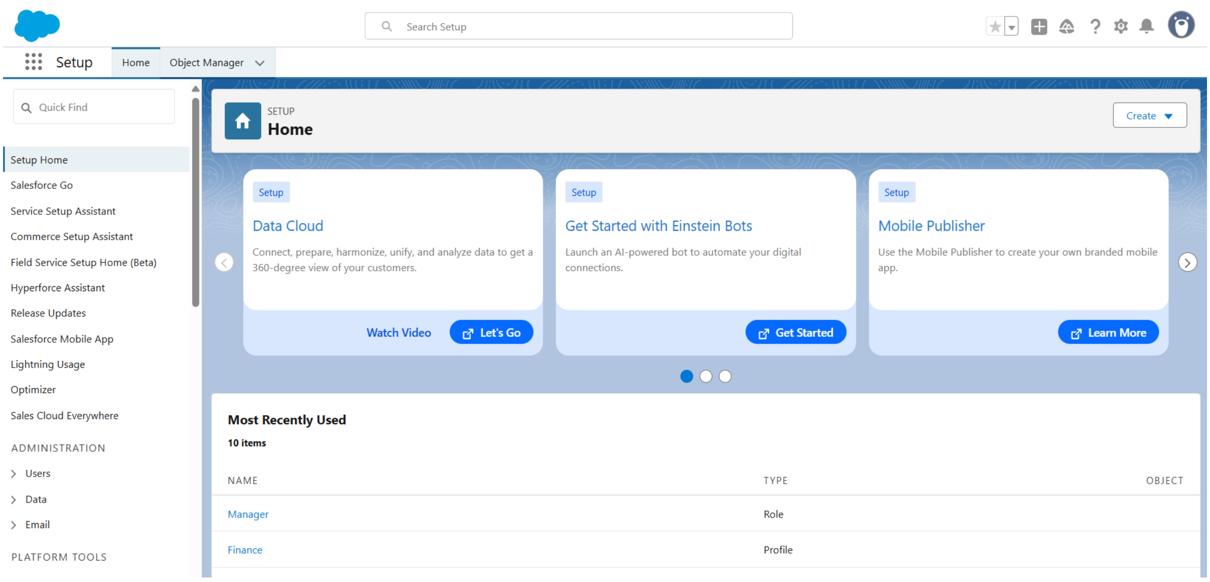
Corporate Travel & Expense Management System Project

Phase 2: Org Setup & Configuration

Goal: Set up a secure, well-structured Salesforce environment to power the Corporate Travel & Expense Management System, ensuring smooth approvals, role-based access, and future-ready scalability**.**

1. Salesforce Editions

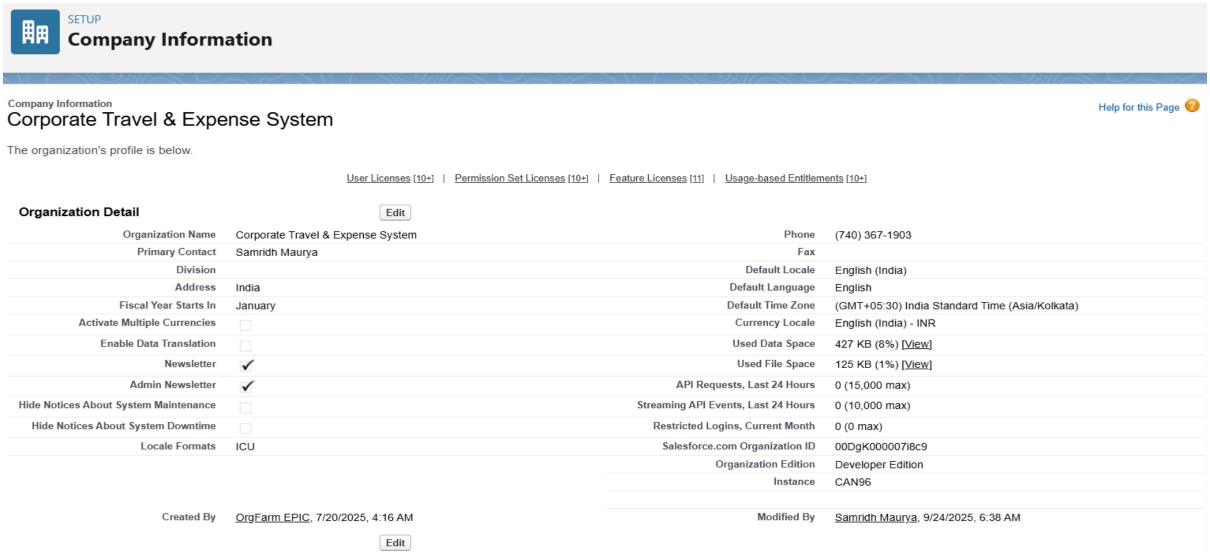
- Sign up for a free **Developer Org**: developer.salesforce.com.
- This will be the build and test environment for the app.



