

Employee Onboarding & Asset Management CRM Project

Phase-2: Org Setup & Configuration :

1. Salesforce Edition & Developer Org Setup

Create a new **Developer Org** dedicated to this project.

The screenshot shows the 'My Domain' setup page in Salesforce. The page title is 'My Domain' with a 'SETUP' icon. Below the title is the 'My Domain Settings' section. A description states: 'My Domain showcases your company's brand and keeps your data more secure. The domains that Salesforce hosts for your org include your company-specific My Domain name.' There are two main sections: 'My Domain Details' and 'Routing and Policies'. 'My Domain Details' includes fields for 'Current My Domain URL' (orgfarm-0d77417598-dev-ed.develop.my.salesforce.com), 'My Domain Name' (orgfarm-0d77417598-dev-ed), and 'Domain Suffix' (standard (.my.salesforce.com)). 'Routing and Policies' includes 'Salesforce Edge Network' (This org uses Salesforce Edge Network), 'Login Policy' (If a My Domain change is in progress, your login policy also applies to the provisioned My Domain login URL. Options: Prevent login from https://login.salesforce.com and https://welcome.salesforce.com, Prevent SOAP API login from https://login.salesforce.com), and 'Cookies' (Require first-party use of Salesforce cookies). A yellow warning box at the bottom states: 'Because your Setup pages aren't served on the my.salesforce-setup.com domain yet, when this setting is enabled, accessing older Setup pages that were built in Classic requires an extra step. Users see a message that directs them to open the page in Salesforce Classic.'

2. Company Profile Setup

Navigate: **Setup** → **Company Information**.

Configure:

- Company Name: *TCS – Employee Onboarding CRM*.
- Primary Contact: HR Manager.
- Default Locale: *English (India)*.
- Currency: *INR (₹)*.
- Timezone: *Asia/Kolkata*.

The screenshot shows the 'Company Information' page in Salesforce. The page title is 'Company Information' with a 'SETUP' icon. Below the title is the 'Employee Onboarding & Asset Management CRM' section. A description states: 'The organization's profile is below.' There are four tabs: 'User Licenses (10/2)', 'Permission Set Licenses (10/2)', 'Feature Licenses (11)', and 'Usage-based Entitlements (10/2)'. The 'Organization Detail' tab is selected. It includes fields for 'Organization Name' (Employee Onboarding & Asset Management CRM), 'Primary Contact' (BANDARU B S VEERA SAI GANESH), 'Phone', 'Fax', 'Division', 'Address', 'India', 'Default Locale' (English (United States)), 'Default Language' (English), 'Fiscal Year Starts In' (April), 'Default Time Zone' (GMT+05:30 India Standard Time (Asia/Kolkata)), 'Activate Multiple Currencies' (checkbox), 'Currency Locale' (English (India) - INR), 'Enable Data Translation' (checkbox), 'Used Data Space' (342 KB (7%) [View]), 'Newsletter' (checkbox), 'Used File Space' (17 KB (9%) [View]), 'Admin Newsletter' (checkbox), 'API Requests, Last 24 Hours' (0 (15,000 max)), 'Hide Notices About System Maintenance' (checkbox), 'Streaming API Events, Last 24 Hours' (0 (10,000 max)), 'Hide Notices About System Downtime' (checkbox), 'Restricted Logins, Current Month' (0 (0 max)), 'Locale Formats' (ICU), 'Salesforce.com Organization ID' (00Dg100000A4WQC), 'Organization Edition' (Developer Edition), 'Instance' (CAN96), 'Created By' (OrgFarm EPIC, 8/26/2025, 10:59 PM), and 'Modified By' (BANDARU B S VEERA SAI GANESH, 9/19/2025, 4:37 AM).

3. Business Hours & Holidays

- ☐ Go to **Setup** → **Company Settings** → **Business Hours**.
 - Create → "TCS Standard Business Hours" → Mon–Fri, 9:00 AM – 6:00 PM.
 - ☐ Add **holidays**: Setup → Company Settings → Holidays → Add "Republic Day", "Independence Day", etc.
- This ensures SLAs/Task deadlines adjust.

