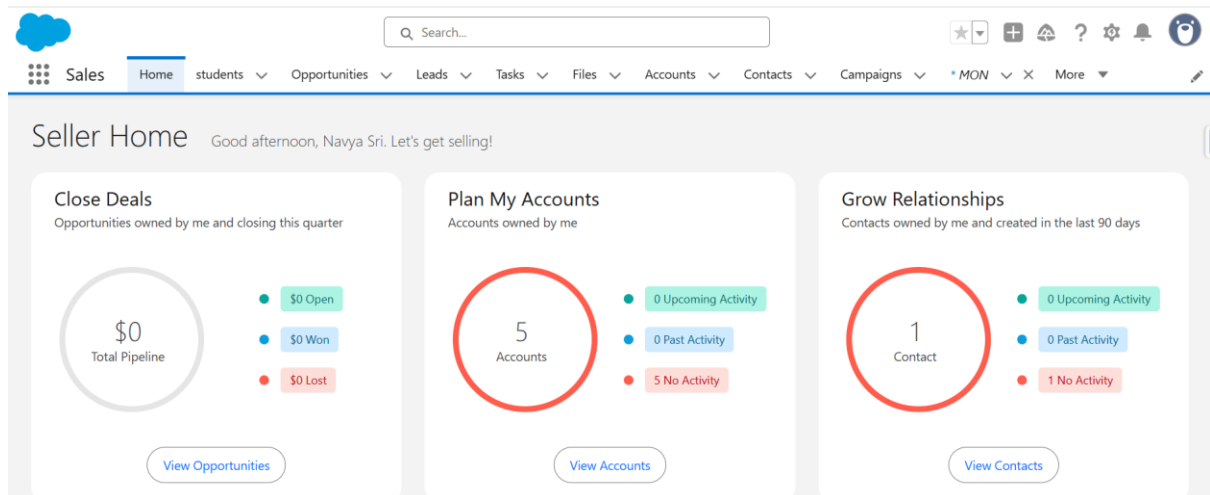


Phase 2: Org Setup and Configuration

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

The screenshot shows the Salesforce Setup page for Company Information. The left sidebar contains a search bar and a list of settings categories: Company Settings, Calendar Settings, and Company Information. The main content area is titled "Company Information" and shows the organization's profile. The profile includes the organization name "Salesforce" and a description "The organization's profile is below." Below the profile, there are links for "User Licenses (10+)", "Permission Set Licenses (10+)", "Feature Licenses (11)", and "Usage-based Entitlements (10+)". The "Organization Detail" section is expanded, showing a table of organization details. The table has columns 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, Phone, Fax, Default Locale, Default Language, Default Time Zone, Currency Locale, Used Data Space, Used File Space, API Requests, Last 24 Hours, Streaming API Events, Last 24 Hours, and Restricted Logins, Current Month. The values for these fields are: Organization Name: Salesforce, Primary Contact: OrgFarm EPIC, Division: India, Address: January, Fiscal Year Starts In: January, Activate Multiple Currencies: ☐, Enable Data Translation: ☐, Newsletter: ☒, Admin Newsletter: ☒, Hide Notices About System Maintenance: ☐, Hide Notices About System Downtime: ☐, Phone: , Fax: , Default Locale: English (India), Default Language: English, Default Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata), Currency Locale: English (India) - INR, Used Data Space: 424 KB (8%) [View], Used File Space: 137 KB (1%) [View], API Requests, Last 24 Hours: 166 (15,000 max), Streaming API Events, Last 24 Hours: 0 (10,000 max), and Restricted Logins, Current Month: 0 (0 max).

Setup → company information → edit.

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

The screenshot shows the Salesforce Setup interface for configuring the Fiscal Year. The left sidebar lists navigation options under 'Company Settings', with 'Fiscal Year' selected. The main content area is titled 'Organization Fiscal Year Edit: Salesforce'. It includes a 'Fiscal Year Information' section with a warning about changing the fiscal year and a 'Change Fiscal Year Period' section. In the 'Change Fiscal Year Period' section, 'Standard Fiscal Year' is selected, and the 'Fiscal Year Start Month' is set to 'January'. The 'Fiscal Year is Based On' option is set to 'The ending month'.

