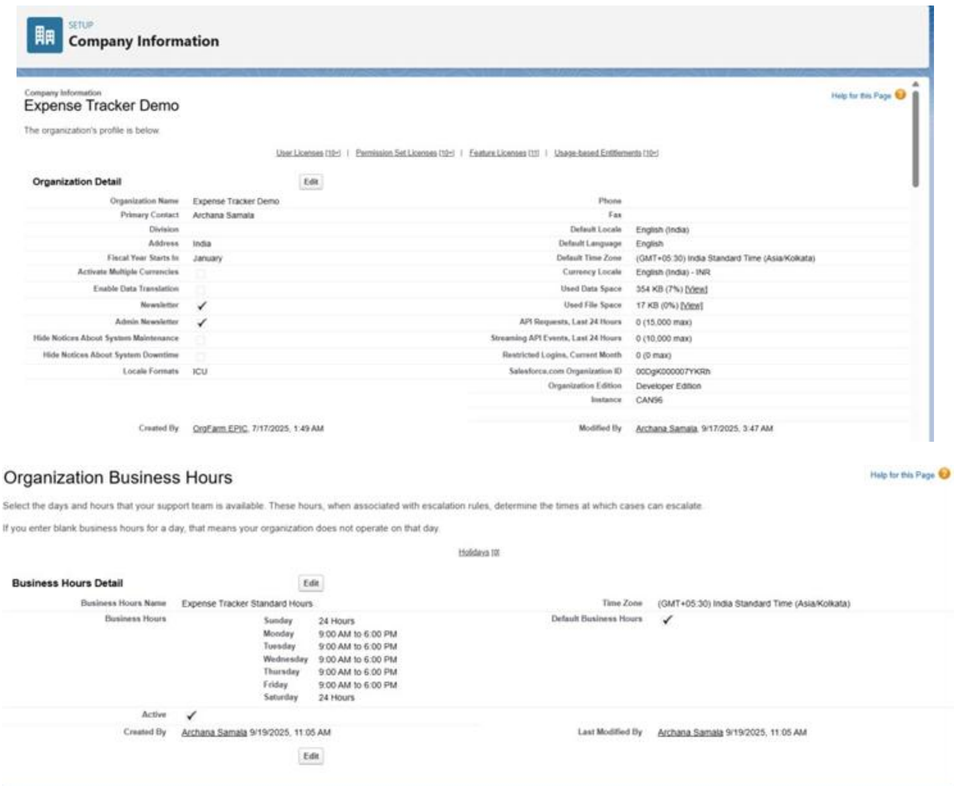
ORGANIZATION SETUP AND CONFIGURATION

1. Salesforce Edition

- Provision a Developer Edition org (free).
- This org provides all necessary functionality for building and testing custom objects, automations, and reports.
- Use this environment as the main workspace for development work.

2. Company Settings

- Open **Setup → Company Information** and fill in organization details.
  - **Org name:** Expense Tracker Demo
  - **Time zone:** (GMT+05:30) Asia/Kolkata
  - **Currency:** Choose INR or USD depending on project scope
- These settings ensure timestamps and monetary values are displayed consistently.



3. Business Hours & Holidays

- Define standard working hours (e.g., **09:00–18:00**) so business rules and scheduled processes respect operating times.

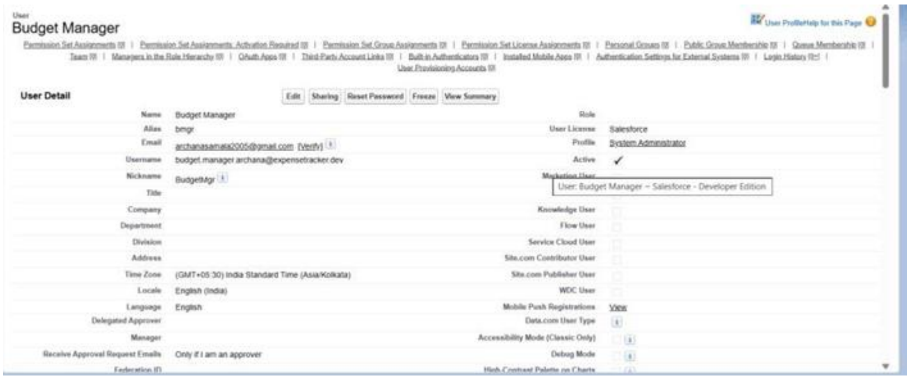
- Add public holidays so automated approvals/notifications don’t trigger on those dates.

