

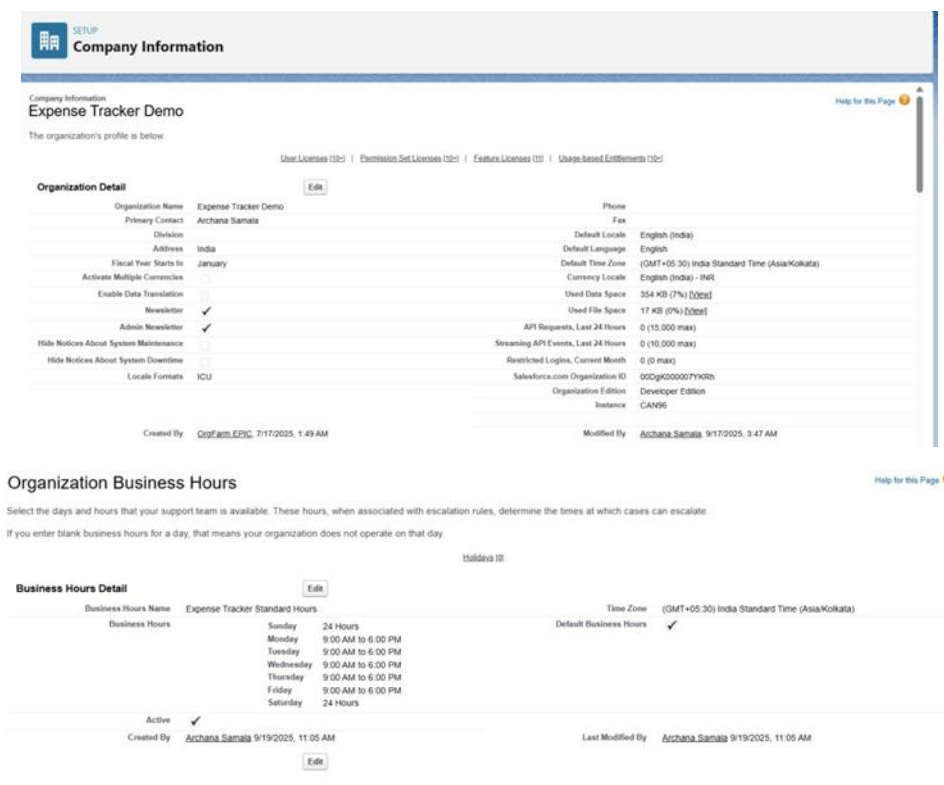
ORGANIZATION SETUP AND CONFIGURATION

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.



The screenshot displays the 'Company Information' setup page in Salesforce. The page title is 'Company Information' with a sub-header 'Expense Tracker Demo'. Below the title, it states 'The organization's profile is below:'. There are links for 'User Licenses (10)', 'Permission Set Licenses (10)', 'Feature Licenses (10)', and 'Usage-based Commitments (10)'. The 'Organization Detail' section includes fields for Organization Name (Expense Tracker Demo), Primary Contact (Archana Samata), Division, Address (India), Fiscal Year Starts In (January), Activate Multiple Currencies, Enable Data Translation, Newsletter, Admin Newsletter, Hide Notices About System Maintenance, Hide Notices About System Downtime, and Locale Formats (ICU). The 'Phone' section includes fields for Phone, Fax, Default Locale (English (India)), Default Language (English), Default Time Zone ((GMT+05:30) India Standard Time (Asia/Kolkata)), Currency Locale (English (India) - INR), Used Data Space (354 KB (7%)), Used File Space (17 KB (0%)), API Requests, Last 24 Hours (0 (10,000 max)), Streaming API Events, Last 24 Hours (0 (10,000 max)), Restricted Logins, Current Month (0 (0 max)), Salesforce.com Organization ID (000G000007YK0th), Organization Edition (Developer Edition), and Instance (CAN06). The page also shows 'Created By: Qiyam.EPIC 9/17/2025, 1:49 AM' and 'Modified By: Archana Samata 9/17/2025, 3:47 AM'. Below this is the 'Organization Business Hours' section, which includes a description: '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.' The 'Business Hours Detail' section includes fields for Business Hours Name (Expense Tracker Standard Hours), Business Hours, Time Zone ((GMT+05:30) India Standard Time (Asia/Kolkata)), and Default Business Hours (checked). The 'Business Hours' table lists days and hours: Sunday (24 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 (9:00 AM to 6:00 PM), and Saturday (24 Hours). The page also shows 'Created By: Archana Samata 9/19/2025, 11:05 AM' and 'Last Modified By: Archana Samata 9/19/2025, 11:05 AM'.

