


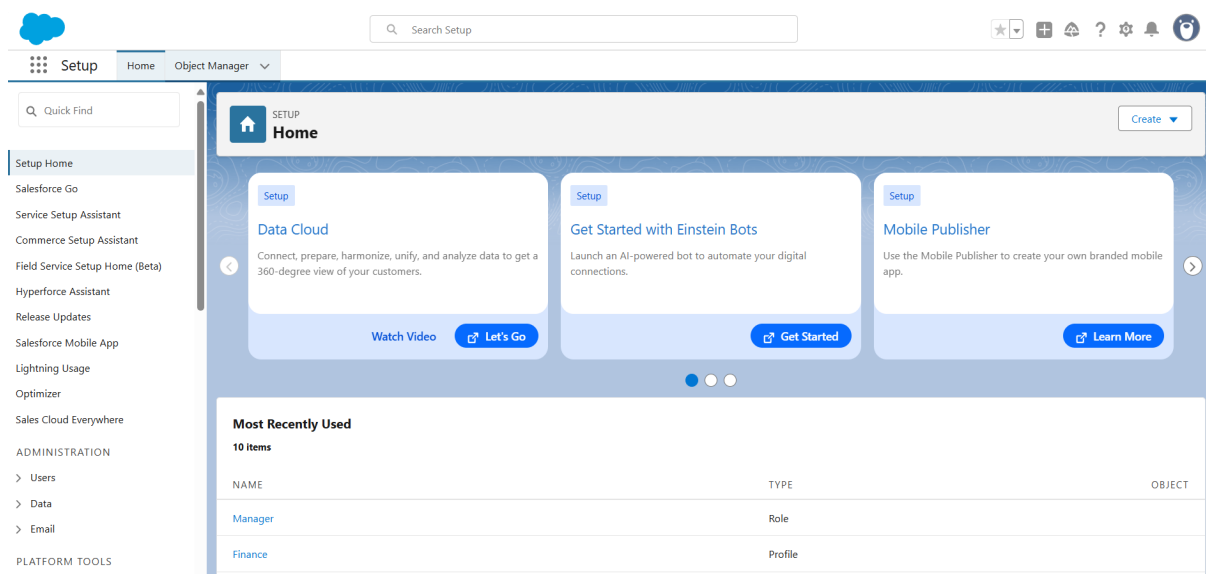
Corporate Travel & Expense Management System Project

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.


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

[Edit](#)

Modified By

Samridh Maurya: 9/24/2025, 6:38 AM

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.

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	✓
	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	✓			
Created By	Samridh Maurya 9/21/2025, 7:02 AM		Last Modified By	Samridh Maurya 9/24/2025, 6:48 AM
	<div>Edit</div>			

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 Fiscal Year (Jan–Dec)**.
- Save.

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.

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.

- ☒ Standard Fiscal Year

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 (Standard User)** → Can submit Travel Requests/Expense Claims.
 - **Manager (Standard User)** → Can approve.
 - **Finance (Standard User)** → 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.

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	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” → 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.

The screenshot shows the Salesforce Setup interface for the 'Finance' profile. At the top, there's a 'SETUP Profiles' header. Below it, the 'Profile' section is titled 'Finance'. A note states: '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.' Another note mentions: '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.' A row of links for various permissions is displayed, including 'Login IP Ranges', 'Enabled Apex Class Access', 'Enabled Visualforce Page Access', 'Enabled External Data Source Access', 'Enabled Named Credential Access', 'Enabled External Credential Principal Access', 'Enabled Custom Metadata Type Access', 'Enabled Custom Setting Definitions Access', 'Enabled Flow Access', 'Enabled Service Presence Status Access', and 'Enabled Custom Permissions'. Below this, the 'Profile Detail' section includes buttons for 'Edit', 'Clone', 'Delete', and 'View Users'. A table shows the profile details: Name (Finance), User License (Salesforce), Custom Profile (checked), Description, Created By (Samridh Maurya, 9/24/2025, 7:13 AM), and Modified By (Samridh Maurya, 9/24/2025, 7:13 AM).

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

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**” Permission Set instead of modifying their profile.
- 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)

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



Search Setup

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

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
Edit
Organization-Wide Defaults Help

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Travel Request	Private	Private	✓

Other Settings
Other Settings Help

Manager Groups

Secure guest user record access

Require permission to view record names in lookup fields

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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