

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. At the top, it displays the current My Domain URL as `orgfarm-0d77417598-dev-ed.develop.my.salesforce.com` with partitioned enhanced domains. The domain name is listed as `orgfarm-0d77417598-dev-ed` and the domain suffix as `Standard (*.my.salesforce.com)`. In the 'Routing and Policies' section, there are options for Salesforce Edge Network (which is applied to most provisioned and deployed domains), Login Policy (which applies to provisioned My Domain login URLs), and Cookies (with a note about requiring first-party cookies). A yellow callout box highlights a note about Setup pages not being served from the `salesforce-setup.com` domain yet, requiring an extra step for users to access them in 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' setup page. It displays the organization's profile, including the organization name as 'Employee Onboarding & Asset Management CRM', primary contact as 'BANDARU B S VEERA SAI GANESH', and various other details like division (India), fiscal year start (April), and newsletter preferences. The page also lists system notices, locale formats, and API usage statistics. At the bottom, it shows the user who created the record (OrgFarm_EPIC) and the date it was modified.

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 'Business Hours' setup page in Salesforce. At the top, there's a header with a gear icon and the word 'SETUP'. Below it, the page title is 'Business Hours'. On the right, there's a link 'Help for this Page' with a question mark icon. The main content area is titled 'Organization Business Hours' and contains a sub-section 'Business Hours Detail'. This section includes a table with columns: Business Hours Name, Company Standard Business Hours, Time Zone, and Default Business Hours. The table shows a single row for 'Business Hours' with specific business hours defined for each day of the week. Below this table, there are fields for 'Active' status (checked), 'Created By' (BANDARU B S VEERA SAI GANESH), and 'Last Modified By' (BANDARU B S VEERA SAI GANESH). A 'Holidays' section follows, with a table showing a single entry for 'Independence Day' with its description and date/time. There are 'Edit' buttons throughout the page.

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 'Fiscal Year Edit' page in Salesforce. At the top, there's a header with a gear icon and the word 'SETUP'. Below it, the page title is 'Fiscal Year'. On the right, there's a link 'Help for this Page' with a question mark icon. The main content area is titled 'Organization Fiscal Year Edit: Employee Onboarding & Asset Management CRM'. It includes a note: 'To specify the fiscal year type for your organization, choose one of the options below.' A 'Fiscal Year Information' section explains that you can change the fiscal year start month and specifies whether the fiscal year name is set to the starting or ending year. A warning message states: '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.' Below this, a 'Change Fiscal Year Period' form is displayed. It has fields for 'Name' (Employee Onboarding & Asset Management CRM), 'Fiscal Year Start Month' (set to April), and 'Fiscal Year is Based On' (set to 'The ending month'). At the bottom of the form are 'Save' and 'Cancel' buttons. The URL at the bottom of the page is 'https://lightning.force.com/lightning/setup/ForecastFiscalYear/home'.

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. At the top, there's a header with 'SETUP' and 'Users'. Below it, a sub-header says 'All Users'. A note says 'On this page you can create, view, and manage users.' and 'To get more licenses, use the Your Account app. Let's Go'. There are buttons for 'View: All Users', 'Edit', and 'Create New View'. A navigation bar at the bottom includes links for A through Z and 'Other'. The main area is a table with columns: Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several user records, such as Admin_IT (alias iadmin, username saiganeshtbandaru9156@gmail.com, role IT Admin, active, profile IT_Profile), B_S_VEERA_SAI_GANESH_BANDARU (alias sal, username saiganeshtbandaru9645@agentforce.com, role System Administrator, active, profile Chatter_Free_User), and others like Chatter_Expert, EPIC_OrgFarm, Manager_Department, Manager_HR, User_Integration, and User_Security.

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. At the top, there's a header with 'SETUP' and 'Profiles'. Below it, a sub-header says 'Profiles'. A note says 'Help for this Page' and 'New Profile'. There are buttons for 'All Profiles', 'Edit', 'Delete', and 'Create New View'. A navigation bar at the bottom includes links for A through Z and 'Other'. The main area is a table with columns: Action, Profile Name, User License, and Custom. The table lists profiles like Einstein_Agent_User (User License: Einstein Agent, Custom: checked), Employee (User License: Salesforce, Custom: checked), External_Apps_Login_User (User License: External Apps Login, Custom: unchecked), and External_Identity_User (User License: External Identity, Custom: unchecked). At the bottom, there are pagination controls for '1-4 of 4' and '3 Selected'.

