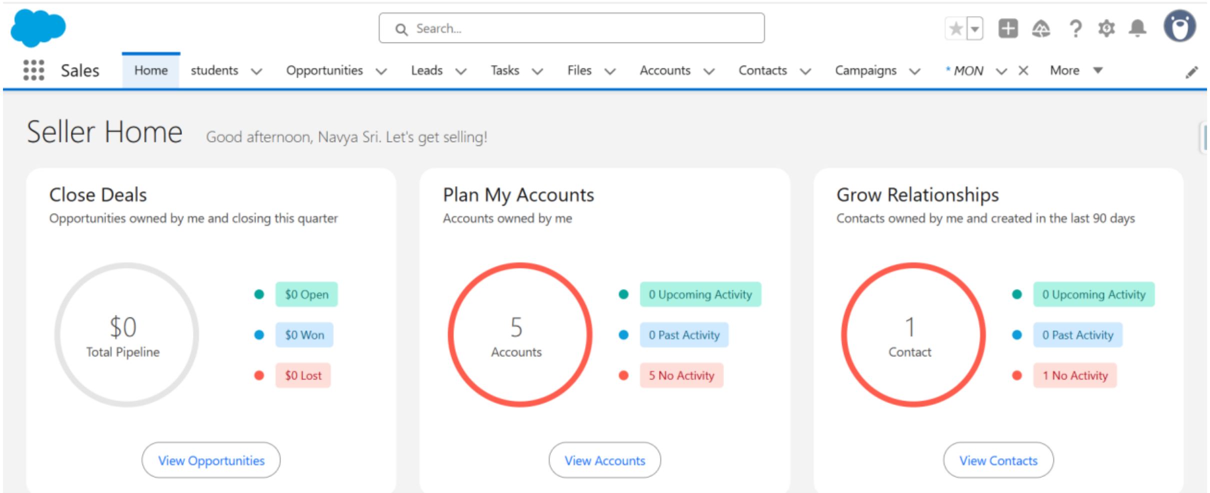
# Phase 2: Org Setup and Configuration

**Salesforce Edition:**

- Salesforce has multiple editions (Essentials, Professional, Enterprise, Unlimited, Developer--- based on the subscription).
- **Developer Edition** gives you full features but limited users & storage. Perfect for practice and learning . (we have chosen this)



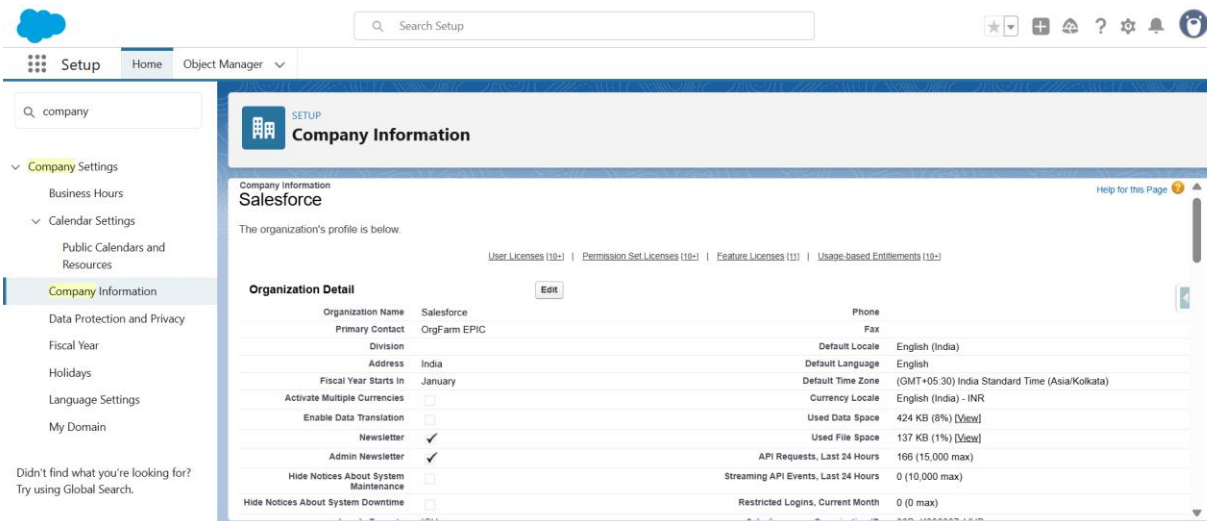

1. **Company Information** → Set your org name, default time zone, currency (important for financial data).