3. **Business Hours**

The screenshot shows the Salesforce Setup interface for configuring Business Hours. The left sidebar lists navigation options under 'Company Settings', with 'Business Hours' selected. The main content area is titled 'Organization Business Hours'. It features a table with columns for 'Action', 'Business Hours Name', 'Active', and 'Time Zone'. Two business hours are listed: 'Default' (Active, Pacific Daylight Time) and 'IST' (Inactive, India Standard Time). A 'New Business Hours' button is visible at the top right of the table.

Action	Business Hours Name	Active	Time Zone
Edit	Default	✓	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Edit	IST	✗	(GMT+05:30) India Standard Time (Asia/Kolkata)

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.

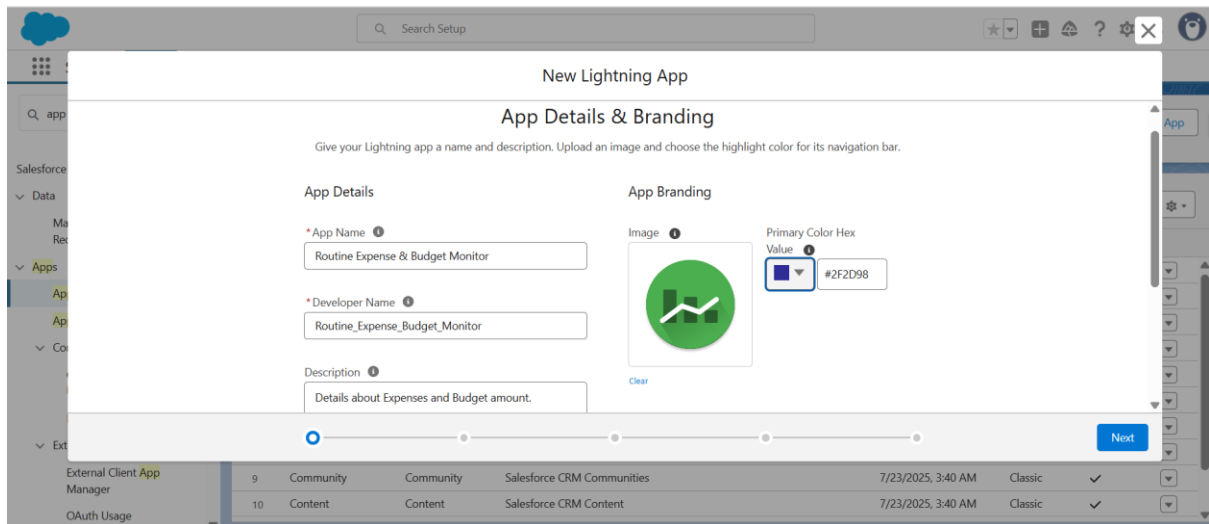
App Creation:

