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

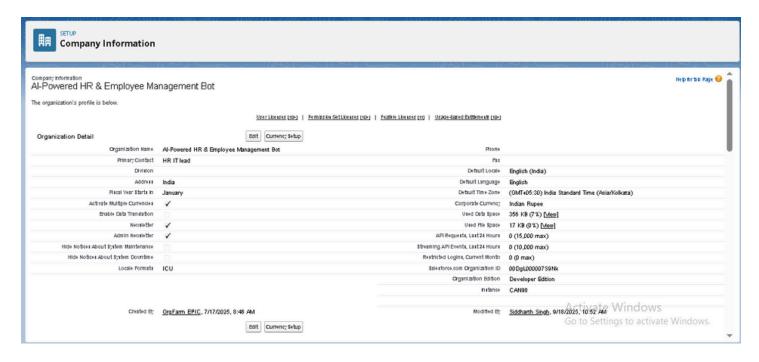
Primary Contact: HR IT lead

Default Time Zone: GMT+05:30 Asia/Kolkata

Default Locale: English (India)

• Default Language: English

Corporate Currency: INR (Multi-Currency).



3. Business Hours & Holidays

Business Hours

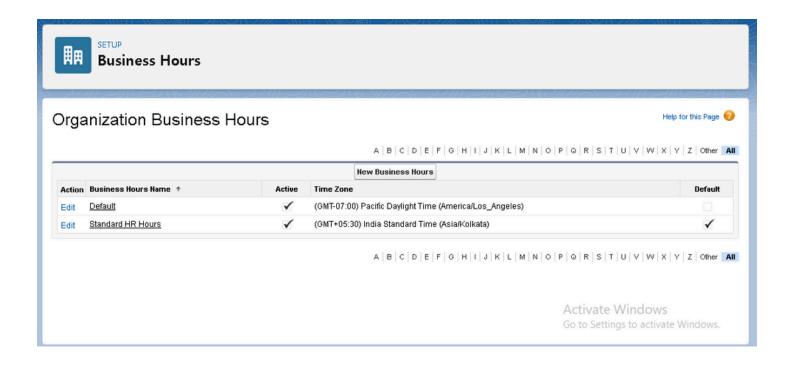
• Path: Setup → Business Hours → New

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.



Holidays

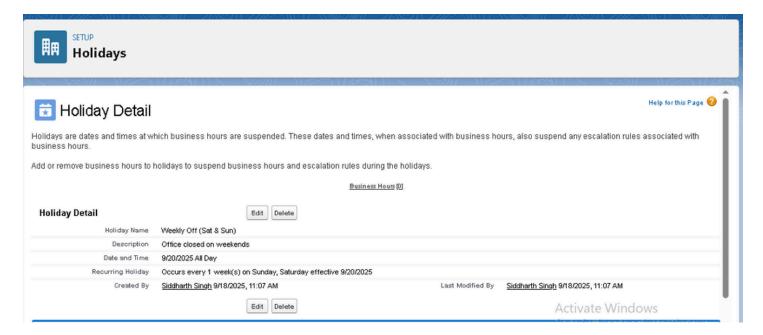
Path: Setup → Holidays → New

• Holiday Name: Weekly Off (Sat & Sun)

Description: HR office closed weekends

Dates: Recurring → Saturday & Sunday

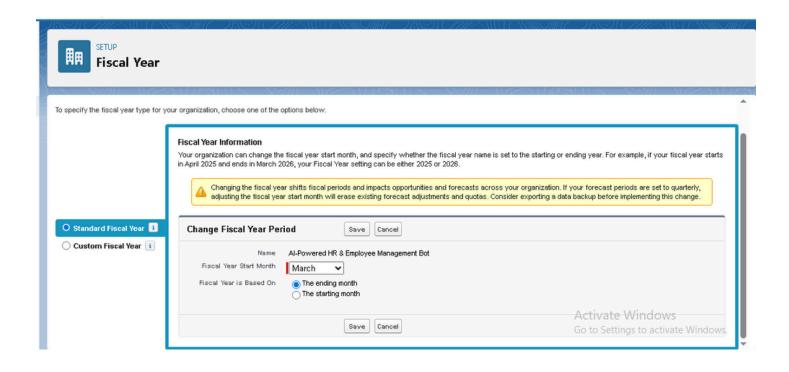
Mark "All Day" →



4. Fiscal Year Settings

- Path: Setup → Fiscal Year
- Standard Fiscal Year → Apr-Mar (common in HR/payroll compliance for India).
- Save.

