


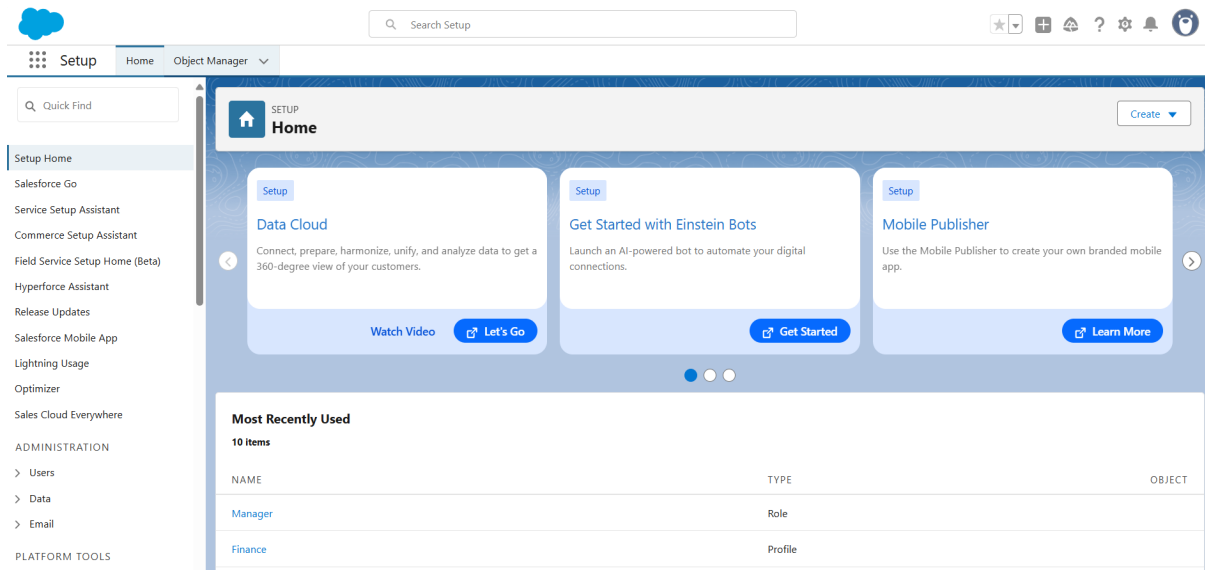
Corporate Travel & Expense Management System Project

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 is your **sandbox environment** for **Travel_Request__c** and **Expense_Claim__c** custom objects.



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.


SETUP

Company Information

Company Information
Corporate Travel & Expense System

[Help for this Page](#)

The organization's profile is below.

[User Licenses \(10+\)](#) |
[Permission Set Licenses \(10+\)](#) |
[Feature Licenses \(11\)](#) |
[Usage-based Entitlements \(10+\)](#)

Organization Detail
[Edit](#)

Organization Name	Corporate Travel & Expense System	Phone	(740) 367-1903
Primary Contact	Samridh Maurya	Fax	
Division		Default Locale	English (India)
Address	India	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	427 KB (8%) View
Newsletter	<input checked="" type="checkbox"/>	Used File Space	125 KB (1%) View
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00DgK000007i8c9
		Organization Edition	Developer Edition
		Instance	CAN96

Created By [OrgFarm EPIC](#), 7/20/2025, 4:16 AM

Modified By [Samridh Maurya](#), 9/24/2025, 6:38 AM

[Edit](#)

3. Business Hours & Holidays

- In Setup → Create: **TravelExpense_BusinessHours__c**, 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.



SETUP

Business Hours

Organization Business Hours

Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate.

If you enter blank business hours for a day, that means your organization does not operate on that day.