The screenshot shows the 'Organization Business Hours' configuration page. At the top, there's a 'Business Hours Detail' section with a table for 'Company Standard Business Hours'. The table lists days from Sunday to Saturday with their respective business hours. Sunday and Saturday are set to 'No Hours', while Monday through Friday are set to '9:00 AM to 6:00 PM'. The 'Time Zone' is set to '(GMT+05:30) India Standard Time (Asia/Kolkata)'. Below the table, there's an 'Active' checkbox which is checked, and a 'Created By' field showing 'RANDARU B S YEERA SAI GANESH' with a timestamp. There's also a 'Last Modified By' field with the same user and timestamp. Below this, there's a 'Holidays' section with an 'Add/Remove' button. A table below shows one holiday: 'Independence Day' on '8/10/2025 All Day'.

Business Hours Name	Company Standard Business Hours	Time Zone
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: RANDARU B S YEERA SAI GANESH 9/18/2025, 11:25 PM

Last Modified By: RANDARU B S YEERA SAI GANESH 9/18/2025, 11:28 PM

Holiday Name	Description	Date and Time
Independence Day		8/10/2025 All Day

4. Fiscal Year Settings

- Setup → Company Settings → Fiscal Year → Standard Fiscal Year.
- Choose: **April – March** (common in India).
- This helps for **cost tracking of assets & HR onboarding reports**.

The screenshot shows the 'Organization Fiscal Year Edit' page for 'Employee Onboarding & Asset Management CRM'. It has two main sections: 'Fiscal Year Information' and 'Change Fiscal Year Period'. The 'Fiscal Year Information' section explains that the fiscal year start month can be changed and provides a warning about the impact on forecasts. The 'Change Fiscal Year Period' section has a 'Save' and 'Cancel' button. Below this, there's a form with 'Name' set to 'Employee Onboarding & Asset Management CRM', 'Fiscal Year Start Month' set to 'April', and 'Fiscal Year is Based On' with 'The ending month' selected. There are 'Save' and 'Cancel' buttons at the bottom of the form.

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, if your fiscal year starts in April 2025 and ends in March 2026, your Fiscal Year setting can be either 2026 or 2025.

Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing this change.

Change Fiscal Year Period

Name: Employee Onboarding & Asset Management CRM

Fiscal Year Start Month: April

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

Save Cancel

5. User Setup & Licenses

1. Setup → Users → New User.

- **HR Manager** → Salesforce License, Profile: *HR Profile*.
- **IT Admin** → Salesforce License, Profile: *IT Profile*.
- **Manager/Leadership** → Salesforce License, Profile: *Manager Profile*.
- **Employee** → Salesforce **Platform License** (lower cost, limited access).

The screenshot shows the 'All Users' page in the Salesforce Setup interface. The page title is 'All Users' with a subtitle 'On this page you can create, view, and manage users.' Below this, there's a 'View:' dropdown set to 'All Users' and a link 'Edit | Create New View'. A table lists existing users with columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. The table contains 8 rows of user data. At the bottom, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Admin IT	ladmi	saiganeshbandaru9155@gmail.com	IT Admin	✓	IT Profile
<input type="checkbox"/> Edit	B.S VEERA SAI GANESH BANDARU	sai	saiganeshbandaru9645@agentforce.com		✓	System Administrator
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty_00d9l00000a4wquu3.nxh0rzttv9@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	EPIC_OrgFarm	OEPIC	epic_5973953f43b4@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/> Edit	Manager Department	mana	tbssvsaiqanesh9202@gmail.com	Department Manager	✓	Minimum Access - API Only Integrations
<input type="checkbox"/> Edit	Manager HR	hmana	tbssvsaiqanesh9123@gmail.com	HR Manager	✓	HR Profile
<input type="checkbox"/> Edit	User Integration	integ	integration@000d9l00000a4wquu3.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightsecu@000d9l00000a4wquu3.com		✓	Analytics Cloud Security User

6. Profiles

Create Custom Profiles:

- HR Profile → Full access to Employee Object, Read/Write to Assets.
- IT Profile → Full access to Asset Object, Read access to Employee.
- Manager Profile → Read access to Employee + Assets, Approvals enabled.
- Employee Profile → Read-Only to *their own onboarding record*.

Path: Setup → Profiles → Clone Standard Profile → Modify Object Settings.

