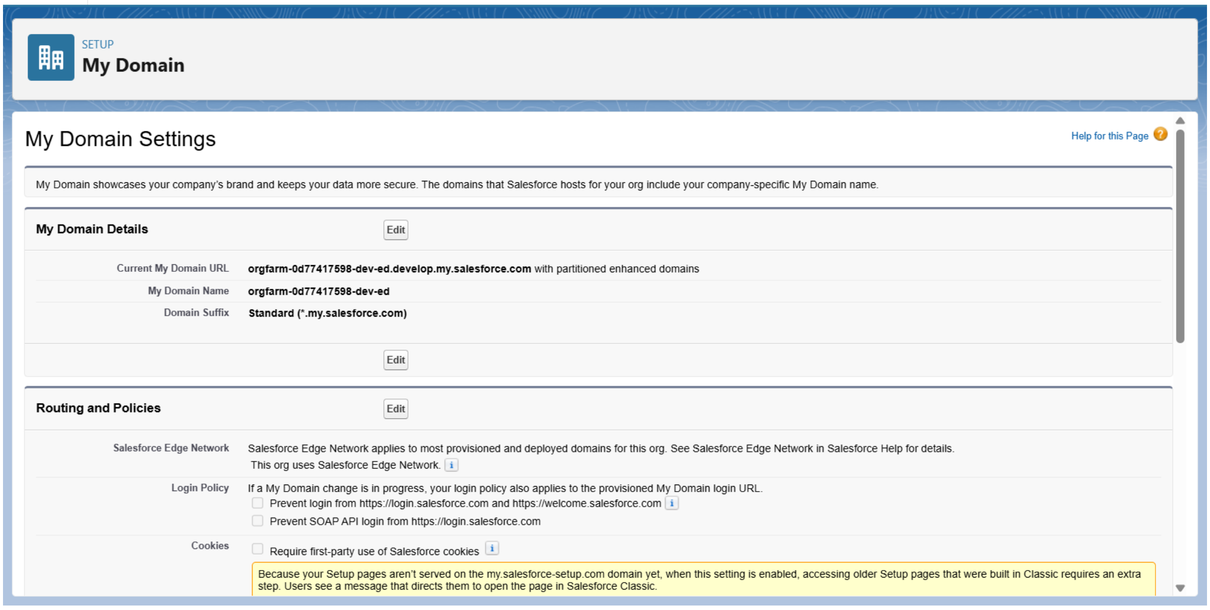
Employee Onboarding & Asset Management CRM Project

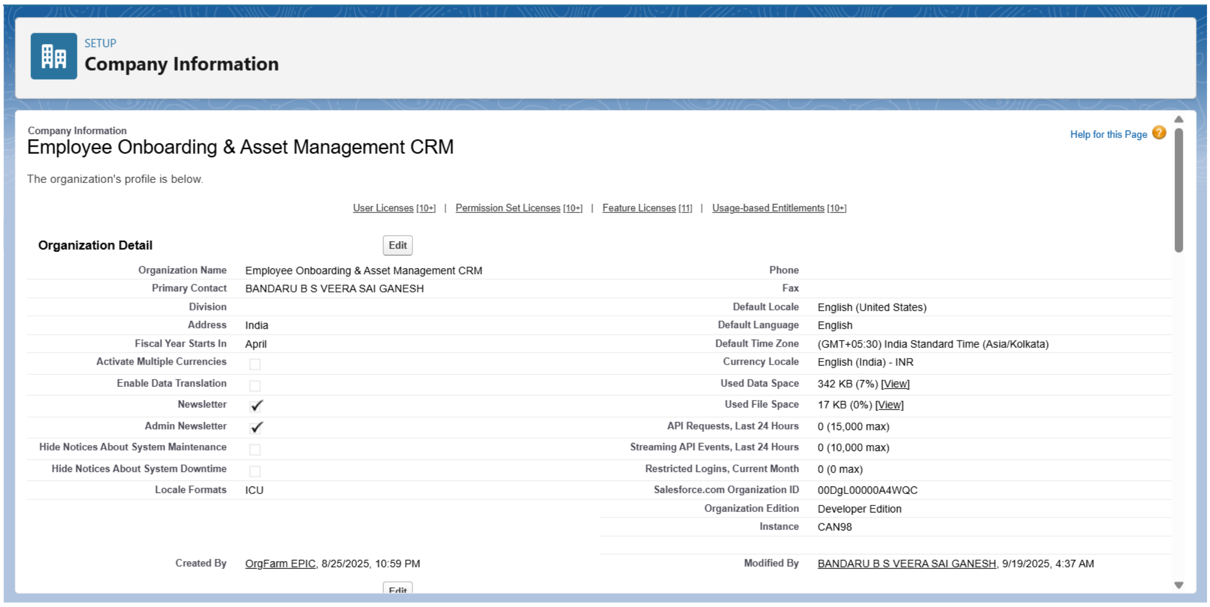
Phase-2: Org Setup & Configuration :

