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

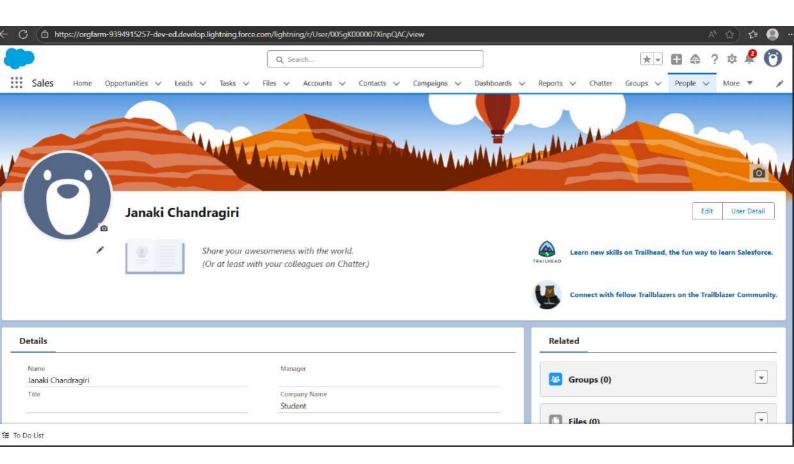
business timings.

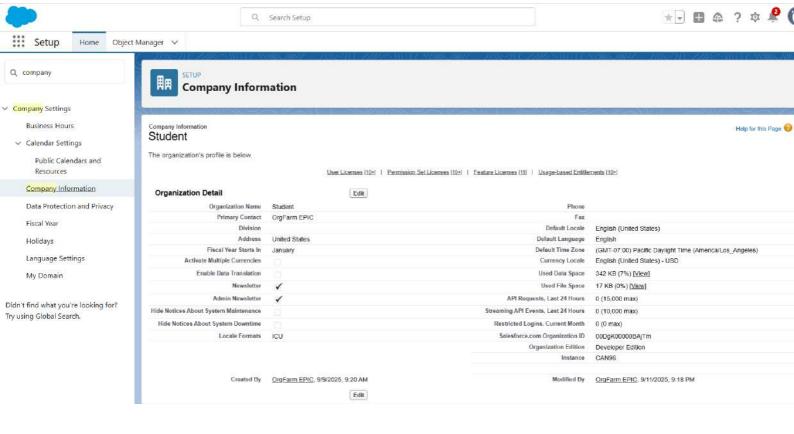
Security Foundation:

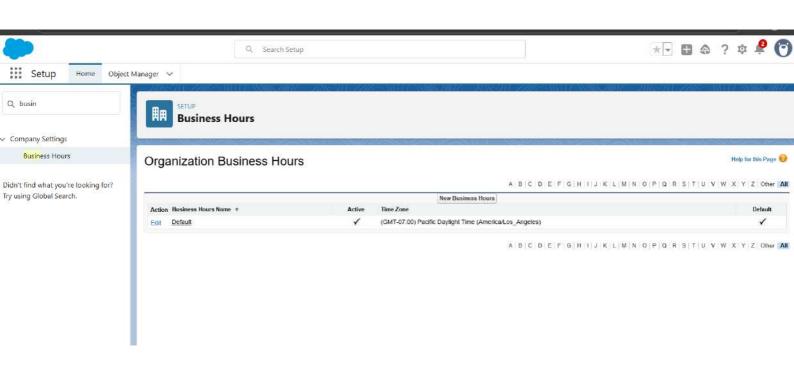
- Organization-Wide Defaults (OWD): Set to Private for Employee and Onboarding Task objects.
- Role Hierarchy: Configured to allow record visibility based on HR roles.
- Sharing Rules: Role-based sharing model applied, ensuring secure but collaborative data access.

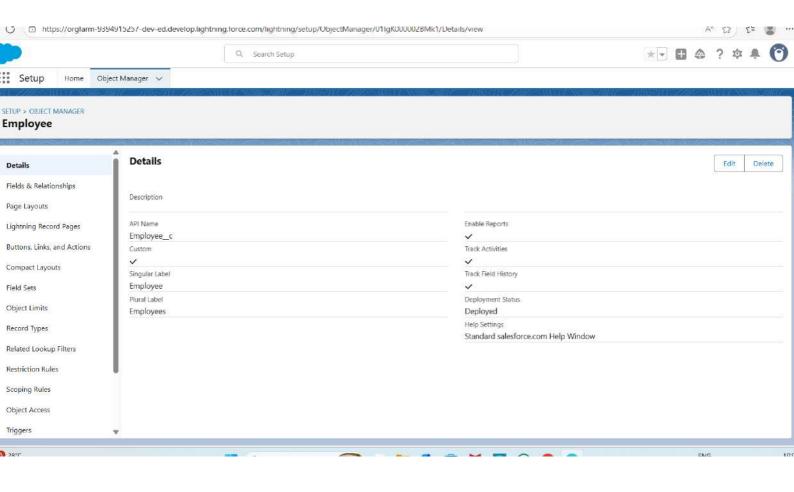
Development Setup:

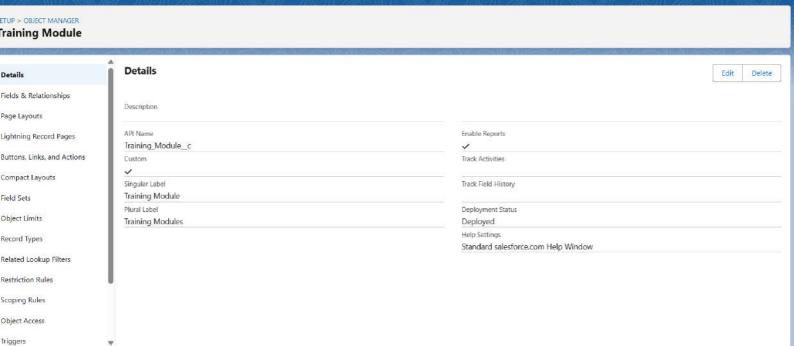
- Current Environment: Developer Edition Org
- Deployment Method: Change Sets (for future production deployment)
- Backup Strategy: Weekly data exports during development phase











Setup Home Object Manager V