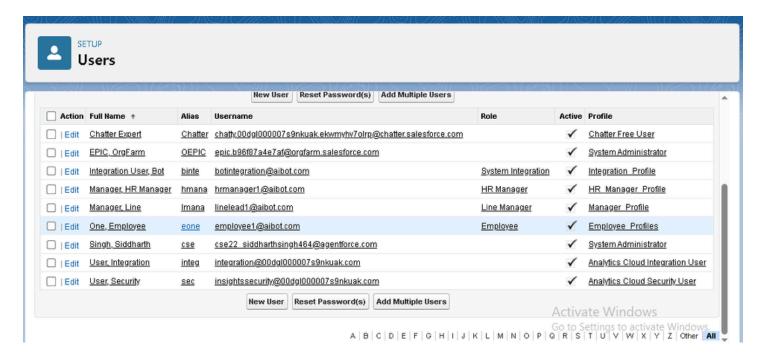
⚠ Don't enable Custom Fiscal Year unless finance/HR specifically requires.



5. User Setup & Licenses

Path: Setup → Users → Users → New User Create sample HR users:

- hrmanager1@aibot.com → Salesforce License → Profile: HR_Manager_Profile → Role: HR Manager
- employee1@aibot.com → Salesforce Platform License → Profile: Employee_Profiles→
 Role: Employee
- 3. <u>linelead1@aibot.com</u> → Salesforce License → Profile: Manager_Profile → Role: Line Manager
- 4. botintegration@aibot.com → Salesforce Platform License → Profile: Integration_Profile → Role: System Integration



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

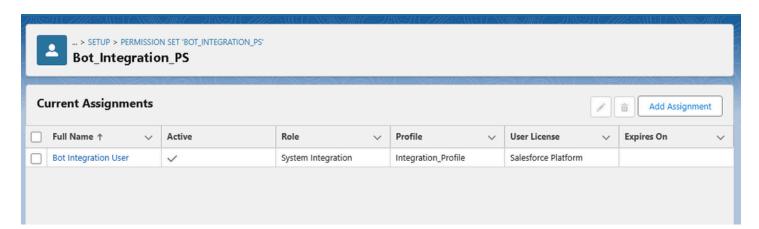
- CEO
 - System Integration
 - o VP_HR
 - HR_Manager
 - Line_Manager
 - Employee



Permission Sets (exception access)

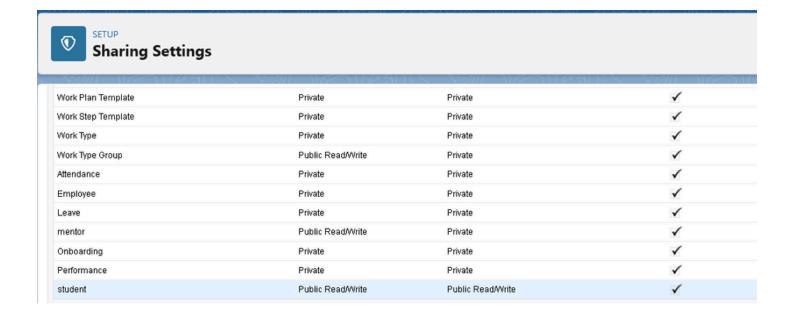
Path: Setup → Permission Sets → New

- 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.



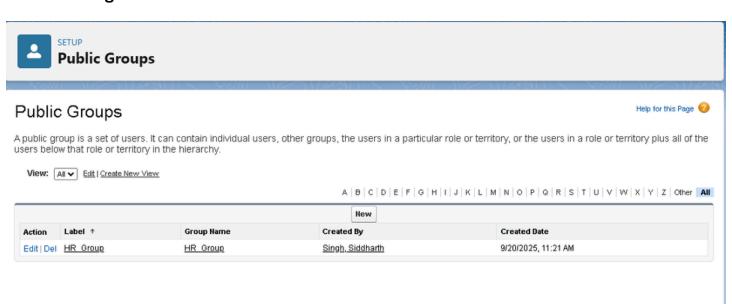
7. Org-Wide Defaults (OWD) & Sharing Rules

- To this once HR objects are created (Phase 3).
 - Path: Setup → Sharing Settings
 - o Employees, Leave, Attendance, Performance → Private

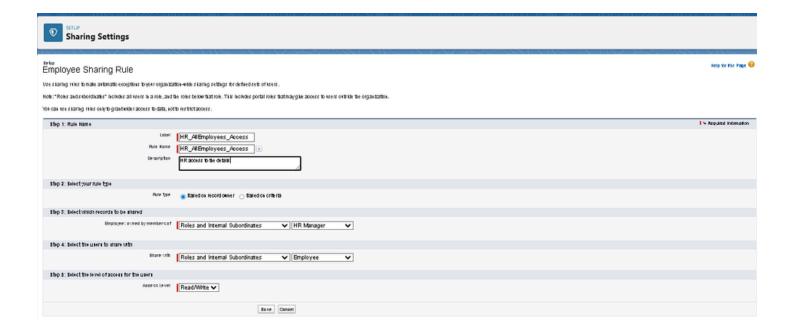


• Sharing Rules:

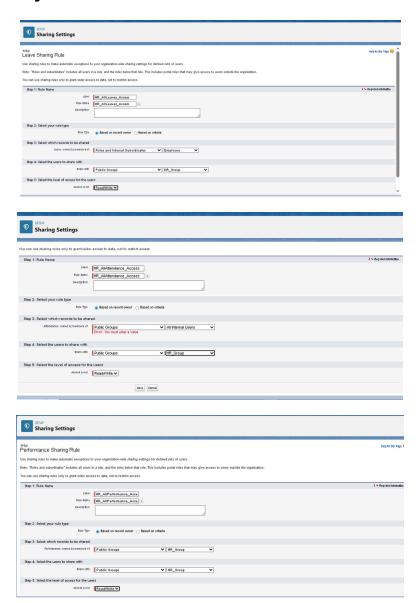
Manager → access to subordinates' records.



o HR → access to all employee records.

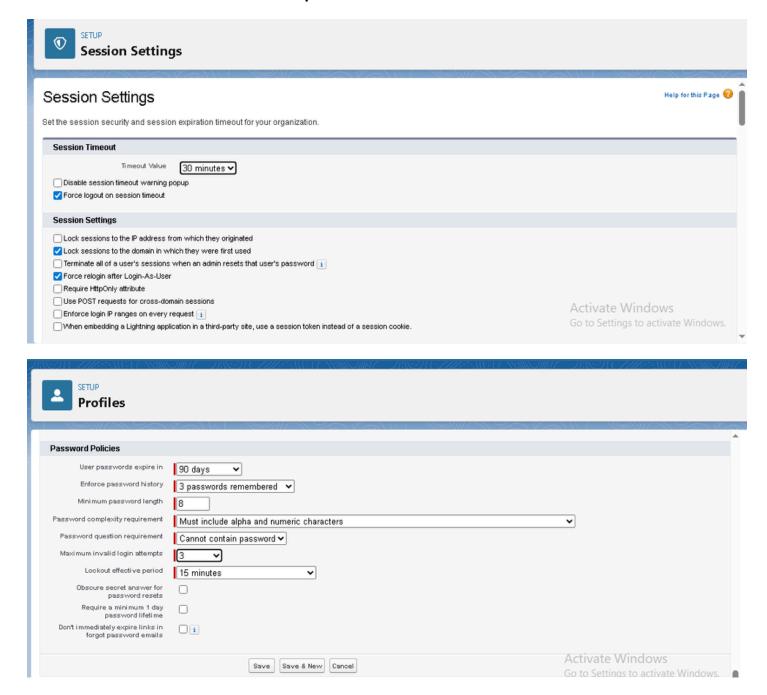


o Employees → only their own records.

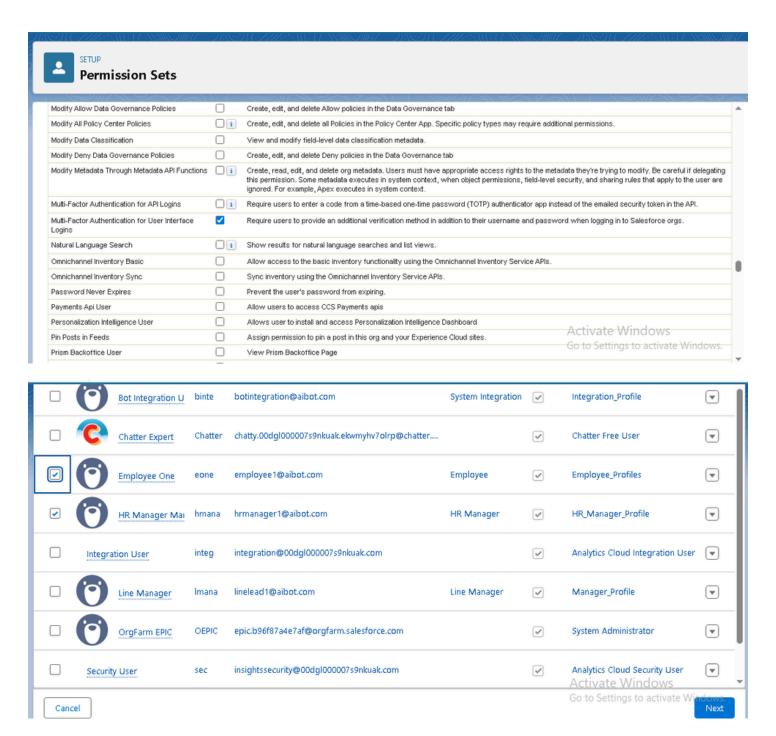


8. Login Access Policies

- 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



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



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: D=Default DevHub, D=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