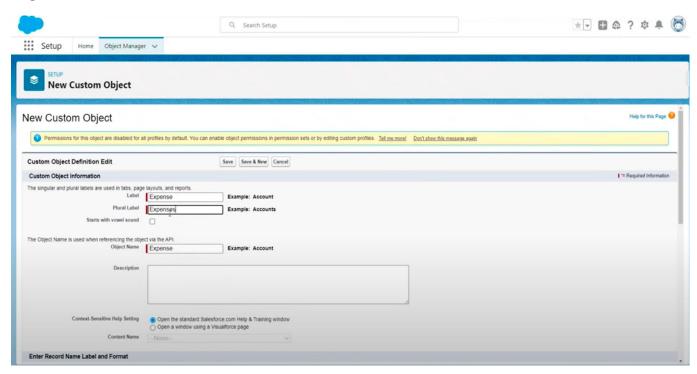# PHASE-2

Expense Tracker Project

Phase 2: Org Setup & Configuration

This phase focuses on laying the foundation for a smooth **Expense Tracker system** by configuring organizational settings, user roles, and data access to ensure accountability and maintainability.

Organization Details

- **Organization Name:** Expense Tracker Management

- **Primary Contact:** Finance Admin

- **Address:** Hyderabad, Telangana, India

- **Default Locale:** English (India)

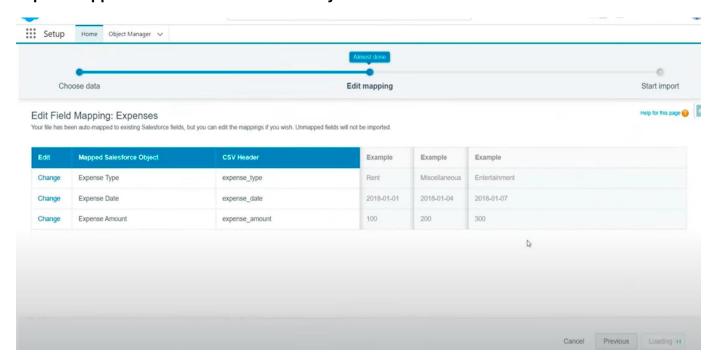- **Default Language:** English

- **Time Zone:** India Standard Time (GMT+05:30, Asia/Kolkata)

- **Currency Locale:** INR (English - India)

- **Multiple Currencies:** Enabled

  Ensures users experience Salesforce in their local context for expense submissions, approvals, and escalations.

Expense Approval Business Hours & Holidays

- **Business Hours Name:** Expense Approval Working Hours

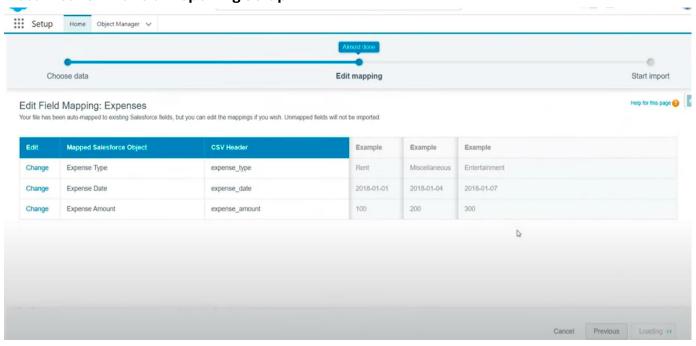- **Schedule:** Monday to Friday – 9 Hours

- **Default Business Hours:** Enabled

- **Active:** Yes

- **Holidays Configured:** 2 Holidays – All Day

  Overdue approvals escalate only during active working days, avoiding unnecessary alerts on holidays.
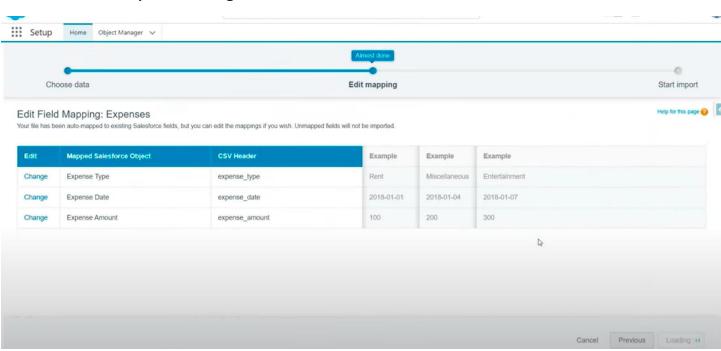
Fiscal Year & Financial Reporting Setup

- Custom Fiscal Year aligned with company reporting.