1. **Salesforce Edition & Developer Org Setup**
   Create a **new Developer Org** dedicated to this project.



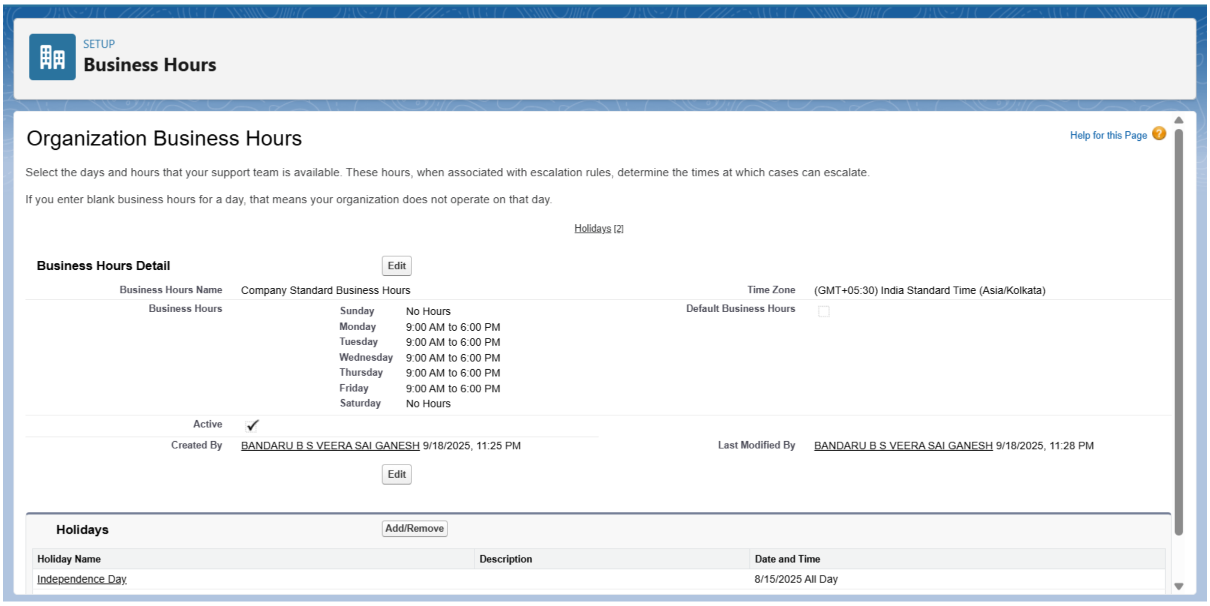
2. **Company Profile Setup**
   Navigate: **Setup → Company Information**.
   Configure:

