Financial Management System – Salesforce Project

Phase 2: Org Setup & Configuration

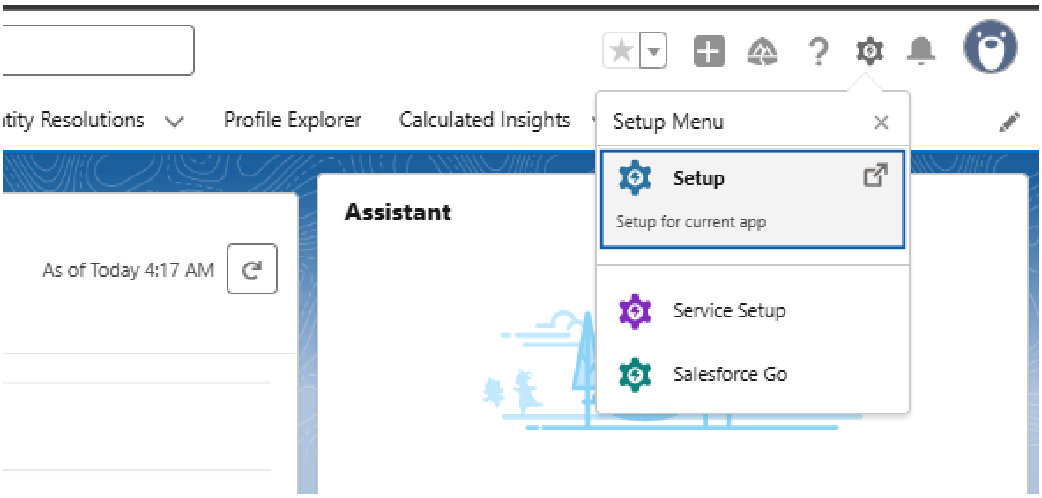
Step 1: Goal of Phase 2

- Prepare Salesforce environment for the Financial Management System.
- Setup Users, Roles, Profiles, and Permissions aligned with finance use cases.
- Configure Company Info, Business Hours, Holidays, and Fiscal Year.
- Apply org-wide defaults and sharing to ensure data security.

Expected Outcome:
A fully configured Salesforce Org with proper access controls, ready for **Phase 3: Data Modeling & Relationships**.

