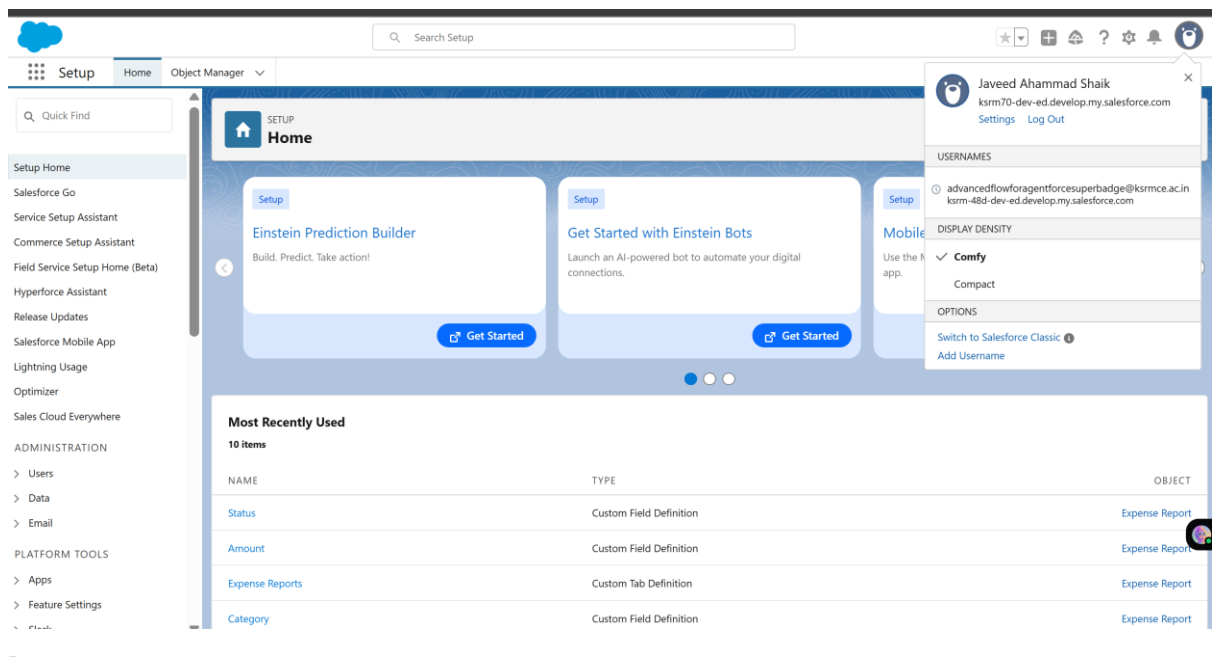
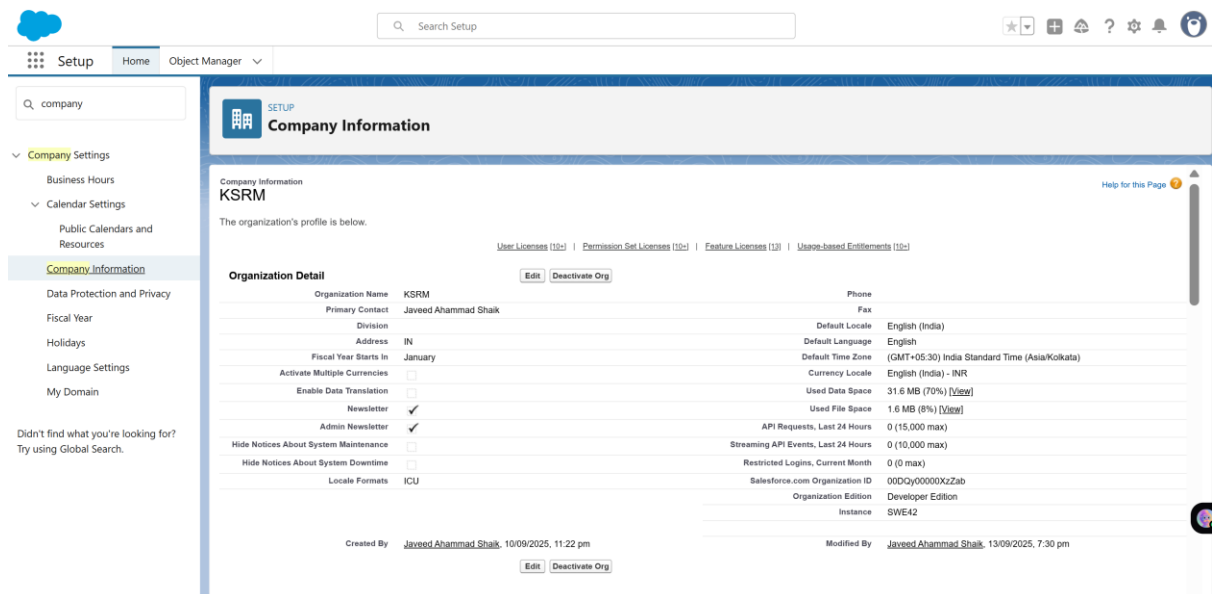


**Phase 2: Org Setup & Configuration****1. Salesforce Org Creation**

- Signed up for a free Salesforce Developer Edition org to serve as the primary development and testing environment.
- Verified login and navigation to the **Setup** menu.

