

# Phase-2: Org Setup & Configuration

## Project Title:

**Expense On a Page: An expense approval & insight system.**

**Industry:** Finance / Corporate Expense Management.

**Target User:** Employees, Managers, and Finance Teams.

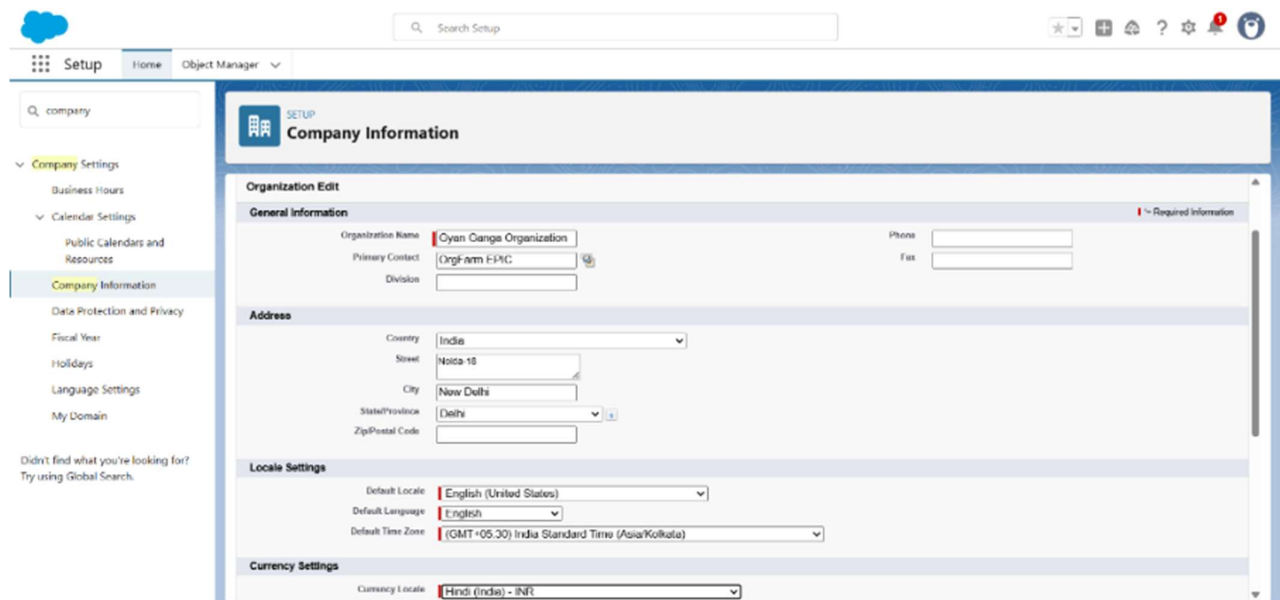
## Salesforce Editions

*-Salesforce Developer Edition*

## Company Profile Setup

Setting up the org for the following company and giving the important information

- Adding Company information such as *Company Name, address, Default currency, primary contact.*



The screenshot shows the Salesforce Setup interface for the 'Company Information' section. The left sidebar contains a search bar and a list of settings categories: Company Settings, Calendar Settings, Company Information (selected), Data Protection and Privacy, Fiscal Year, Holidays, Language Settings, and My Domain. The main content area is titled 'Company Information' and contains the 'Organization Edit' form. The form is divided into several sections: General Information, Address, Locale Settings, and Currency Settings. The 'General Information' section includes fields for Organization Name (Oyan Ganga Organization), Primary Contact (Org-ann F-MC), Division, Phone, and Fax. The 'Address' section includes fields for Country (India), Street (Noida 18), City (New Delhi), State/Province (Delhi), and Zip/Postal Code. The 'Locale Settings' section includes fields for Default Locale (English (United States)), Default Language (English), and Default Time Zone ((GMT+05:30) India Standard Time (Asia/Kolkata)). The 'Currency Settings' section includes a field for Currency Locale (Hindi (India) - INR). A red banner at the top right of the form indicates 'Required Information'.

Search Setup

Setup Home Object Manager

Q company

Company Settings

- Business Hours
- Calendar Settings
- Public Calendars and Resources
- Company Information
- Data Protection and Privacy
- Fiscal Year
- Holidays
- Language Settings
- My Domain

Didn't find what you're looking for? Try using Global Search.

SETUP Company Information

Organization Edit

General Information

Organization Name: Oyan Ganga Organization

Primary Contact: Org-ann F-MC

Division:

Phone:

Fax:

Address

Country: India

Street: Noida 18

City: New Delhi

State/Province: Delhi

Zip/Postal Code:

Locale Settings

Default Locale: English (United States)

Default Language: English

Default Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)

Currency Settings

Currency Locale: Hindi (India) - INR

## Business Hours & Holidays

Setting up the working hours for the user and holidays for them.