2. Company Profile Setup

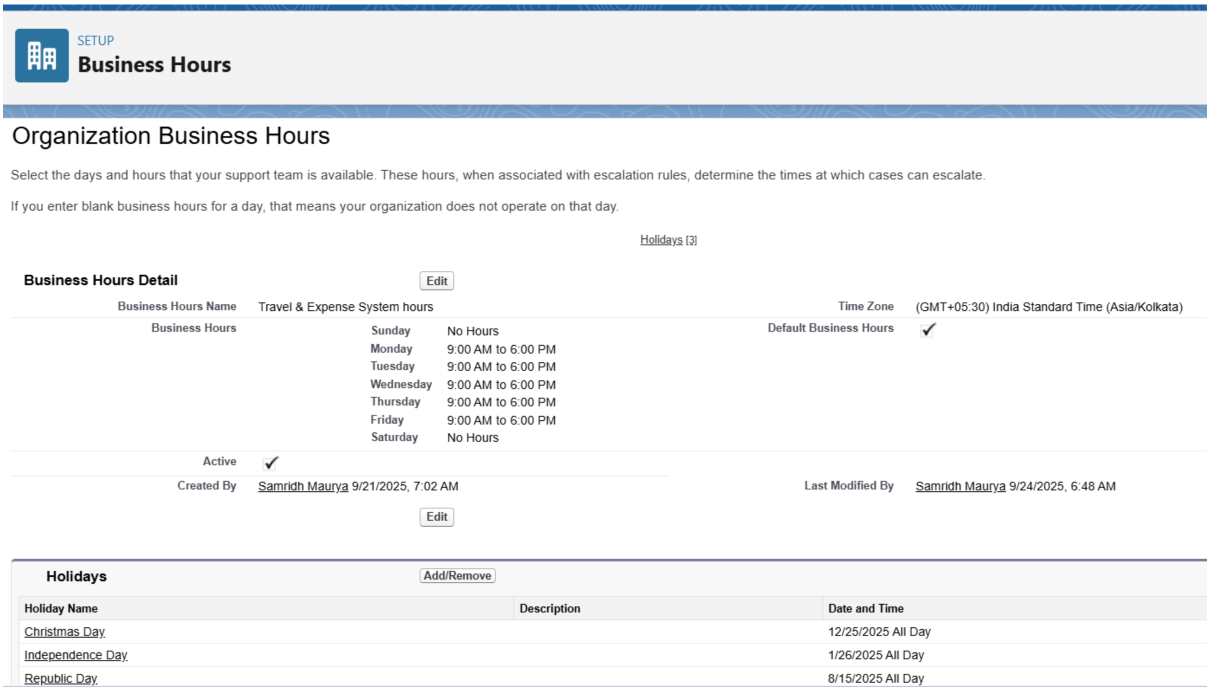
- Company Name → ***Corporate Travel & Expense Management System***
- Primary Contact → Samridh Maurya (**Admin**)

- Default Locale → English (**India**)
- Default Time Zone → (GMT+05:30) **India Standard Time**
- Default Currency → **INR** (₹) – since expense claims & travel requests are in Indian Rupees.