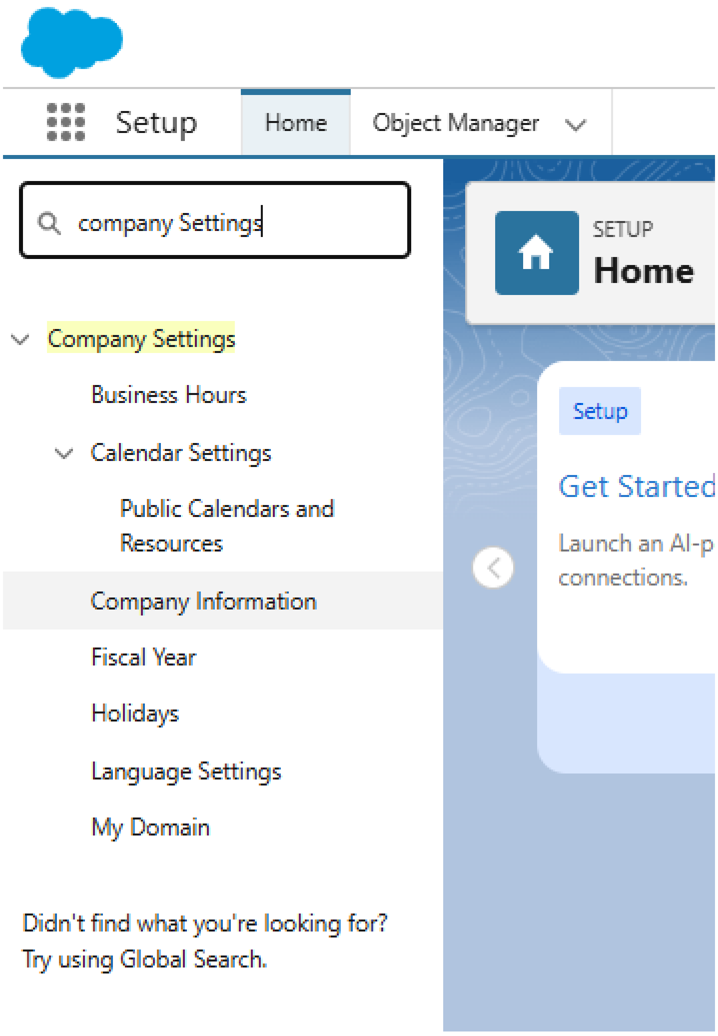
Step 2: Salesforce Editions

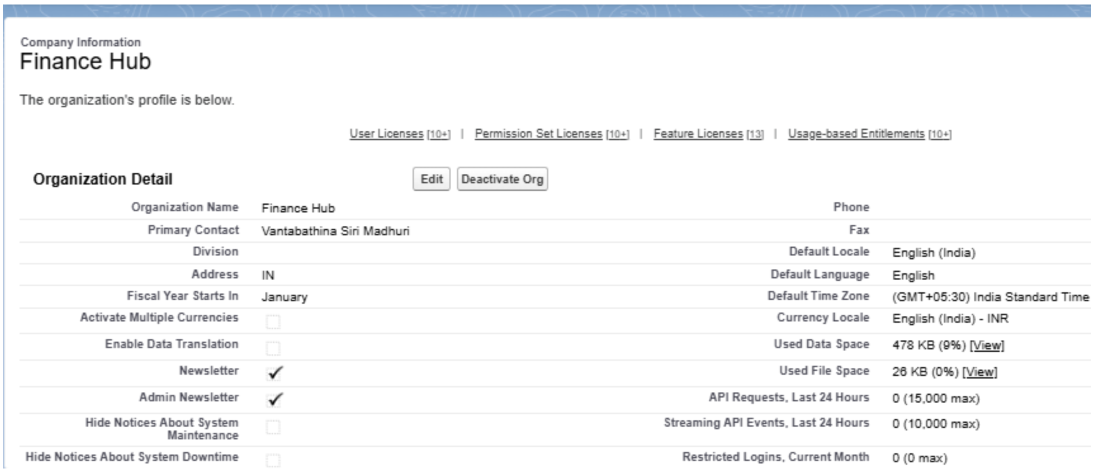
- Use **Developer Edition Org (free)** for this build.
- If you already have a Dev Org → login.
- Dev Org will act as a **sandbox for testing finance objects (Budget, Expense, Income)**.



Step 3: Company Profile Setup

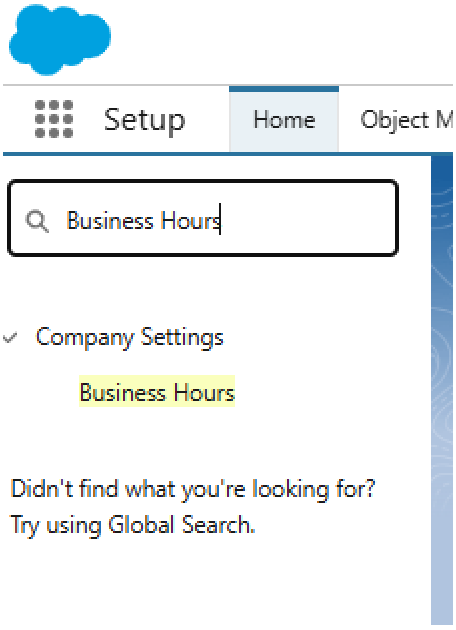
- Navigate: Setup → Company Settings → Company Information.

- 

- Fill details:
    - Company Name: *Finance Hub*
    - Default Timezone: *(GMT +05:30) India Standard Time* (or your local zone)
    - Default Currency: INR (₹) / USD ($) depending on use case
- Save changes.
- 

Step 4: Business Hours & Holidays

- Setup → Business Hours → New → “Finance Hours” → 9 AM – 6 PM.