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



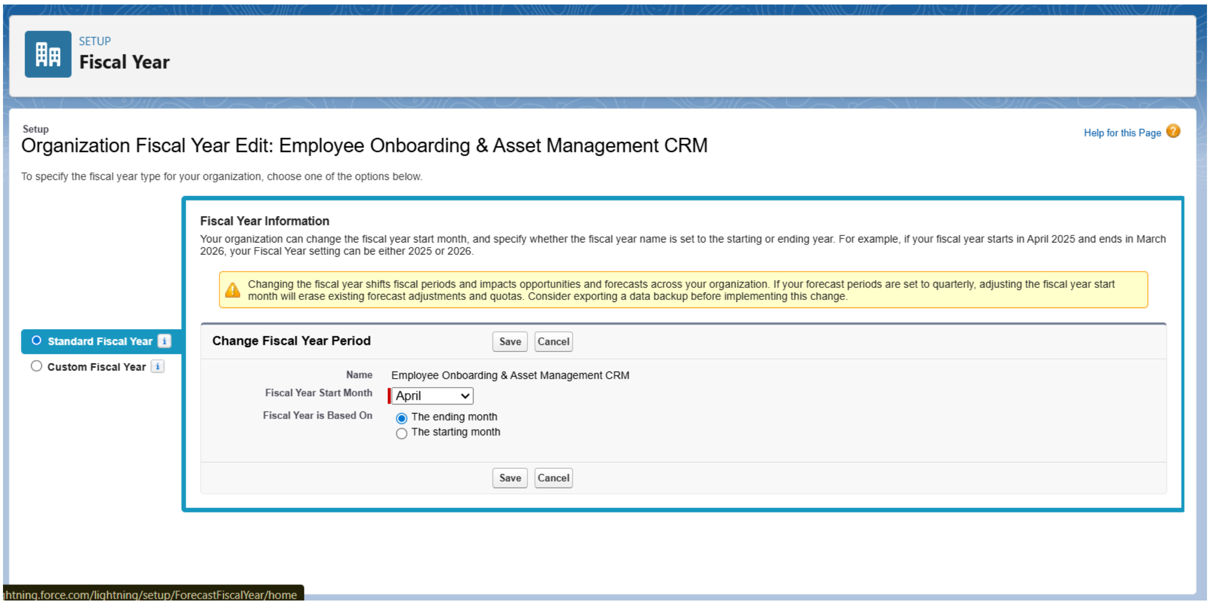
3. Business Hours & Holidays

- 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.



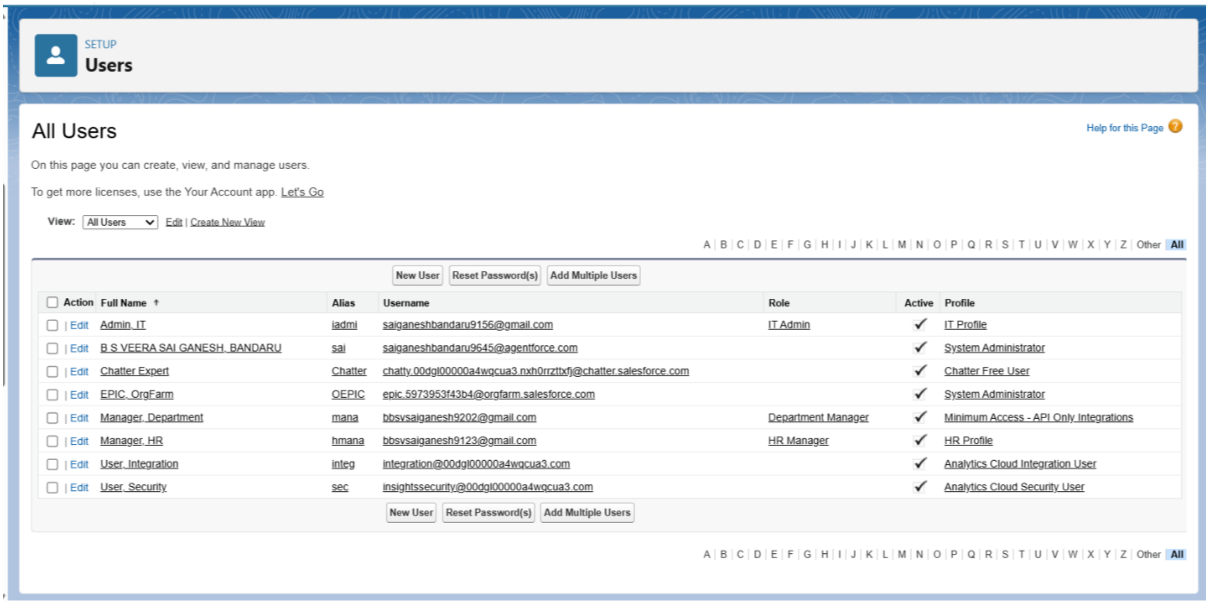
4. Fiscal Year Settings

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



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).

