

Phase 2: Org Setup & Configuration

Project: Employee Onboarding & Training Tracker using Salesforce CRM

Organizations face challenges in ensuring a smooth onboarding and training process. Without proper system setup and configuration, automation and streamlined workflows cannot be achieved. In this phase, the Salesforce Org was set up and configured to provide a foundation for the onboarding and training solution.

Salesforce Edition & Environment Setup:

- Edition: Salesforce Developer Edition
- Purpose: Development environment dedicated to building and testing the Employee Onboarding & Training CRM system.

Company Profile Configuration:

- Organization Name: XYZ Tech Solutions
- Industry: Information Technology Services
- Primary Contact: System Administrator
- Default Locale: English (India)
- Default Time Zone: (GMT +5:30) Asia/Kolkata
- Currency: Indian Rupee (INR)

Role Hierarchy Setup:

HR Manager (Top Level)

 ■■■ Training Admin

 ■■■ Employee

User Profiles Created:

- HR Manager
- Training Admin
- Employee

Business Hours Configuration:

- Operating Hours:
 - Monday – Friday: 9:00 AM – 6:00 PM
 - Saturday: Closed
 - Sunday: Closed

Purpose: Ensures automated workflows and time-dependent processes respect organizational business timings.

Security Foundation:

- Organization-Wide Defaults (OWD): Set to Private for Employee and Onboarding Task objects.
- Role Hierarchy: Configured to allow record visibility based on HR roles.
- Sharing Rules: Role-based sharing model applied, ensuring secure but collaborative data access.

Development Setup:

- Current Environment: Developer Edition Org
- Deployment Method: Change Sets (for future production deployment)
- Backup Strategy: Weekly data exports during development phase

https://orgfarm-9394915257-dev-ed.develop.lightning.force.com/lightning/r/User/005gk000007XinpQAC/view

Sales

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Opportunities

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Tasks

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Janaki Chandragiri

Edit


User Detail






Share your awesomeness with the world.

(Or at least with your colleagues on Chatter.)

 Learn new skills on Trailhead, the fun way to learn Salesforce.

 Connect with fellow Trailblazers on the Trailblazer Community.

Details

Name

Janaki Chandragiri


Title


Manager

Company Name

Student

Related

 Groups (0)

 Files (0)

To Do List

Setup

Home

Object Manager

Search Setup

Star

Plus

Alert

Help

Settings

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company

Company Settings

Business Hours

Calendar Settings

Public Calendars and Resources

Company Information

Data Protection and Privacy

Fiscal Year

Holidays

Language Settings

My Domain

Didn't find what you're looking for?

Try using Global Search.

SETUP

Company Information

Company Information

Student

Help for this Page

The organization's profile is below.

User Licenses (102)

Permission Set Licenses (102)

Feature Licenses (11)

Usage-based Entitlements (102)

Organization Detail

Edit

Organization Name	Student	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (United States)
Address	United States	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (United States) - USD
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	00DgK000005A1m
		Organization Edition	Developer Edition
		Instance	CAN96
Created By	OrgFarm EPIC, 9/9/2025, 9:20 AM	Modified By	OrgFarm EPIC, 9/11/2025, 9:18 PM

Edit

Setup

Home

Object Manager

Search Setup

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Company Settings

Business Hours

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Try using Global Search.

SETUP

Business Hours

Organization Business Hours

Help for this Page

New Business Hours

Action	Business Hours Name	Active	Time Zone	Default
Edit	Default	✓	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	✓

A

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Y

Z

Other

All

Employee

- Details
- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers

Details

Edit Delete

Description

API Name

Employee__c

Custom

✓

Singular Label

Employee

Plural Label

Employees

Enable Reports

✓

Track Activities

✓

Track Field History

✓

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Setup > OBJECT MANAGER

Training Module

- Details
- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers

Details

Edit

Delete

Description	
API Name	Enable Reports
Training_Module__c	<input checked="" type="checkbox"/>
Custom	Track Activities
<input checked="" type="checkbox"/>	
Singular Label	Track Field History
Training Module	
Plural Label	Deployment Status
Training Modules	Deployed
	Help Settings
	Standard salesforce.com Help Window

Setup > OBJECT MANAGER

Onboarding Task

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Details

EditDelete

Description

API Name

Onboarding_Task_c

Custom

✓

Singular Label

Onboarding Task

Plural Label

Onboarding Tasks

Enable Reports

✓

Track Activities

✓

Track Field History

Deployment Status

Deployed

Help Settings

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