   **Eg:**

   Org name: Salesforce ,TCS, TATA or any MNC or start-up companies

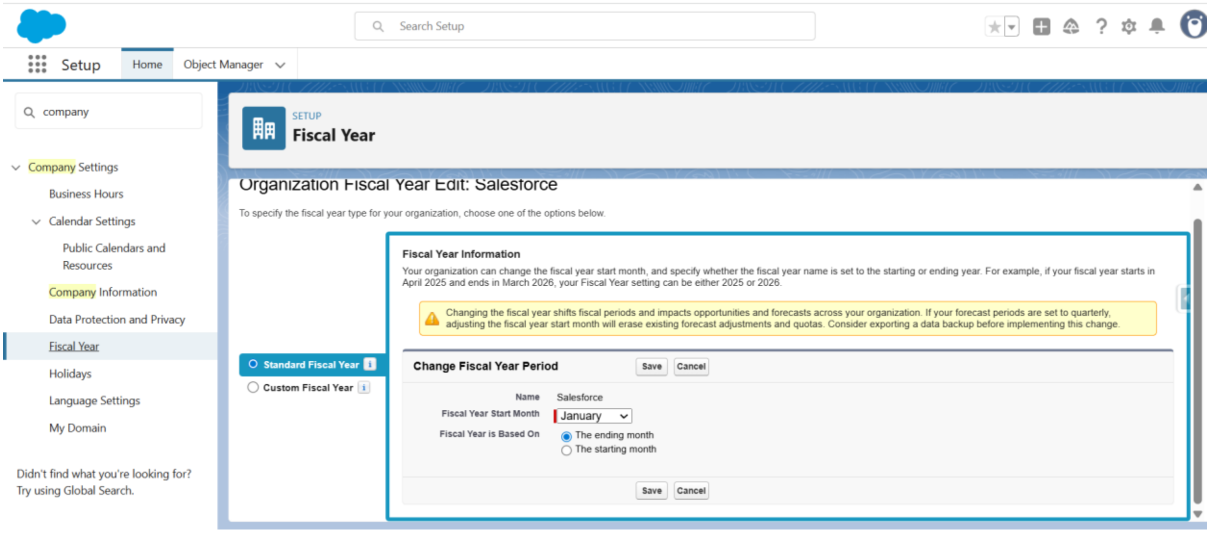
   Default time Zone : Indian Standard Time (GMT +5.30)

