Corporate Travel & Expense Management System Project

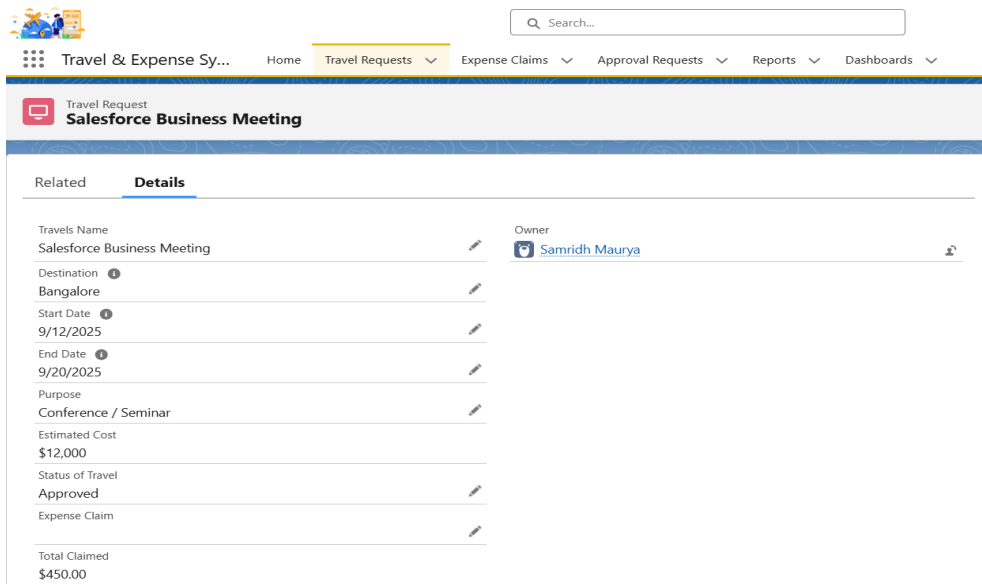## Phase 2: Org Setup & Configuration

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 your build and test environment.

2. Company Profile Setup

- Go to **Setup (⚙) → Company Information**.

- Update:

  - Company Name → *Corporate Travel & Expense System*.

  - Default Time Zone → (e.g., Asia/Kolkata).

  - Default Currency → INR or USD.

- Click **Save**.

3. Business Hours & Holidays

- In Setup, search **Business Hours**.

- Create a record: *9 AM – 6 PM, Mon–Fri.*

- Check **Default** box.

- In Setup, search **Holidays**.

- Add holidays (e.g., Jan 26, Aug 15, Dec 25).

- Associate these with your 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 [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	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 9/21/2025, 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

- o In Setup, search **Fiscal Year**.

- o Select **Standard Fiscal Year (Jan–Dec)**.

- o Save.

5. User Setup & Licenses

- o In Setup, search **Users → New User**

- o Create profiles of users:

  - ❖ Employee (travel request submitter).

  - ❖ Manager (approver).

  - ❖ Finance team (expense verifier).

  - ❖ System Admin (you).

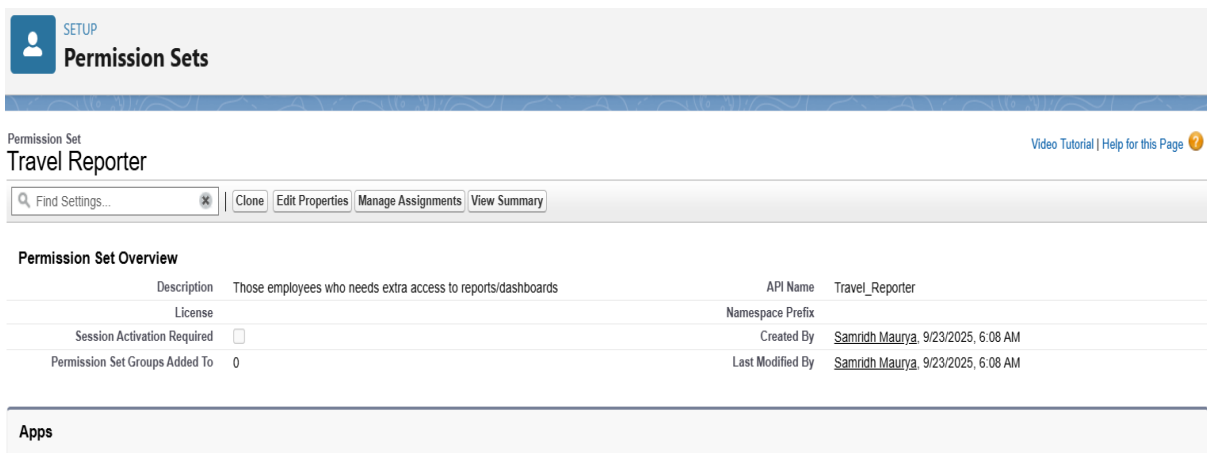o Assign Salesforce Platform User Licenses for non-sales roles.

6. Profiles

o In Setup, search **Profiles**.

o Clone "Standard User" → rename to *Employee Profile*.

- Grant Create + Read on Travel Request & Expense Claim.

o Clone "Standard User" → rename to *Manager Profile*.

- Add Edit on Travel Request + Approvals.

o Clone "Standard User" → rename to *Finance Profile*.

- Full CRUD on Expense Claims + Reports.

7. Roles

o Create a Role Hierarchy:

- CEO (top)

  ➢ Finance Manager

  ➢ Department Manager

  ➢ Employee

o Ensures managers see their employees requests.

8. Permission Sets

- o   If an employee needs access to reports/dashboards, create a "**Travel Reporter**" Permission Set instead of modifying their profile.

9. OWD (Org-Wide Defaults)

- o   Travel Requests: Private (only owner & manager can see).

- o   Expense Claims: Private (only owner & finance can see).

10. Sharing Rules

- o   Share Travel Requests with Managers for visibility.

- o   Share Expense Claims with Finance Team for processing.

11. Login Access Policies

- o   Restrict login hours (9am–6pm for employees).

o Enable Admins can log in as any user for troubleshooting**.**

12. Dev Org Setup

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

13. Sandbox Usage

o (If **Developer Edition Developer Org**) → Create Developer

   Sandbox for testing automations.

o Deploy only tested features to production**.**

14. Deployment Basics

o Deployment = moving config/code from **Sandbox → Production**

   using **Change Sets** (or VS Code + SFDX if advanced).