

PHASE - 2

Project: AI-Powered HR & Employee Management Bot

1. Salesforce Edition

- Path: Setup → Company Information
- Check Organization Edition → Ensure it's Enterprise Edition.
 - Enterprise required for: Automation (Flows), APIs (bot integration), Experience Cloud (employee/manager access), and Sandboxes.
- ⚠ If not Enterprise → upgrade.

2. Company Profile Setup

Path: Setup → Company Information → Edit

- Organization Name: AI-Powered HR & Employee Management Bot
- Primary Contact: HR IT lead
- Default Time Zone: GMT+05:30 Asia/Kolkata
- Default Locale: English (India)
- Default Language: English
- Corporate Currency: INR (Multi-Currency).

The screenshot shows the Salesforce Setup page for Company Information. The page title is "Company Information" and the subtitle is "AI-Powered HR & Employee Management Bot". The page displays the organization's profile details, including the organization name, primary contact, division, address, fiscal year start, and various settings like activate multiple currencies, enable data translation, newsletter, admin newsletter, hide notices about system maintenance, hide notices about system downtime, locale format, default locale, default language, default time zone, corporate currency, used data space, used file space, API requests, streaming API events, restricted logins, Salesforce.com organization ID, organization edition, and instance.

Organization Detail	
Organization Name	AI-Powered HR & Employee Management Bot
Primary Contact	HR IT lead
Division	
Address	India
Fiscal Year Starts In	January
Activate Multiple Currencies	<input checked="" 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 Format	ICU
Default Locale	English (India)
Default Language	English
Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Corporate Currency	Indian Rupee
Used Data Space	356 KB (7%) View
Used File Space	17 KB (0%) View
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	00DgU00000759Nk
Organization Edition	Developer Edition
Instance	CAN98

Created By: OrgFarm EPIC, 7/17/2025, 8:46 AM


Modified By: Siddharth Singh, 9/18/2025, 10:52 AM

3. Business Hours & Holidays

Business Hours

- Path: Setup → Business Hours → New
- Name: Standard HR Hours
- Time Zone: Asia/Kolkata (GMT+05:30)

- **Hours: Mon–Fri → 9:00 AM – 6:00 PM, Sat-Sun closed**
- **Save & set as Default Business Hours.**



SETUP

Business Hours

Organization Business Hours

Help for this Page ?

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

New Business Hours

Action	Business Hours Name ↑	Active	Time Zone	Default
Edit	Default	✓	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)	<input type="checkbox"/>
Edit	Standard HR Hours	✓	(GMT+05:30) India Standard Time (Asia/Kolkata)	<input checked="" type="checkbox"/>


A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Activate Windows

Go to Settings to activate Windows.


Holidays

- **Path: Setup → Holidays → New**
- **Holiday Name: Weekly Off (Sat & Sun)**
- **Description: HR office closed weekends**
- **Dates: Recurring → Saturday & Sunday**
- **Mark “All Day” → ☒**



SETUP

Holidays

 Holiday Detail

Help for this Page ?

Holidays are dates and times at which business hours are suspended. These dates and times, when associated with business hours, also suspend any escalation rules associated with business hours.

Add or remove business hours to holidays to suspend business hours and escalation rules during the holidays.

Business Hours (0)

Holiday Detail

[Edit](#) [Delete](#)

Holiday Name	Weekly Off (Sat & Sun)
Description	Office closed on weekends
Date and Time	9/20/2025 All Day
Recurring Holiday	Occurs every 1 week(s) on Sunday, Saturday effective 9/20/2025
Created By	Siddharth Singh 9/18/2025, 11:07 AM
Last Modified By	Siddharth Singh 9/18/2025, 11:07 AM

[Edit](#) [Delete](#)

Activate Windows

4. Fiscal Year Settings

- **Path: Setup → Fiscal Year**

- Standard Fiscal Year → Apr–Mar (common in HR/payroll compliance for India).
- Save.
- ⚠ Don't enable Custom Fiscal Year unless finance/HR specifically requires.

SETUP
Fiscal Year

To specify the fiscal year type for your organization, choose one of the options below.

Fiscal Year Information
Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example, if your fiscal year starts in April 2025 and ends in March 2026, your Fiscal Year setting can be either 2025 or 2026.

⚠ 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.

