Expense Tracker Project — Phase 2: Org Setup & Configuration

Goal: Prepare Salesforce environment for Expense Tracker project. Only mandatory steps are included to save time.

Step 0 — Log in to Developer Org - Go to Salesforce Developer Edition signup if you don’t have an org. - Log in using System Administrator credentials. - Why: Provides a free environment to build and test the project. - Screenshot Placeholder: *Add screenshot of Salesforce login page here.*

Step 1 — Set Company Information 1. Navigation: Setup (□) → Quick Find → Company Information → Edit 2. Set the following: - Company Name: Your project name - Default Time Zone: e.g., GMT+05:30 India Standard Time - Default Currency: INR or USD 3. Click Save - Why: Ensures proper display of dates, times, and currency. - Screenshot Placeholder: *Company Information Edit page.*

Step 2 — Fiscal Year 1. Navigation: Setup → Quick Find → Fiscal Year 2. Ensure Standard Fiscal Year (Jan–Dec) is selected 3. Click Save if any changes were made - Why: Standard reporting periods for revenue/expense reporting. - Screenshot Placeholder: *Fiscal Year setup page.*

Step 3 — Create Roles 1. Navigation: Setup → Quick Find → Roles → Set Up Roles 2. Create roles: - Manager → Top-level role - Employee/Agent → Child role under Manager 3. Click Save - Why: Role hierarchy ensures managers can view subordinate records when OWD is Private. - Screenshot Placeholder: *Roles hierarchy diagram.*

Step 4 — Create Users 1. Navigation: Setup → Quick Find → Users → New User 2. Manager User: - Profile: System Administrator (fastest for demo) - Role: Manager - Fill Name, Email, Username, Alias, Time Zone, Locale - Click Save 3. Employee User: - Profile: Standard User - Role: Employee - Fill Name, Email, Username, Alias, Time Zone, Locale - Click Save 4. Important: After saving Employee, edit the record → set Manager lookup = Manager user → Save - Why: Approval routing and role-based visibility depend on Manager link and role hierarchy. - Screenshot Placeholder: *User creation page.*

Step 5 — Clone Profile for Employee 1. Navigation: Setup → Quick Find → Profiles → Standard User → Clone 2. Profile Name: Expense Employee Profile 3. Click Save -

Why: Prevents modifying the standard profile while giving minimal permissions. - Screenshot Placeholder: *Profile cloning page.*

Step 6 — Org-Wide Defaults (OWD) 1. Navigation: Setup → Quick Find → Sharing Settings → Edit 2. Set: - Expense__c → Private 3. Click Save - Why: Only record owner and their manager can view expenses by default. - Screenshot Placeholder: *Sharing Settings edit page.*

Step 7 — Field-Level Security & Profile Object Access (Do this after creating Expense object and fields)

Step 7A — Field-Level Security: - Setup → Object Manager → Expense → Fields & Relationships → click each field → Set Field-Level Security - Make fields Visible for Expense Employee Profile and Manager/Admin

Step 7B — Profile Object Access: - Setup → Profiles → Expense Employee Profile → Object Settings → Expense → Edit - Grant Read, Create, Edit (Delete optional) - Click Save - Why: Employees can create/edit their own expenses; managers can review/approve. - Screenshot Placeholder: *Field-level security page.*

Step 8 — Quick Test 1. Log in as Employee → create one Expense record 2. Log in as Manager → verify record is visible 3. Confirm role hierarchy and OWD are working - Why: Validates setup before moving to Phase 3 (object/field creation and relationships). - Screenshot Placeholder: *Expense record view as Employee and Manager.*

Mandatory Phase 2 Complete: - Salesforce org is now minimally configured for Expense Tracker. - Ready for Phase 3: creating objects, fields, and relationships.