   Currency : Rupee

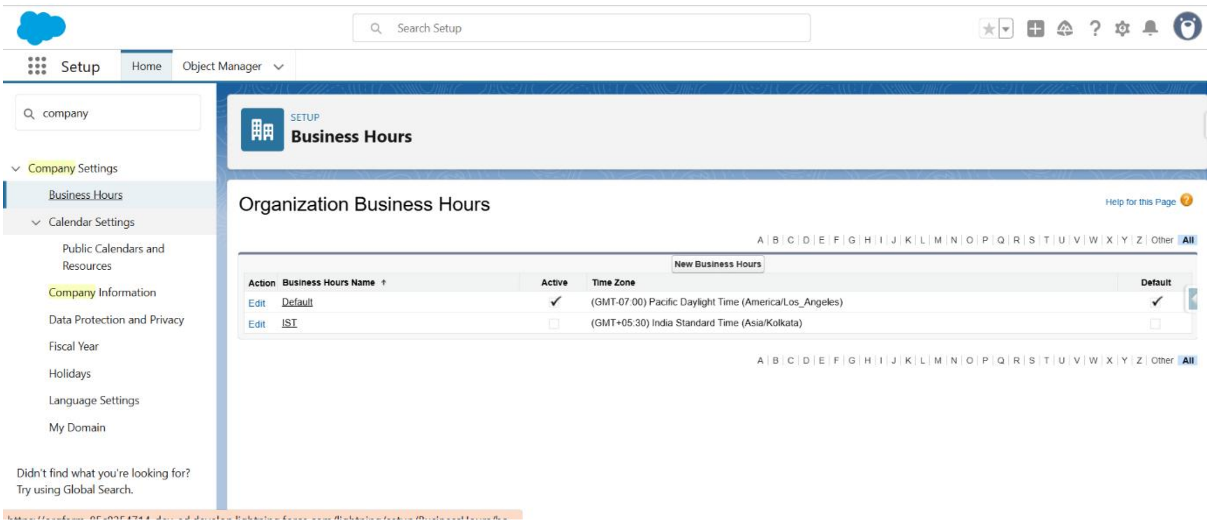



Setup → company information →edit.

2. **Fiscal Year** → Standard (Jan–Dec) or Custom (e.g., Apr–Mar). Helps for budget reporting.




3. **Business Hours**




4. **Users, Profiles, Roles** → Create test users (e.g., Employee, Manager, Finance). Assign profiles and role hierarchy.
   - Example: CEO → Finance Manager → Employee.

5. **OWD & Sharing Rules**

   Make *Expense* object Private → then share with Managers using Sharing Rules.

6. **Permission Sets** → Create "Expense Manager" permission set with extra access.

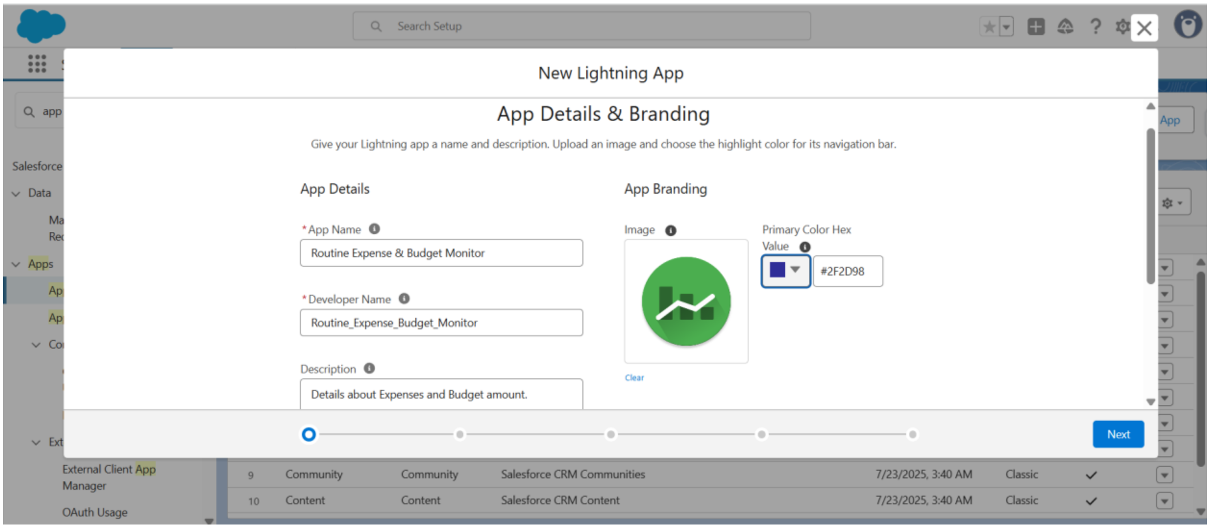
**App Creation:**

Go to setup → search App Manager → Create New Lightning App.

