

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

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
 - Diwali – (date varies, e.g., November 12 for demo)
 - Christmas – December 25

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

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

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.

PERMISSION SETS

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

- **Employee Wellness App Access**
- **Dashboard & Report Access**
- **Mobile App Access**

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

Purpose:

- Ensures managers can view and act on employee wellness data while keeping individual data private.
- Automates data visibility based on roles or criteria.

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

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

Best Practices for Project:

- Build and test all custom objects, fields, and workflows in Dev Org or Sandbox
- Validate with test users before moving to production

ROLES HIEARCHY SCREENSHOT :-

 **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](#)
 - Empolyee [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](#)