ExpenseFlow: Expense Request Approval Automator   Name: Shaik Javeed Ahammad
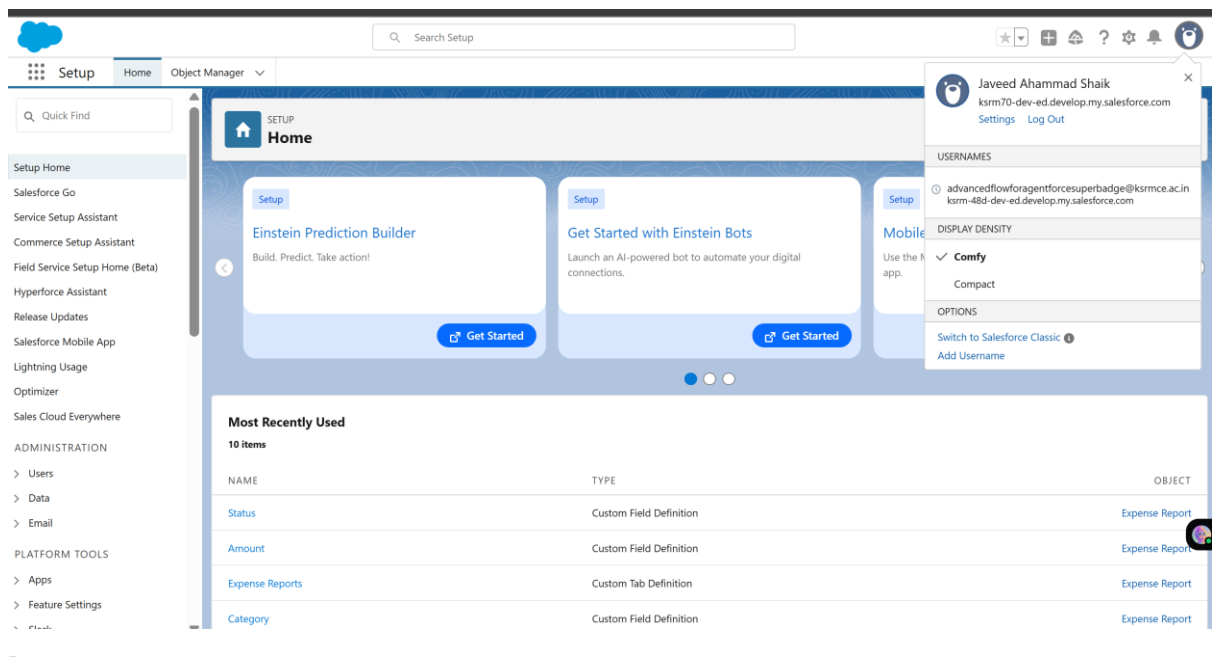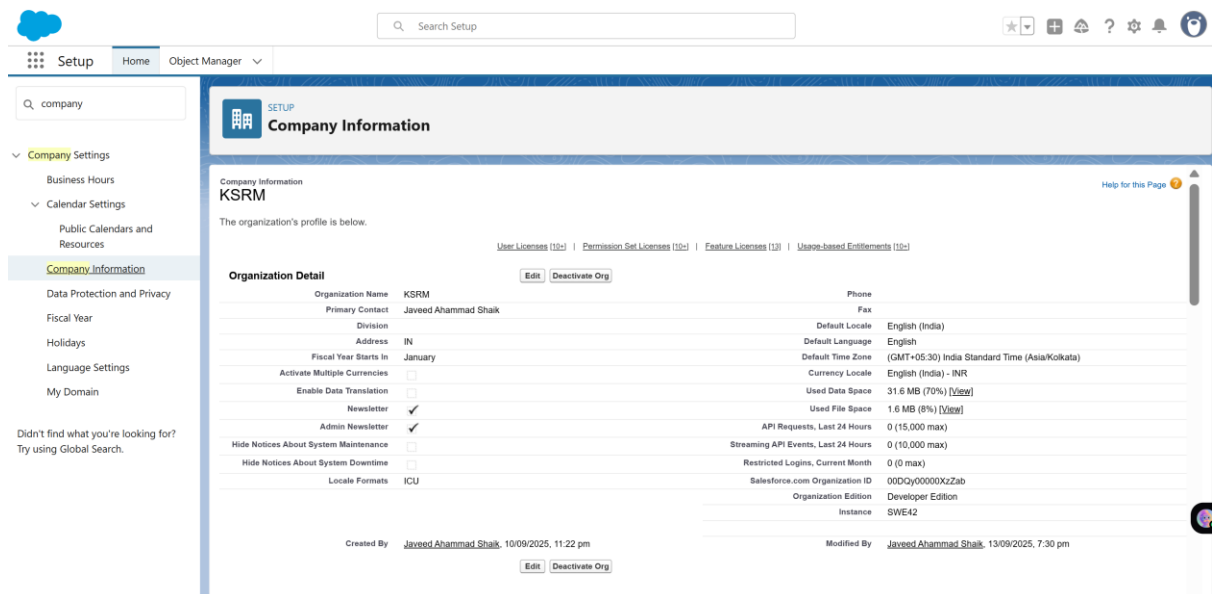
Phase 2: Org Setup & Configuration

