


# Corporate Travel & Expense Management System Project

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## 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

- Use **Developer Edition Dev Org** (free dev org) for this project.
- Provides support for approval processes, roles, profiles, and automation.

### 2. Company Profile Setup

- Configure **Company Information** (Name = “Corporate Travel & Expense System”).
- Set **default currency** to INR/USD depending on project needs.
- Add **corporate logo** for branding in the org.

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Travel Request

**Salesforce Business Meeting**

Related

Details

Travels Name	Salesforce Business Meeting	Owner	Samridh Maurya
Destination	Bangalore		
Start Date	9/12/2025		
End Date	9/20/2025		
Purpose	Conference / Seminar		
Estimated Cost	\$12,000		
Status of Travel	Approved		
Expense Claim			
Total Claimed	\$450.00		

### 3. Business Hours & Holidays

- Define Business Hours (e.g., Mon–Fri, 9 AM – 6 PM).
- Add holidays (e.g., Independence Day, New Year) so approval processes respect non-working days.

Organization Business Hours

Help for this Page

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 (2)

Business Hours Detail

Edit

Business Hours Name	Travel & Expense System hours	Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Business Hours	<div> <div>Sunday</div> <div>No Hours</div> </div> <div> <div>Monday</div> <div>9:00 AM to 6:00 PM</div> </div> <div> <div>Tuesday</div> <div>9:00 AM to 6:00 PM</div> </div> <div> <div>Wednesday</div> <div>9:00 AM to 6:00 PM</div> </div> <div> <div>Thursday</div> <div>9:00 AM to 6:00 PM</div> </div> <div> <div>Friday</div> <div>9:00 AM to 6:00 PM</div> </div> <div> <div>Saturday</div> <div>No Hours</div> </div>	Default Business Hours	<input type="checkbox"/>

Active

☒

Created By

Samridh Maurya 9/21/2025, 7:02 AM

Last Modified By

Samridh Maurya 9/21/2025, 7:02 AM

Edit

Holidays

Add/Remove

Holiday Name	Description	Date and Time
Festival Season	All the big cultural festivals	10/2/2025 All Day
Independence Day		1/26/2025 All Day

## **4. Fiscal Year Settings**

- Use Standard Fiscal Year (Jan–Dec).
- If finance requires quarterly travel budgets, configure Quarterly reports.

## **5. User Setup & Licenses**

- Profiles of users:
  - ❖ Employee (travel request submitter).
  - ❖ Manager (approver).
  - ❖ Finance team (expense verifier).
  - ❖ System Admin (you).
- Assign Salesforce Platform User Licenses for non-sales roles.

## **6. Profiles**

- Employee Profile → Create + Read on Travel Requests/Expense Claims.
- Manager Profile → Read + Approve + Edit Status fields.
- Finance Profile → Read + Edit 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.

## 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).
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