

Phase 2 — Org Setup & Configuration

Project: Employee Onboarding System (Salesforce) **Context:** As a 4th-year student, my goal is to simulate how a Salesforce consultant/administrator would set up the environment for an onboarding solution. This phase ensures the org is correctly configured before I build the automation, onboarding flows, and dashboards.

1. Salesforce Editions

- Using a **Developer Edition org**.
- Real-world note: Companies may choose Enterprise or Unlimited editions.

2. Company Profile Setup

- Set company info (name,address,timezone,currency).
- For this project: set timezone to my country, currency to INR/USD.

3. Business Hours & Holidays

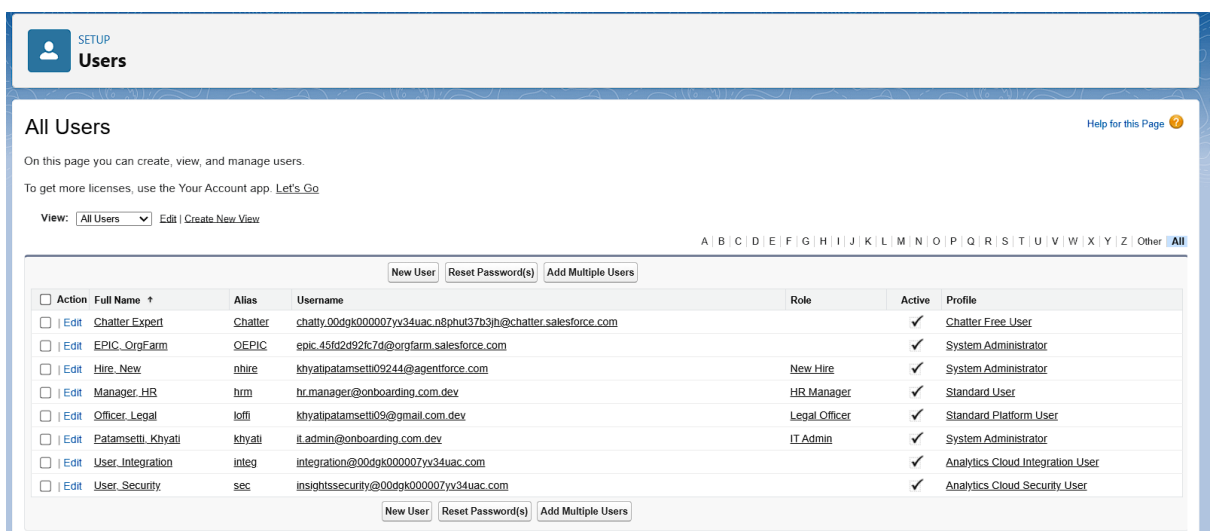
- Business hours: 9 AM–6 PM, Mon–Fri.
- Add public holidays to simulate SLA tracking.

4. Fiscal Year Settings

- Standard fiscal year (Jan–Dec).
- Note: Custom fiscal years used in specific industries.

5. User Setup & Licenses

- Create sample users: HR Manager, IT Admin, Legal Officer, New Hire.
- Assign standard Salesforce licenses.



The screenshot shows the Salesforce Setup Users page. At the top, there's a header with a user icon and the text "SETUP Users". Below this, the page title "All Users" is displayed, followed by a sub-header "On this page you can create, view, and manage users." and a link "To get more licenses, use the Your Account app. Let's Go".

Below the header, there's a "View:" dropdown set to "All Users" and a link "Edit | Create New View". To the right, there's a "Help for this Page" link.

The main content area features a table with columns: Action, Full Name, Alias, Username, Role, Active, and Profile. The table contains 8 rows of user data. At the bottom of the table, 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	Chatter Expert	Chatter	chatterly.00d9k000007yv34uac-n8phtu37b3jh@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	EPIC_OrgFarm	OEPIIC	epic.45fd2d92fc7d@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/> Edit	Hire_New	nhire	khyatipatamsetti09244@agentforce.com	New Hire	✓	System Administrator
<input type="checkbox"/> Edit	Manager_HR	hrm	hr.manager@onboarding.com.dev	HR Manager	✓	Standard User
<input type="checkbox"/> Edit	Officer_Legal	loff	khyatipatamsetti09@gmail.com.dev	Legal Officer	✓	Standard Platform User
<input type="checkbox"/> Edit	Patamsetti_Khyati	khyati	it.admin@onboarding.com.dev	IT Admin	✓	System Administrator
<input type="checkbox"/> Edit	User_Integration	integ	integration@00d9k000007yv34uac.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d9k000007yv34uac.com		✓	Analytics Cloud Security User

6. Profiles

- HR Profile: access to employee objects & dashboards.

- IT Profile: access to setup + onboarding tasks.
- New Hire Profile: limited access.

SETUP Profiles

Profile
HR Profile

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \(0\)](#) | [Enabled Apex Class Access \(0\)](#) | [Enabled Visualforce Page Access \(0\)](#) | [Enabled External Data Source Access \(0\)](#) | [Enabled Named Credential Access \(0\)](#) | [Enabled External Credential Principal Access \(0\)](#) | [Enabled Custom Metadata Type Access \(0\)](#) | [Enabled Custom Setting Definitions Access \(0\)](#) | [Enabled Flow Access \(0\)](#) | [Enabled Service Presence Status Access \(0\)](#) | [Enabled Custom Permissions \(0\)](#)

Profile Detail [Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name	HR Profile		
User License	Salesforce Platform	Custom Profile	✓
Description	CRUD on Employee / Onboarding Objects. Access to Reports & Dashboards. Read-only on IT and Legal objects.		
Created By	New Hire, 9/12/2025, 8:44 AM	Modified By	New Hire, 9/25/2025, 8:59 AM

Page Layouts

Standard Object Layouts

Global	Global Layout [View Assignment]	Lead	Lead Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Location	Location Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Location Group	Location Group Layout [View Assignment]
Account	Account Layout [View Assignment]	Location Group Assignment	Location Group Assignment Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout	Object Milestone	Object Milestone Layout

7. Roles

- Role hierarchy: CEO → HR Manager → IT Admin → New Hire.
- Visibility flows upward.

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](#)

Contact Roles on Contracts **Ordering System**

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**
 - New Hire** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**
 - IT Admin** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**
 - Legal Officer** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**

8. Permission Sets

- Document Signer Access (DocuSign integration).
- Training Module Access.

9. Organization-Wide Defaults (OWD)

- Employee Records: Private.
- Onboarding Tasks: Controlled by Parent.

10. Sharing Rules

- Example: Allow IT team to view onboarding records for account setup.

11. Login Access Policies

- Trusted IP ranges.
- Two-factor authentication for admins.

12. Dev Org Setup

- Connect Developer Org to VS Code + GitHub.
- Practice with Salesforce DX scratch orgs.

```
PS C:\Users\patem\OneDrive\Desktop\Employee_Onboarding_System\Employee_Onboarding_System> sfdx auth:web:login -a MyOrg
Warning: The "auth web login" command has been deprecated. Use "org login web" instead.
Successfully authorized khyatipatamsetti09244@agentforce.com with org ID 00DgK000007Yv34UAC
```