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

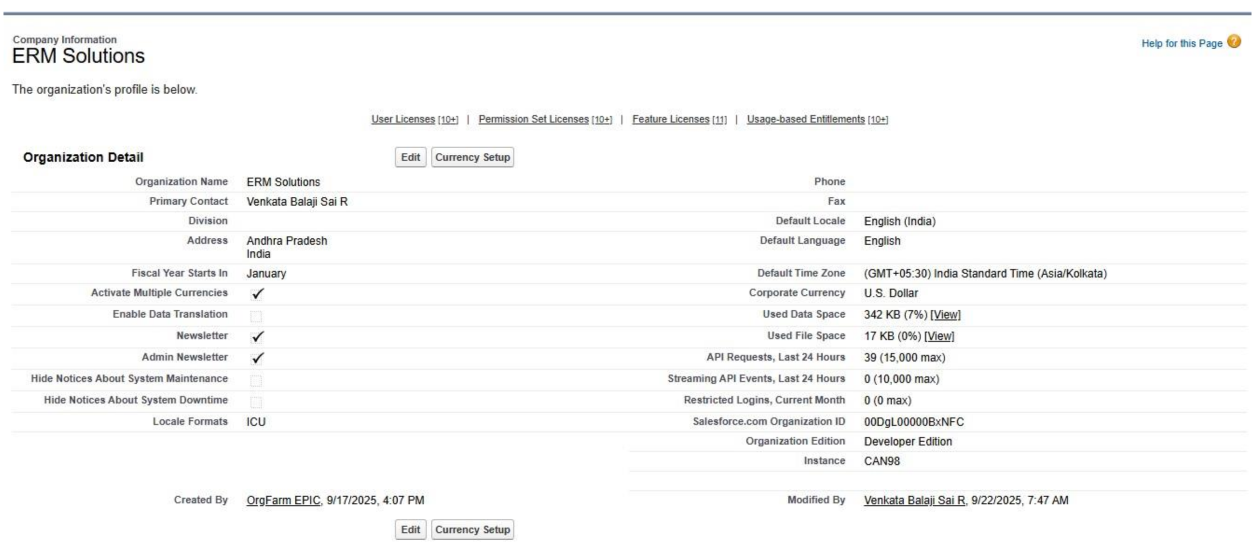
1. Salesforce Editions

- 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+]

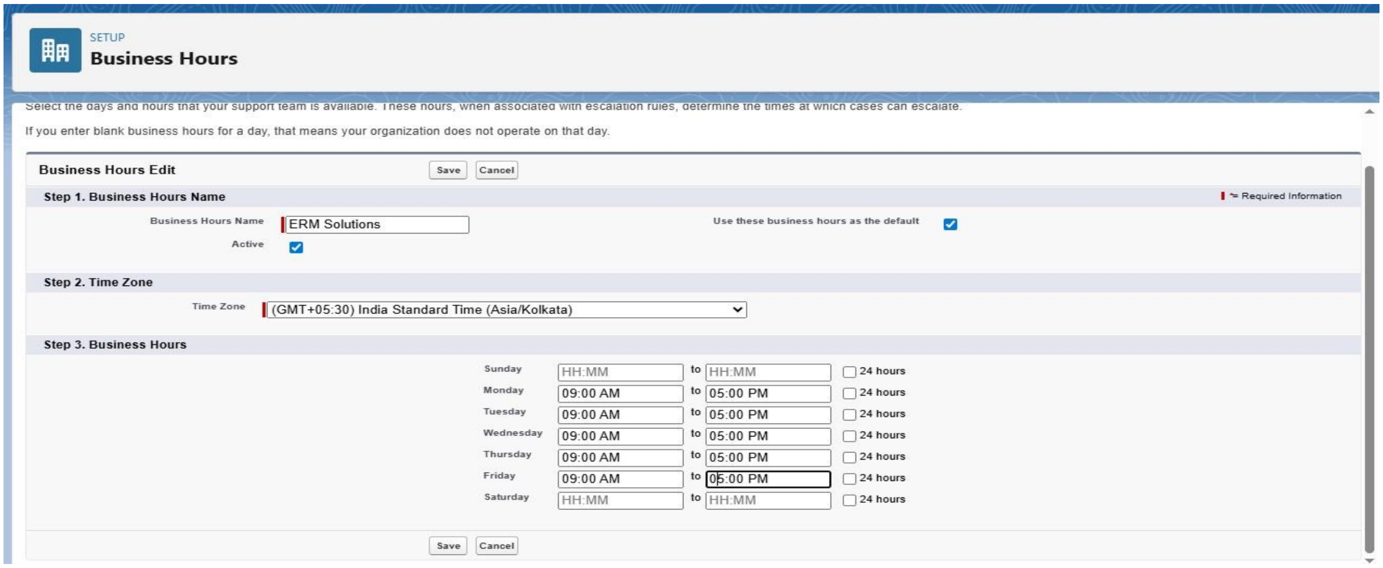
Organization Detail — Edit | Currency Setup