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.

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

- Employee Onboarding & Asset Management CRM
 - Add Role
 - CEO Edit | Del | Assign
 - Add Role
 - Department Manager Edit | Del | Assign
 - Add Role
 - HR Manager Edit | Del | Assign
 - Add Role
 - Employee Edit | Del | Assign
 - Add Role
 - IT Admin Edit | Del | Assign
 - Add Role

Show in tree view

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.

Permission Sets

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

All Permission Sets

| Action | Permission Set Name | Description | License |
|-------------------------------------|--|--|----------------------------------|
| <input type="checkbox"/> | Access Agentforce Default Agent | Gives users access to the default Agentforce agent in Salesforce. | Agentforce (Default) |
| <input type="checkbox"/> | Agent Platform Builder | Allow access to agent platform. | Agent platform builder |
| <input type="checkbox"/> | Agentforce Default Admin | Allows users to build and manage in-org copilot. | Agentforce (Default) |
| <input type="checkbox"/> | Agentforce Service Agent Configuration | Build and manage autonomous AI service agents. | Agentforce Service Agent Builder |
| <input type="checkbox"/> | Agentforce Service Agent Object Access | Access knowledge articles and manage cases and contacts as an aut... Agentforce Service Agent User | Agentforce Service Agent User |
| <input type="checkbox"/> | Agentforce Service Agent Secure Base | Set up and use Agentforce Service Agent actions with enhanced data ... Agentforce Service Agent User | Agentforce Service Agent User |
| <input type="checkbox"/> | Agentforce Service Agent User | Analyze topics and perform actions as an autonomous AI service agent. Agentforce Service Agent User | Agentforce Service Agent User |
| <input checked="" type="checkbox"/> | Asset Approver | Allows managers to approve and edit asset records. | |
| <input type="checkbox"/> | Authenticated Payer | An authenticated external user with the ability to make and manage th... Salesforce Payments External | |

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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 for 'Employee'. The 'Manage sharing settings for' dropdown is set to 'Employee'. Under 'Default Sharing Settings', the 'Organization-Wide Defaults' section shows:

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

The 'Other Settings' section includes checkboxes for Manager Groups, Secure guest user record access (checked), and Require permission to view record names in lookup fields.

At the bottom, there's a 'Sharing Rules' section for 'Employee Sharing Rules' with 'New' and 'Recalculate' buttons.

The screenshot shows the 'Sharing Settings' page for 'Onboarding Task'. The 'Manage sharing settings for' dropdown is set to 'Onboarding Task'. Under 'Default Sharing Settings', the 'Organization-Wide Defaults' section shows:

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

The 'Other Settings' section includes checkboxes for Manager Groups, Secure guest user record access (checked), and Require permission to view record names in lookup fields.

At the bottom, there's a 'Sharing Rules' section for '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*.

Sharing Settings

Other Settings

- Manager Groups: ⓘ
- Secure guest user record access: ⓘ
- Require permission to view record names in lookup fields: ⓘ

Sharing Rules

Onboarding Task Sharing Rules

| Action | Criteria | Shared With | Access Level |
|------------|--|------------------|--------------|
| Edit Del | Onboarding Task: Status EQUALS In Progress | Role: HR Manager | Read Only |

Sharing Overrides

Profiles That Override Onboarding Task Sharing

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

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).

Session Settings

Standard

- Username Password
- Delegated Authentication Activation
- Lightning Login
- Passwordless Login

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: ⓘ

Buttons

Save | Cancel

The screenshot shows the Salesforce Setup interface under the Profiles section. The title is "Login IP Ranges". A sub-header says "Enter the range of valid IP addresses from which users with this profile can log in." Below this, there is a form titled "Please specify IP range". It contains fields for "Start IP Address" (with placeholder "<Your Office Start IP>"), "End IP Address" (with placeholder "<Your Office End IP>"), and "Description" (with a small input field). At the top right of the form is a note "Required Information". At the bottom of the form are "Save" and "Cancel" buttons.

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).