# 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.

Help for this Page

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 | ☐ | Currency Locale | English (India) - INR |
| Enable Data Translation | ☐ | Used Data Space | 390 KB (8%) [View] |
| Newsletter | ✓ | Used File Space | 21 KB (0%) [View] |
| Admin Newsletter | ✓ | API Requests, Last 24 Hours | 0 (15,000 max) |
| Hide Notices About System Maintenance | ☐ | Streaming API Events, Last 24 Hours | 0 (10,000 max) |
| Hide Notices About System | ☐ | 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

## 5 - Fiscal Year Settings



- 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).

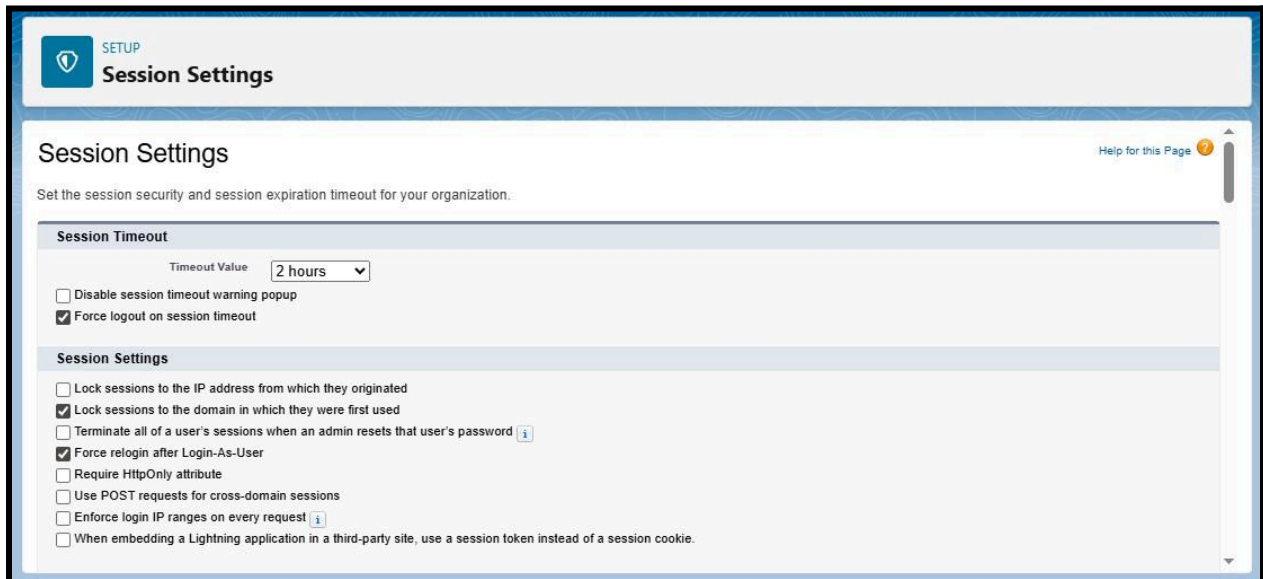- **Auditor Read Access** → Read-only on *Invoices, Expenses, Investments, Goals* (for Auditor).

## 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



**Session Timeout** = 2 hours.

## 11 - Dev Org Setup

- Name = *Finance & Investment Tracker*.



- We'll create objects/fields in Phase 3