The screenshot shows the 'Profiles' page in the Salesforce Setup interface. The page title is 'Profiles' with a subtitle 'All Profiles'. Below this, there's a 'New Profile' button and a link 'Edit | Delete | Create New View'. A table lists existing profiles with columns for Action, Profile Name, User License, and Custom status. The table contains 4 rows of profile data. At the bottom, there are buttons for 'New Profile', 'Reset Password(s)', and 'Add Multiple Users'.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Clone	Einstein Agent User	Einstein Agent	<input type="checkbox"/>
<input checked="" type="checkbox"/> Edit Del ...	Employee	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	External Apps Login User	External Apps Login	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	External Identity User	External Identity	<input type="checkbox"/>

7. Roles

Path: **Setup** → **Roles** → **Set Up Roles**.

Hierarchy Example:

- CEO (Top)
 - HR Manager
 - IT Admin
 - Department Manager
 - Employee

👉 This ensures managers can see their team's records automatically.

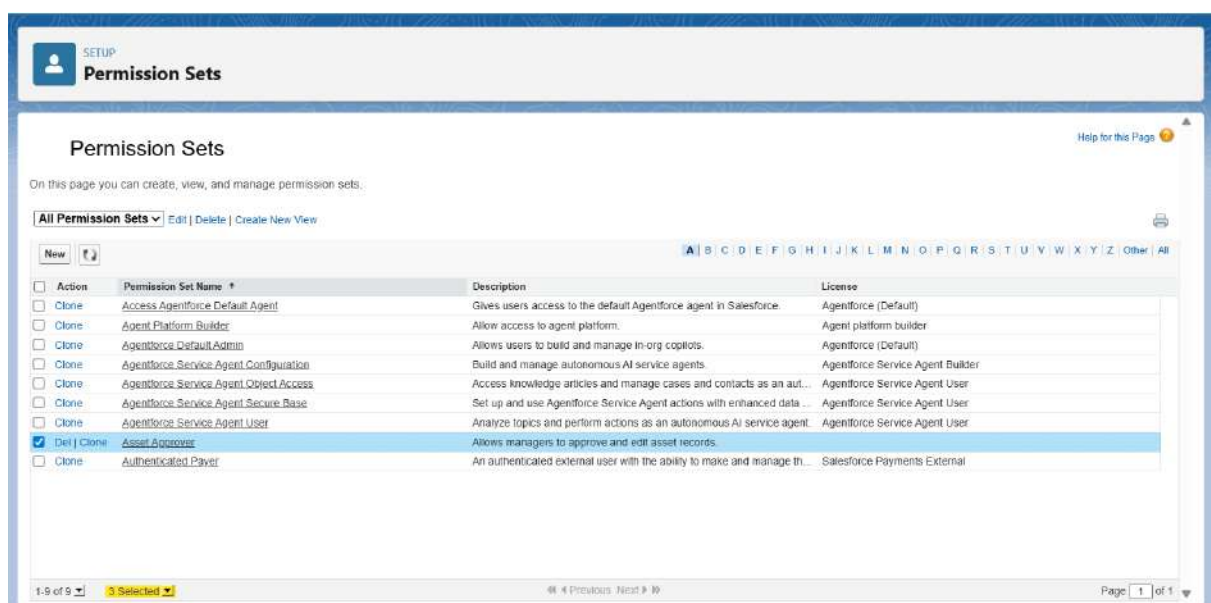


8. Permission Sets

- Create → *Setup* → *Permission Sets* → *New*.

Examples:

- Asset Approver → Assign to Managers only.
- Sensitive Data Access → Assign only to HR for employee salary/bank details.
- Onboarding Task Override → Assign to IT Admin when they need to edit HR tasks.



9. OWD (Organization-Wide Defaults)

Path: Setup → Sharing Settings.

- Employee Records → Private (each Employee sees only their own).
- Assets → Controlled by Parent (linked to Employee).
- Onboarding Tasks → Public Read/Write for HR & IT.

The screenshot shows the 'Sharing Settings' page in Salesforce Setup. The 'Manage sharing settings for:' dropdown is set to 'Employee'. The 'Default Sharing Settings' section shows 'Organization-Wide Defaults' with a table:

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Employee	Public Read/Write	Private	<input checked="" type="checkbox"/>

Below this, the 'Other Settings' section includes checkboxes for 'Manager Groups' (unchecked), 'Secure guest user record access' (checked), and 'Require permission to view record names in lookup fields' (unchecked). At the bottom, the 'Sharing Rules' section shows 'Employee Sharing Rules' with 'New' and 'Recalculate' buttons.

