

1 – Problem Statement (Quick Recap)

- Centralized financial visibility issue in SMBs
- Goal of Phase 2 → Configure Salesforce org for finance management


2 – Salesforce Edition

- Edition used → **Developer Edition**
- Features available (Apex, LWC, Flows, Reports)
- Limitations (No Sandbox, limited storage, API limits)

Salesforce.com Organization ID	00DQy00000Y6h0W
Organization Edition	Developer Edition
Instance	SWE42

3 – Company Profile Setup

- Company Info
- Company Name = Alpha Consultancy Services
Locale = English (India)
Time Zone = Asia/Kolkata
Currency = INR

 **SETUP**

Company Information

Company Information

Alpha Consultancy Services

The organization's profile is below.

[User Licenses \[10+\]](#) | [Permission Set Licenses \[10+\]](#) | [Feature Licenses \[13\]](#) | [Usage-based Entitlements \[10+\]](#)

Organization Detail

Edit

Deactivate Org

Organization Name	Alpha Consultancy Services	Phone	9999999999
Primary Contact	Ganesh Sharma	Fax	
Division		Default Locale	English (India)
Address	IN	Default Language	English
Fiscal Year Starts In	April	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	390 KB (8%) View
Newsletter	<input checked="" type="checkbox"/>	Used File Space	21 KB (0%) 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	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)

4. Business Hours & Holidays

- Time Zone = IST
- Hours = Mon–Fri, 9 AM–6 PM

Holidays Configured in Org

- **Republic Day** – 26th January
Independence Day – 15th August
Diwali – (date varies each year, usually Oct–Nov → for demo take **22-11-2025**)
Christmas – 25th December

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 \(0\)](#)

Business Hours Detail

Edit

Business Hours Name	Default Hours	Time Zone														
Business Hours	<table><tr><td>Sunday</td><td>No Hours</td></tr><tr><td>Monday</td><td>9:00 am to 6:00 pm</td></tr><tr><td>Tuesday</td><td>9:00 am to 6:00 pm</td></tr><tr><td>Wednesday</td><td>9:00 am to 6:00 pm</td></tr><tr><td>Thursday</td><td>9:00 am to 6:00 pm</td></tr><tr><td>Friday</td><td>12:00 am to 12:00 pm</td></tr><tr><td>Saturday</td><td>No Hours</td></tr></table>	Sunday	No 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	12:00 am to 12:00 pm	Saturday	No Hours	(GMT+05:30) India Standard Time (Asia/Kolkata)
Sunday	No 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	12:00 am to 12:00 pm															
Saturday	No Hours															
	Default Business Hours	✓														

Active

✓

Created By

Ganesh Sharma 12/09/2025, 9:27 pm

Last Modified By

Ganesh Sharma 12/09/2025, 9:27 pm

Edit

SETUP

Holidays

Holidays

Help for this Page

Holidays are dates and times at which business hours are suspended. Business hours are the days and hours that your support team is available.

Holidays

New

Action	Holiday Name	Description	Date and Time
Edit Del	Christmas	Merry Christmas	25/12/2025 All Day
Edit Del	Diwali		22/11/2025 All Day
Edit Del	Independence Day		15/09/2026 All Day
Edit Del	Republic Day		26/09/2025 All Day

5 - Fiscal Year Settings

SETUP
Fiscal Year

Organization Fiscal Year Edit: Alpha Consultancy Services

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 *i*
☐ Custom Fiscal Year *i*

Change Fiscal Year Period Save Cancel

Name: Alpha Consultancy Services

Fiscal Year Start Month: April

Fiscal Year is Based On:
☐ The ending month
☒ The starting month

- April–March cycle (As per Indian Accounting Calendar).

6 - User Setup & Licenses(Roles & Profiles)

User	License Type	Profile Needed	Role in Hierarchy
CEO (Owner)	Salesforce (Full CRM)	System Administrator	CEO (Top Role)
CFO	Salesforce Platform User	Finance Manager Profile	Reports to CEO
Finance Mgr	Salesforce Platform User	Finance Manager Profile	Reports to CFO
Accountant	Force.com – App Subscription	Accountant Profile	Reports to Finance Mgr
Auditor	Chatter Free	Auditor Profile	Independent (parallel)

Role Hierarchy (How Records are Shared)

Business Owner (CEO)

└─ CFO
 └─ Finance Manager
 └─ Accountant

Auditor (parallel branch) → independent read-only

7 - Permission Sets

- **Investment Manager Access** → Full CRUD on *Investments* (for CFO/Finance Manager).
- **Auditor Read Access** → Read-only on *Invoices, Expenses, Investments, Goals* (for Auditor).