- Adding the business hours with Name: Default Business Hours.

The screenshot shows the 'Business Hours' setup page. The left sidebar has a search bar with 'Busin' and a list of 'Company Settings' including 'Business Hours'. The main content area is titled 'Business Hours' and contains a 'Business Hours Edit' form. The form has three steps: Step 1: Business Hours Name, Step 2: Time Zone, and Step 3: Business Hours. In Step 1, the 'Business Hours Name' is 'Default Business Hours' and there is a checkbox for 'Use these business hours as the default'. In Step 2, the 'Time Zone' is '(GMT+05:30) India Standard Time (Asia/Kolkata)'. In Step 3, there is a table for setting hours for each day of the week.

Day	Start Time	End Time	24 hours
Sunday	12:00 AM	12:00 AM	<input checked="" type="checkbox"/>
Monday	07:00 AM	08:00 PM	<input type="checkbox"/>
Tuesday	07:00 AM	08:00 PM	<input type="checkbox"/>
Wednesday	07:00 AM	08:00 PM	<input type="checkbox"/>
Thursday	07:00 AM	08:00 PM	<input type="checkbox"/>
Friday	07:00 AM	08:00 PM	<input type="checkbox"/>
Saturday	12:00 AM	12:00 AM	<input checked="" type="checkbox"/>

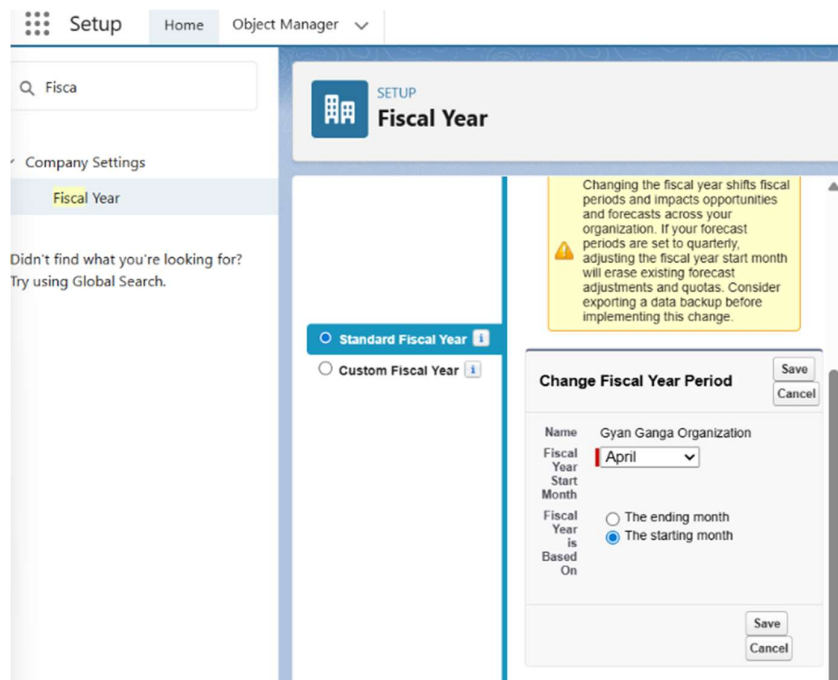
- Adding Important public Holidays from time to time.

The screenshot shows the 'Holidays' setup page. The left sidebar has a search bar with 'Holiday' and a list of 'Company Settings' including 'Holidays'. The main content area is titled 'Holidays' and contains a 'Holidays' table. The table has columns for 'Action', 'Holiday Name', 'Description', and 'Date and Time'. There are two entries: 'Diwali' and 'Gandhi Jayanti', both for '10/20/2025 All Day'.

Action	Holiday Name	Description	Date and Time
<a href="#">Edit</a>   <a href="#">Del</a>	Diwali		10/20/2025 All Day
<a href="#">Edit</a>   <a href="#">Del</a>	Gandhi Jayanti		10/2/2025 All Day

## Fiscal Year Settings

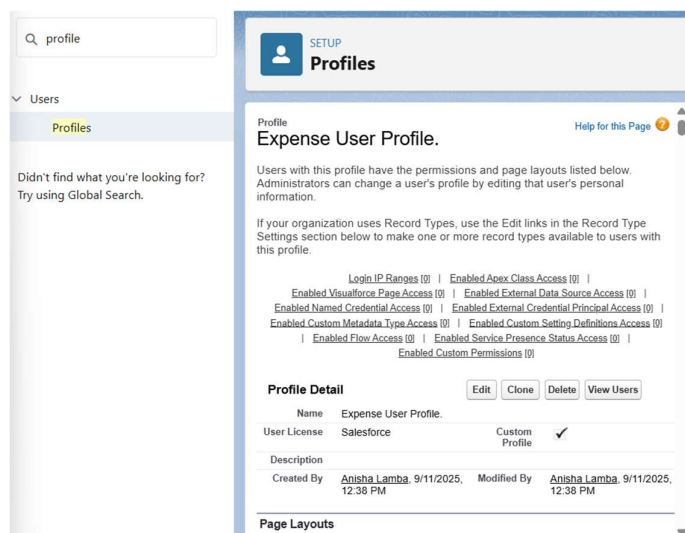
Setting up the fiscal year for the company (in this case keeping it default).