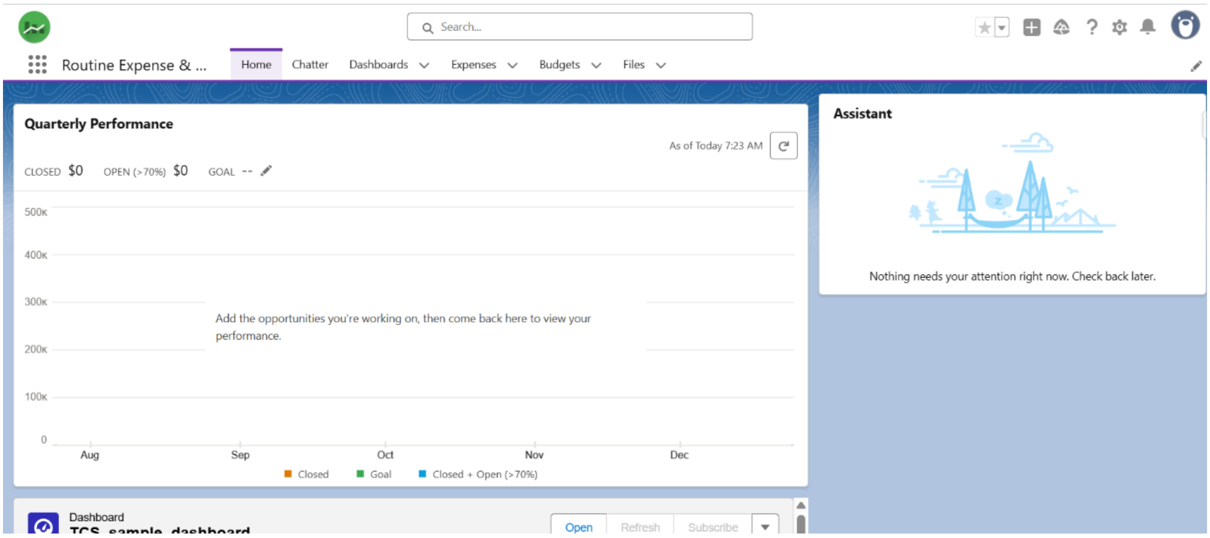
App name: Routine Expense & Budget Monitor

Add Tabs: Expenses, Budgets, Reports and Dashboards

Assign it to test users and standard users (system administrator, standard user)

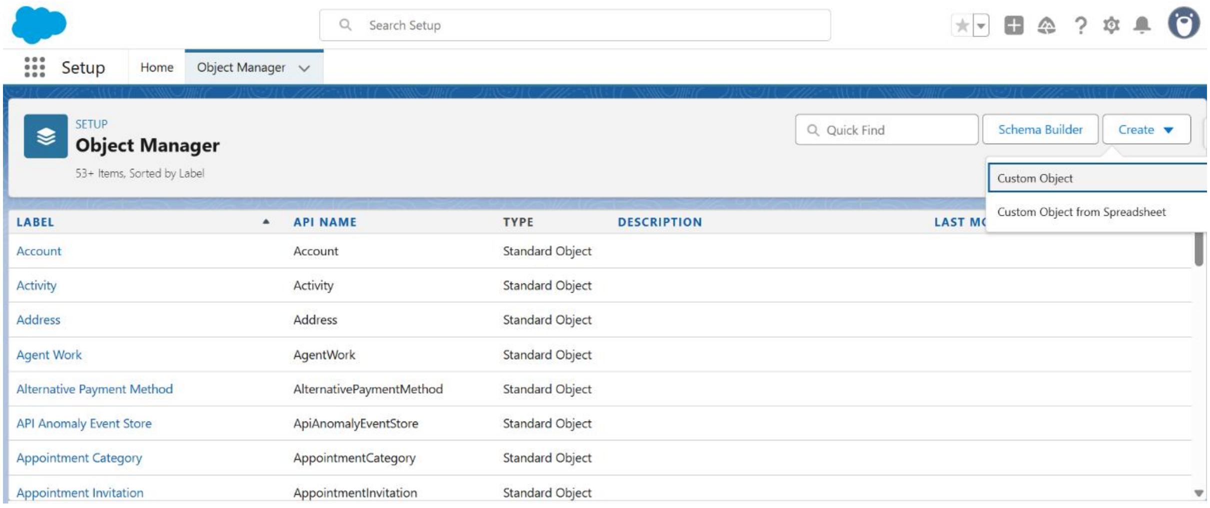



After creation of App , launch it from App Launcher.

