

## Phase 2: Org Setup & Configuration

### 1. Salesforce Edition

Salesforce Developer Edition is a free Salesforce org with full features but limited storage and users, designed for learning, experimentation, and app development, not for production use.

Company Information  
CVR College of Engineering Help for

The organization's profile is below.

User Licenses (10+) | Permission Set Licenses (10+) | Feature Licenses (11) | Usage-based Entitlements (10+)

Organization Detail		Edit	
Organization Name	CVR College of Engineering	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (United States)
Address	Hyderabad Telangana India	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	342 KB (7%) [View]
Newsletter	<input checked="" type="checkbox"/>	Used File Space	659 KB (3%) [View]
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00Dfj000008Wvg8
		Organization Edition	Developer Edition
		Instance	USA1044

### 2. Setup company info:

Setup → Company Settings → Company Information → fill Company details.

- Company Information provides key details about your org:
  - such as the organization name, default locale, language, currency, fiscal year, and time zone.
- It also shows edition, licenses, usage limits, and org ID, helping admins manage identity, settings, and capacity of the org.

SETUP Company Information

Edit Organization Profile  
CVR College of Engineering

Use the form below to edit your organization profile.

**Organization Edit**

**General Information**

Organization Name	CVR College of Engineering
Primary Contact	OrgFarm EPIC
Division	

**Address**

Country	India
Street	
City	Hyderabad
State/Province	Telangana
Zip/Postal Code	

### 3. Business Hours

Business Hours define the working days and working hours of your company

1. Go to Setup → Business Hours → Create business hours (useful for scheduling interviews).
2. Click New Business Hours.
3. Enter details:
  - Name: Recruitment Business Hours
  - Time Zone: (GMT-07:00) Pacific Daylight Time (America/Los\_Angeles)
  - Start Time: 09:00 AM
  - End Time: 06:00 PM
  - Days Active: Monday–Friday
  - Saturday & Sunday: Unchecked (non-business days)

4. Save.

The screenshot shows the 'Business Hours Edit' page in the Salesforce Setup interface. The page is divided into three main sections: Step 1. Business Hours Name, Step 2. Time Zone, and Step 3. Business Hours.

- Step 1. Business Hours Name:** Contains fields for 'Business Hours Name' (set to 'Recruitment Business Hour'), 'Active' (unchecked), and a checkbox for 'Use these business hours as the default' (unchecked).
- Step 2. Time Zone:** Shows the selected time zone as '(GMT-07:00) Pacific Daylight Time (America/Los\_Angeles)'.
- Step 3. Business Hours:** A table showing daily work hours from Monday to Saturday. The table includes columns for the day of the week, start time (HH:MM), end time (HH:MM), and duration (24 hours). The table shows the following times:

Day	Start (HH:MM)	End (HH:MM)	Duration
Monday	9:00 AM	6:00 PM	24 hours
Tuesday	9:00 AM	6:00 PM	24 hours
Wednesday	9:00 AM	6:00 PM	24 hours
Thursday	9:00 AM	6:00 PM	24 hours
Friday	9:00 AM	6:00 PM	24 hours
Saturday	HH:MM	HH:MM	24 hours

### 4. Business Holidays

The screenshot shows the 'Holiday Detail' page in the Salesforce Setup interface. It allows creating a new holiday record.

**Holiday Detail**

Fields include:

- Holiday Name: New Year's Day
- Description: New Year
- Date: 1/1/2025
- Time: from [ ] to [ ] (All Day checked)
- Recurring Holiday: checked
- Frequency: Daily, Weekly, Monthly, Yearly (Yearly selected)
- Recurrence Start: 1/1/2025
- Recurrence End: [ ] (No End Date checked)

The screenshot shows the 'Holidays' selection page in the Salesforce Setup interface, specifically for the 'Recruitment Business Hours' entry.

**Recruitment Business Hours**

Instructions: Choose the holidays during which business hours, and any escalation rules associated with business hours, are suspended.

**Holidays**

Shows two lists:

- Available Holidays:** None
- Selected Holidays:** New Year's Day, Independence Day, Gandhi Jayanthi, Christmas, Diwali, Dussehra

Buttons: Add (with up and down arrows), Remove, Create New Holiday.

