

Phase 2: Problem Understanding & Industry Analysis — ERM for Hybrid Workforce

1. Salesforce Editions

- Choose the Salesforce edition suitable for your ERM project (e.g., Enterprise or Unlimited) based on the number of users and required features.
- Ensure the edition supports **Profiles, Permission Sets, Sharing Rules, and API access** for integrations.

2. Company Profile Setup

Set basic org details under *Setup* → *Company Information* → *Edit*:

- Name:** ERM Solutions
- Time Zone:** ((GMT+05:30) India Standard Time (Asia/Kolkata)
- Locale:** English (India)
- Language:** English
- Currency:** USD Dollars

Company Information

ERM Solutions

Help for this Page

The organization's profile is below.

User Licenses (10+)

Permission Set Licenses (10+)

Feature Licenses (11)

Usage-based Entitlements (10+)

Organization Detail

Edit

Currency Setup

Organization Name	ERM Solutions	Phone	
Primary Contact	Venkata Balaji Sai R	Fax	
Division		Default Locale	English (India)
Address	Andhra Pradesh India	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input checked="" type="checkbox"/>	Corporate Currency	U.S. Dollar
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	39 (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	00DgL00000BxNFC
		Organization Edition	Developer Edition
		Instance	CAN98

Created By

OrgFarm EPIC, 9/17/2025, 4:07 PM

Edit

Currency Setup

Modified By

Venkata Balaji Sai R, 9/22/2025, 7:47 AM

3. Business Hours & Holidays

- Setup → Business Hours.

The screenshot shows the 'Business Hours Edit' form. At the top, there's a header with a building icon and the text 'SETUP Business Hours'. Below this, a note states: 'Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate. If you enter blank business hours for a day, that means your organization does not operate on that day.' The form is divided into three steps. Step 1, 'Business Hours Name', has a text field for 'Business Hours Name' containing 'ERM Solutions', an 'Active' checkbox which is checked, and a checkbox for 'Use these business hours as the default' which is also checked. Step 2, 'Time Zone', has a dropdown menu for 'Time Zone' set to '(GMT+05:30) India Standard Time (Asia/Kolkata)'. Step 3, 'Business Hours', is a table with columns for days of the week, start time (HH:MM), end time (HH:MM), and a checkbox for '24 hours'. The times for Monday through Friday are set from 09:00 AM to 05:00 PM. Saturday and Sunday are currently blank. At the bottom of the form are 'Save' and 'Cancel' buttons.

- Define standard working hours for hybrid employees (office/remote schedule).
- Setup → Holidays (Independence Day, Gandhi Jayanthi, Republic Day).

3. Fiscal Year Settings

- Setup → Fiscal Year. Standard Fiscal Year, starting April.

The screenshot shows the 'Organization Fiscal Year Edit: ERM Solutions' form. The header includes a building icon and 'SETUP Fiscal Year'. Below the header, it says 'Setup Organization Fiscal Year Edit: ERM Solutions' and 'To specify the fiscal year type for your organization, choose one of the options below.' There are two radio buttons: 'Standard Fiscal Year' (selected) and 'Custom Fiscal Year'. A yellow warning box states: 'Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing this change.' The 'Change Fiscal Year Period' section has a 'Name' field with 'ERM Solutions', a 'Fiscal Year Start Month' dropdown set to 'April', and a 'Fiscal Year is Based On' section with two radio buttons: 'The ending month' and 'The starting month' (selected). At the bottom are 'Save' and 'Cancel' buttons.

5. User Setup & Licenses

- Setup → Users → Users → New User.
- Assign **Salesforce licenses** (e.g., Salesforce) each user according to their role.
- Required details: ERM HR, ERM Manger, ERM Employee.