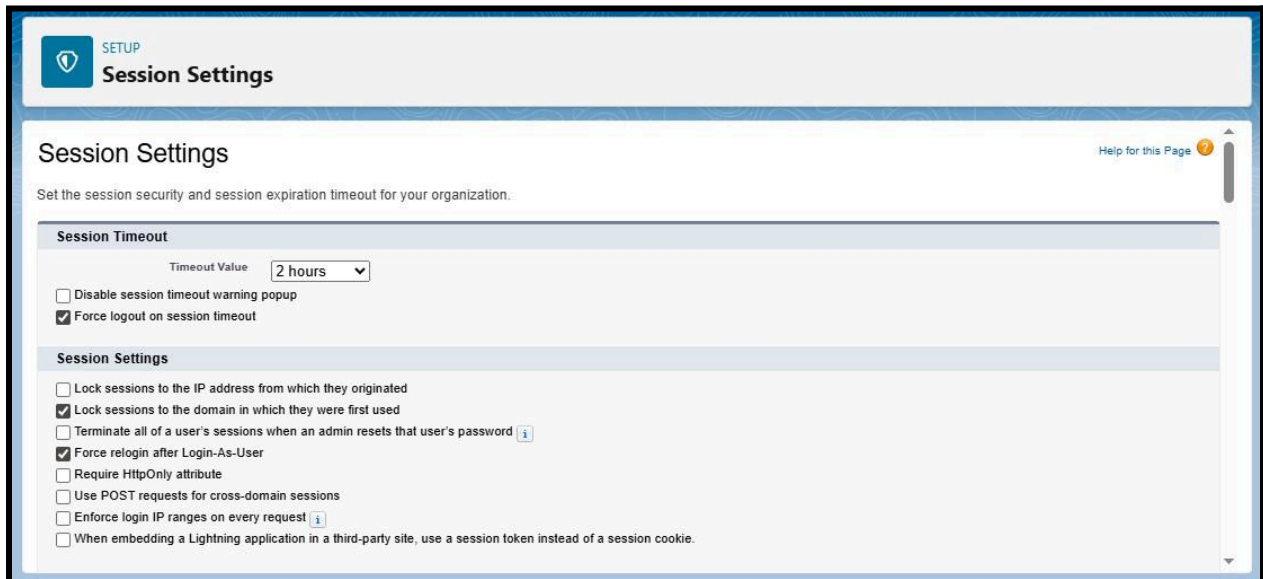
8 - OWD (Org-Wide Defaults)

- **Invoices** = Private (only owner + role above can see)
- **Expenses** = Private
- **Investments** = Private
- **Financial Goals** = Public Read Only (so CEO can see all, but edits restricted)

9 - Sharing Rules

As Objects Not yet created will complete in Phase 3

10 - Login Access Policies



The screenshot shows the 'Session Settings' page in Salesforce. The page has a header with a 'SETUP' icon and the title 'Session Settings'. Below the header, there is a sub-header 'Session Settings' and a description: 'Set the session security and session expiration timeout for your organization.' The main content area is divided into two sections: 'Session Timeout' and 'Session Settings'. The 'Session Timeout' section has a 'Timeout Value' dropdown set to '2 hours' and two checkboxes: 'Disable session timeout warning popup' (unchecked) and 'Force logout on session timeout' (checked). The 'Session Settings' section has several checkboxes: 'Lock sessions to the IP address from which they originated' (unchecked), 'Lock sessions to the domain in which they were first used' (checked), 'Terminate all of a user's sessions when an admin resets that user's password' (unchecked), 'Force relogin after Login-As-User' (checked), 'Require HttpOnly attribute' (unchecked), 'Use POST requests for cross-domain sessions' (unchecked), 'Enforce login IP ranges on every request' (unchecked), and 'When embedding a Lightning application in a third-party site, use a session token instead of a session cookie' (unchecked).

Session Timeout = 2 hours.

11 - Dev Org Setup

- Name = *Finance & Investment Tracker*.

The screenshot shows the 'App Settings' page in the Lightning App Builder. The left sidebar lists 'App Settings' with sub-items: 'App Details & Branding' (selected), 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles'. The main content area is titled 'App Details & Branding' and includes the instruction: 'Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.' The 'App Details' section contains three fields: 'App Name' (filled with 'Finance & Investment Tracker'), 'Developer Name' (filled with 'Finance_Investment_Tracker'), and 'Description' (placeholder 'Enter a description...'). The 'App Branding' section includes an 'Image' upload area (showing a placeholder icon), a 'Primary Color Hex Value' dropdown (set to '#0070D2'), and an 'Org Theme Options' checkbox (unchecked, with text 'Use the app's image and color instead of the org's custom theme'). At the bottom, an 'App Launcher Preview' shows a button with the app icon and the text 'Finance & Investment Track...'.

- We'll create objects/fields in Phase 3