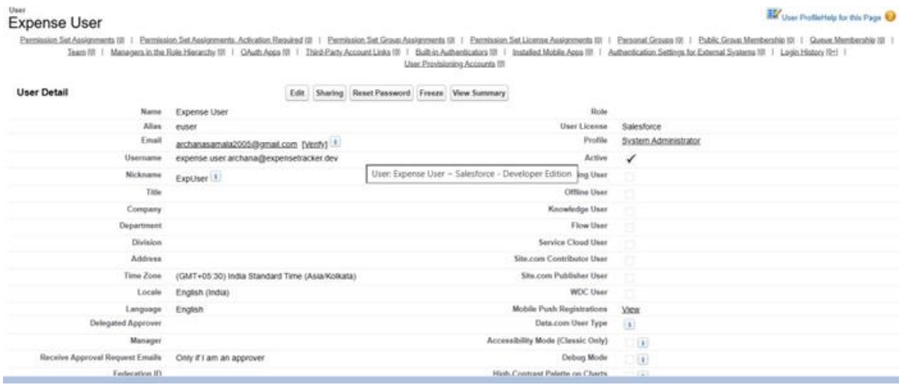
4. Fiscal Year

- Keep the **Standard (Jan–Dec)** fiscal calendar to simplify budget and expense reporting aligned with the calendar year.

5. Users & Licenses

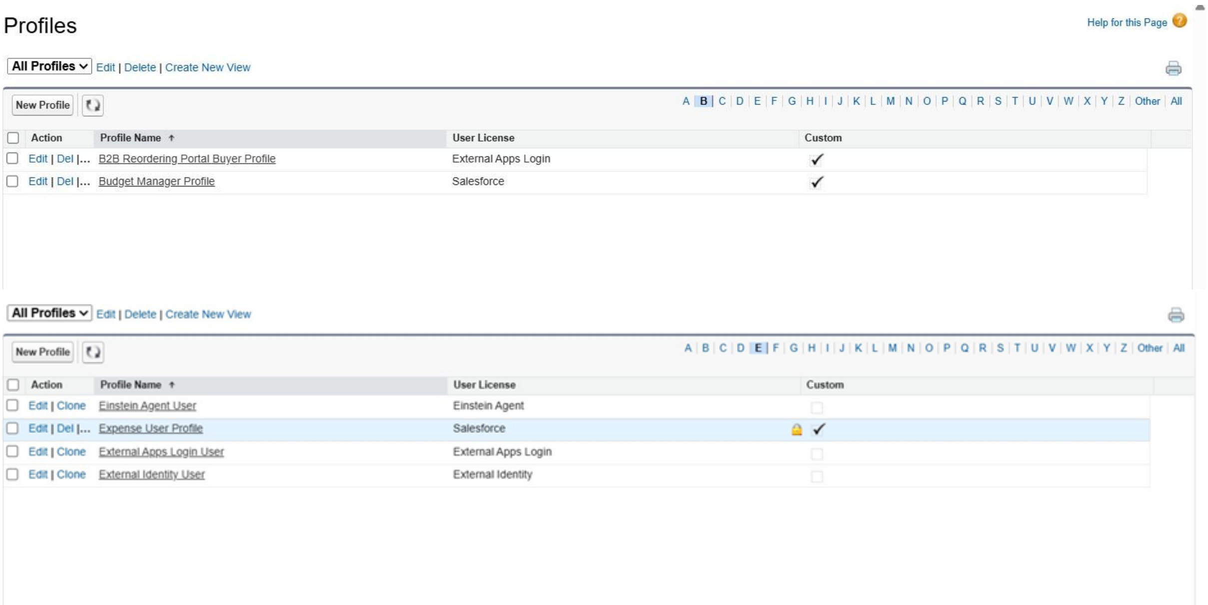
- Create the needed user accounts under **Setup → Users → New User**. Example users:
    - **Budget Manager** — responsible for creating budgets and monitoring spend.
    - **Expense User** — records day-to-day expense transactions.
- Assign appropriate Salesforce licenses when creating each account.