SETUP

Users

User

ERM HR

[Permission Set Assignments](#) | [Permission Set Assignments Activation Required](#) | [Permission Set Group Assignments](#) | [Permission Set License Assignments](#) | [Personal Groups](#) | [Public Group Memberships](#) | [Queue Membership](#) | [Team](#) | [Managers in the Role Hierarchy](#) | [OAuth Apps](#) | [Third-Party Account Links](#) | [Built-in Authenticators](#) | [Installed Mobile Apps](#) | [Authentication Settings for External Systems](#) | [Login History](#) | [User Provisioning Accounts](#)

User Detail

Edit

Sharing

Reset Password

Freeze

View Summary

Name	ERM HR	Role	Manager
Alias	ehr	User License	Salesforce
Email	234g5a3213@srl.ac.in Verify	Profile	ERM Manager
Username	234g5a3213@srl.ac.in	Active	<input checked="" type="checkbox"/>
Nickname	User17585820948556440432 i	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company	ERM Solutions	Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Currency	USD - U.S. Dollar	Data.com User Type	i
Delegated Approver		Accessibility Mode (Classic Only)	<input type="checkbox"/> i
Manager	Venkata Balaji Sai R	Debug Mode	<input type="checkbox"/> i
Receive Approval Request Emails	Only if I am an approver	High-Contrast Palette on Charts	<input type="checkbox"/> i
Federation ID		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/> i
App Registration: One-Time Password Authenticator	i	Send Apex Warning Emails	<input type="checkbox"/>
App Registration: Salesforce Authenticator	i	Salesforce CRM Content User	<input checked="" type="checkbox"/>
Security Key (U2F or WebAuthn)	i	Receive Salesforce CRM Content Email Alerts	<input checked="" type="checkbox"/>

6. Profiles

- Setup → Profiles → New Profile (clone existing if needed).
- Example Profiles: Employee, Team Manager, HR Manager, L&D, IT Tech.

SETUP

Profiles

Profile

HR

[Help for this Page](#)

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

Profile Detail

Edit

Clone


Delete

View Users

Name	HR	Custom Profile	<input checked="" type="checkbox"/>
User License	Salesforce		
Description			
Created By	Venkata Balaji Sai R , 9/22/2025, 9:48 AM	Modified By	Venkata Balaji Sai R , 9/22/2025, 7:57 PM

7. Roles

- Setup → Roles → Set Up Roles → Add Role.
- Create **role hierarchy** to reflect reporting structure: Employee < Team Manager < HR Manager < Leadership.

 **SETUP**
Roles

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](#)

- ERM Solutions
 - [Add Role](#)
 - CEO [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - CFO [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - COO [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - HR Managers [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - Team Managers [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - L & D Teams [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - IT Technician [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - Employee [Edit](#) | [Del](#) | [Assign](#)

8. Permission Sets

- Setup → Permission Sets → New.
- Create specific permission sets:
 - **Surveys & Feedback:** HR and L&D access to create, run, and analyze surveys.
 - **Schedule Planning:** Team Managers access to view/edit schedules.

- **Employee Monitoring:** HR access to dashboards and well-being analytics.

SETUP

Permission Sets

Permission Set

Schedule Planning

[Find Settings...](#)
[Clone](#)
[Edit Properties](#)
[Manage Assignments](#)
[View Summary](#)

Permission Set Overview

Description	Allows Team Managers to view and edit hybrid work schedules, manage team calendars, and approve schedule changes for office/remote days. Supports workforce planning visibility.	API Name	Schedule_Planning
License	Salesforce	Namespace Prefix	
Session Activation Required	<input type="checkbox"/>	Created By	Venkata Rajaji Sai R 9/22/2025, 8:38 PM
Permission Set Groups Added To	0	Last Modified By	Venkata Rajaji Sai R 9/22/2025, 8:38 PM

9. Deployment Workflow

Development in Salesforce Developer Org - Version control with GitHub - Metadata deployed with SFDX commands - Future plan: Use Change Sets/Packages for sandbox → production

With Phase 2 completed, the project is now ready for Phase 3: Data Modeling & Relationships.

Phase 2 Completion Status: DONE