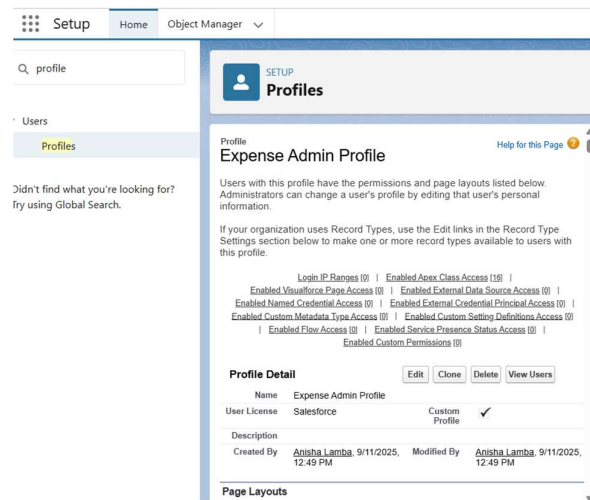
## Profile:

Creating the necessary profile needed

- Cloning Standard User to make a profile *Expense User Profile*.

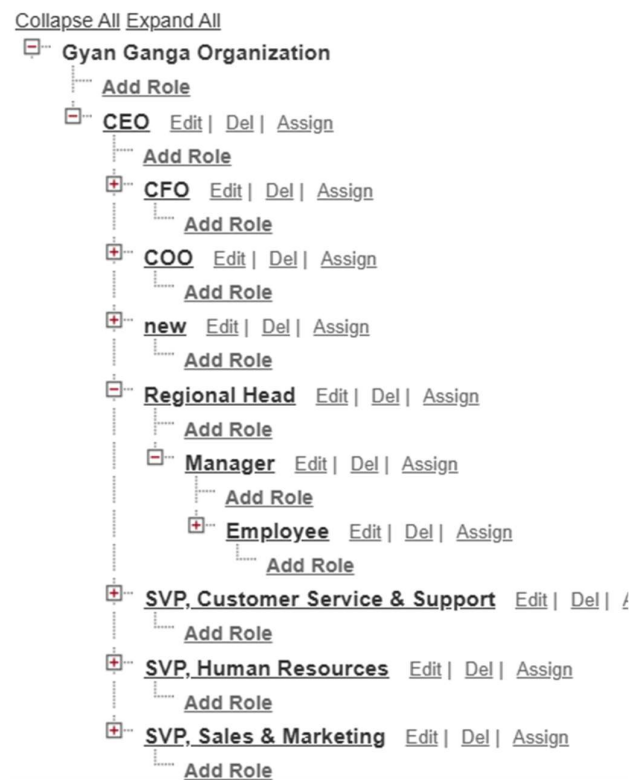


- Cloning System Administrator to make a profile *Expense Admin Profile*.



### Role

### Entering the Role Hierarchy by *CEO >> Regional Head >> Manager >> Employee*



## User Setup & Licenses

Adding the necessary users i.e. all the stakeholder.

- Adding an employee user: [annie\\_emp@gyanganga.com](mailto:annie_emp@gyanganga.com)

The screenshot shows the 'User Edit' page for a user named 'annie employee'. The page is titled 'User Edit' and has buttons for 'Save', 'Save & New', and 'Cancel'. The 'General Information' section includes fields for First Name (annie), Last Name (employee), Alias (aempl), Email (annieemp@gyanganga.com), Username (annie\_emp@gyanganga.co), Nickname (User175762079454414503), Title, Company, and Department. On the right, there are dropdown menus for Role (Employee), User License (Salesforce Platform), and Profile (Standard Platform User). There are also checkboxes for Active (checked), Marketing User, Offline User, Knowledge User, Flow User, and Service Cloud User.

