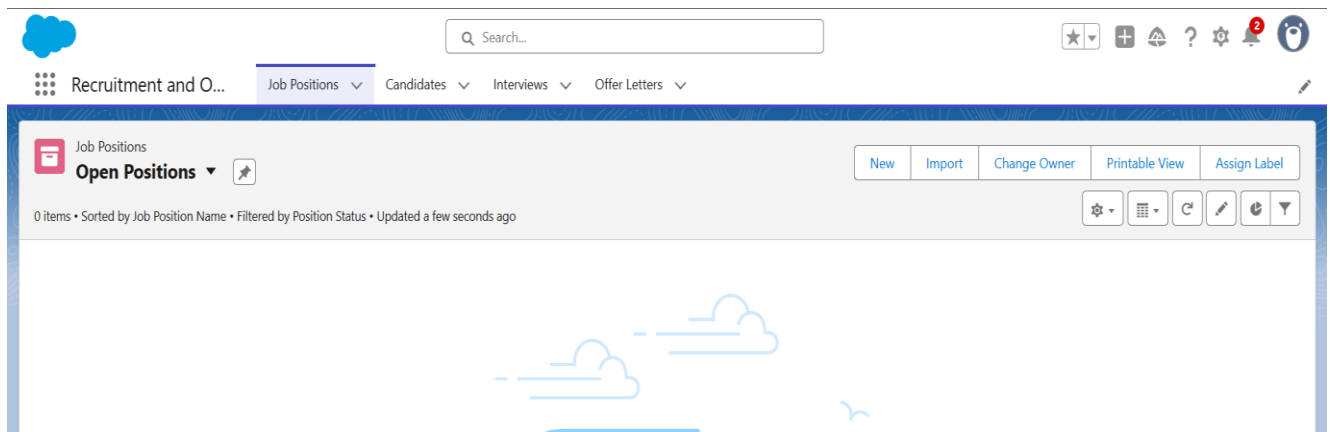


- Login Access Policies.



## 12.Dev Org Setup

- Configuration
  - Lightning App: Recruitment & Onboarding; Tabs: Job Positions, Candidates, Interviews, Offer Letters.
- Procedure
  - App Manager → New Lightning App → add tabs; assign app visibility to personas; set app as default where needed.
- Screenshot
  - App Manager entry for the app; App navigation tabs visible.



## 13.Sandbox Usage

- Configuration
  - For Developer Edition, sandboxes are not used; configuration and testing performed in this dev org.
- Procedure
  - State that changes are tracked and packaged at the dev org level for Phase 2.

## 14. Deployment Basics

- Configuration
  - Deployment planned via unmanaged package or change set; CI/CD out of scope in Phase 2.
- Procedure
  - Prepare unmanaged package “RecruitmentApp\_Phase2” including custom objects, fields, tabs, and permission sets; document version/date

Note: Package ‘RecruitmentApp\_Phase2’ created  
objects/fields to be added in next update.

- Screenshot
  - Package details page

The screenshot shows the Salesforce Package Manager interface. The left sidebar contains navigation links: Setup, Home, Object Manager, Apps, Packaging, Installed Packages, Package Manager (selected), and Package Usage. The main content area displays the details for the package 'RecruitmentApp\_Phase2'. The package is of type 'Unmanaged' and is in English. It was created by Poonam Rajak on 9/18/2025 at 8:44 AM. The description is 'Phase 2 – Org Setup & Configuration'. The interface includes a search bar at the top, a 'Search Setup' button, and a 'Help' link.

Package Detail	
Package Name	RecruitmentApp_Phase2
Language	English
Type	Unmanaged
Notify on Apex Error	
Created By	Poonam Rajak
Last Modified By	Poonam Rajak
Description	Phase 2 – Org Setup & Configuration

## Executive Summary

- Configured a Recruitment & Onboarding app in Developer Edition with tabs for Job Positions, Candidates, Interviews, and Offer Letters to centralize hiring.
- Enforced least privilege via minimal profiles and targeted Permission Sets for HR Manager, Recruiter, and Interviewer.
- Role hierarchy aligned with process: HR Head → Recruiter → Interviewer; visibility governed via roles and OWD.
- Secured data: OWDs (Candidate = Private; Job Position = Public Read Only; Interview = Private; Offer Letter = Private) and FLS hiding Offer Amount from Interviewers.
- Governance in place: session settings, documented recruiter IP ranges, and deployment plan via unmanaged package/change set.