Phase 2: Org Setup & Configuration

1. Salesforce Editions

Salesforce offers different editions such as Essentials, Professional, Enterprise, and Unlimited. For this project, the Developer Edition was chosen as it provides complete features like custom objects, flows, and dashboards for free. This is suitable for building, experimenting, and testing the Travel Approval App without licensing costs.

2. Company Profile Setup

The company profile contains organization details like name, address, locale, language, and time zone. In this project, the company profile was configured with India Standard Time and English. This ensures travel approvals and expense records reflect correct regional formats for date, currency, and time.

3. Business Hours & Holidays

Business hours define the working time range while holidays mark official non-working days. For this app, business hours were set as Monday–Friday, 9 AM–6 PM. Holidays such as Diwali and Independence Day were added. This setup ensures that workflow actions, approvals, and notifications respect business hours and pause during holidays.

4. Fiscal Year Settings

The fiscal year determines financial reporting cycles. The fiscal year was aligned from April to March, as commonly followed in India. This helps finance teams analyze travel expenses quarterly or yearly in line with company budgets and compliance requirements.

5. User Setup & Licenses

Users represent employees, managers, and admins. Employees were assigned standard user licenses to create requests, managers were given permissions to approve or reject requests, and admins were provided with full access to manage configuration. Role hierarchies were also defined to ensure data visibility aligns with reporting structures.

6. Login Access Policies

Login policies control how and when users access the system. To enhance security, login hours were restricted to business timings (8 AM–8 PM), and IP ranges were set for office networks. This prevents unauthorized access attempts and protects sensitive travel and expense data.

7. Developer Org Setup (Dev Org)

A Developer Org is a personal Salesforce environment for experimentation and development. The Travel Approval App was built in a Dev Org where custom objects (Department, Travel Approval, Expense Item), flows, and reports were created and tested safely. This isolated environment ensures no risk to real company data.

8. Sandbox Usage

Sandboxes provide a test environment mirroring production. A sandbox was used to test workflows, validation rules, and dashboards with sample data. By simulating real scenarios, errors were identified and corrected before going live, ensuring a stable production release.

9. Deployment Basics

Deployment is the process of moving changes from sandbox or development to the production environment. For this project, deployment was carried out using Change Sets, which moved customizations like objects, fields, flows, and reports. This structured deployment approach reduces risks and ensures the app functions correctly in production.

Summary of Phase 2

The Salesforce Org setup forms the foundation of the Travel Approval App. Key configurations such as business hours, holidays, user roles, login policies, and fiscal year settings ensure that the app aligns with real organizational requirements. By using a Developer Org for building, a Sandbox for testing, and Change Sets for deployment, the app achieves scalability, security, and reliability for product

IMAGES:

SETUP > OBJECT MANAGER
Expense Item

Fields & Relationships
6 Items, Sorted by Field Label

Quick Find | New | Deleted Fields | Field Dependencies | Set History Tracking |

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Amount	Amount__c	Currency(16, 2)			▼
Created By	CreatedById	Lookup(User)			
Expense Item Number	Name	Auto Number		✓	▼
Expense Type	Expense_Type__c	Picklist			▼
Last Modified By	LastModifiedById	Lookup(User)			
Travel Approval	Travel_Approval__c	Master-Detail(Travel Approval)		✓	▼

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Q import

- ∨ User Interface
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SETUP
Bulk Data Load Jobs

Bulk Data Load Job
750d200000JAgLI
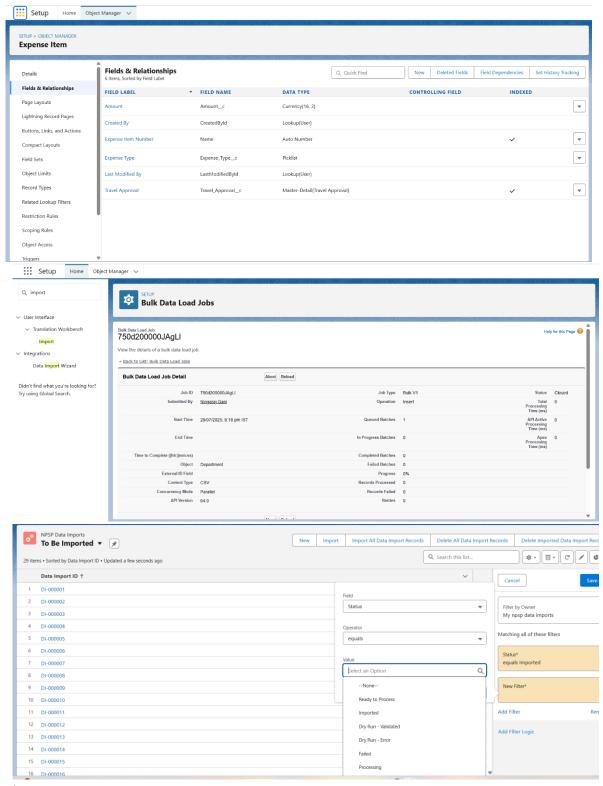
View the details of a bulk data load job.

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Bulk Data Load Job Detail   Abort | Reload

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Job ID	750d200000JAgLI	Job Type	Bulk V1	Status	Closed
Submitted By	Ningaraj Gani	Operation	Insert	Total Processing Time (ms)	0
Start Time	28/07/2025, 8:18 pm IST	Queued Batches	1	API Active Processing Time (ms)	0
End Time		In Progress Batches	0	Apex Processing Time (ms)	0
Time to Complete ([hh:]mm:ss)		Completed Batches	0		
Object	Department	Failed Batches	0		
External ID Field		Progress	0%		
Content Type	CSV	Records Processed	0		
Concurrency Mode	Parallel	Records Failed	0		
API Version	64.0	Retries	0		

NPSP Data Imports
To Be Imported ▾ 📌

29 items • Sorted by Data Import ID • Updated a few seconds ago

| New | Import | Import All Data Import Records | Delete All Data Import Records | Delete Imported Data Import Rec |

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	Data Import ID ↑	
1	DI-000001	
2	DI-000002	
3	DI-000003	
4	DI-000004	
5	DI-000005	
6	DI-000006	
7	DI-000007	
8	DI-000008	
9	DI-000009	
10	DI-000010	
11	DI-000011	
12	DI-000012	
13	DI-000013	
14	DI-000014	
15	DI-000015	
16	DI-000016	

Cancel   Save

Field
Status ▼

Operator
equals ▼

Value
Select an Option   🔍

- --None--
- Ready to Process
- Imported
- Dry Run - Validated
- Dry Run - Error
- Failed
- Processing

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My npsp data imports

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Status*
equals Imported

New Filter*

Add Filter   Rem

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