☒ Standard Fiscal Year ⓘ
☐ Custom Fiscal Year ⓘ

Change Fiscal Year Period [Save] [Cancel]

Name: AI-Powered HR & Employee Management Bot

Fiscal Year Start Month: March ▼

Fiscal Year is Based On:
☒ The ending month
☐ The starting month

[Save] [Cancel]

Activate Windows
Go to Settings to activate Windows.

5. User Setup & Licenses

Path: Setup → Users → Users → New User

Create sample HR users:

1. hrmanager1@aibot.com → Salesforce License → Profile: HR_Manager_Profile → Role: HR Manager
2. employee1@aibot.com → Salesforce Platform License → Profile: Employee_Profiles → Role: Employee
3. linelead1@aibot.com → Salesforce License → Profile: Manager_Profile → Role: Line Manager
4. botintegration@aibot.com → Salesforce Platform License → Profile: Integration_Profile → Role: System Integration

SETUP

Users

New User

Reset Password(s)

Add Multiple Users

<input type="checkbox"/>	Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Edit	Chatter Expert	Chatter	chatty.00dgl000007s9nkuak.ekwmyhw7olrp@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/>	Edit	EPIC_OrgFarm	OEPIc	epic.b96f87a4e7af@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/>	Edit	Integration User, Bot	binte	botintegration@aibot.com	System Integration	✓	Integration Profile
<input type="checkbox"/>	Edit	Manager, HR Manager	hmana	hrmanager1@aibot.com	HR Manager	✓	HR Manager Profile
<input type="checkbox"/>	Edit	Manager, Line	lmana	linelead1@aibot.com	Line Manager	✓	Manager Profile
<input type="checkbox"/>	Edit	One, Employee	eone	employee1@aibot.com	Employee	✓	Employee Profiles
<input type="checkbox"/>	Edit	Singh, Siddharth	cse	cse22_siddharthsingh464@agentforce.com		✓	System Administrator
<input type="checkbox"/>	Edit	User, Integration	integ	integration@00dgl000007s9nkuak.com		✓	Analytics Cloud Integration User
<input type="checkbox"/>	Edit	User, Security	sec	insightssecurity@00dgl000007s9nkuak.com		✓	Analytics Cloud Security User

New User

Reset Password(s)

Add Multiple Users

Activate Windows

Go to Settings to activate Windows.

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

6. Profiles, Roles & Permission Sets

Profiles (baseline access)

- Path: Setup → Profiles → New Profile (Clone “Standard User”)
- Create:
 - HR_Manager_Profile → Full CRUD on Employee, Leave, Attendance, Onboarding, Performance objects
 - Manager_Profile → Read/write on direct-report records, Approve/Reject requests
 - Employee_Profile → Limited → Can view/update own profile, submit leave/queries
 - Integration_Profile → API access only for bot

Roles (hierarchy)

Path: Setup → Roles → Set Up Roles

- CEO
 - System Integration
 - VP_HR
 - HR_Manager
 - Line_Manager
 - Employee

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 Show in tree view

[Collapse All](#) [Expand All](#)

- AI-Powered HR & Employee Management Bot
 - Add Role
 - CEO [Edit](#) | [Del](#) | [Assign](#)
 - Add Role
 - System Integration [Edit](#) | [Del](#) | [Assign](#)
 - Add Role
 - VP HR [Edit](#) | [Del](#) | [Assign](#)
 - Add Role
 - HR Manager [Edit](#) | [Del](#) | [Assign](#)
 - Add Role
 - Line Manager [Edit](#) | [Del](#) | [Assign](#)
 - Add Role
 - Employee [Edit](#) | [Del](#) | [Assign](#)
 - Add Role

Permission Sets (exception access)

Path: Setup → Permission Sets → New

- Create Performance_Access_PS → add object permissions for Performance Review (Read/Edit).
- Assign to HR Managers only.
- Create Bot_Integration_PS → API Enabled + access to Employee/Attendance/Leave objects.

... > SETUP > PERMISSION SET 'BOT_INTEGRATION_PS'
Bot_Integration_PS

Current Assignments

Add Assignment

<input type="checkbox"/> Full Name ↑	Active	Role	Profile	User License	Expires On
<input type="checkbox"/> Bot Integration User	✓	System Integration	Integration_Profile	Salesforce Platform	

7. Org-Wide Defaults (OWD) & Sharing Rules

👉 Do this once HR objects are created (Phase 3).

