Expense Tracker Salesforce Project

Phase 2: Org Setup & Configuration

In this phase, the Salesforce environment will be prepared for development and deployment. The focus is on setting up the organization structure, security, and access controls.

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1. Salesforce Editions

- Choose the correct edition for the project (e.g., **Enterprise Edition** for advanced features like roles, OWD, and sharing rules).
- Evaluate licensing requirements for employees, managers, and finance users.

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2. Company Profile Setup

- Define **Company Information**:
  - Company Name
  - Default Locale, Time Zone, and Currency
  - Corporate Address

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3. Business Hours & Holidays

- Configure **business hours** to match the organization's operational hours.
- Add **public holidays** to ensure workflow automation respects non-working days.

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4. Fiscal Year Settings

- Set up **Standard or Custom Fiscal Year** based on company reporting cycles.
- This helps in accurate reporting for expenses and budgets.

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5. User Setup & Licenses

- Create user records for:
  - Employees
  - Managers
  - Finance team
  - Salesforce Admin
- Assign appropriate **user licenses**.

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6. Profiles

- Create and customize **profiles** to control access:
  - Employee Profile
  - Manager Profile
  - Finance Team Profile
  - Admin Profile

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7. Roles

- Build a **role hierarchy** to enable record visibility:
  - Leadership (Top)
  - Finance Team
  - Managers
  - Employees

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8. Permission Sets

- Create **permission sets** for special access:
  - Report and Dashboard Access
  - Expense Approval Permissions
  - Finance Data Export Permissions

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9. Organization-Wide Defaults (OWD)

- Define default record access levels:
  - Expenses: **Private**
  - Reports: **Controlled by Parent**
  - Other related objects based on business needs.

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10. Sharing Rules

- Configure **sharing rules** to grant additional access:
    - Managers can see their team's expense reports.
    - Finance team has read/write access to all records.

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11. Login Access Policies

- Implement secure login policies:
    - Trusted IP ranges
    - Two-Factor Authentication
    - Session timeout settings

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12. Developer Org Setup

- Prepare a **developer org** for initial configuration and customization.
- Enable required features such as:
    - Lightning Experience
    - Approval Processes
    - Automation tools like Flow and Process Builder.

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13. Sandbox Usage

- Plan for sandboxes:
    - **Developer Sandbox** for unit testing.
    - **Full Sandbox** for UAT and integration testing.

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14. Deployment Basics

- Establish a **deployment strategy**:
    - Use **Change Sets** or **Salesforce DevOps tools** like Gearset or Copado.
    - Create a **deployment checklist**.
    - Version control using Git.