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.
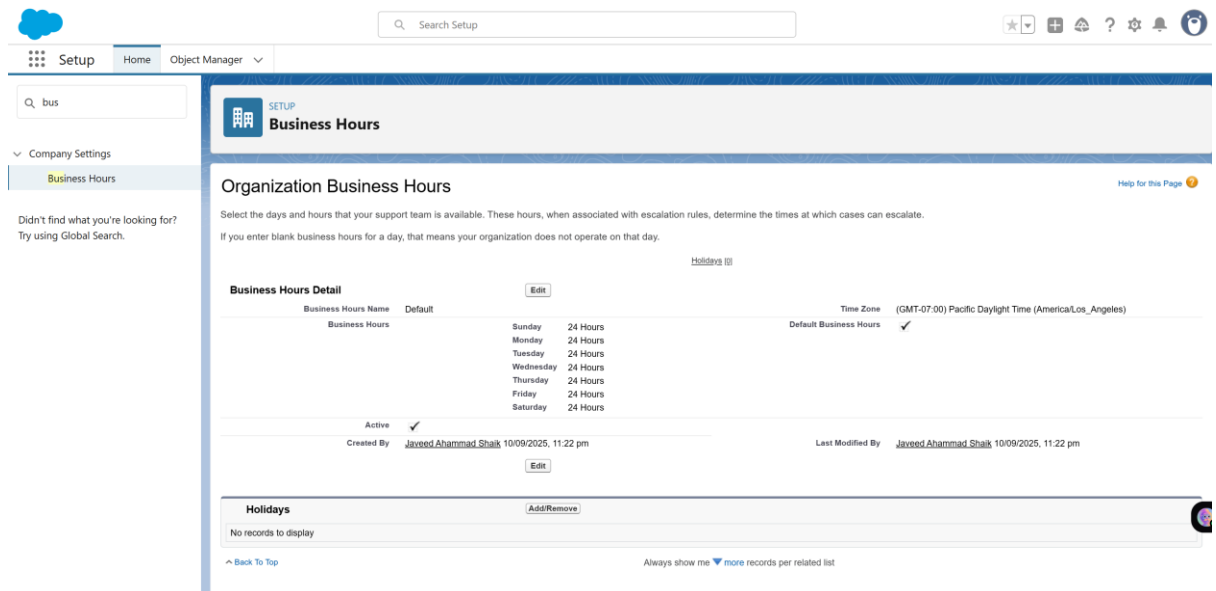

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2. Company Profile Setup

- 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 (₹).

3. Business Hours & Holidays
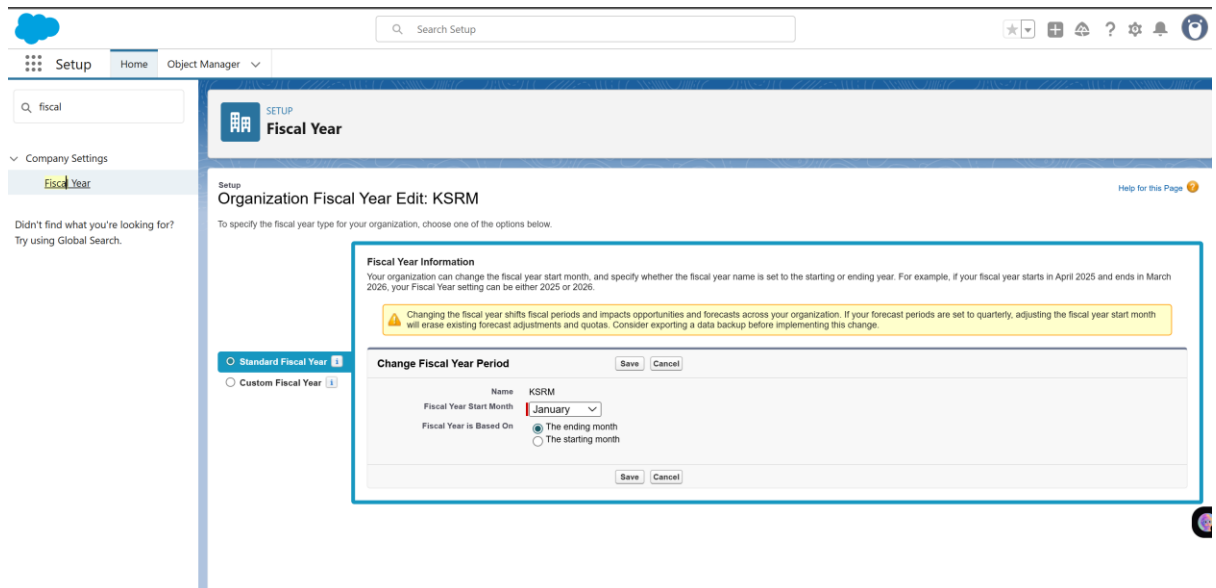
- Created a new business hours set named **Expense Approval Hours**, covering 12:00 AM to 12:00 AM.

- Added key organizational holidays (e.g., Independence Day, Republic Day) for accurate approval timelines.

4. Fiscal Year Settings

- Selected the **Standard Fiscal Year**, starting in January.

- Ensures financial reports and dashboards align with the calendar year (Jan–Dec).

5. User Setup & Licenses

- Created three test users for role-based scenarios:

    o **Admin User**: Full system access and configuration.

    o **Manager User**: For approving employee expense requests.

    o **Employee User**: For submitting expense requests.

- Assigned Salesforce licenses to each user and mapped them to their respective roles.

6. Profiles

- Customized profiles based on responsibilities:

    o **Employee Profile**: Granted *Read, Create, and Edit* permissions on the Expense Request and Expense Item objects

    o **Manager Profile**: Granted *Read, Create, Edit, and Approve* permissions, with visibility to employee records.

    o **Admin Profile**: Full system access (default).

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.

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9. Org-Wide Defaults (OWD)

- Configured default record access:

    - Expense Request = **Private**

    - Expense Item = **Controlled by Parent**

    - User = **Private**

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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.