

Phase 2: Org Setup & Configuration

1. Salesforce Editions

- Selected Developer Edition because it provides free access with customization options.
- Supports custom objects, fields, workflows, reports, and dashboards required for the Travel Approval App.
- Suitable for testing the full travel approval process before moving to production.

2. Company Profile Setup

- Configured organization details like company name, address, email, and contact info.
- Set default currency: INR for expense tracking.
- Applied time zone: IST (GMT +5:30) to ensure correct travel date and time records.
- Configured default language: English (India) for consistency among users.

The screenshot shows the 'App Details & Branding' configuration page in the Lightning App Builder. The left sidebar contains a 'Settings' menu with options: 'App Details & Branding' (selected), 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles'. The main content area is divided into two sections: 'App Details' and 'App Branding'. The 'App Details' section includes fields for 'App Name' (Travel App), 'Developer Name' (Travel_App), and a 'Description' field with the placeholder 'Enter a description...'. The 'App Branding' section includes an 'Image' field with a blue circular icon containing a white airplane, a 'Primary Color Hex Value' field with a blue color picker and the value '#0070D2', and a 'Clear' link. Below these is the 'Org Theme Options' section with a checkbox 'Use the app's image and color instead of the org's custom theme' which is currently unchecked. At the bottom is the 'App Launcher Preview' section showing a preview of the app icon and name 'Travel App'.

3. Business Hours & Holidays

- Defined official working hours: Monday to Friday, 9 AM – 6 PM.
- Added key holidays (Independence Day, Republic Day, Diwali, Christmas, New Year).
- Ensures travel requests submitted during holidays or after office hours are handled the next business day.
- Approval workflows and notifications respect business hours.

4. Fiscal Year Settings

- Configured fiscal year: April to March, as per Indian business standards.
- Ensures travel expenses and reports are aligned with quarterly and yearly budget planning.
- Helps finance/admin generate department-wise and yearly expense reports.

5. User Setup & Licenses

- Created Employee Users to submit travel requests.
- Created Manager Users to approve/reject requests.
- Assigned Admin Users to configure app, manage data, and monitor usage.
- Defined roles & profiles to control access levels:
 - - Employees → Limited access (submit/view own requests).
 - - Managers → Approvals + view team requests.
 - - Admins → Full access (all requests, expenses, dashboards).

SETUP Users

All Users

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: [All Users](#) | [Edit](#) | [Create New View](#)

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty.00dd200000hgksfeab.miccozxxxi456@chatter.salesforce.com		✓	Chatter Free User
Edit	Gani, Ningaraj	NGani	ningarjgani00@mindful-fox-7ysoali.com		✓	System Administrator
Edit	User Integration	Integ	integration@00dd200000hgksfeab.com		✓	Analytics Cloud Integration User
Edit	User Security	sec	insightssecurity@00dd200000hgksfeab.com		✓	Analytics Cloud Security User

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6. Login Access Policies

- Configured IP restrictions so only office/approved networks can access Salesforce.
- Enabled Multi-Factor Authentication (MFA) for employees and managers.
- Applied login hour restrictions (8 AM – 8 PM) to avoid unauthorized midnight logins.
- Improves overall security of sensitive travel and expense data.

Setup

App Launcher

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Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty.00dd200000hgksfeab.miccozxxxi456@chatter.salesforce.com		✓	Chatter Free User
Edit	Gani, Ningaraj	NGani	ningarjgani00@mindful-fox-7ysoali.com		✓	System Administrator
Edit	User Integration	Integ	integration@00dd200000hgksfeab.com		✓	Analytics Cloud Integration User
Edit	User Security	sec	insightssecurity@00dd200000hgksfeab.com		✓	Analytics Cloud Security User

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7. Developer Org Setup

- Created a Salesforce Developer Org for app building.
- Used this org to create Department, Travel Approval, and Expense Item objects.
- Designed and tested workflows, approvals, and reports before moving to production.

Developer Edition		Rename	Disconnect	Launch
Organization ID	00DQy00000Yqx5H			
Username	ningarajgani@gmail.com			
Type	Developer Edition			
Connected	9/24/2025			
Last Activity	Connected on 9/24/2025			

8. Sandbox Usage

- Used Sandbox to test:
 - - Approval workflows (Manager approvals).
 - - Validation rules (e.g., End Date must be after Start Date).
 - - Expense logging automation.
- Allowed safe testing without affecting live data.
- Ensured bugs were fixed before deployment.

9. Deployment Basics

- Used Change Sets for deploying components to production.
- Deployed:
 - - Custom Objects (Department, Travel Approval, Expense Item).
 - - Fields and Page Layouts.
 - - Approval Process and Flows.
 - - Reports and Dashboards.
- Ensured smooth migration from sandbox to production environment.

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Setup Home, Salesforce Go, Service Setup Assistant, Commerce Setup Assistant, Field Service Setup Home (Beta), Hyperforce Assistant, Release Updates, Salesforce Mobile App, Lightning Usage, Optimizer, Sales Cloud Everywhere, ADMINISTRATION (Users, Data, Email), and PLATFORM TOOLS (Apps). The main content area is titled 'New Custom Object Tab' and shows 'Step 1 of 3: Enter the Details'. It prompts the user to 'Choose the custom object for this new custom tab. Fill in other details.' Under 'New Custom Object Tab', there is a section 'Select an existing custom object or create a new custom object now' with a dropdown menu set to 'Department' and a 'Tab Style' dropdown set to 'None'. Below this, an optional section asks to 'Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab', with a dropdown set to 'None'. A text box for 'Enter a short description' is also present. At the bottom right, there are 'Next' and 'Cancel' buttons.