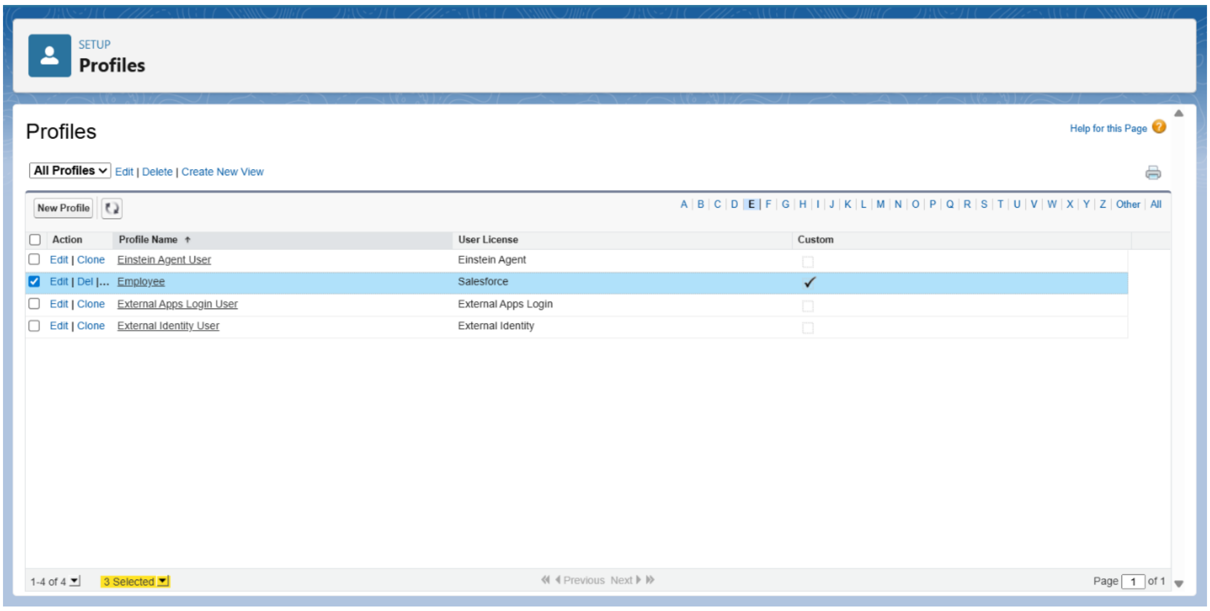


6. Profiles

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**.