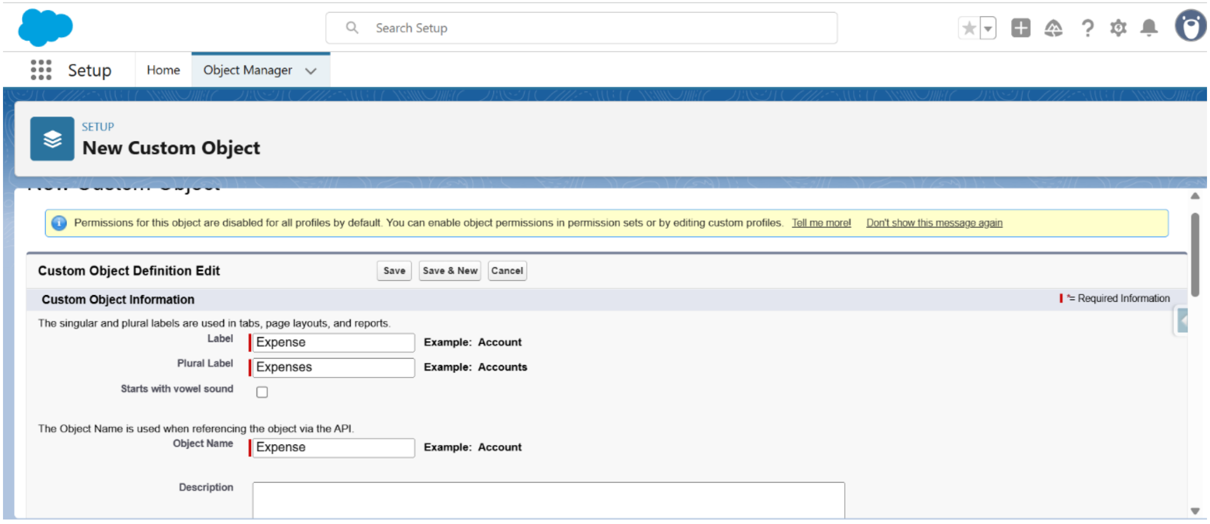



**Create Custom Objects:**

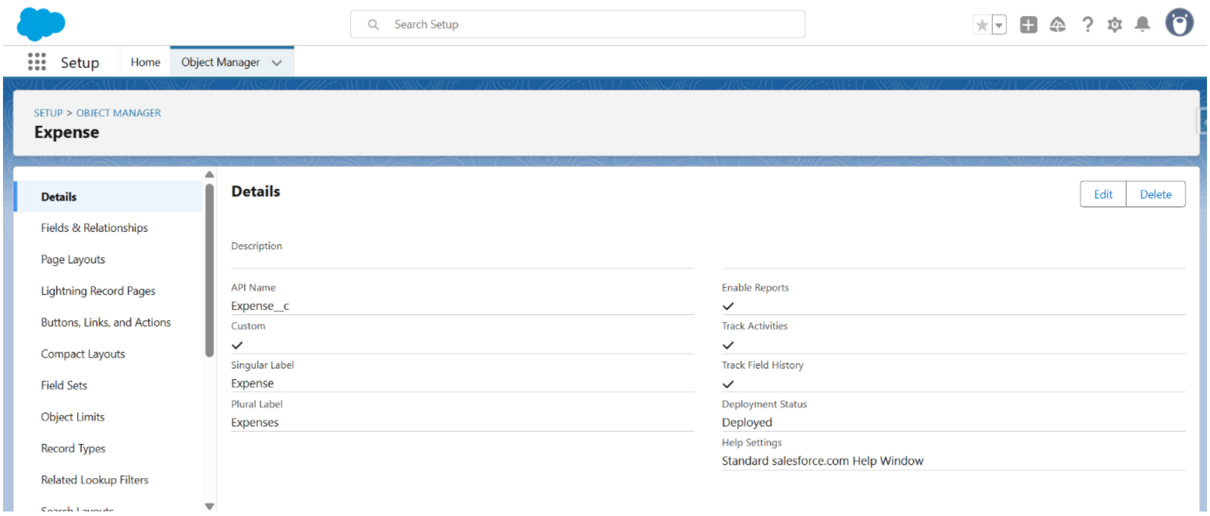
