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

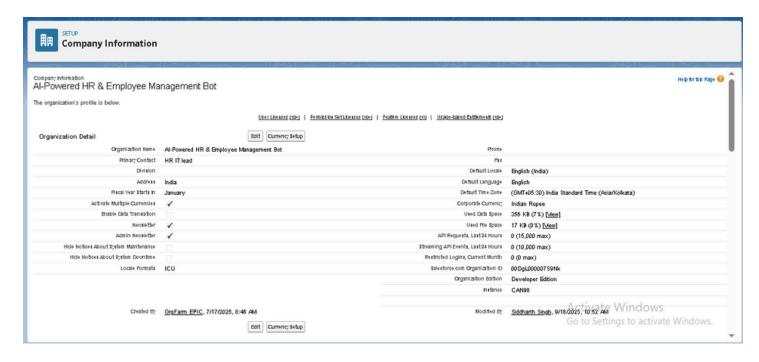- **Organization Name: AI-Powered HR & Employee Management Bot**
- **Primary Contact: HR IT lead**
- **Default Time Zone: GMT+05:30 Asia/Kolkata**
- **Default Locale: English (India)**
- **Default Language: English**
- **Corporate Currency: INR (Multi-Currency).**

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.**
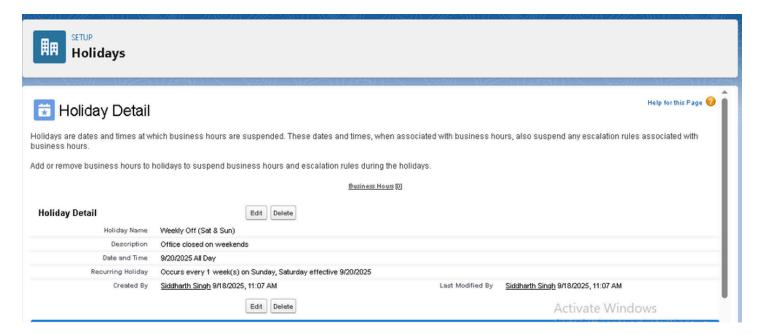

5. User Setup & Licenses

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

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**

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

Help for this Page ⓪

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

☐	Full Name ↑	⌄	Active	Role	⌄	Profile	⌄	User License	⌄	Expires On	⌄
☐	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**

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.**

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.**

- 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**
  - **Require MFA for all HR managers & employees**