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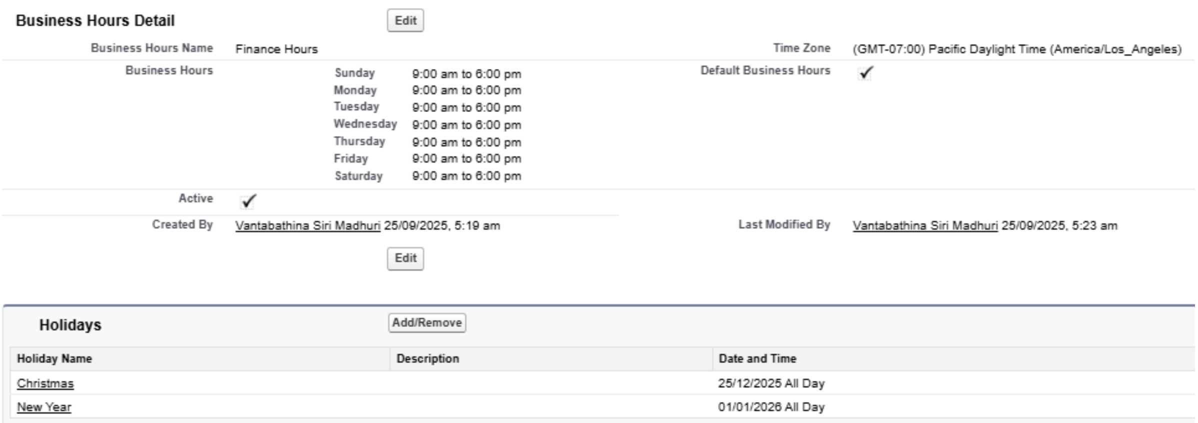
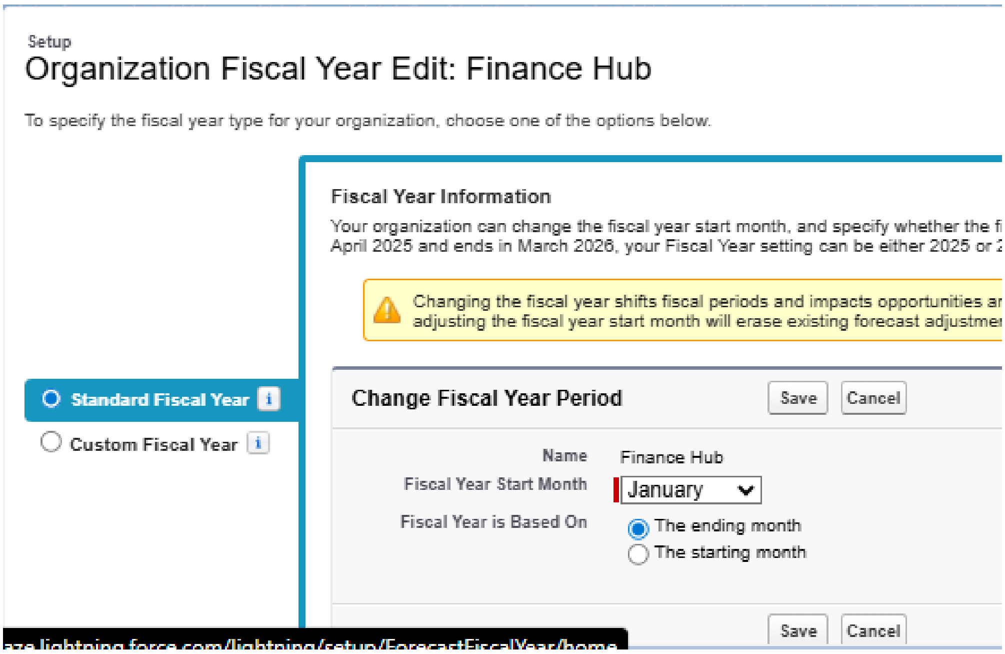
- Add official holidays (New Year, Independence Day, Diwali, etc.).



Step 5: Fiscal Year Settings

- Setup → Company Settings → Fiscal Year.
- Choose **Standard Fiscal Year (Jan – Dec)**.
- Save.