**2. Company Profile Setup**

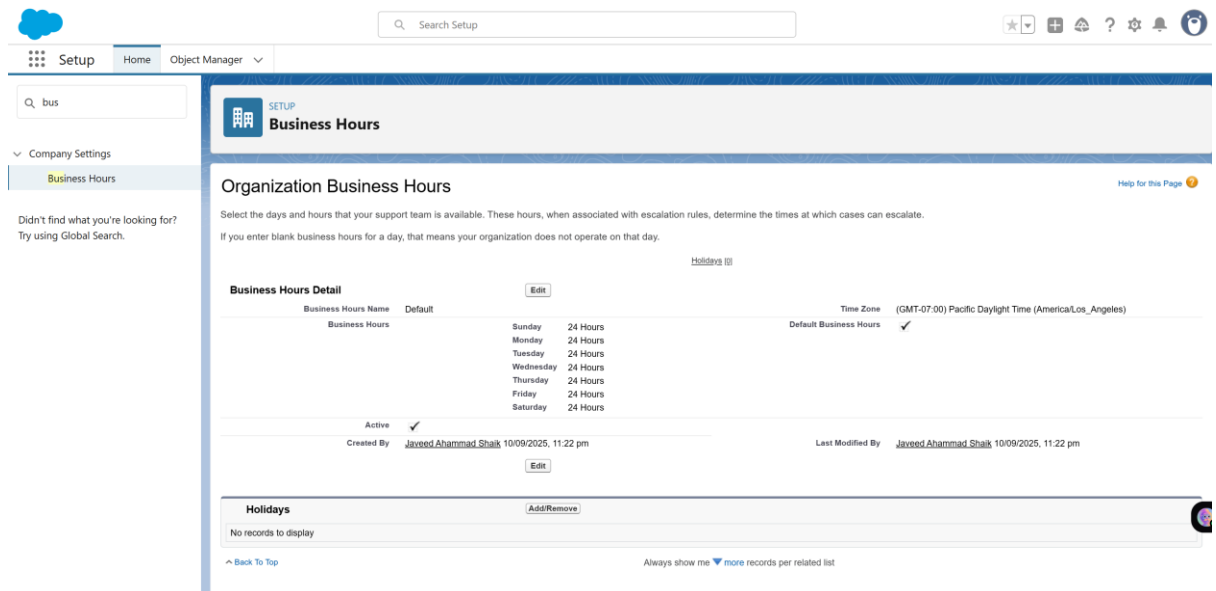
- Updated the Company Name to *ExpenseFlow: Expense Request Approval Automator*.
- Configured the **Time Zone** to (GMT+05:30) India Standard Time.
- Set the **Default Currency** to INR – Indian Rupee (₹).



The screenshot shows the Salesforce Setup interface with the 'Company Information' page selected. The left sidebar contains a search bar with 'company' and a list of settings including 'Company Settings', 'Data Protection and Privacy', 'Fiscal Year', 'Holidays', 'Language Settings', and 'My Domain'. The main content area displays the 'Company Information' for 'KSRM'. It includes a 'Organization Detail' section with fields for Organization Name, Primary Contact, Division, Address, Fiscal Year Starts In, Activate Multiple Currencies, Enable Data Translation, Newsletter, Admin Newsletter, Hide Notices About System Maintenance, Hide Notices About System Downtime, and Locale Formats. There are also links for 'User Licenses (10)', 'Permission Set Licenses (10)', 'Feature Licenses (13)', and 'Usage-based Entitlements (10)'. The 'Organization Detail' section has 'Edit' and 'Deactivate Org' buttons. The 'Created By' field shows 'Javed Ahammad Shaik' on '10/09/2025, 11:22 pm'. The 'Modified By' field shows 'Javed Ahammad Shaik' on '13/09/2025, 7:30 pm'.