2. Click **New Holiday**.
3. Add Holiday dates:
  - Name: New Year's Day, Date: 01-Jan-2025
  - Name: Republic Day, Date: 26-Jan-2025
  - Name: Independence Day, Date: 15-Aug-2025
  - Name: Gandhi Jayanthi, Date: 02-Oct-2025
  - Name: Christmas, Date: 25-Dec-2025

4. Save each holiday.

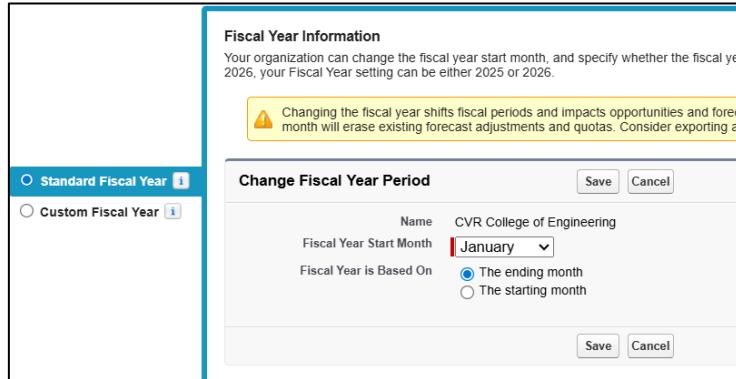
 These settings ensure interview scheduling avoids weekends/holidays.

## 6. Fiscal Year Setup

Fiscal year defines how your company tracks financial reporting periods (months, quarters, years). It impacts reports, forecasts, and dashboards.

### Navigate to Fiscal Year Setup

1. Go to Setup → Company Information → Fiscal Year.
2. Click Edit.



### Choose Fiscal Year Type

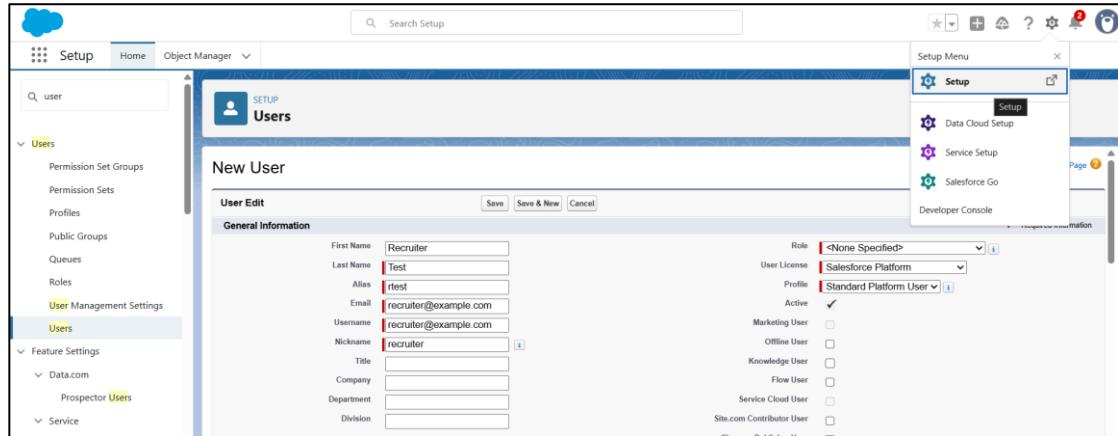
- Standard Fiscal Year: Aligns with calendar months.
- Choose start month (e.g., January).
- Set Start Month & Save

## 7. User Setup & Licenses

Users are individual people who log in to Salesforce. Each user needs a license which defines what Salesforce features they can access.

- Create Users (Setup → Users → Users → New User) – create three test users with different profiles:

- *recruiter@example.com* (Profile: Standard Platform User or custom Recruiter)
- *hrmanager@example.com* (Profile: Standard Platform User or custom HR Manager)
- *interviewer@example.com* (Profile: Standard Platform User or custom Interviewer)



## 8. Profiles

- Profiles define what a user can do in Salesforce.
- Profiles define baseline permissions (object access, field access, tab visibility, app access).

### Steps:

1. Setup → Profiles.
2. Clone a standard profile (e.g., Standard Platform User).
3. Rename (e.g., Recruiter Profile, HR Manager Profile).
4. Configure object permissions, tab visibility, system permissions.
5. Save.