[Holidays \(3\)](#)**Business Hours Detail**[Edit](#)

Business Hours Name	Travel & Expense System hours		Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Business Hours	Sunday	No Hours	Default Business Hours	<input checked="" type="checkbox"/>
	Monday	9:00 AM to 6:00 PM		
	Tuesday	9:00 AM to 6:00 PM		
	Wednesday	9:00 AM to 6:00 PM		
	Thursday	9:00 AM to 6:00 PM		
	Friday	9:00 AM to 6:00 PM		
	Saturday	No Hours		
Active	<input checked="" type="checkbox"/>			
Created By	Samridh Maurya 9/21/2025, 7:02 AM		Last Modified By	Samridh Maurya 9/24/2025, 6:48 AM

[Edit](#)**Holidays**[Add/Remove](#)

Holiday Name	Description	Date and Time
Christmas Day		12/25/2025 All Day
Independence Day		1/26/2025 All Day
Republic Day		8/15/2025 All Day

4. Fiscal Year Settings

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



SETUP

Fiscal Year

Setup

Organization Fiscal Year Edit: Corporate Travel & Expense System

[Help for this Page](#)

To specify the fiscal year type for your organization, choose one of the options below.

☒ Standard Fiscal Year ⓘ☐ Custom Fiscal Year ⓘ**Fiscal Year Information**

Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example, if your fiscal year starts in April 2025 and ends in March 2026, your Fiscal Year setting can be either 2025 or 2026.

⚠ Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing this change.

Change Fiscal Year Period[Save](#) [Cancel](#)

Name Corporate Travel & Expense System


Fiscal Year Start Month January

Fiscal Year is Based On ☒ The ending month ☐ The starting month

[Save](#) [Cancel](#)

5. User Setup & Licenses

- In Setup, search **Users** → **New User**
- Create profiles of users:
 - **Employee**→ **ProfileId = Employee_Profile__c**, can submit Travel Requests/Expense Claims.
 - **Manager**→ **ProfileId = Manager_Profile__c**, can approve.
 - **Finance**→ **ProfileId = Finance_Profile__c**, can process reimbursements.

 **SETUP**
Profiles

Profile

Employee

Help for this Page

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges [0] | Enabled Apex Class Access [0] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] | Enabled External Credential Principal Access [0] | Enabled Custom Metadata Type Access [0] | Enabled Custom Setting Definitions Access [0] | Enabled Flow Access [0] | Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]

Profile Detail


EditCloneDeleteView Users

Name	Employee	Custom Profile	✓
User License	Salesforce		
Description			
Created By	Samridh Maurya, 9/19/2025, 7:56 AM	Modified By	Samridh Maurya, 9/19/2025, 8:53 AM

Page Layouts

Standard Object Layouts

Global	Global Layout [View Assignment]	Location Group	Location Group Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Location Group Assignment	Location Group Assignment Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Macro	Macro Layout [View Assignment]
Account	Account Layout [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout	Opportunity	Opportunity Layout

 **SETUP**
Profiles

Profile

Manager

Help for this Page

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

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Login IP Ranges [0] | Enabled Apex Class Access [0] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] | Enabled External Credential Principal Access [0] | Enabled Custom Metadata Type Access [0] | Enabled Custom Setting Definitions Access [0] | Enabled Flow Access [0] | Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]

Profile Detail

EditCloneDeleteView Users

Name	Manager	Custom Profile	✓
User License	Salesforce		
Description			
Created By	Samridh Maurya, 9/24/2025, 7:08 AM	Modified By	Samridh Maurya, 9/24/2025, 7:12 AM


Page Layouts

Standard Object Layouts

Global	Global Layout [View Assignment]	Location Group	Location Group Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Location Group Assignment	Location Group Assignment Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Macro	Macro Layout [View Assignment]
Account	Account Layout [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout	Opportunity	Opportunity Layout

6. Profiles

- In Setup, search **Profiles**.
- Clone “Standard User” → **Employee_Profile__c**.
 - Grant Create + Read on Travel Request & Expense Claim.
- Clone “Standard User” → **Manager_Profile__c**.
 - Add Edit on Travel Request + Approvals.
- Clone “Standard User” → **Finance_Profile__c**.
 - Full CRUD on **Expense_Claim__c**.