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	✓	Corporate Currency	U.S. Dollar
Enable Data Translation		Used Data Space	342 KB (7%) [View]
Newsletter	✓	Used File Space	17 KB (0%) [View]
Admin Newsletter	✓	API Requests, Last 24 Hours	39 (15,000 max)
Hide Notices About System Maintenance		Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime		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	Modified By	Venkata Balaji Sai R, 9/22/2025, 7:47 AM

Edit | Currency Setup

3. Business Hours & Holidays

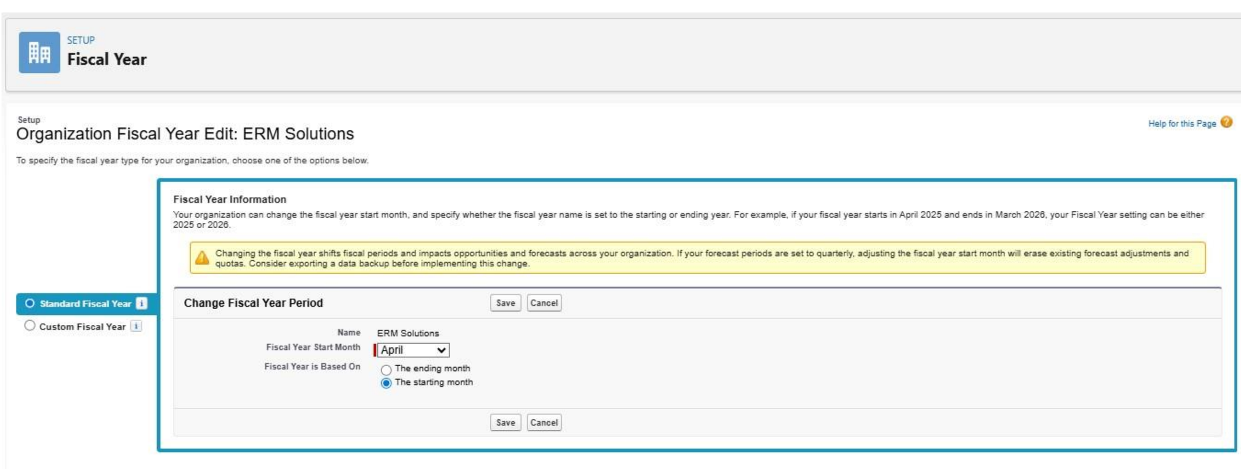
- Setup → Business Hours.