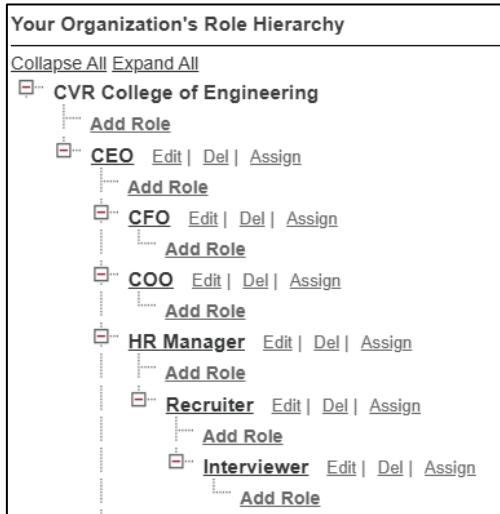
Profiles			
<a href="#">All Profiles</a> <a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Create New View</a>			
	Action	Profile Name	User License
<input type="checkbox"/>	Edit   Del  ...	HR Manager	Salesforce Platform
<input type="checkbox"/>	Edit   Clone	Identity User	Identity
<input type="checkbox"/>	Edit   Del  ...	Interviewer	Salesforce Platform
<input type="checkbox"/>	Edit   Clone	Marketing User	Salesforce
<input type="checkbox"/>	Edit   Clone	Minimum Access - API Only Integrations	Salesforce Integration
<input type="checkbox"/>	Edit   Clone	Minimum Access - Salesforce	Salesforce
<input type="checkbox"/>	Edit   Clone	Partner App Subscription User	Partner App Subscription
<input type="checkbox"/>	Edit   Clone	Partner Community Login User	Partner Community Login
<input type="checkbox"/>	Edit   Clone	Partner Community User	Partner Community
<input type="checkbox"/>	Edit   Del  ...	Read Only	Salesforce
<input type="checkbox"/>	Edit   Del  ...	Recruiter	Salesforce Platform
<input type="checkbox"/>	Edit   Del  ...	Salesforce API Only System Integrations	Salesforce Integration
<input type="checkbox"/>	Edit   Clone	Silver Partner User	Silver Partner

## 9. Roles

- Roles define where a user sits in the role hierarchy, which controls record-level visibility. Higher roles can see records owned by lower roles.
- Roles control record-level access via hierarchy.

### Steps:

1. Setup → Roles → Set Up Roles.
2. Define hierarchy: CEO → HR Manager → Recruiter → Interviewer.
3. Assign users to roles.



## 10. Permission Sets

- Permission Sets extend permissions beyond the profile without needing to create multiple profiles.
- Extend permissions beyond profiles without creating new profiles.

### Steps:

1. Setup → Permission Sets → New.
2. Label: Resume Upload Access.
3. Configure object/system permissions.
4. Assign to Recruiter and HR users.

Full Name ↑	Active	Role	Profile	User License	Expires On
HR Manager	✓	HR Manager	HR Manager	Salesforce Platform	
Recruiter Test	✓	Recruiter	Recruiter	Salesforce Platform	

## 11. Organization-Wide Defaults (OWD)

OWD sets the baseline level of access for all records of an object across the org.

- Candidate, Application, Interview → Private (each user only sees their own).
- Job → Public Read Only (so all can see open jobs, but only owners edit).

### Steps:

1. Setup → Sharing Settings.
2. Candidate = Private.
3. Application = Private.
4. Job = Public Read Only.
5. Interview = Private.
6. Save.

Sharing Settings			
Object	Action	Access Level	Controlled By
Application	Private	Private	✓
Candidate	Private	Private	✓
Interview	Controlled by Parent	Controlled by Parent	
Job	Public Read Only	Private	✓

## 12. Sharing Rules

- Sharing Rules extend access beyond OWD to specific users, roles, or groups.
- Use them to give Recruiters and HR Managers access to Candidate and Application records while keeping OWD restrictive.
  - Create a Public Group or use Roles (Recruiter, HR Manager) to target who should see records.
  - Create sharing rules on the Candidate and Application objects to grant appropriate access (Read Only or Read/Write).

Application Sharing Rules		
Action	Criteria	New Recalculate
Edit   Del	Owner in Role: Recruiter	Shared With: Role: Recruiter Access Level: Read/Write
Candidate Sharing Rules		
Action	Criteria	New Recalculate
Edit   Del	Owner in Role: HR Manager	Shared With: Role: HR Manager Access Level: Read/Write

## 13. Login Access Policies

Controls whether Salesforce support and administrators can log in as other users for troubleshooting.

### Steps:

1. Setup → Login Access Policies.
2. Enable “Administrators Can Log in as Any User.”
3. Save.

The screenshot shows the 'Login Access Policies' page under 'Manage Support Options'. It has a header 'Login Access Policies' and a sub-header 'Control which support organizations your users can grant login access to.' Below this is a table with one row. The table has two columns: 'Setting' and 'Enabled'. The setting is 'Administrators Can Log in as Any User' and the status is 'Enabled' with a checked checkbox. At the bottom right of the table are 'Save' and 'Cancel' buttons.

Setting	Enabled
Administrators Can Log in as Any User	<input checked="" type="checkbox"/>

For testing/demo: enable this so you (as admin) can log in as Recruiter or Interviewer to verify role-based access, OWD, and sharing rules are working properly.

## 14. Dev Org Setup

A Developer Org is a free Salesforce environment provided by Salesforce for learning, testing, and building apps. It comes with preloaded features and a limited amount of storage.

### Steps to Set Up:

- Go to [developer.salesforce.com](https://developer.salesforce.com).
- Click Sign Up → Fill details (name, email, username).
- Activate account from the verification email.
- Login to your Dev Org → you'll have access to Salesforce Lightning Platform.