Step 6: Users & Licenses

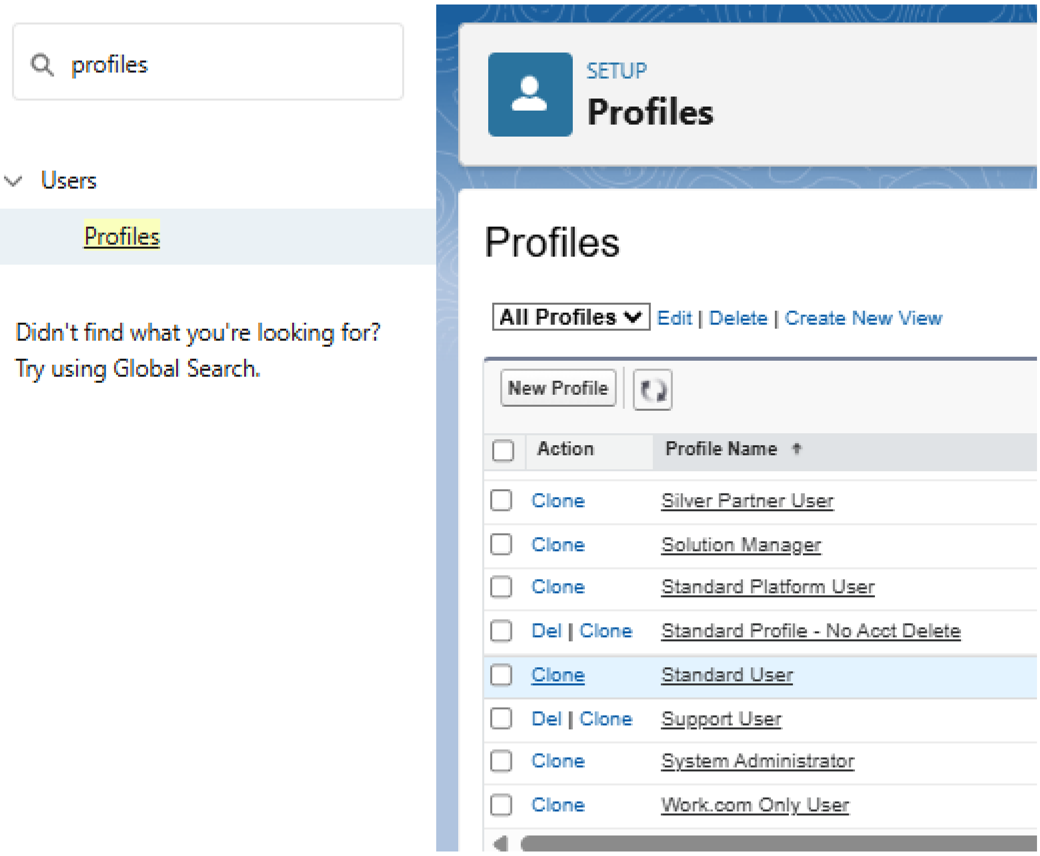
Create sample users to simulate stakeholders:

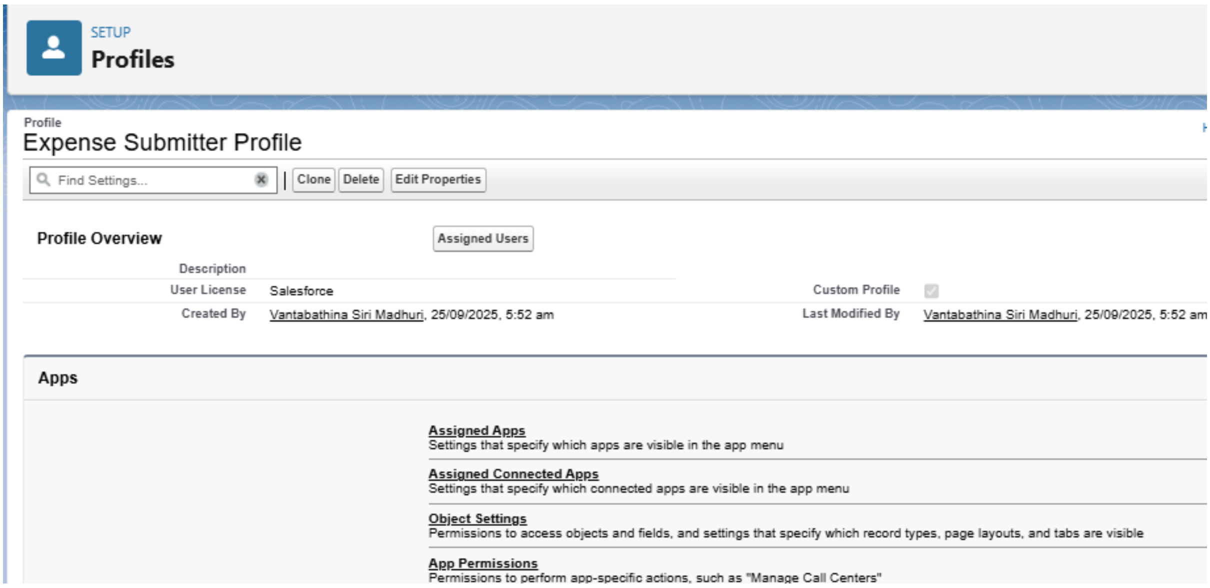
- **Admin** → Full control of setup.
- **Finance Manager** → Oversees all budgets & expenses.
- **Budget Owner** → Creates department/team budgets.
- **Expense Submitter** → Logs expenses against budgets.

Steps:

- Setup → Users → New User.
- Assign Salesforce License.
- Assign profiles (created in Step 7).

Step 7: Profiles

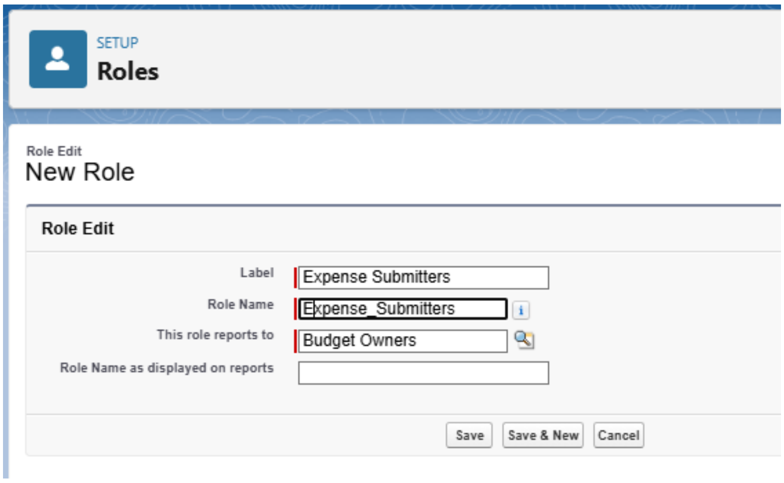


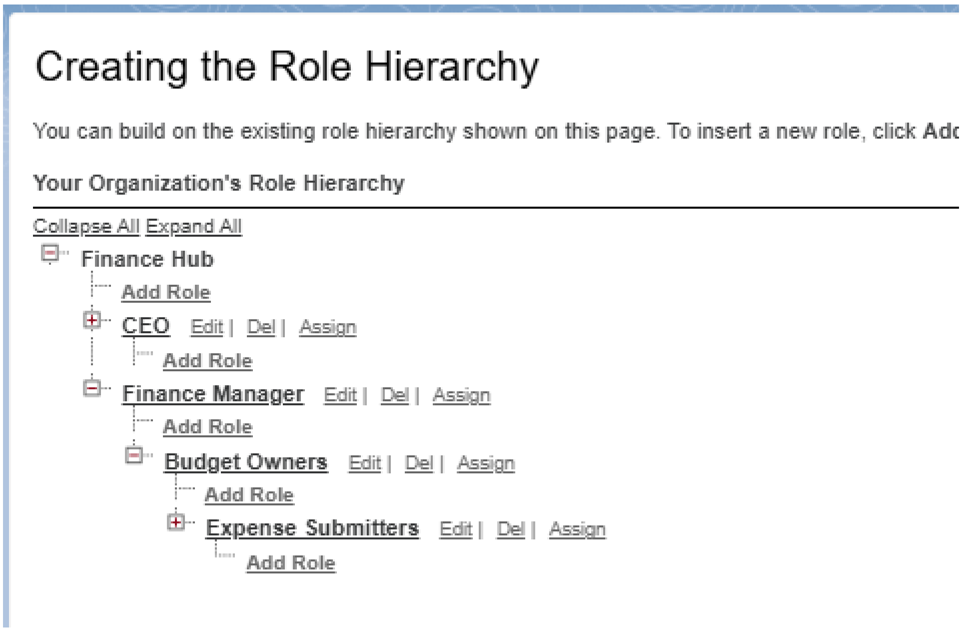
- **Expense Submitter Profile** → Create/Edit their own expenses only.
- 