Setup → Object Manager → custom object



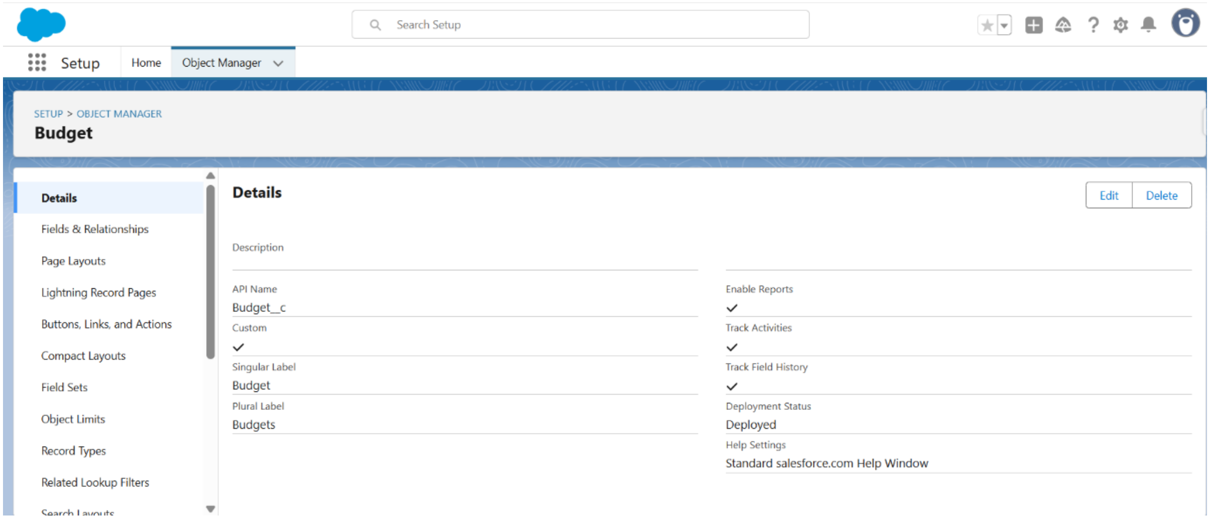

## Expense:




With API name: Expense__c



Budget:

