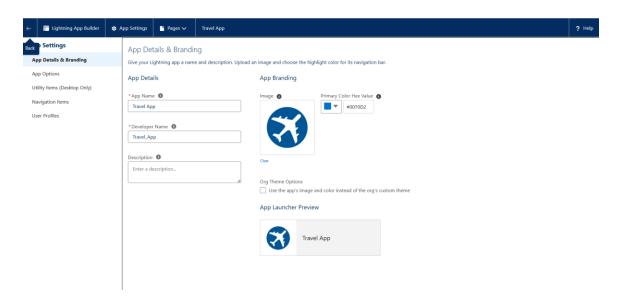
# Phase 2: Org Setup & Configuration

#### 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.



# 3. Business Hours & Holidays

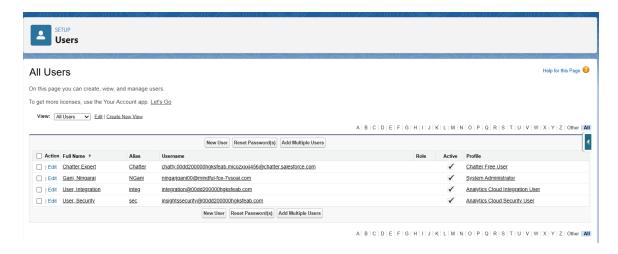
- Defined official working hours: Monday to Friday, 9 AM 6 PM.
- Added key holidays (Independence Day, Republic Day, Diwali, Christmas, New Year).
- Ensures travel requests submitted during holidays or after office hours are handled the next business day.
- Approval workflows and notifications respect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

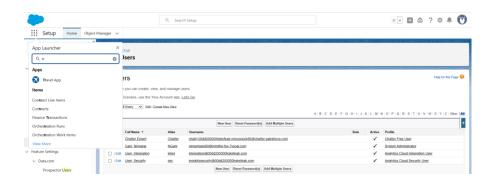
# 5. User Setup & Licenses

- 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).



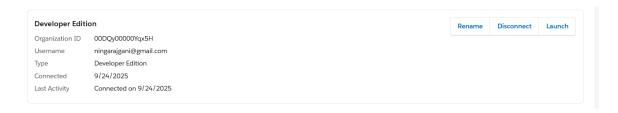
### 6. Login Access Policies

- 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.



# 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.



# 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.

