

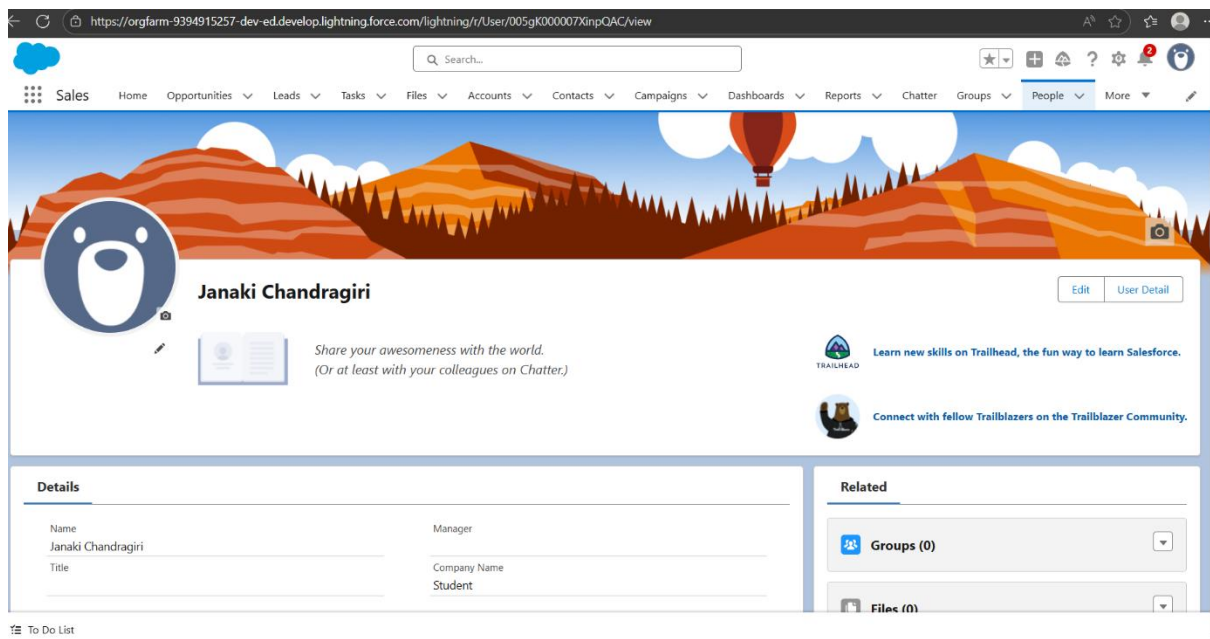
## Phase 2: Org Setup & Configuration

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

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'company' and a list of settings categories: Company Settings, Calendar Settings, Public Calendars and Resources, Company Information (selected), Data Protection and Privacy, Fiscal Year, Holidays, Language Settings, and My Domain. The main content area is titled 'Company Information' and shows the profile for 'Student'. It includes links for User Licenses (10), Permission Set Licenses (10), Feature Licenses (11), and Usage-based Entitlements (10). The 'Organization Detail' section is expanded, showing fields for Organization Name, Primary Contact, Division, Address, Fiscal Year, Activate Multiple Currencies, Enable Data Translation, Newsletter, Admin Newsletter, Hide Notices About System Maintenance, Hide Notices About System Downtime, and Locale Formats. The 'Phone' section is also expanded, showing fields for Phone, Fax, Default Locale, Default Language, Default Time Zone, Currency Locale, Used Data Space, Used File Space, API Requests, Last 24 Hours, Streaming API Events, Last 24 Hours, Restricted Logins, Current Month, Salesforce.com Organization ID, Organization Edition, Instance, and Modified By. The 'Created By' field is OrgFarm EPIC, 9/9/2025, 9:20 AM. The 'Modified By' field is OrgFarm EPIC, 9/11/2025, 9:18 PM.

Organization Detail	
Organization Name	Student
Primary Contact	OrgFarm EPIC
Division	
Address	United States
Fiscal Year Starts In	January
Activate Multiple Currencies	<input type="checkbox"/>
Enable Data Translation	<input type="checkbox"/>
Newsletter	<input checked="" type="checkbox"/>
Admin Newsletter	<input checked="" type="checkbox"/>
Hide Notices About System Maintenance	<input type="checkbox"/>
Hide Notices About System Downtime	<input type="checkbox"/>
Locale Formats	ICU

Phone	
Phone	
Fax	
Default Locale	English (United States)
Default Language	English
Default Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Currency Locale	English (United States) - USD
Used Data Space	342 KB (7%) <a href="#">View</a>
Used File Space	17 KB (0%) <a href="#">View</a>
API Requests, Last 24 Hours	0 (15,000 max)
Streaming API Events, Last 24 Hours	0 (10,000 max)
Restricted Logins, Current Month	0 (0 max)
Salesforce.com Organization ID	000gK000000BAJm
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

## Business Hours Configuration:

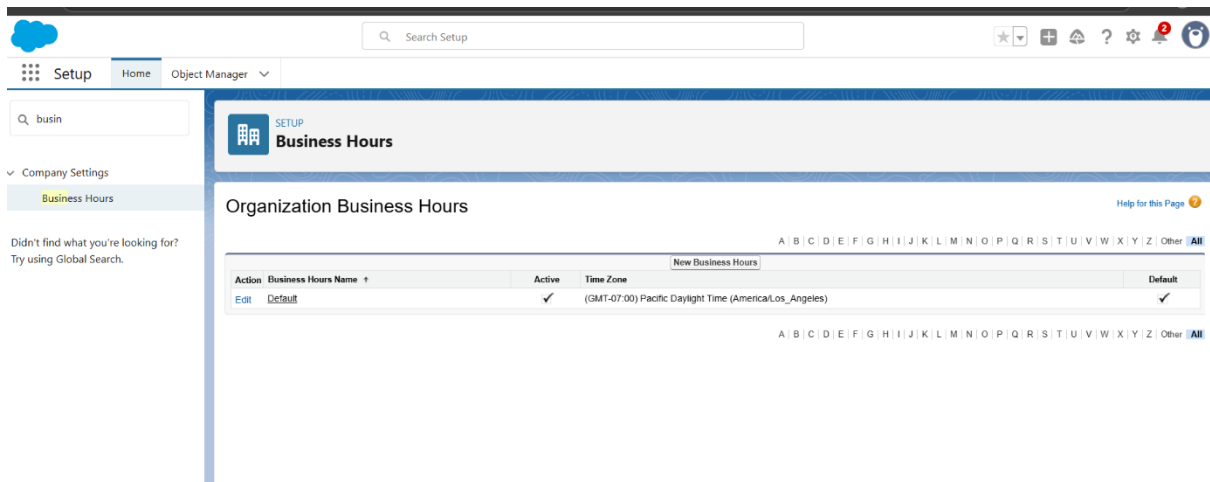
- Operating Hours:

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


## Role Hierarchy Setup: HR Manager (Top Level)

■■■ Training Admin







■■■ Employee

## User Profiles Created:

- HR Manager
- Training Admin
- Employee



Search Setup



Setup

Home

Object Manager

SETUP > OBJECT MANAGER

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

Fields & Relationships

8 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Date of Joining	Date_of_Joining__c	Date		
Department	Department__c	Picklist		
Employee Email	Employee_Email__c	Email		
Employee Name	Employee_Name__c	Text(100)		
Employee Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