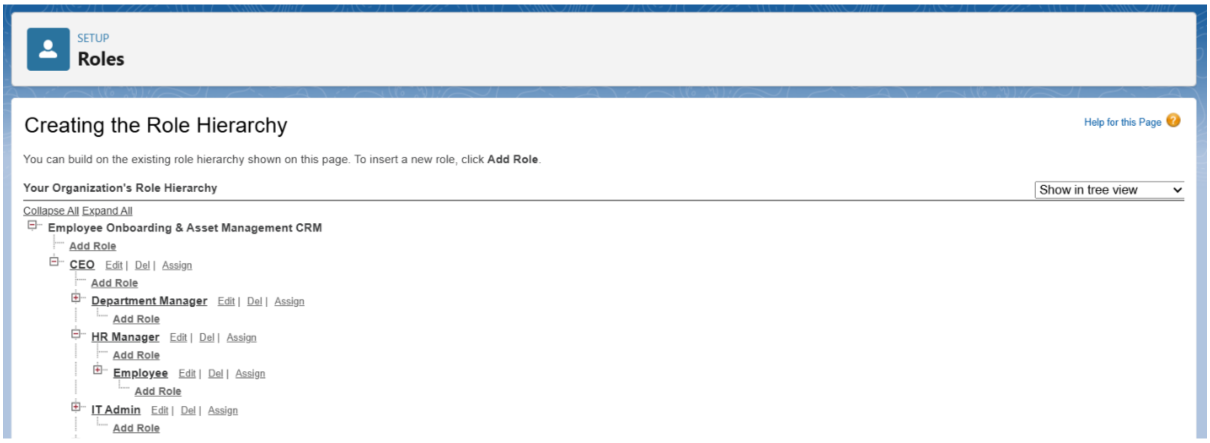
7. Roles

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

Hierarchy Example:

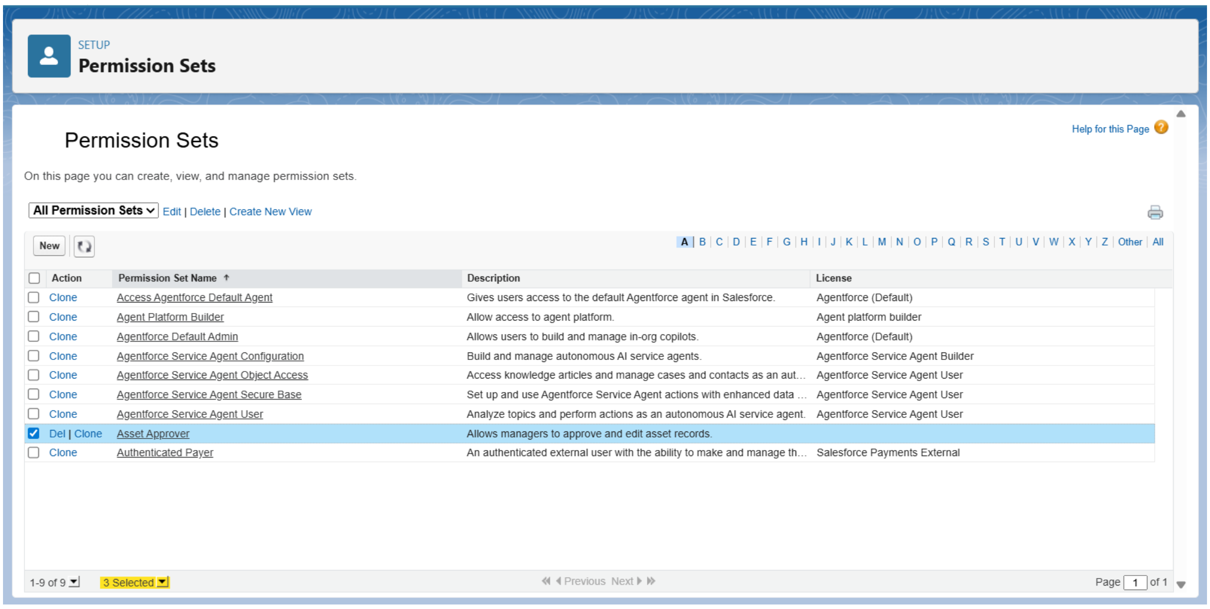
- CEO (Top)
    - HR Manager
    - IT Admin
    - Department Manager
        - Employee

