


# Corporate Travel & Expense Management System Project

---


## Phase 2: Org Setup & Configuration

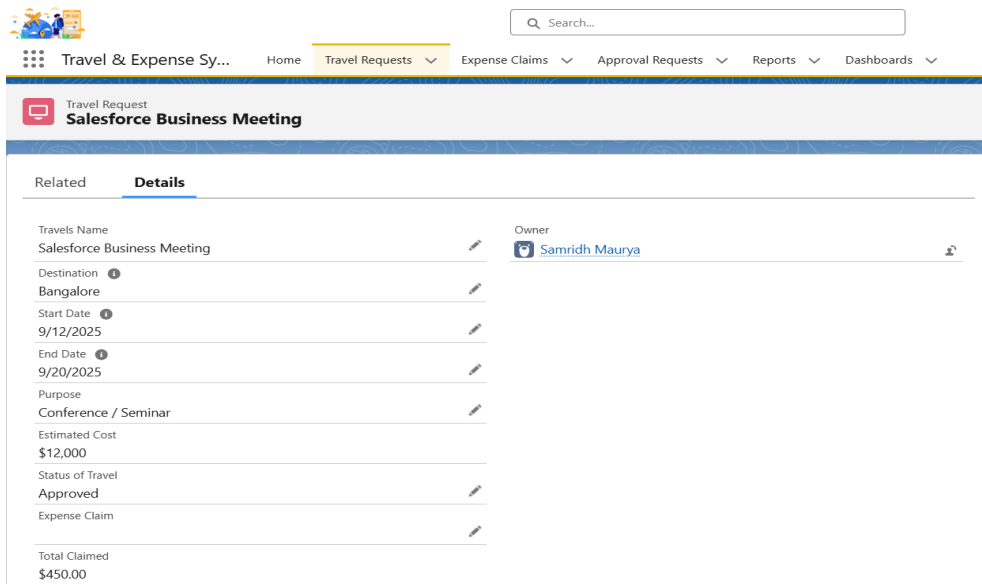
 **Goal:** Set up a secure, well-structured Salesforce environment to power the Corporate Travel & Expense Management System, ensuring smooth approvals, role-based access, and future-ready scalability.

### 1. Salesforce Editions

- Sign up for a free **Developer Org**: [developer.salesforce.com](https://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**.



The screenshot shows a web application interface for a 'Travel & Expense System'. At the top, there is a navigation bar with a search bar and several menu items: Home, Travel Requests (selected), Expense Claims, Approval Requests, Reports, and Dashboards. Below the navigation bar, the main header displays 'Travel Request' and 'Salesforce Business Meeting'. The main content area is divided into two tabs: 'Related' and 'Details' (which is active). Under the 'Details' tab, there is a form with the following fields and values:

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

- 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

[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](#)

Business Hours Detail

Edit

Business Hours Name	Travel & Expense System hours	Time Zone
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>	<div>(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)</div> <div>Default Business Hours</div> <div> <input type="checkbox"/> </div>

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
<a href="#">Festival Season</a>	All the big cultural festivals	10/2/2025 All Day
<a href="#">Independence Day</a>		1/26/2025 All Day

## 4. Fiscal Year Settings

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

## 5. User Setup & Licenses

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

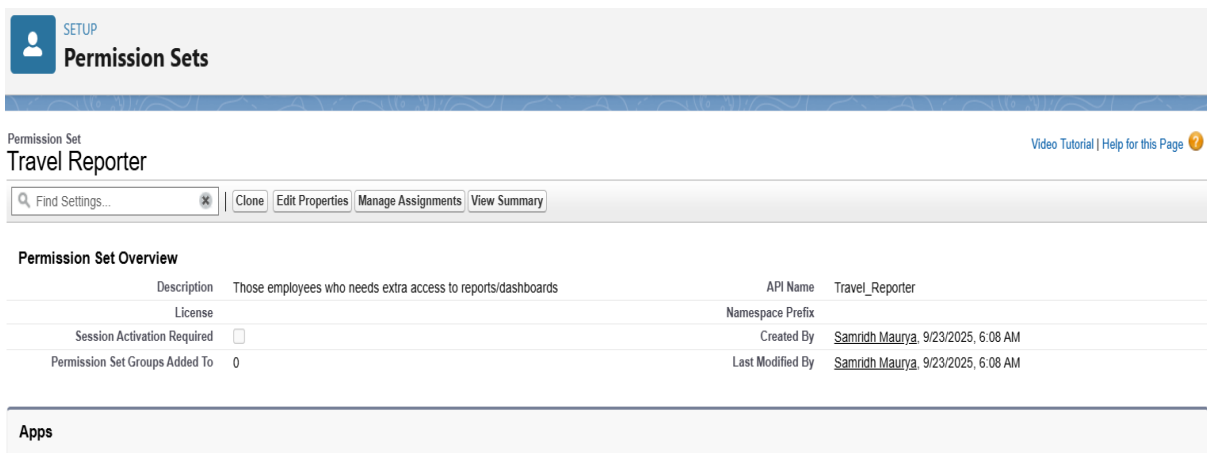
- In Setup, search **Profiles**.
- Clone “Standard User” → rename to *Employee Profile*.
  - Grant Create + Read on Travel Request & Expense Claim.
- Clone “Standard User” → rename to *Manager Profile*.
  - Add Edit on Travel Request + Approvals.
- Clone “Standard User” → rename to *Finance Profile*.
  - Full CRUD on Expense Claims + Reports.

## 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.



The screenshot shows the Salesforce 'Permission Sets' page for a specific set named 'Travel Reporter'. The page has a header with a 'SETUP' icon and the title 'Permission Sets'. Below the header, the 'Travel Reporter' permission set is selected, and a search bar is visible. A navigation bar contains buttons for 'Clone', 'Edit Properties', 'Manage Assignments', and 'View Summary'. The main content area is titled 'Permission Set Overview' and displays a table with details about the permission set. The table includes fields for Description, License, Session Activation Required, Permission Set Groups Added To, API Name, Namespace Prefix, Created By, and Last Modified By. The 'Travel Reporter' permission set is described as 'Those employees who needs extra access to reports/dashboards'. The 'Session Activation Required' checkbox is unchecked. The 'Permission Set Groups Added To' field shows a value of 0. The 'API Name' is 'Travel\_Reporter'. The 'Namespace Prefix' is empty. The 'Created By' and 'Last Modified By' fields both show 'Samridh Maurya' with a timestamp of '9/23/2025, 6:08 AM'. Below the table, there is a section titled 'Apps'.

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

## 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).
-