Corporate Travel & Expense Management System Project

Phase 2: Org Setup & Configuration

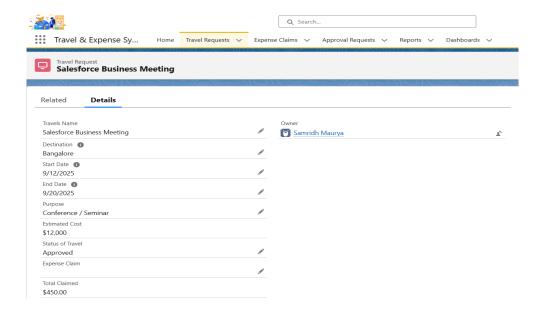
Goal: Set up a secure, well-structured Salesforce environment to power the Corporate Travel & Expense Management System, ensuring smooth approvals, role-based access, and future-ready scalability.

1. Salesforce Editions

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

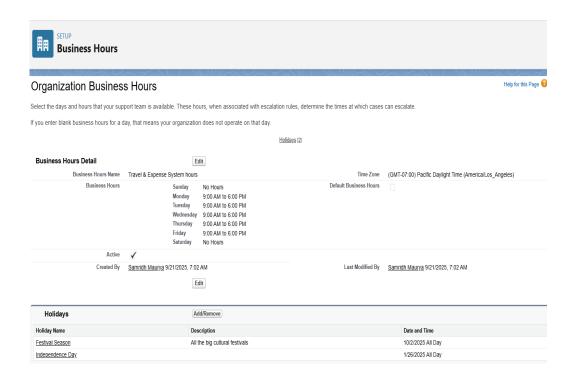
2. Company Profile Setup

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



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.



4. Fiscal Year Settings

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

5. User Setup & Licenses

- O 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

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

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

- (If **Developer Edition Developer Org**) → Create Developer
 Sandbox for testing automations.
- O 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).