### 3. Business Hours & Holidays

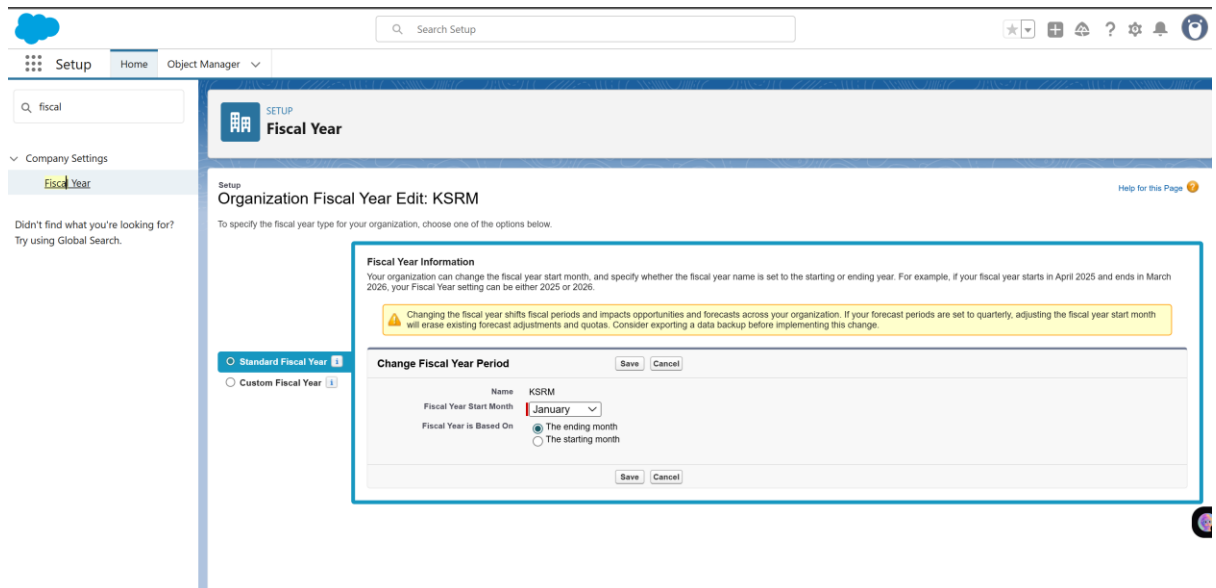
- Created a new business hours set named **Expense Approval Hours**, covering 12:00 AM to 12:00 AM.
- Added key organizational holidays (e.g., Independence Day, Republic Day) for accurate approval timelines.



The screenshot shows the Salesforce Setup interface with the 'Business Hours' page selected. The left sidebar contains a search bar with 'bus' and a list of settings including 'Company Settings' and 'Business Hours'. The main content area displays the 'Organization Business Hours' for 'KSRM'. It includes a 'Business Hours Detail' section with fields for Business Hours Name, Default, Time Zone, and Active. The 'Business Hours Detail' section has 'Edit' and 'Deactivate Org' buttons. The 'Created By' field shows 'Javed Ahammad Shaik' on '10/09/2025, 11:22 pm'. The 'Modified By' field shows 'Javed Ahammad Shaik' on '10/09/2025, 11:22 pm'. The 'Holidays' section shows 'No records to display' and an 'Add/Remove' button.

### 4. Fiscal Year Settings

- Selected the **Standard Fiscal Year**, starting in January.
- Ensures financial reports and dashboards align with the calendar year (Jan–Dec).



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## 5. User Setup & Licenses

- Created three test users for role-based scenarios:
  - **Admin User:** Full system access and configuration.
  - **Manager User:** For approving employee expense requests.
  - **Employee User:** For submitting expense requests.
- Assigned Salesforce licenses to each user and mapped them to their respective roles.

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## 6. Profiles

- Customized profiles based on responsibilities:
  - **Employee Profile:** Granted *Read, Create, and Edit* permissions on the Expense Request and Expense Item objects
  - **Manager Profile:** Granted *Read, Create, Edit, and Approve* permissions, with visibility to employee records.
  - **Admin Profile:** Full system access (default).

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## 7. Roles

- Established a role hierarchy:
    - **Manager → Employee**
  - This ensures managers can view and approve records created by employees reporting to them.
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## 8. Permission Sets

- Created permission sets for flexibility:
    - **Expense Request Submitter:** Grants additional create permissions for employees.
    - **Expense Approver:** Grants approval-related permissions for managers.
- 

## 9. Org-Wide Defaults (OWD)

- Configured default record access:
    - Expense Request = **Private**
    - Expense Item = **Controlled by Parent**
    - User = **Private**
- 

## 10. Sharing Rules

- Implemented role-based sharing:
  - **Manager Access:** Managers automatically gain read/write access to their team's Expense Requests.
  - **Finance Collaboration:** Sharing rule to allow finance role users to view and update all expense requests for auditing.