    Ensures dashboards and reports reflect accurate quarterly and annual expense data.
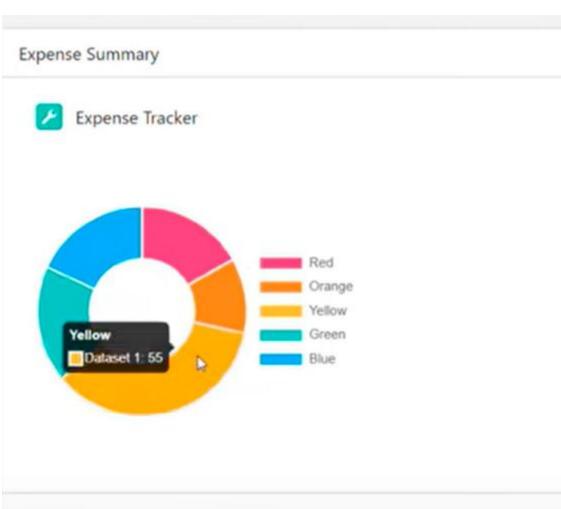

User Profiles for Expense Management

- **Expense Admin:** Full access to configure automation, dashboards, and security.

- **Expense Manager:** Manage approvals, escalations, and monitor expense records.

- **Expense Employee:** Submit and track their own expenses.

- **Expense Executive:** View-only access to dashboards and reports for insights.

Roles & Expense Visibility

- **Executive:** Can view all expense reports and analytics.
- **Manager:** Can view, approve, and escalate team expenses.
- **Employee:** Can view and submit only their own expenses.

Permission Sets for Extended Access

- **Reporting Access:** Access to dashboards/reports.
- **Escalation Management:** Enables managers to escalate overdue approvals.

Expense Record Security (OWD)

- Set to **Private** for Expense records:

Transaction Committed
Any records that the flow was ready to create, update, or delete were committed to the database.

SCREEN: Date Range
Date: Start_Date
Label: Start Date
Value at run time: 1 September 2020

Date: End_Date
Label: End Date
Value at run time: 30 September 2024

Selected Navigation Button: NEXT

Transaction Committed
Any records that the flow was ready to create, update, or delete were committed to the database.

-
    - Employees see only their submitted expenses.
    - Managers see their team's expenses for approval.
    - Executives get reporting visibility through the role hierarchy.

DevOps & Deployment for Expense Tracker

Expense Summary

🔧 Expense Tracker

Entertainment
Miscellaneous
Education
Rent
Travel
Insurance

Transaction Committed
Any records that the flow was ready to create, update, or delete were committed to the database.

SCREEN: Date Range
Date: Start_Date
Label: Start Date
Value at run time: 1 September 2024

Date: End_Date
Label: End Date
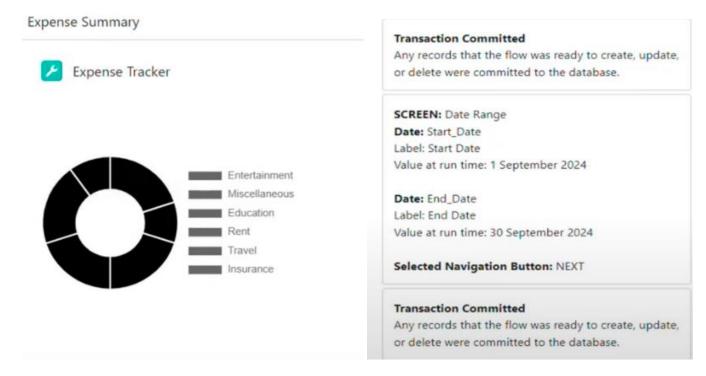Value at run time: 30 September 2024

Selected Navigation Button: NEXT

Transaction Committed
Any records that the flow was ready to create, update, or delete were committed to the database.

- **Version Control:** All metadata tracked in Git.

- **Salesforce CLI (SFDX):** For scripting, retrieving, and deploying metadata.

- **CI/CD Pipeline:** Automated testing and deployment using GitHub Actions or Copado.

  Ensures scalability, reduces errors, and maintains long-term system health.