- Path: Setup → Sharing Settings
 - Employees, Leave, Attendance, Performance → Private



SETUP

Sharing Settings

Work Plan Template	Private	Private	✓
Work Step Template	Private	Private	✓
Work Type	Private	Private	✓
Work Type Group	Public Read/Write	Private	✓
Attendance	Private	Private	✓
Employee	Private	Private	✓
Leave	Private	Private	✓
mentor	Public Read/Write	Private	✓
Onboarding	Private	Private	✓
Performance	Private	Private	✓
student	Public Read/Write	Public Read/Write	✓

- **Sharing Rules:**
 - **Manager → access to subordinates' records.**



SETUP

Public Groups

Public Groups

[Help for this Page](#) ?

A public group is a set of users. It can contain individual users, other groups, the users in a particular role or territory, or the users in a role or territory plus all of the users below that role or territory in the hierarchy.

View: All ▼ [Edit](#) | [Create New View](#)A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

New				
Action	Label ↑	Group Name	Created By	Created Date
Edit Del	HR_Group	HR_Group	Singh, Siddharth	9/20/2025, 11:21 AM

- **HR → access to all employee records.**

8. Login Access Policies

- **Path: Setup → Security → Login Access Policies**
 - Allow users to grant login access to Admin (for troubleshooting).
- **Path: Setup → Session Settings**
 - **Session Timeout: 30 minutes**
 - **Lockout: after 3 failed attempts**

The screenshot shows the 'Session Settings' page under the 'SETUP' tab. The page title is 'Session Settings' with a 'Help for this Page' link. Below the title is a subtitle: 'Set the session security and session expiration timeout for your organization.' The main content area is divided into two sections: 'Session Timeout' and 'Session Settings'. In the 'Session Timeout' section, the 'Timeout Value' is set to '30 minutes'. There are two checkboxes: 'Disable session timeout warning popup' (unchecked) and 'Force logout on session timeout' (checked). The 'Session Settings' section contains several checkboxes: 'Lock sessions to the IP address from which they originated' (unchecked), 'Lock sessions to the domain in which they were first used' (checked), 'Terminate all of a user's sessions when an admin resets that user's password' (unchecked), 'Force relogin after Login-As-User' (checked), 'Require HttpOnly attribute' (unchecked), 'Use POST requests for cross-domain sessions' (unchecked), 'Enforce login IP ranges on every request' (unchecked), and 'When embedding a Lightning application in a third-party site, use a session token instead of a session cookie' (unchecked). An 'Activate Windows' watermark is visible in the bottom right corner.

The screenshot shows the 'Password Policies' page under the 'SETUP' tab. The page title is 'Profiles' with a 'Help for this Page' link. Below the title is a subtitle: 'Set the password security and session expiration timeout for your organization.' The main content area is divided into two sections: 'Password Policies' and 'Session Settings'. In the 'Password Policies' section, there are several settings: 'User passwords expire in' (90 days), 'Enforce password history' (3 passwords remembered), 'Minimum password length' (8), 'Password complexity requirement' (Must include alpha and numeric characters), 'Password question requirement' (Cannot contain password), 'Maximum invalid login attempts' (3), 'Lockout effective period' (15 minutes), 'Obscure secret answer for password resets' (unchecked), 'Require a minimum 1 day password lifetime' (unchecked), and 'Don't immediately expire links in forgot password emails' (unchecked). At the bottom, there are three buttons: 'Save', 'Save & New', and 'Cancel'. An 'Activate Windows' watermark is visible in the bottom right corner.

- **Path: Setup → Identity → MFA**
 - **Require MFA for all HR managers & employees**