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



8. Permission Sets

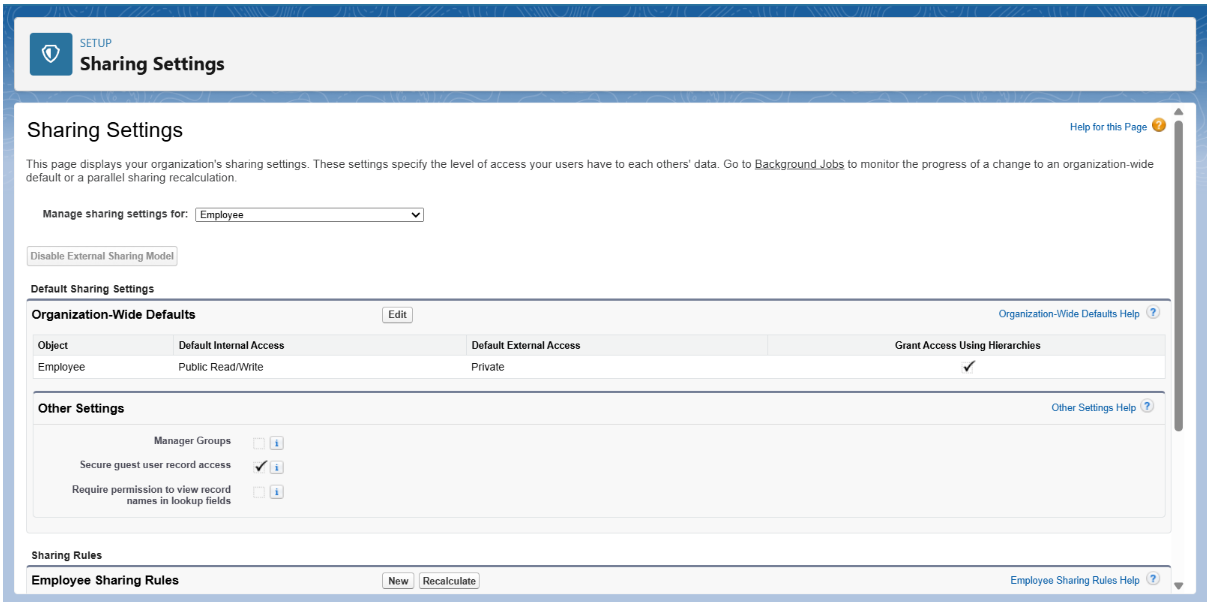
- Create → *Setup* → *Permission Sets* → *New*.
  Examples:
- Asset Approver → Assign to Managers only.
- Sensitive Data Access → Assign only to HR for employee salary/bank details.
- Onboarding Task Override → Assign to IT Admin when they need to edit HR tasks.

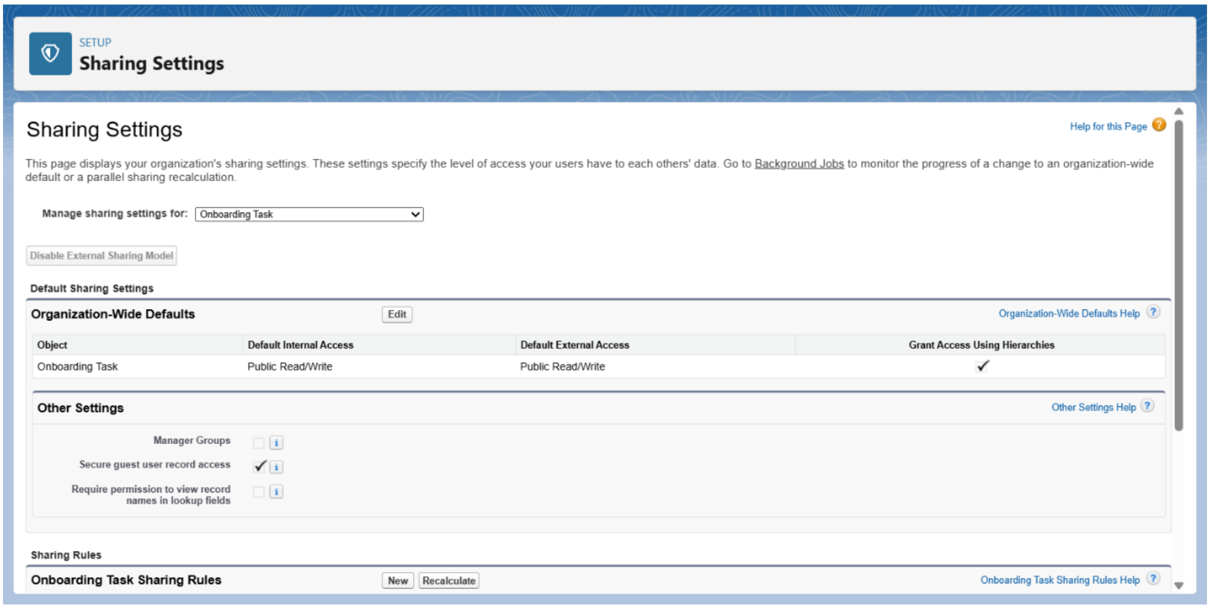


9. OWD (Organization-Wide Defaults)

Path: Setup → Sharing Settings.

