# Phase 2: Org Setup & Configuration

Goals:

- Create Salesforce Developer Org

- Configure company info, users, and profiles

- Set up permission sets for HR, Manager, Employee

Developer Org Setup

1. Signup: [Salesforce Developer Signup](#)

   - Username: manas@onboarding.com

   - Company: Onboarding Capstone

   - Job Role: Developer

2. Setup → Company Information:

   - Fiscal Year = Standard, Locale = English (India), Time Zone = GMT+5:30

Create Custom Profiles

- Clone *Standard User* → create:

   - HR_Profile, Manager_Profile, Employee_Profile

- Object Permissions (Employee, OnboardingTask, Document):

   - HR → CRUD, Manager → Read/Edit, Employee → Read/Edit (own)

- Tab Visibility: Default On

Kjhk
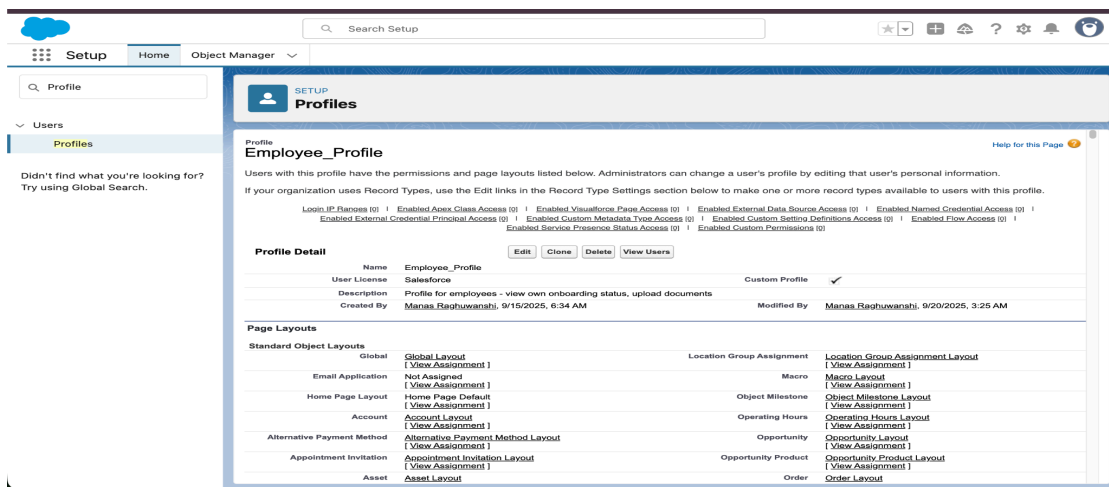
Create UsersScreenshot: Users list showing all 3 users

Name	Profile	Username
Hira Singh	HR_Profile	hira@onboarding.com
Mohan Verma	Manager_Profile	mohan@onboarding.com
Asha Kumar	Employee_Profile	asha@onboarding.com
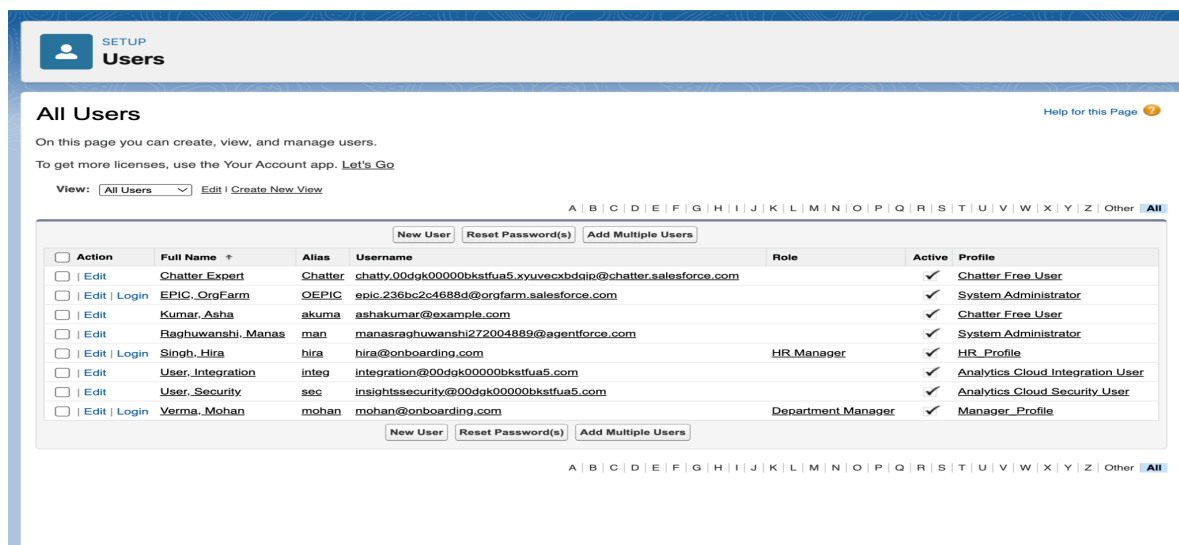
Create Permission Sets

- Permission Sets: HR_Full_Access, Manager_Approvals, Employee_SelfService

- Configure Object Settings (CRUD) and assign to users

Sharing & Security

- Sharing Settings → Org-Wide Defaults → Private for Employee, Task, Document

SETUP				
Sharing Settings				

No sharing rules specified.

Work Type Sharing Rules	New	Recalculate		Work Type Sharing Rules Help ?

No sharing rules specified.

Work Type Group Sharing Rules	New	Recalculate		Work Type Group Sharing Rules Help ?

No sharing rules specified.

Document Sharing Rules	New	Recalculate			Document Sharing Rules Help ?

Action	Criteria	Shared With	Access Level
Edit | Del	Document: Owner NOT EQUAL TO	Group: Manager Group	Read/Write
Edit | Del	Owner in Group: HR Group	Group: HR Group	Read/Write

Employee Sharing Rules	New	Recalculate			Employee Sharing Rules Help ?

Action	Criteria	Shared With	Access Level
Edit | Del	Employee: Manager NOT EQUAL TO	Group: Manager Group	Read/Write
Edit | Del	Owner in All Internal Users	Group: HR Group	Read/Write
Edit | Del	Owner in Group: HR Group	Group: HR Group	Read/Write

Onboarding Task Sharing Rules	New	Recalculate			Onboarding Task Sharing Rules Help ?

Action	Criteria	Shared With	Access Level
Edit | Del	Onboarding Task: Owner NOT EQUAL TO	Group: Manager Group	Read/Write
Edit | Del	Owner in Group: HR Group	Group: HR Group	Read/Write

Verify Access

- Login as each user:

  - HR → create records

  - Manager → approve/view team

  - Employee → view own tasks

Search...

Sales   Home   Opportunities ⌄   Leads ⌄   Tasks ⌄   Files ⌄   Accounts ⌄   Contacts ⌄   Campaigns ⌄   Dashboards ⌄   Employees ⌄   More ⌄

Employee
Test EmployeeHR

New Contact   Edit   New Opportunity   ⌄

Related   **Details**

Activity

Employee Name
Test EmployeeHR

Owner
Hira Singh

Has Manager
☐

Manager
Mohan Verma

Created By
Hira Singh , 21/09/2025, 10:19 am

Last Modified By
Hira Singh , 21/09/2025, 10:19 am

Filters: All time • All activities • All types

Refresh • Expand All • View All

⌄ **Upcoming & Overdue**

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

To Do List