The screenshot shows the 'Sharing Settings' page in Salesforce Setup. The 'Manage sharing settings for:' dropdown is set to 'Onboarding Task'. The 'Default Sharing Settings' section shows 'Organization-Wide Defaults' with a table:

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Onboarding Task	Public Read/Write	Public Read/Write	<input checked="" type="checkbox"/>

Below this, the 'Other Settings' section includes checkboxes for 'Manager Groups' (unchecked), 'Secure guest user record access' (checked), and 'Require permission to view record names in lookup fields' (unchecked). At the bottom, the 'Sharing Rules' section shows 'Onboarding Task Sharing Rules' with 'New' and 'Recalculate' buttons.

10. Sharing Rules

- Example: Manager should see all employees in their department.

Path: Setup → Sharing Rules → Create Rule:

- Object: *Employee*
- Criteria: *Department = Manager's Department*
- Share With: *Manager Role*.

SETUP

Sharing Settings

Other Settings

Manager Groups

☐

?

Secure guest user record access

☒

?

Require permission to view record names in lookup fields

☐

?

Other Settings Help ?

Sharing Rules

Onboarding Task Sharing Rules

New

Recalculate

Onboarding Task Sharing Rules Help ?

⚠

A sharing rule operation is currently in progress. The initiating user will receive an email when each operation finishes.

Action	Criteria	Shared With	Access Level
<div>Edit</div> <div>Delete</div>	Onboarding Task: Status Equals In Progress	Role: HR Manager	Read Only

Sharing Overrides

Profiles That Override Onboarding Task Sharing

Sharing Overrides Help ?

ℹ

Organization-wide permissions affect all objects in the organization. Object permissions affect only the given object.

Learn more

Don't show this message again

Profile	Custom Profile	Organization-Wide Permissions		Onboarding Task Permissions	
		View All Data	Modify All Data	View All Records	Modify All Records
Analytics Cloud Integration User	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
System Administrator	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

11. Login Access Policies

Path: Setup → Security → Session Settings / Login IP Ranges.

- Enable MFA (Multi-Factor Authentication).
- Restrict HR & IT Admin to office IP ranges.
- Employees → Allow login from anywhere (with MFA).

SETUP

Session Settings

Standard

Username Password

Delegated Authentication

Activation

Lightning Login

Passwordless Login

Add

Remove

High Assurance

Multi-Factor Authentication

Logout Page Settings

Logout URL

☐

Store the redirect logout URL in your local browser

New User Welcome Email Settings

Link expires in

7 days

Welcome Email Template

Save

Cancel

lightning.force.com/lightning/setup/SecuritySession/home

The screenshot shows the 'Setup Profiles' page in Salesforce. The main heading is 'Login IP Ranges'. Below it, a sub-heading says 'Enter the range of valid IP addresses from which users with this profile can log in'. There is a 'Help for this Page' link. The form area is titled 'Please specify IP range' and contains two input fields: 'Start IP Address' and 'End IP Address', both with placeholder text '<Your Office Start IP>' and '<Your Office End IP>' respectively. Below these is a 'Description' field. There are 'Save' and 'Cancel' buttons at the top and bottom of the form. A red error message 'Required Information' is visible next to the 'Start IP Address' field.

12. Sandbox Usage

- Path: Setup → Sandboxes → Create “Onboarding_Test_Sandbox”.
- Use for: testing Flows, Approval Workflows, Automation before pushing to Production.

13. Deployment Basics

- For moving configuration:
 - Change Sets → Upload from Sandbox to Production.
 - VS Code + Salesforce CLI (SFDX) for advanced deployment.
- **Outcome of Phase 2:**
- At the end of this phase, you will have:
 - ✓ A fully configured Salesforce Org (Company, Users, Security).
 - ✓ Profiles, Roles, Permission Sets ensuring secure access.
 - ✓ OWD & Sharing Rules implemented for HR, IT, Managers, Employees.
 - ✓ Sandbox + Deployment ready for automation & development (Phase 3 onwards).