

Project Title: **Employee Wellness & Productivity Tracker**

Phase 2 : Org Setup & Configuration

SALESFORCE EDITION

The project is built on **Salesforce Enterprise Edition**. This edition was chosen because it provides robust customization, advanced sharing settings, approval processes, and scalability required for managing sensitive employee wellness and productivity data.

For development purposes, a **Developer Edition** org is used to simulate enterprise features in a safe, sandboxed environment.

COMPANY PROFILE SETUP

The organization is configured to represent **WellTrack Solutions Pvt. Ltd.**, an IT services firm headquartered in **Bengaluru, India**.

Configuration Details:

- **Organization Name:** WellTrack Solutions Pvt. Ltd.
- **Phone:** +91 7869835601
- **Primary Contact:** Ayushi Bhanotra (System Administrator)
- **Address:** 15th Floor, Tech Park, Whitefield, Bengaluru, Karnataka – 560066
- **Default Locale:** English (India)
- **Default Language:** English
- **Default Time Zone:** GMT+05:30 (Asia/Kolkata)
- **Currency Locale:** INR (₹)

This setup ensures consistency with Indian business standards and financial practices

WellTrack Solutions Pvt. Ltd

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 | WellTrack Solutions Pvt. Ltd | Phone | 91+7869835601 |
| Primary Contact | Ayushi Bhanotra | Fax | |
| Division | | Default Locale | English (India) |
| Address | 15th Floor, Tech Park, Whitefield Bengaluru 560066 Karnataka India | Default Language | English |
| Fiscal Year Starts In | April | Default Time Zone | (GMT+05:30) India Standard Time (Asia/Kolkata) |
| 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 | 17 KB (0%) [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 | 00Dfj000008jBdn |
| | | Organization Edition | Developer Edition |
| | | Instance | USA1044 |

Created By

[OrgFarm EPIC](#) 9/18/2025, 10:44 AM

Modified By

[Ayushi Bhanotra](#) 9/23/2025, 2:55 AM

BUSINESS HOURS & HOLIDAYS

The standard business schedule reflects Indian corporate norms:

- **Business Hours:**
 - Monday – Friday: 9:00 AM – 6:00 PM IST
 - Saturday & Sunday: Closed
- **Holidays Configured:**
 - Republic Day – January 26
 - Independence Day – August 15
 - Christmas – December 25

This configuration ensures accurate time tracking for case escalations and employee activity monitoring.

Business Hours Detail

Edit

| | | | | |
|---------------------|--------------------------------|--------------------|------------------------|--|
| Business Hours Name | WellTrack India Business Hours | | Time Zone | (GMT+05:30) India Standard Time (Asia/Kolkata) |
| Business Hours | Sunday | No Hours | Default Business Hours | <input checked="" type="checkbox"/> |
| | 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 | | |

Active

☒

Created By

Ayushi.Bhanotra

9/23/2025, 1:23 AM

Last Modified By

Ayushi.Bhanotra

9/23/2025, 1:23 AM

Edit

Holidays

Add/Remove

| Holiday Name | Description | Date and Time |
|------------------|-------------|--------------------|
| Christmas | | 12/25/2025 All Day |
| Independence Day | | 8/1/2027 All Day |
| Republic day | | 1/26/2026 All Day |

FISCAL YEAR SETTINGS

The organization follows the **Indian financial year (April – March)**.

- **Fiscal Year Start:** April 1st
- **Fiscal Year Type:** Standard Fiscal Year

This aligns reporting cycles with statutory compliance and corporate governance norms in India.

USER SETUP & LICENSES

| USER | PROFILE | LICENSE |
|-----------------|------------------------|---------------------|
| Ayushi Bhanotra | System Administrator | Salesforce |
| Celia Martinez | HR Manager Profile | Salesforce Platform |
| Jasmine Airy | Wellness Coach Profile | Salesforce Platform |
| Ana Huang | Employee Profile | Salesforce Platform |

All Users

[Help for this Page](#)

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

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

View: All Users [Edit](#) [Create New View](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other [All](#)

| New User Reset Password(s) Add Multiple Users | | | | | | |
|---|------------------|---------|--|----------------|--------|----------------------------------|
| <input type="checkbox"/> Action | Full Name ↑ | Alias | Username | Role | Active | Profile |
| <input type="checkbox"/> Edit Login | Airy, Jasmine | jairy | jasmine456@gmail.com | Wellness Coach | ✓ | Wellness Coach Profile |
| <input type="checkbox"/> Edit | Bhanotra, Ayushi | ayu | ayushibhanotra04351@agentforce.com | | ✓ | System Administrator |
| <input type="checkbox"/> Edit | Chatter Expert | Chatter | chatty.00df000008jbdneae.sjoengdjv4vl@chatter.salesforce.com | | ✓ | Chatter Free User |
| <input type="checkbox"/> Edit Login | EPIC, OrgFarm | OEPIE | epic.77f29af235c8@orgfarm.salesforce.com | | ✓ | System Administrator |
| <input type="checkbox"/> Edit Login | Huang, Ana | ahuan | anahuang56@gmail.com | Employee | ✓ | Employee Profile |
| <input type="checkbox"/> Edit Login | Martinez, Celia | cmart | celia789@gmail.com | HR Manager | ✓ | HR Manager Profile |
| <input type="checkbox"/> Edit | User Integration | integ | integration@00df000008jbdneae.com | | ✓ | Analytics Cloud Integration User |
| <input type="checkbox"/> Edit | User Security | sec | insightssecurity@00df000008jbdneae.com | | ✓ | Analytics Cloud Security User |
| New User Reset Password(s) Add Multiple Users | | | | | | |

PROFILE

Profiles control base system permissions. Custom profiles were created to support organizational needs:


- System Administrator – Full system access.
- HR Manager Profile – Access to employee wellness data, dashboards, and reports.
- Coach Profile – Restricted to assigned employee records.
- Employee Profile – Limited self-service access

ROLES

A role hierarchy was implemented to define data visibility and reporting structure:

- **CEO**
 - **HR Manager**
 - **Wellness Coach**
 - **Employee**

This ensures managers can view the records of their subordinates while maintaining privacy for individual employees.