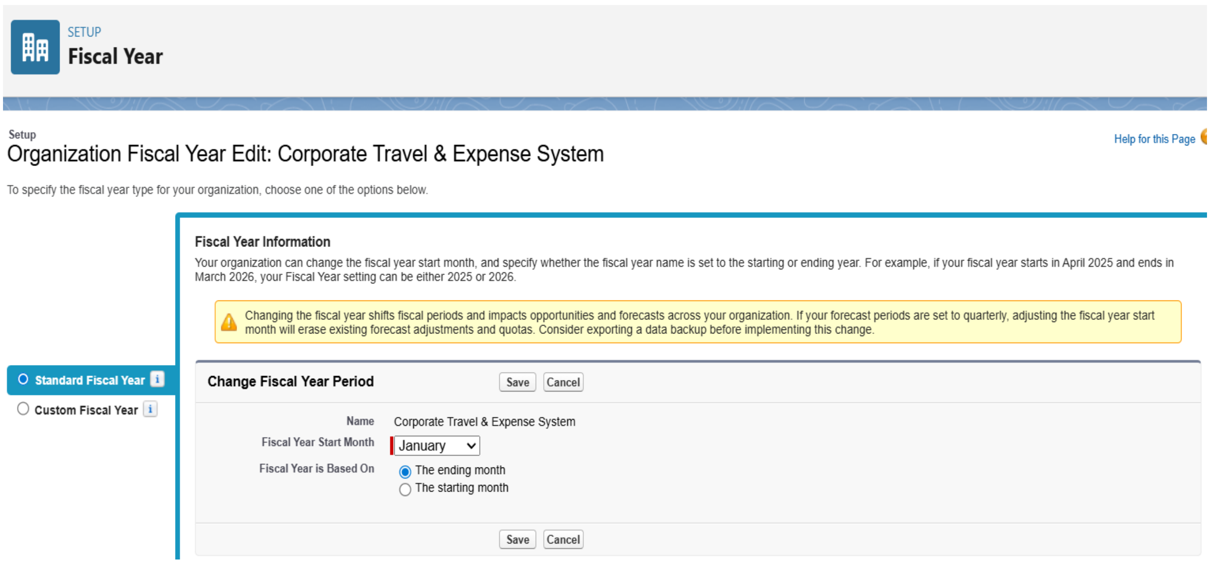
3. Business Hours & Holidays

- In Setup, search **Business Hours,** it as "Travel & Expense System hours".
- Create a record: *9 AM – 6 PM, Mon–Fri*.
- Check **Default** box.
- In Setup, search **Holidays**.
- Add holidays (like Jan 26, Aug 15, Dec 25).
- Associate these with the Business Hours.