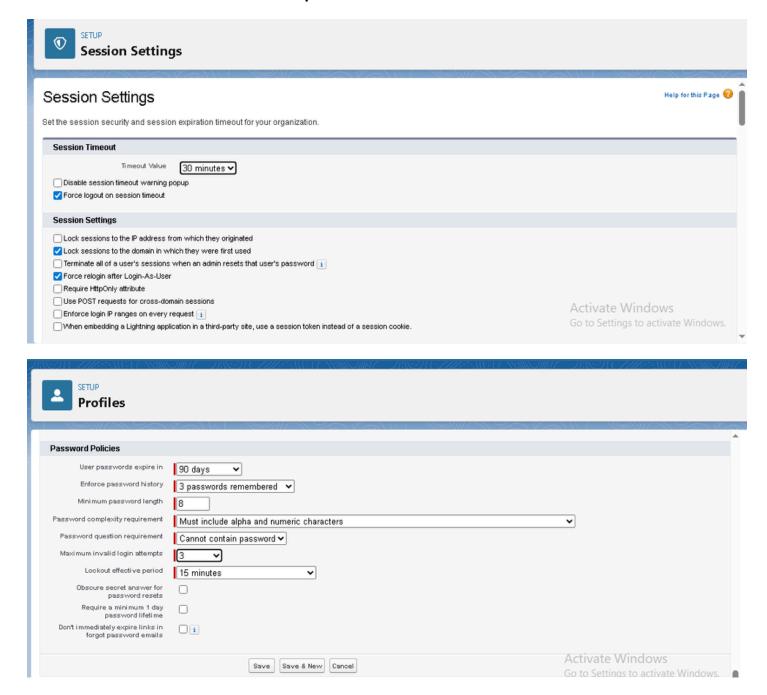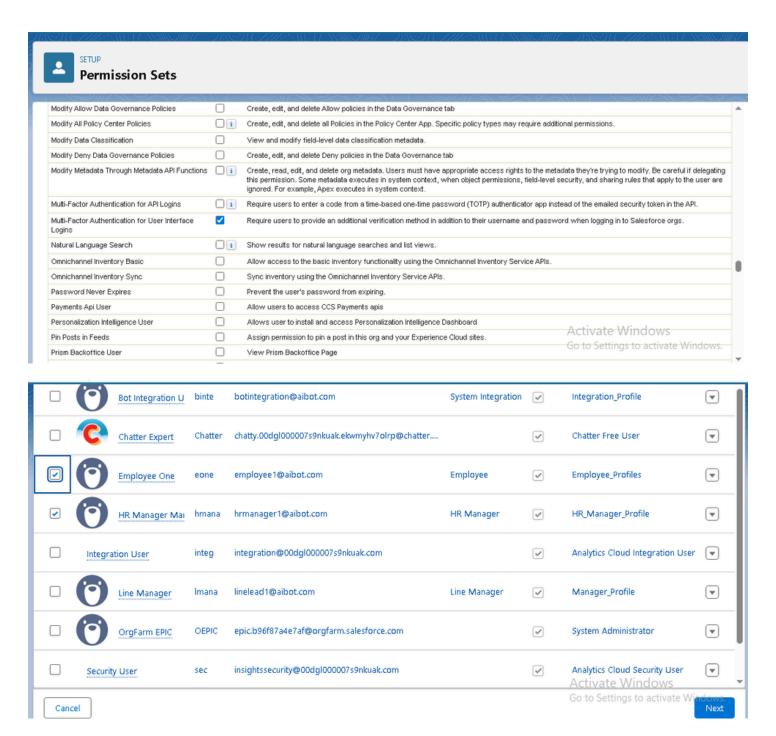|			
Modify Allow Data Governance Policies	☐	Create, edit, and delete Allow policies in the Data Governance tab	
Modify All Policy Center Policies	☐ ⓘ	Create, edit, and delete all Policies in the Policy Center App. Specific policy types may require additional permissions.	
Modify Data Classification	☐	View and modify field-level data classification metadata.	
Modify Deny Data Governance Policies	☐	Create, edit, and delete Deny policies in the Data Governance tab	
Modify Metadata Through Metadata API Functions	☐ ⓘ	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	☐ ⓘ	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	☑	Require users to provide an additional verification method in addition to their username and password when logging in to Salesforce orgs.	
Natural Language Search	☐ ⓘ	Show results for natural language searches and list views.	
Omnichannel Inventory Basic	☐	Allow access to the basic inventory functionality using the Omnichannel Inventory Service APIs.	
Omnichannel Inventory Sync	☐	Sync inventory using the Omnichannel Inventory Service APIs.	
Password Never Expires	☐	Prevent the user's password from expiring.	
Payments Api User	☐	Allow users to access CCS Payments apis	
Personalization Intelligence User	☐	Allows user to install and access Personalization Intelligence Dashboard	
Pin Posts in Feeds	☐	Assign permission to pin a post in this org and your Experience Cloud sites.	
Prism Backoffice User	☐	View Prism Backoffice Page	

☐	🐻	Bot Integration U	binte	botintegration@aibot.com	System Integration ☑	Integration_Profile	▼
☐	🔴	Chatter Expert	Chatter	chatty.00dgl000007s9nkuak.ekwmyhv7olrp@chatter....	☑	Chatter Free User	▼
☑	🐻	Employee One	eone	employee1@aibot.com	Employee ☑	Employee_Profiles	▼
☑	🐻	HR Manager Mar	hmana	hrmanager1@aibot.com	HR Manager ☑	HR_Manager_Profile	▼
☐		Integration User	integ	integration@00dgl000007s9nkuak.com	☑	Analytics Cloud Integration User	▼
☐	🐻	Line Manager	lmana	linelead1@aibot.com	Line Manager ☑	Manager_Profile	▼
☐	🐻	OrgFarm EPIC	OEPIC	epic.b96f87a4e7af@orgfarm.salesforce.com	☑	System Administrator	▼
☐		Security User	sec	insightssecurity@00dgl000007s9nkuak.com	☑	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