SETUP

Permission Sets

Modify Allow Data Governance Policies	<input type="checkbox"/>	Create, edit, and delete Allow policies in the Data Governance tab
Modify All Policy Center Policies	<input type="checkbox"/>	Create, edit, and delete all Policies in the Policy Center App. Specific policy types may require additional permissions.
Modify Data Classification	<input type="checkbox"/>	View and modify field-level data classification metadata.
Modify Deny Data Governance Policies	<input type="checkbox"/>	Create, edit, and delete Deny policies in the Data Governance tab
Modify Metadata Through Metadata API Functions	<input type="checkbox"/>	Create, read, edit, and delete org metadata. Users must have appropriate access rights to the metadata they're trying to modify. Be careful if delegating this permission. Some metadata executes in system context, when object permissions, field-level security, and sharing rules that apply to the user are ignored. For example, Apex executes in system context.
Multi-Factor Authentication for API Logins	<input type="checkbox"/>	Require users to enter a code from a time-based one-time password (TOTP) authenticator app instead of the emailed security token in the API.
Multi-Factor Authentication for User Interface Logins	<input checked="" type="checkbox"/>	Require users to provide an additional verification method in addition to their username and password when logging in to Salesforce orgs.
Natural Language Search	<input type="checkbox"/>	Show results for natural language searches and list views.
Omnichannel Inventory Basic	<input type="checkbox"/>	Allow access to the basic inventory functionality using the Omnichannel Inventory Service APIs.
Omnichannel Inventory Sync	<input type="checkbox"/>	Sync inventory using the Omnichannel Inventory Service APIs.
Password Never Expires	<input type="checkbox"/>	Prevent the user's password from expiring.
Payments Api User	<input type="checkbox"/>	Allow users to access CCS Payments apis
Personalization Intelligence User	<input type="checkbox"/>	Allows user to install and access Personalization Intelligence Dashboard
Pin Posts in Feeds	<input type="checkbox"/>	Assign permission to pin a post in this org and your Experience Cloud sites.
Prism Backoffice User	<input type="checkbox"/>	View Prism Backoffice Page

<input type="checkbox"/>		Bot Integration U	binte	botintegration@aibot.com	System Integration	<input checked="" type="checkbox"/>	Integration_Profile	
<input type="checkbox"/>		Chatter Expert	Chatter	chatty.00dgl000007s9nkuak.ekwmyhv7olrp@chatter....		<input checked="" type="checkbox"/>	Chatter Free User	
<input checked="" type="checkbox"/>		Employee One	eone	employee1@aibot.com	Employee	<input checked="" type="checkbox"/>	Employee_Profiles	
<input checked="" type="checkbox"/>		HR Manager Mai	hmana	hrmanager1@aibot.com	HR Manager	<input checked="" type="checkbox"/>	HR_Manager_Profile	
<input type="checkbox"/>		Integration User	integ	integration@00dgl000007s9nkuak.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User	
<input type="checkbox"/>		Line Manager	lmana	linelead1@aibot.com	Line Manager	<input checked="" type="checkbox"/>	Manager_Profile	
<input type="checkbox"/>		OrgFarm EPIC	OEPI	epic.b96f87a4e7af@orgfarm.salesforce.com		<input checked="" type="checkbox"/>	System Administrator	
<input type="checkbox"/>		Security User	sec	insightssecurity@00dgl000007s9nkuak.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User	

Cancel

Next

9. Integration

- **Connect VS Code + Salesforce CLI (SF)**
- **Create GitHub repo for version control (metadata & code)**

```
Microsoft Windows [Version 10.0.19045.6332]
(c) Microsoft Corporation. All rights reserved.

C:\Users\Toshiba\Desktop\salesforce>sf org login web --set-default --alias DevOrg
Successfully authorized cse22_siddharthsingh464@agentforce.com with org ID 00DgL000007S9NkUAK

C:\Users\Toshiba\Desktop\salesforce>sf org list
```

	Alias	Username	Org Id	Status
☑	DevOrg	cse22_siddharthsingh464@agentforce.com	00DgL000007S9NkUAK	Connected

```
Legend: ☑ =Default DevHub, ☑ =Default Org      Use --all to see expired and deleted scratch orgs

C:\Users\Toshiba\Desktop\salesforce>
C:\Users\Toshiba\Desktop\salesforce>
```

Quick Summary (HR & Employee Management Bot) :-

Profiles: HR Manager, Employee, Team Manager, Admin

Roles: CEO → HR Head → HR Manager → Employee; CEO → HR Head → Team Manager → Employee

Users: Created for HR, Employees, and Managers

OWD: Private (to be finalized in Phase 3)

Business Hours: Mon–Fri 9am–6pm, Sat–Sun closed

Holidays: Weekly recurring Saturday & Sunday off + Configurable regional holidays

Security: MFA + Session control + Optional SSO + Role-based access