 **SETUP**
Profiles

Profile

Finance

Help for this Page

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \[0\]](#) | [Enabled Apex Class Access \[0\]](#) | [Enabled Visualforce Page Access \[0\]](#) | [Enabled External Data Source Access \[0\]](#) | [Enabled Named Credential Access \[0\]](#) | [Enabled External Credential Principal Access \[0\]](#) | [Enabled Custom Metadata Type Access \[0\]](#) | [Enabled Custom Setting Definitions Access \[0\]](#) | [Enabled Flow Access \[0\]](#) | [Enabled Service Presence Status Access \[0\]](#) | [Enabled Custom Permissions \[0\]](#)

Profile Detail [Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name	Finance
User License	Salesforce
Description	
Created By	Samridh Maurya , 9/24/2025, 7:13 AM
Modified By	Samridh Maurya , 9/24/2025, 7:13 AM
Custom Profile	✓

7. Roles

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

- Department Manager
- Employee
- Ensures managers see their employees requests.

SETUP
Roles

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)

Corporate Travel & Expense System

Add Role

CEO Edit | Del | Assign

Add Role

CFO Edit | Del | Assign

Add Role

COO Edit | Del | Assign

Add Role

Department Manager Edit | Del | Assign

Add Role

Employee Edit | Del | Assign

Add Role

Finance Manager Edit | Del | Assign


Add Role

Manager Edit | Del | Assign

Add Role

8. Permission Sets

- If an employee needs access to reports/dashboards, create a “**Travel Reporter**” (**TravelReporter__c**) Permission Set instead of modifying their profile.
- Permissions: Run Reports, View Dashboards.
- This ensure that user can see the **status** of Travel Request.


Permission Sets

Permission Set

Travel Reporter

Video Tutorial | Help for this Page

[Clone](#)
[Edit Properties](#)
[Manage Assignments](#)
[View Summary](#)


Permission Set Overview

Description	Those employees who needs extra access to reports/dashboards	API Name	Travel_Reporter
License		Namespace Prefix	
Session Activation Required	<input type="checkbox"/>	Created By	Samridh Maurya, 9/23/2025, 6:08 AM
Permission Set Groups Added To	0	Last Modified By	Samridh Maurya, 9/23/2025, 6:08 AM

Apps

9. OWD (Org-Wide Defaults)

- Setup → **Sharing Settings.**
- Set:
 - **Travel_Request__c** → Private.
 - **Expense_Claim__c** → Private.



Setup

Home

Object Manager

Setup Home

Salesforce Go

Service Setup Assistant

Commerce Setup Assistant

Field Service Setup Home (Beta)

Hyperforce Assistant

Release Updates

Salesforce Mobile App

Lightning Usage

Optimizer


Sales Cloud Everywhere

ADMINISTRATION

> Users

> Data

> Email


Sharing Settings

Help for this Page

Sharing Settings

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: Travel Request

[Disable External Sharing Model](#)

Default Sharing Settings

Organization-Wide Defaults

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Travel Request	Private	Private	<input checked="" type="checkbox"/>

Other Settings

Manager Groups	<input type="checkbox"/>
Secure guest user record access	<input checked="" type="checkbox"/>
Require permission to view record names in lookup fields	<input type="checkbox"/>

[Organization-Wide Defaults Help](#)

[Other Settings Help](#)

10. Sharing Rules

- Share **Travel_Request__c** → with **Manager_Role__c** for visibility.
- Share **Expense_Claim__c** → with **Finance_Role__c** for processing.

11. Login Access Policies

- In each Profile (e.g., **Employee_Profile__c**), 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.
- All objects (**Travel_Request__c**, **Expense_Claim__c**) are built here.

13. Sandbox Usage

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

14. Deployment Basics

- Tools:

- **Change Sets** → Sandbox → Production.
 - **Salesforce CLI (sfdx)** → deploy metadata
(Travel_Request__c, Expense_Claim__c).
 - **GitHub** → version control for metadata XML.
-