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

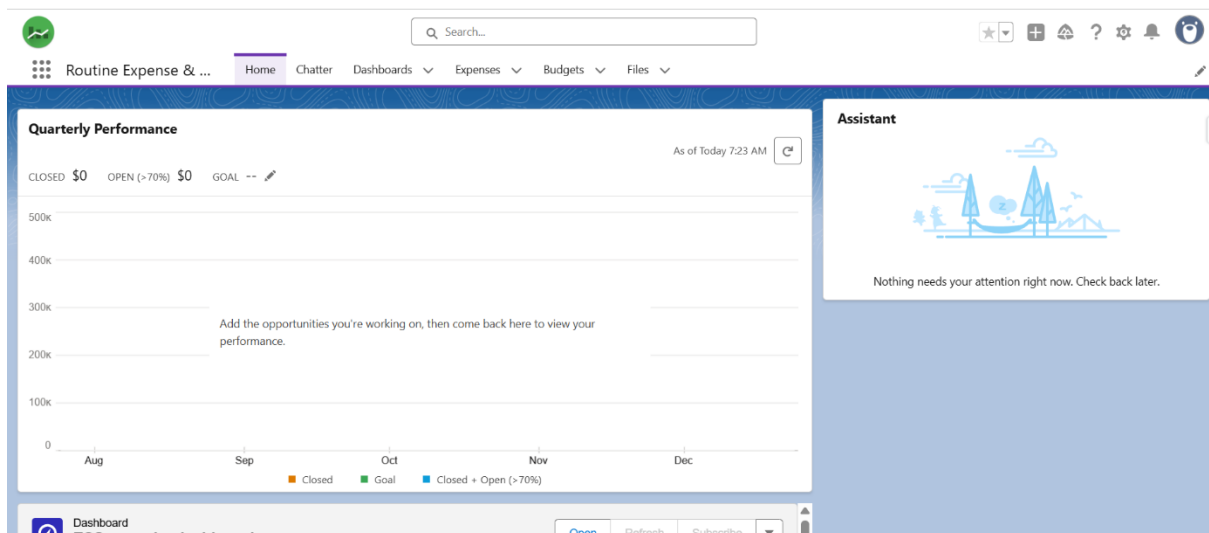
App name: Routine Expense & Budget Monitor

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



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Setup
Home
Object Manager


Object Manager
 53+ Items, Sorted by Label

Schema Builder
Create

Custom Object
Custom Object from Spreadsheet

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED
Account	Account	Standard Object		
Activity	Activity	Standard Object		
Address	Address	Standard Object		
Agent Work	AgentWork	Standard Object		
Alternative Payment Method	AlternativePaymentMethod	Standard Object		
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object		
Appointment Category	AppointmentCategory	Standard Object		
Appointment Invitation	AppointmentInvitation	Standard Object		

Expense:



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Setup
Home
Object Manager

New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)

Custom Object Definition Edit

Save
Save & New
Cancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label **Example: Account**

Plural Label **Example: Accounts**


Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name **Example: Account**

Description

With API name: Expense__c



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Setup
Home
Object Manager

SETUP > OBJECT MANAGER
Expense

Details

Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters

Details

Description

API Name
Expense__c
Custom

Singular Label
Expense
Plural Label
Expenses

Enable Reports
Track Activities
Track Field History
Deployment Status
Help Settings
Standard salesforce.com Help Window

Edit
Delete

Budget:

The screenshot shows the Salesforce Setup interface for the 'Budget' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Details' and contains the following fields:

- Description
- API Name: Budget__c
- Custom: ☒
- Singular Label: Budget
- Plural Label: Budgets
- Enable Reports: ☒
- Track Activities: ☒
- Track Field History: ☒
- Deployment Status: Deployed
- Help Settings: Standard salesforce.com Help Window

Buttons for 'Edit' and 'Delete' are located in the top right corner of the details section.

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.)

The screenshot shows the Salesforce Setup interface for the 'Expense' object, specifically the 'Fields & Relationships' section. The left sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area displays the following options:

- ☐ Master-Detail Relationship: Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
 - The relationship field is required on all detail records.
 - The ownership and sharing of a detail record are determined by the master record.
 - When a user deletes the master record, all detail records are deleted.
 - You can create rollup summary fields on the master record to summarize the detail records.The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
- ☐ External Lookup Relationship: Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
- ☐ Checkbox: Allows users to select a True (checked) or False (unchecked) value.
- ☒ Currency: Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
- ☐ Date: Allows users to enter a date or pick a date from a popup calendar.
- ☐ Date/Time: Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
- ☐ Email: Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
- ☐ Location: Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

SETUP > OBJECT MANAGER

Expense

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Step 2. Enter the details

Step 2 of 4

Previous Next Cancel

Field Label

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90"

Length Decimal Places

Number of digits to the left of the decimal point

Number of digits to the right of the decimal point

Field Name

Description

Help Text

- ❖ 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.