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

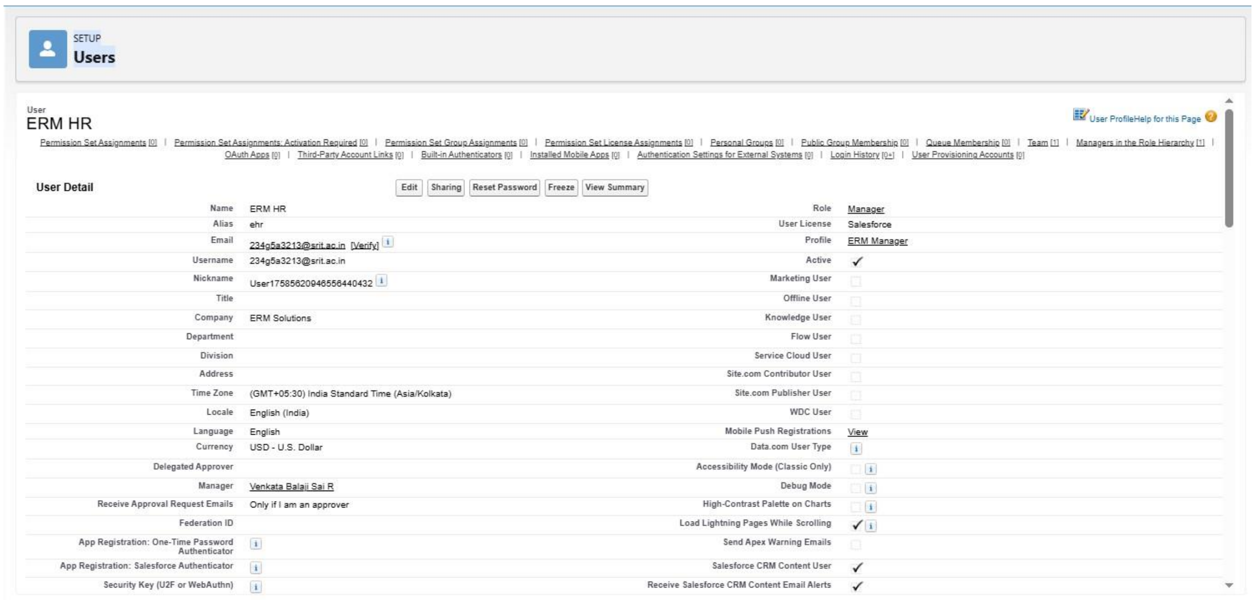
3. Fiscal Year Settings

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



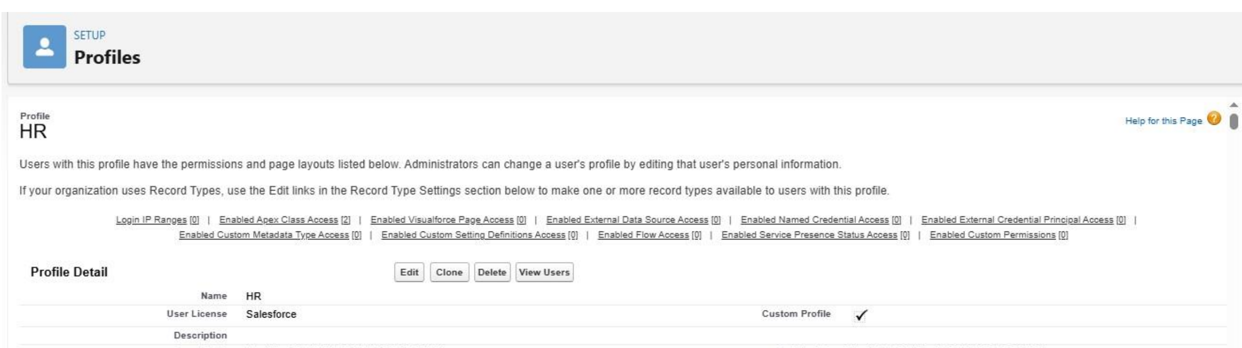
5. User Setup & Licenses

- 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.