Organization Name	Expense Tracker Demo
Primary Contact	Archana Samata
Division	
Address	India
Fiscal Year Starts In	January
Activate Multiple Currencies	<input type="checkbox"/>
Enable Data Translation	<input type="checkbox"/>
Newsletter	<input checked="" type="checkbox"/>
Admin Newsletter	<input checked="" type="checkbox"/>
Hide Notices About System Maintenance	<input type="checkbox"/>
Hide Notices About System Downtime	<input type="checkbox"/>
Locale Formats	ICU

Phone	Fax
Default Locale	English (India)
Default Language	English
Default Time Zone	((GMT+05:30) India Standard Time (Asia/Kolkata))
Currency Locale	English (India) - INR
Used Data Space	354 KB (7%)
Used File Space	17 KB (0%)
API Requests, Last 24 Hours	0 (10,000 max)
Streaming API Events, Last 24 Hours	0 (10,000 max)
Restricted Logins, Current Month	0 (0 max)
Salesforce.com Organization ID	000G000007YK0th
Organization Edition	Developer Edition
Instance	CAN06

Created By: Qiyam.EPIC 9/17/2025, 1:49 AM Modified By: Archana Samata 9/17/2025, 3:47 AM

Organization Business Hours

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.

Business Hours Name	Expense Tracker Standard Hours	Time Zone
Business Hours	Sunday 24 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 9:00 AM to 6:00 PM Saturday 24 Hours	((GMT+05:30) India Standard Time (Asia/Kolkata))

Active ☒ Created By: Archana Samata 9/19/2025, 11:05 AM Last Modified By: Archana Samata 9/19/2025, 11:05 AM

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.

The image shows two screenshots of the Salesforce User Detail page. The top screenshot is for a user named 'Budget Manager' (bmg) with email 'archanasamata2005@gmail.com'. The bottom screenshot is for a user named 'Expense User' (evuser) with email 'expense.user.archana@expensetracker.dev'. Both users are assigned the 'Salesforce' license and the 'System Administrator' profile. The 'Budget Manager' user has a 'MySalesforce User' role, while the 'Expense User' has a 'ExpUser' role. Both users are active and have their 'Receive Approval Request Emails' set to 'Only if I am an approver'.

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.

Profiles

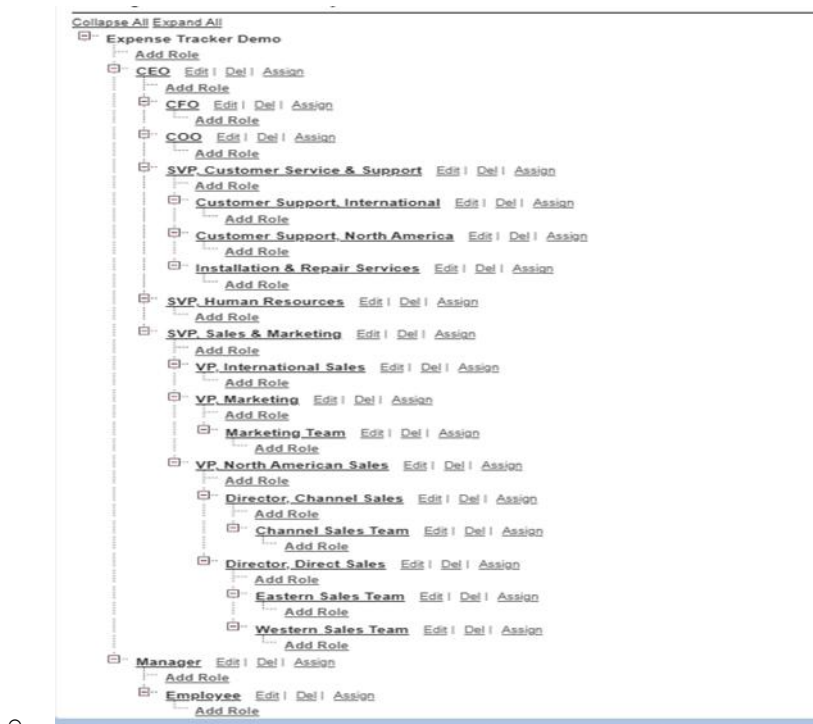
Help for this Page

All Profiles ▾ Edit Delete Create New View			
New Profile ↕			
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All			
Action	Profile Name ↑	User License	Custom
<input type="checkbox"/> Edit Del ...	B2B Reordering Portal Buyer Profile	External Apps Login	✓
<input type="checkbox"/> Edit Del ...	Budget Manager Profile	Salesforce	✓

All Profiles ▾ Edit Delete Create New View			
New Profile ↕			
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All			
Action	Profile Name ↑	User License	Custom
<input type="checkbox"/> Edit Clone	Einstein Agent User	Einstein Agent	<input type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Expense User Profile	Salesforce	🔔 ✓
<input type="checkbox"/> Edit Clone	External Apps Login User	External Apps Login	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	External Identity User	External Identity	<input type="checkbox"/>

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

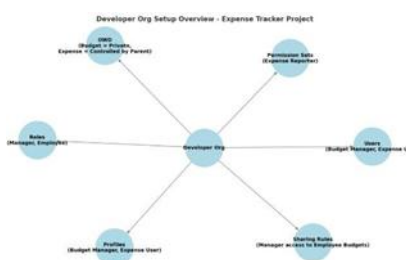
- Add sharing rules where appropriate. Example: create a rule allowing managers to view budgets owned by their team members.
- If cross-team access is required, create conditional sharing rules to grant visibility safely.

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.