 **SETUP**
Roles

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](#)

- WellTrack Solutions Pvt. Ltd
 - [Add Role](#)
 - CEO [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - CFO [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - COO [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - HR_Manager [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - Wellness Coach [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - Employee [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - SVP, Customer Service & Support [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - SVP, Human Resources [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - SVP, Sales & Marketing [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)

PERMISSION SETS

Permission sets will be defined as new features are developed. Planned sets include:

- **Employee Wellness App Access**

Permission Set
Employee Wellness App Access

Find Settings... Clone Edit Properties Manage Assignments View Summary

Permission Set Overview

| | | | |
|--------------------------------|--|------------------|-------------------------------------|
| Description | Grants users access to the Employee Wellness application, enabling them to view and update wellness records, participate in wellness programs, and track personal wellness progress. Ensures proper access while maintaining data security | API Name | Employee_Wellness_App_Access |
| License | | Namespace Prefix | |
| Session Activation Required | <input type="checkbox"/> | Created By | Ayushi Bhanotra, 9/24/2025, 6:16 AM |
| Permission Set Groups Added To | 0 | Last Modified By | Ayushi Bhanotra, 9/24/2025, 6:25 AM |

... > SETUP > PERMISSION SET 'EMPLOYEE WELLNESS APP ACCESS'

Employee Wellness App Access

Current Assignments ✎ 🗑 [Add Assignment](#)

| <input type="checkbox"/> Full Name ↑ | Active | Role | Profile | User License | Expires On |
|---|--------|------------|--------------------|---------------------|------------|
| <input type="checkbox"/> Celia Martinez | ✓ | HR_Manager | HR Manager Profile | Salesforce Platform | |

ORGANIZATION - WIDE DEFAULT (OWD)

To protect sensitive employee wellness data, strict data sharing policies were applied:

- **Employee Wellness Records** – Private
- **Tasks & Events** – Controlled by Parent
- **Reports/Dashboards** – Public Read Only
- **Accounts/Contacts (if used)** – Private

This ensures employee wellness data is visible only to authorized personnel

SHARING RULES

Sharing rules allow you to **extend access to records beyond the organization-wide defaults (OWD)** while maintaining security.

Sample configuration for your project:

- **Employee Wellness Records** – Private by default (OWD)

- **Sharing Rules:**

- HR Manager → access to all Employee Wellness Records
- Wellness Coach → access to records of assigned employees only

Manage sharing settings for: Employee Wellness

[Disable External Sharing Model](#)

Default Sharing Settings

Organization-Wide Defaults [Edit](#) [Organization-Wide Defaults Help](#)

| Object | Default Internal Access | Default External Access | Grant Access Using Hierarchies |
|-------------------|-------------------------|-------------------------|--------------------------------|
| Employee Wellness | Private | Private | ✓ |

Other Settings [Other Settings Help](#)

☐ Manager Groups [i](#)
☒ Secure guest user record access [i](#)
☐ Require permission to view record names in lookup fields [i](#)

Sharing Rules

Employee Wellness Sharing Rules [New](#) [Recalculate](#) [Employee Wellness Sharing Rules Help](#)

| Action | Criteria | Shared With | Access Level |
|--|---|--------------------------------------|--------------|
| Edit Del | Employee Wellness: Assigned Coach EQUALS Current User | Role: Wellness Coach | Read/Write |
| Edit Del | Owner in Role: HR Manager | Role: HR Manager | Read/Write |

LOGIN ACCESS POLICIES

Login access policies define **how administrators and support can access user accounts**.

Configuration for your org:

- Enabled **“Administrators Can Log in as Any User”**
- Users can grant temporary access to administrators for troubleshooting

Purpose:

- Allows quick issue resolution without compromising security
- Maintains user privacy while enabling support

Login Access Policies

[Help for this Page](#) ?

Control which support organizations your users can grant login access to.

Manage Support Options Save Cancel

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

| Support Organization | Packages | Available to Users | Available to Administrators Only i |
|------------------------|----------|----------------------------------|--|
| Salesforce.com Support | | <input checked="" type="radio"/> | <input type="radio"/> |

Save Cancel

DEVELOPER ORG SETUP

Developer Edition is used for your project to **simulate enterprise features safely**. **Key setup elements for Dev Org:**

- Salesforce Platform License used for most users
- Custom objects created: **Employee_Wellness__c**, **Wellness_Report__c**
- Profiles and roles configured for data security and visibility
- Business hours, fiscal year, locale, and currency set to Indian standards

Purpose:

- Provides full-feature access for testing, development, and demonstration
- Safe environment without impacting production data

SANDBOX USAGE

Sandboxes are **copies of your production environment** used for development, testing, or training.

Types (for context):

- Developer Sandbox – small data set, for building customizations
- Partial Copy – includes sample data, for testing reports and workflows
- Full Sandbox – mirror of production, for UAT or integration testing

Usage in Project:

- Simulate employee wellness processes before deployment to production
- Test validation rules, flows, and sharing rules safely

DEPLOYMENT BASICS

Deployment refers to **moving metadata or configuration changes** from one Salesforce org to another.

Common Tools for Deployment:

- Change Sets (sandbox → production)
- Salesforce CLI / VS Code (for Developer Orgs)
- ANT Migration Tool