- **Budget Owner Profile** → Full access to Budget object, read-only on Expenses.
- **Finance Manager Profile** → Full access on all finance objects (Budgets, Expenses, Reports, Dashboards).
- **System Admin Profile** → Default admin with setup permissions.

Step 8: Roles

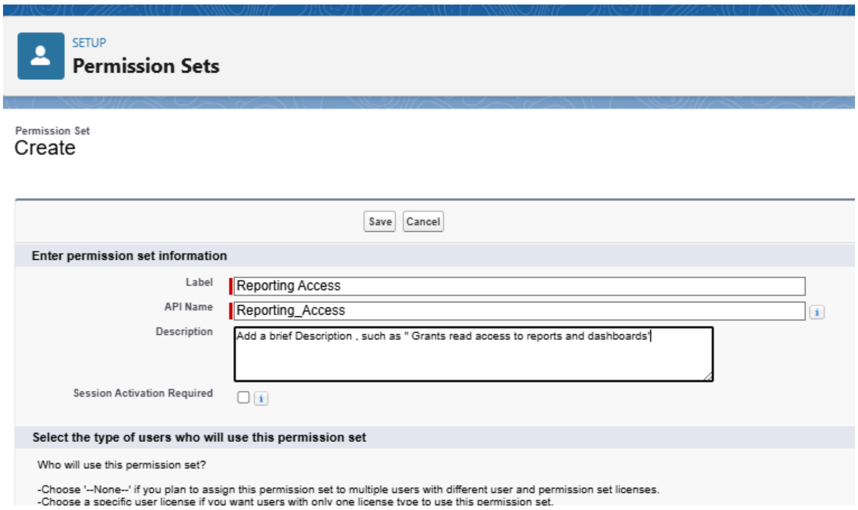
- Role Hierarchy:
  - Finance Manager (Top)
    - Budget Owners (Under Manager)
      - Expense Submitters (Under Budget Owner)





Step 9: Permission Sets

- Create extra permissions for special cases:
  - **Reporting Access** → Permission Set for users who only need reports/dashboards.
  - **Expense Approver** → Permission Set for those who can approve large expenses (future automation).



Step 10: Org-Wide Defaults (OWD)

- **Budget__c** → Public Read Only (anyone can view budgets, only owners can edit).
- **Expense__c** → Private (users only see their own expenses unless higher role).

Step 11: Sharing Rules

- Share **Expense__c** with **Budget Owners** and **Finance Managers**.
- This allows managers to see all expenses linked to their budgets.

Step 12: Login Access Policies

- Restrict login hours for Expense Submitters: 9 AM – 6 PM.
- Admin and Managers → unrestricted.

Step 13: Dev Org & Sandbox

- Build in **Developer Org**.
- For real-world deployments:
  - Sandbox → UAT → Production.
  - Deployment options: **Change Sets** or **SFDX (VS Code)**.

Step 14: Deployment Basics

- For this mini project, deployment will be **within Developer Org only**.
- For enterprise scenario: Use Change Sets to move from Sandbox → Production.

Step 15: Expected Outcome (Phase 2 Completion)

- Salesforce Org is fully configured.
- Users, Roles, Profiles, Permission Sets, OWD, Business Hours, and Holidays set.
- Finance-specific security model in place.