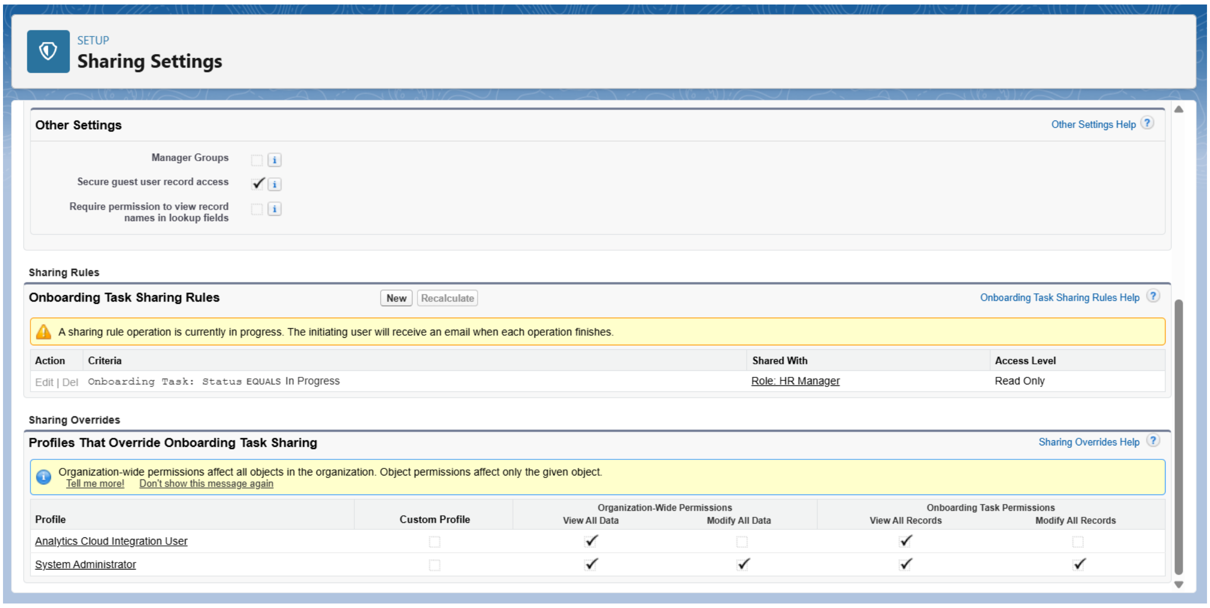
- Employee Records → Private (each Employee sees only their own).
- Assets → Controlled by Parent (linked to Employee).
- Onboarding Tasks → Public Read/Write for HR & IT.