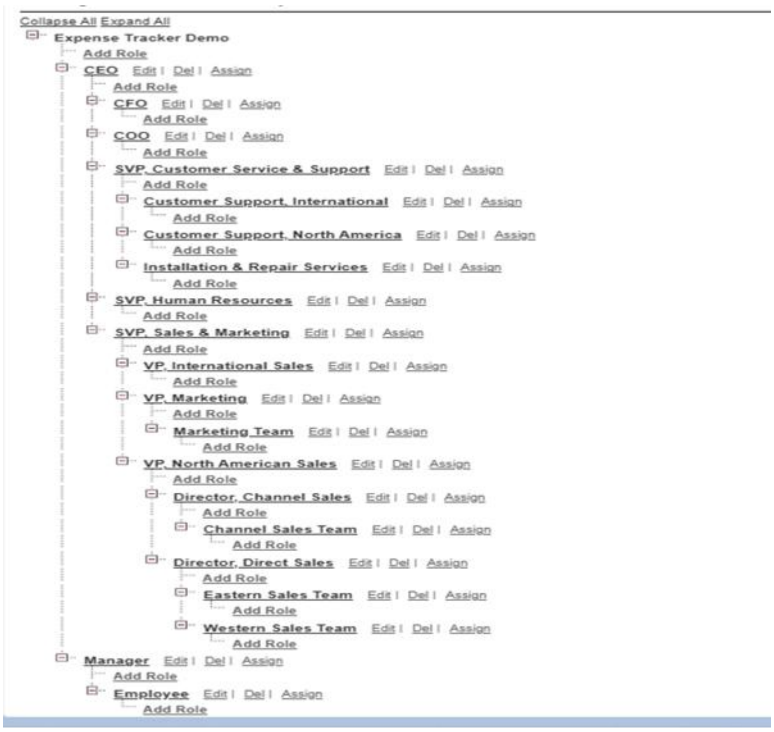


6. Profiles (Base Access Control)

- Clone the standard user profile and tailor two profiles:
    - **Budget Manager Profile** — modify to grant full create/read/update/delete access on Budget and Expense objects.
    - **Expense User Profile** — allow create/read on Expense; set Budgets to read-only.
- Profiles define core permission sets for groups of users.



7. Role Hierarchy (Record Visibility)

- Create a simple role structure so records roll up appropriately:
  - **Manager (Budget Manager)** at a higher level.
  - **Employee (Expense User)** beneath the manager.
  - 

- With this hierarchy, managers can view records owned by their reports.

8. Permission Sets (Targeted Privileges)

- Create a **Permission Set** (e.g., Expense Reporter) for one-off or temporary permissions such as enhanced reporting access.
- Assign permission sets to users who need extra capabilities without changing their profile.

9. Org-Wide Defaults (OWD) & Sharing Model

- Configure **Setup → Sharing Settings**:
    - **Budget** object: Private - only owners and their managers see budget records by default.
    - **Expense** object: Controlled *by Parent* - inherits visibility from the related Budget record.
- This model enforces confidentiality around budgets and their expenses.

10. Sharing Rules & Team Access

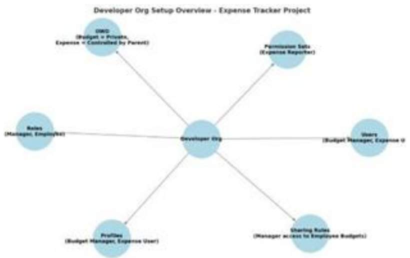
- Add sharing rules where appropriate. Example: create a rule allowing managers to view budgets owned by their team members.
- If cross-team access is required, create conditional sharing rules to grant visibility safely.

11. Login & Security Policies

- Configure **Login Access Policies**:
    - Allow administrators to log in as users (useful for troubleshooting).
    - Optionally restrict Expense Users to log in only during business hours (09:00–18:00).
- These settings add operational controls and help with security.

12. Developer Org Configuration & Tools

- Treat the Developer Org as your build environment: create objects, fields, automations, and test data here.
- Install helpful tools (optional) such as **Salesforce Inspector** to speed up metadata inspection and data tasks.



13. Sandbox / Deployment Notes (Production Path)

- For a production-ready rollout, follow the sandbox → production model: develop and test in Sandbox or Developer Pro, then migrate validated changes to Production.
- Use **Change Sets** or the **Salesforce CLI** for deployments.