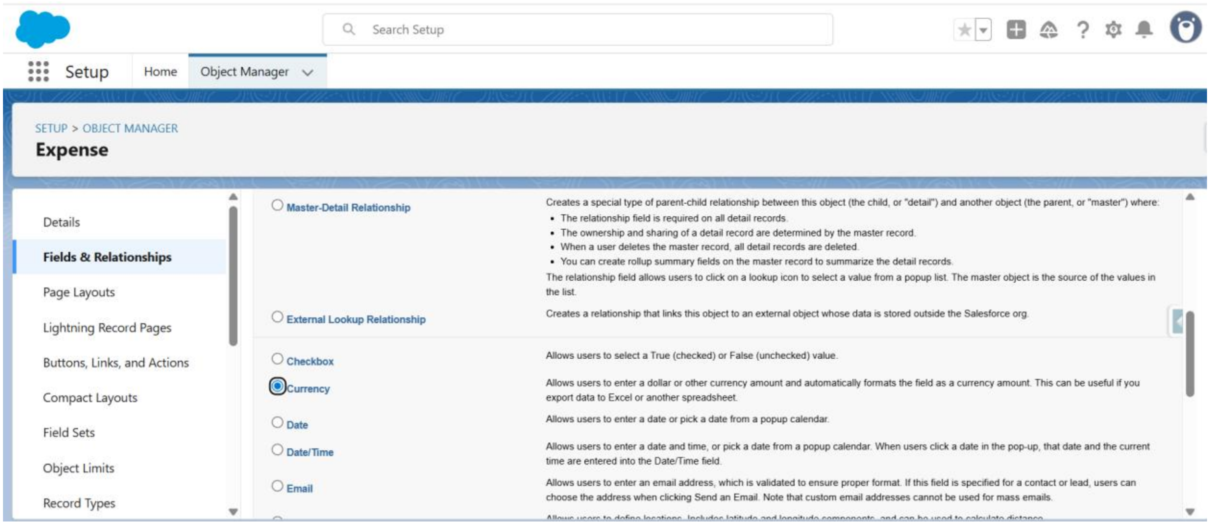


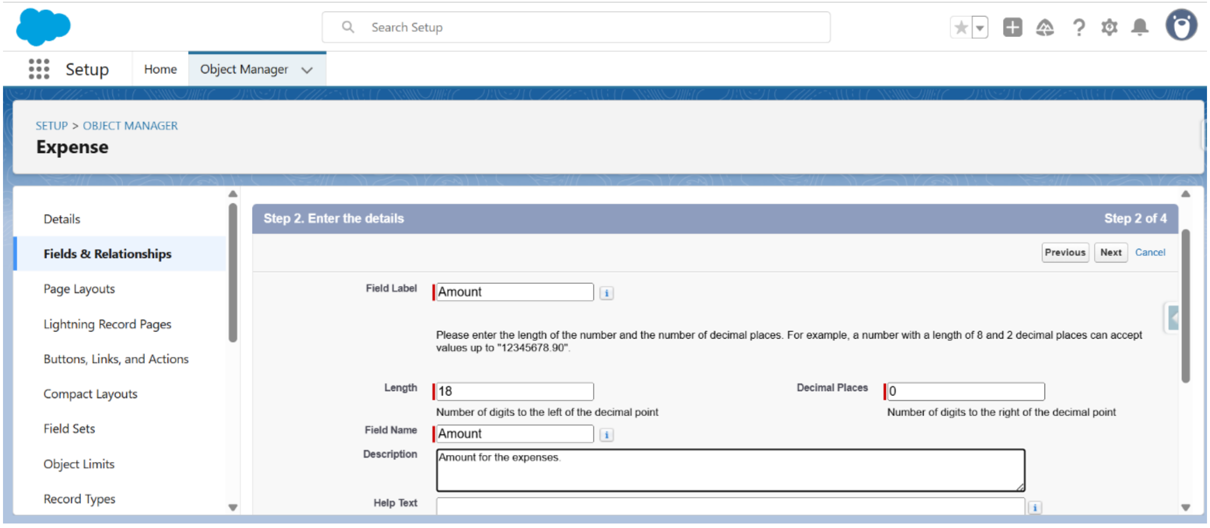

**Add Custom Fields:**

**Expense Object**

Expense Object → fields & relationships → new → select data types based on requirement → Assign required permissions.

(Repeat the same procedure for all required fields.)






- ❖ Amount → currency
- ❖ Expense Name →Text
- ❖ Date → Date
- ❖ Category → (picklist: Food, Travel ,Rent ,Utilities, others…)

**Extended Version (When you want more features)**

These are optional to improve advanced features based on Salesforce Edition

- ❖ Budget → lookup (budget object)
- ❖ Owner →default and links to user
- ❖ Receipt Image → file or URL
- ❖ Status → picklist : Submitted, Approved, Rejected

**Budget Object:**

- ❖ Budget name (Text)
- ❖ Category (picklist same as expense categories)
- ❖ Amount allocated (currency)
- ❖ Start Date (date)
- ❖ End Date (date)
- ❖ Total Expense

**Relationships**:

Use Roll-up Summary Field on Budget → SUM( Expense. Amount)

Formula for budget:

Remaining = Allocated – Total Expenses.

Mainly here, Expense links to a Budget via Lookup Relationship.