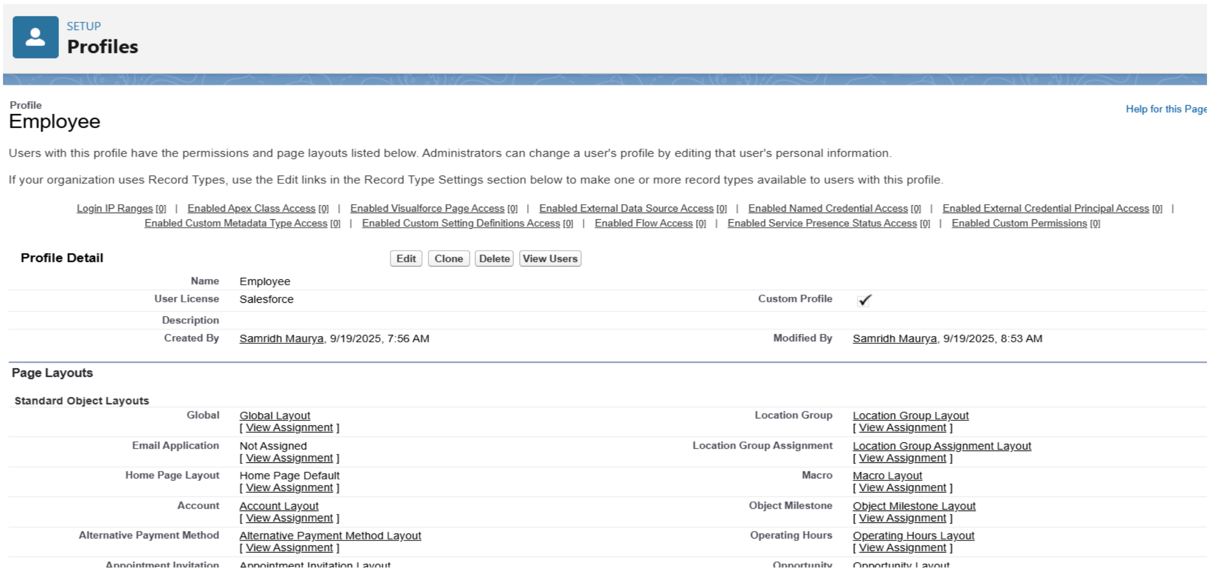
4. Fiscal Year Settings

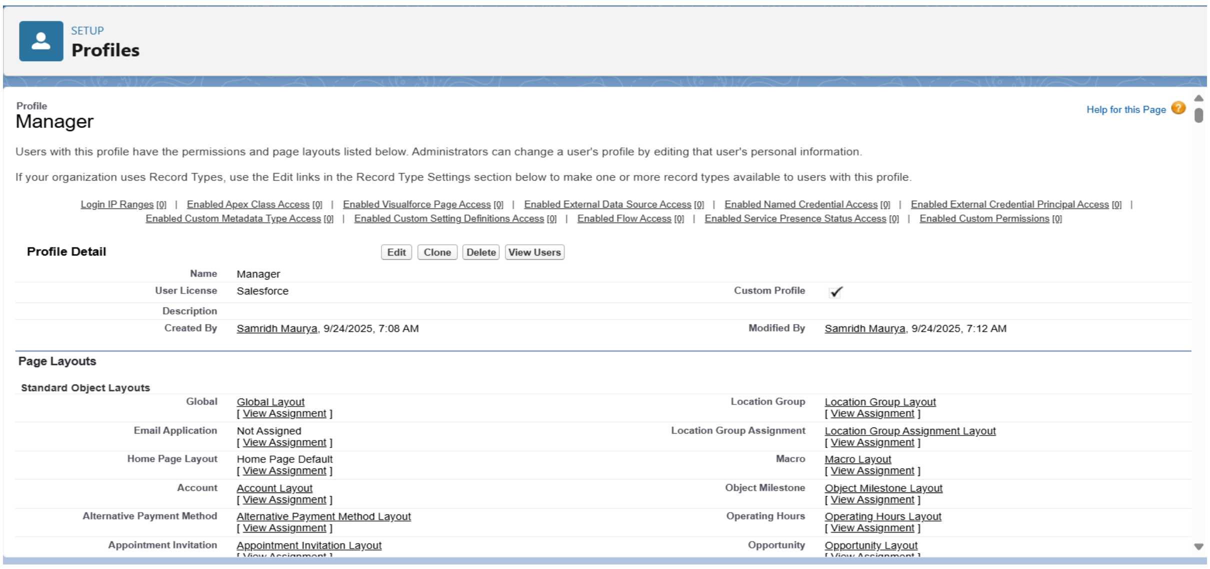
- In Setup, search **Fiscal Year**.
- Select **Standard Fiscal Year (Jan–Dec)**.
- Save.



5. User Setup & Licenses

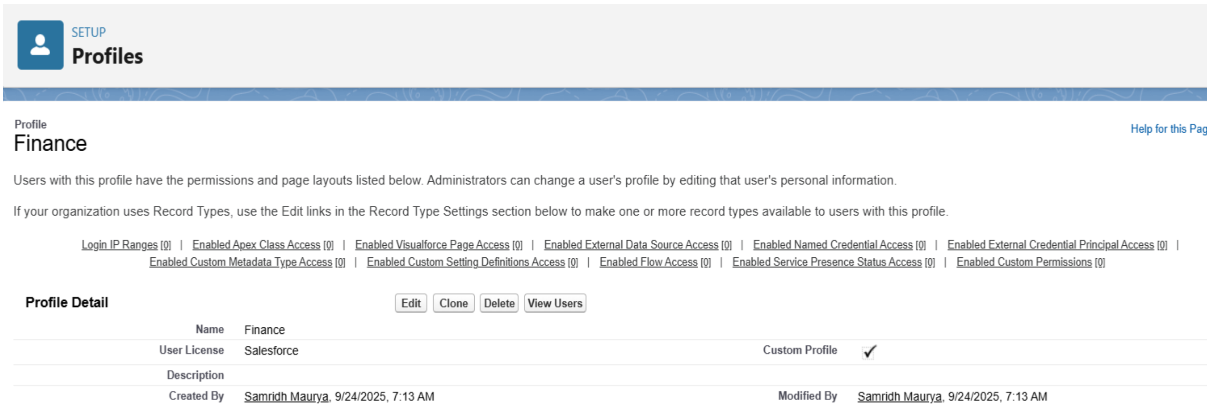
- In Setup, search **Users → New User**
- Create profiles of users:
  - **Employee (Standard User)** → Can submit Travel Requests/Expense Claims.
  - **Manager (Standard User)** → Can approve.
  - **Finance (Standard User)** → Can process reimbursements.