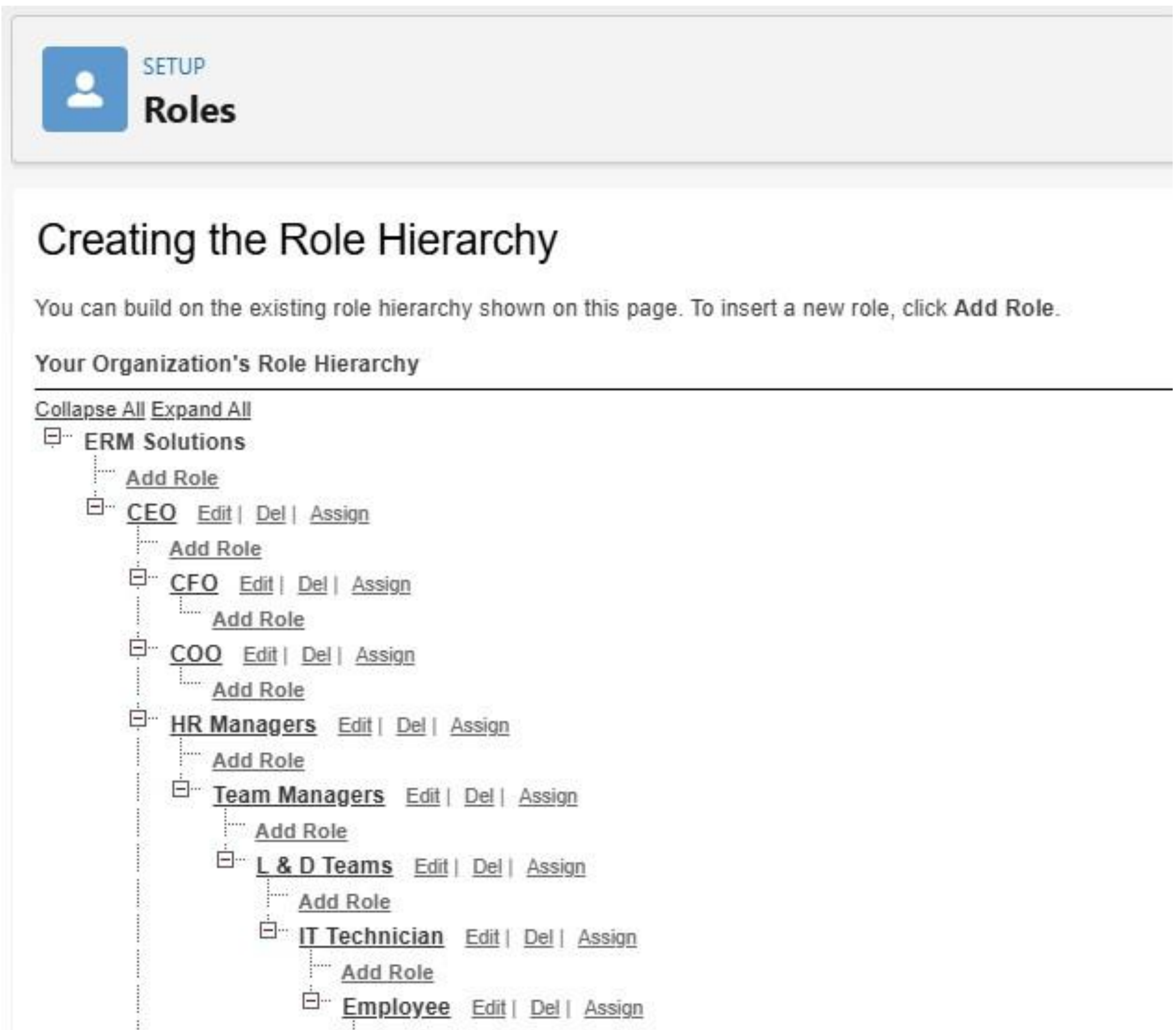
6. Profiles

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



7. Roles

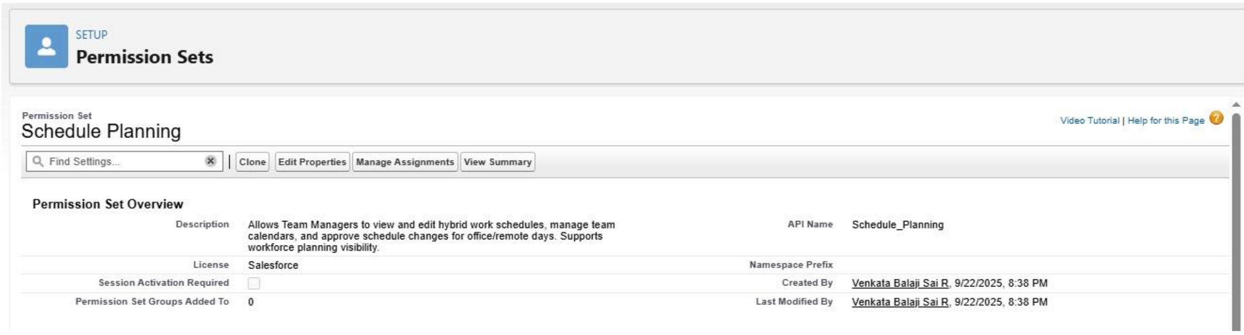
- Setup → Roles → Set Up Roles → Add Role.
- Create **role hierarchy** to reflect reporting structure: Employee < Team Manager < HR Manager < Leadership.



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.



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

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

Phase 2 Completion Status: DONE