10. Sharing Rules

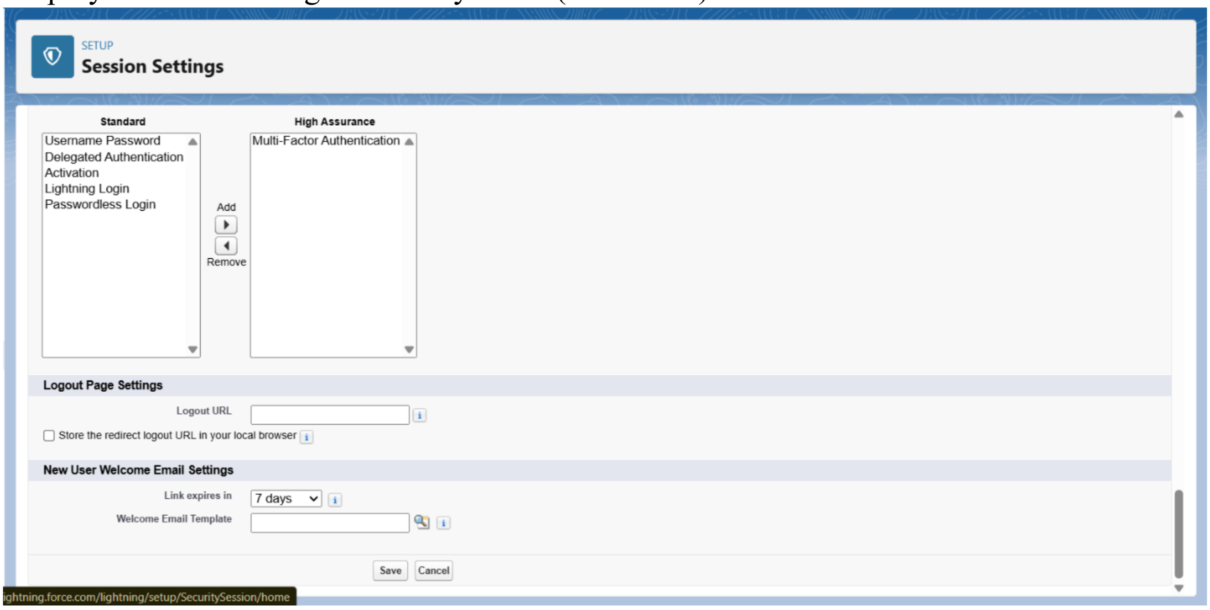
- Example: Manager should see all employees in their department.
  Path: Setup → Sharing Rules → Create Rule:
- Object: *Employee*
- Criteria: *Department = Manager's Department*
- Share With: *Manager Role*.

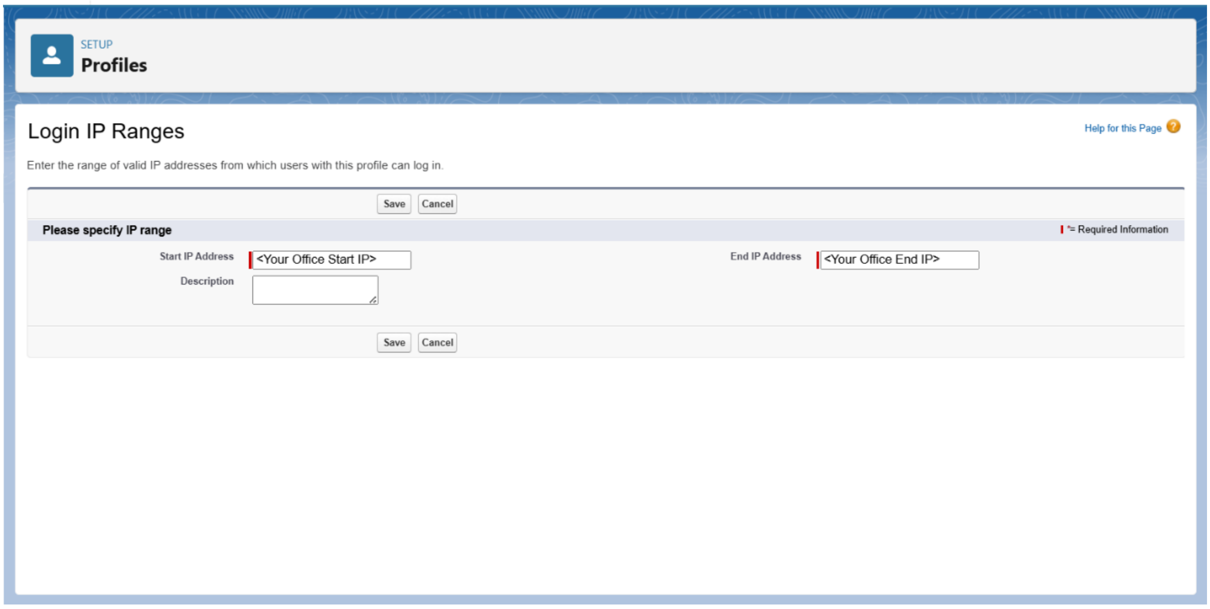


11. Login Access Policies

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).





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).