6. Profiles

- In Setup, search **Profiles**.
- Clone “Standard User” → rename to *Employee Profile*.
    - Grant Create + Read on Travel Request & Expense Claim.
- Clone “Standard User” → rename to *Manager Profile*.
    - Add Edit on Travel Request + Approvals.
- Clone “Standard User” → rename to *Finance Profile*.
    - Full CRUD on Expense Claims + Reports.

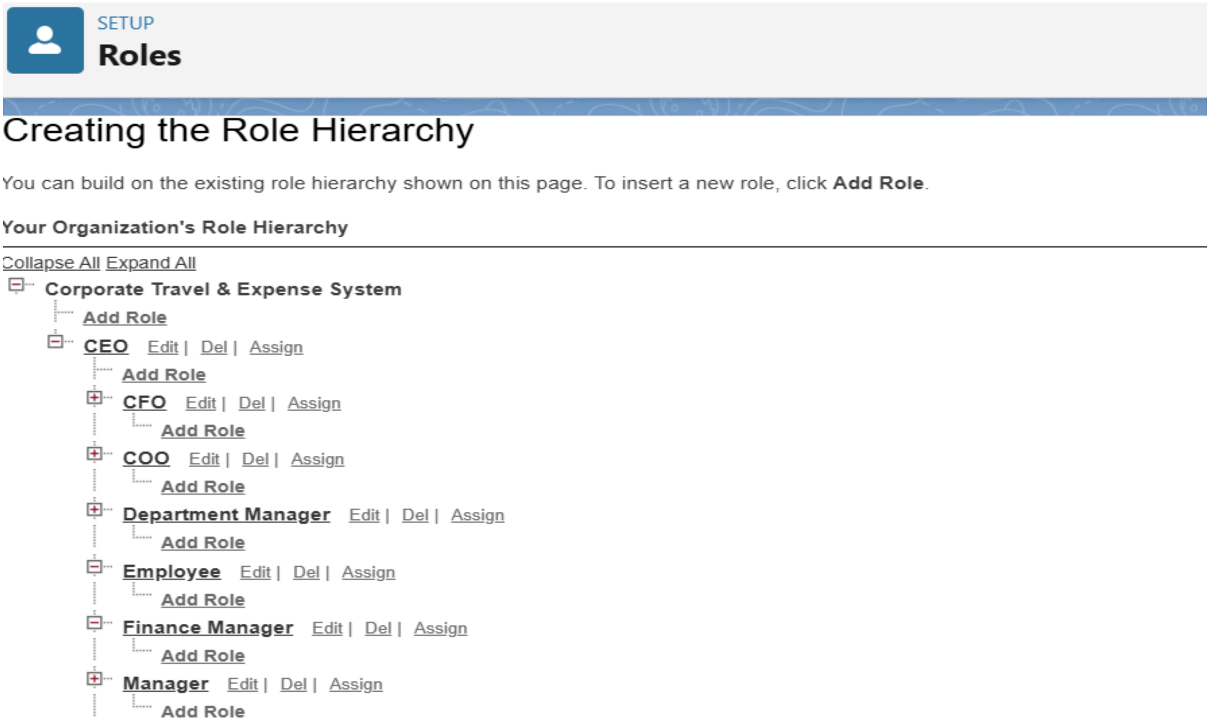


7. Roles

- Create a Role Hierarchy:
    - CEO (top)
        - Finance Manager

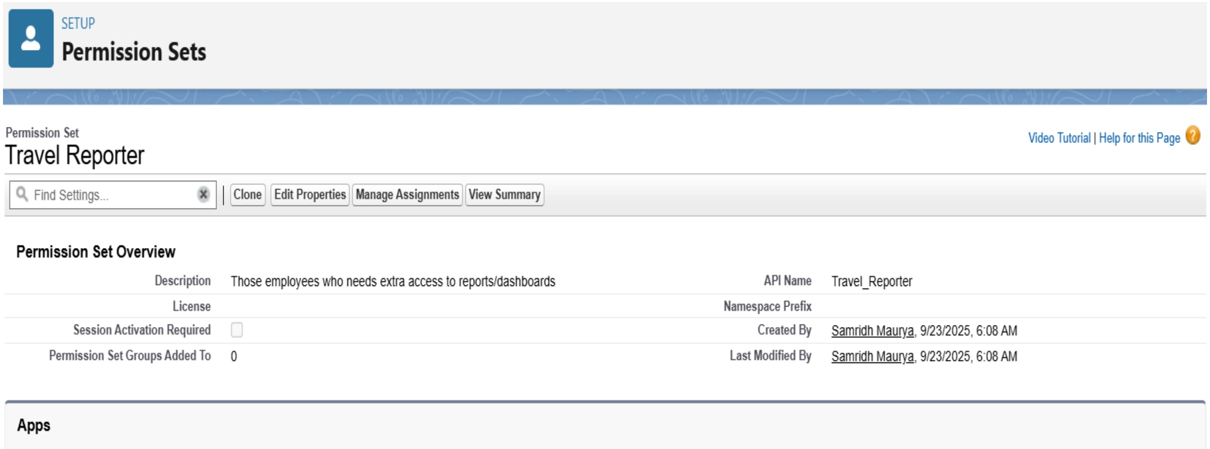
- ➢ Department Manager
- ➢ Employee

- Ensures managers see their employees requests.



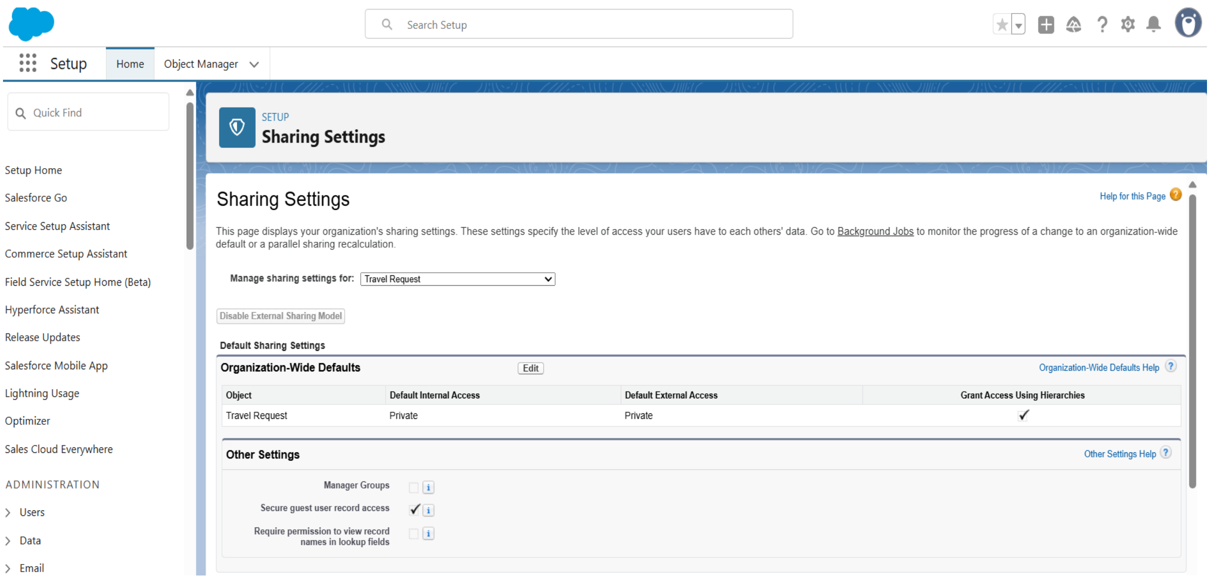
8. Permission Sets

- If an employee needs access to reports/dashboards, create a "**Travel Reporter**" Permission Set instead of modifying their profile.
- This ensure that user can see the **status** of Travel Request.



9. OWD (Org-Wide Defaults)

- Travel Requests: **Private** (only owner & manager can see).
- Expense Claims: **Private** (only owner & finance can see).



10. Sharing Rules

- Share Travel Requests with Managers for visibility.
- Share Expense Claims with Finance Team for processing**.**

11. Login Access Policies

- Restrict login hours (9am–6pm for employees).
- Enable Admins can log in as any user for troubleshooting**.**

12. Dev Org Setup

- Use a **Developer Org** for build & testing.

13. Sandbox Usage

- (If **Developer Edition Developer Org**) → Create Developer Sandbox for testing automations.
- Deploy only tested features to production**.**

14. Deployment Basics

- Deployment = moving config/code from **Sandbox → Production** using **Change Sets** (or VS Code + SFDX if advanced).