- Adding a manager user: mgr\_Rahul@gyanganga.com

The screenshot shows the 'User Edit' page for a user named 'Rahul Reddy'. The page is titled 'User Edit' and has buttons for 'Save', 'Save & New', and 'Cancel'. The 'General Information' section includes fields for First Name (Rahul), Last Name (Reddy), Alias (redd), Email (mgr\_rahul@gyanganga.com), Username (mgr\_rahul@gyanganga.com), Nickname (User175762106107488533), Title, Company, and Department. On the right, there are dropdown menus for Role (Manager), User License (Salesforce), and Profile (System Administrator). There are also checkboxes for Active (checked), Marketing User, Offline User, Knowledge User, and Flow User.

- Adding a Finance User: [fin\\_priya@gyanganga.com](mailto:fin_priya@gyanganga.com)

The screenshot shows the 'New User' page. The page is titled 'New User' and has buttons for 'Save', 'Save & New', and 'Cancel'. The 'General Information' section includes fields for First Name (priya), Last Name (Finance), Alias (pfina), Email (fin\_priya@gyanganga.com), Username (fin\_priya@gyanganga.com), Nickname (User175762216221360536), Title, Company, Department, and Division. On the right, there are dropdown menus for Role (<None Specified>), User License (Salesforce Platform), and Profile (Standard Platform User). There are also checkboxes for Active (checked), Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, and Site.com Publisher User.

## Permission Sets

Creating a new permission set in the org that give permission to *Manager* and *Finance Team* only to approve.

Name: *Expense\_Approver*

- Creating a Permission Set.

Permission Set  
Create

The screenshot shows the 'Create Permission Set' form. At the top, there are 'Save' and 'Cancel' buttons. Below them is a section titled 'Enter permission set information'. This section contains three fields: 'Label' with the value 'Expense Approver', 'API Name' with the value 'Expense\_Approver', and 'Description' with the text 'THIS PERMISSION SET WILL PROVIDE PERMISSION TO ONLY MANAGERS AND FINANCE TEAM TO GIVE APPROVAL TO EXPENSE RECORD'. There is also a checkbox for 'Session Activation Required' which is currently unchecked.

- Assigning the Managers and Finance team to the Permission Set.

The screenshot shows the 'Manage Assignment Expiration' page for the 'Expense Approver' permission set. It includes a breadcrumb trail: '... > PERMISSION SET 'EXPENSE APPROVER' > MANAGE ASSIGNMENT EXPIRATION'. Below the title, there are two radio buttons for 'Select an Expiration Option For Assigned Users': 'No expiration date' (selected) and 'Specify the expiration date'. Under 'Specify the expiration date', there are buttons for '1 Day', '1 Week', '30 Days', '60 Days', and 'Custom Date'. To the right, there is a 'Time Zone' dropdown menu. Below these options is a table titled 'Selected Users' with columns: Full Name, Role, Profile, Active, User License, and Expires On. The table lists two users: 'Rahul Reddy' (Manager, System Administrator, Active, Salesforce, Never Expires) and 'Priya Finance' (Standard Platform User, Active, Salesforce Platform, Never Expires). At the bottom, there are 'Cancel', 'Back', and 'Assign' buttons.

Full Name	Role	Profile	Active	User License	Expires On
Rahul Reddy	Manager	System Administrator	✓	Salesforce	Never Expires
Priya Finance		Standard Platform User	✓	Salesforce Platform	Never Expires

## OWD (Org Wide Default)

This has to be done in the Phase 3, as the OWD setting are needed to be applied on an object which will be implemented in next phase of the project.

## Sharing Rule

This has to be done in the Phase 3 as well considering it has to be implemented on an object.

## Login Access Policies

Setting up the same Login hours for each of the Profile same to-

- prevent them from accessing the org after and before login.
- in order to maintain the privacy of the data and keep the org secure.

### Login Hours

[Help for this Page](#) 🍌

Select the days and hours that users with this profile are allowed to log in. Note that all times are exact times specific to a time zone. Login hours will be applied at those exact times even for users in different time zones.

SaveCancel

All times are in (GMT+05:30) India Standard Time (Asia/Kolkata)

Day	Start Time	End Time	
Sunday	--None--	--None--	<a href="#">Clear times</a>
Monday	7:00 AM	8:00 PM	<a href="#">Clear times</a>
Tuesday	7:00 AM	8:00 PM	<a href="#">Clear times</a>
Wednesday	7:00 AM	8:00 PM	<a href="#">Clear times</a>
Thursday	7:00 AM	8:00 PM	<a href="#">Clear times</a>
Friday	7:00 AM	8:00 PM	<a href="#">Clear times</a>
Saturday	--None--	--None--	<a href="#">Clear times</a>

[Clear all times](#)

SaveCancel

## Dev Org Setup

- To implement the following project a *Salesforce Developer Edition org* was setup.
- Made a *GitHub Repository for source control*.
- Setting up the *VS Code and SFDX* for the implementation of *the LWC Component for development*.