

Financial Management System – Salesforce Project

Phase 2: Org Setup & Configuration

Step 1: Goal of Phase 2

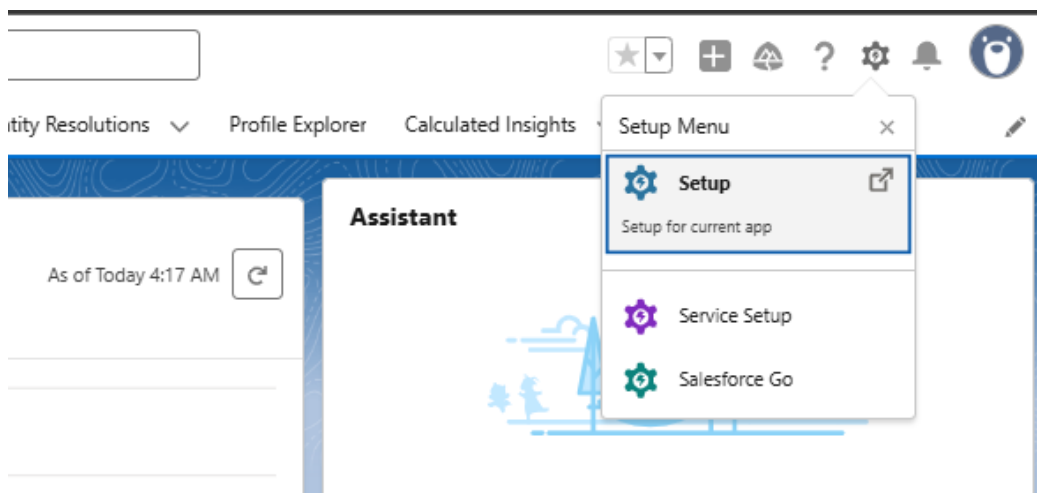
- Prepare Salesforce environment for the Financial Management System.
- Setup Users, Roles, Profiles, and Permissions aligned with finance use cases.
- Configure Company Info, Business Hours, Holidays, and Fiscal Year.
- Apply org-wide defaults and sharing to ensure data security.

Expected Outcome:

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

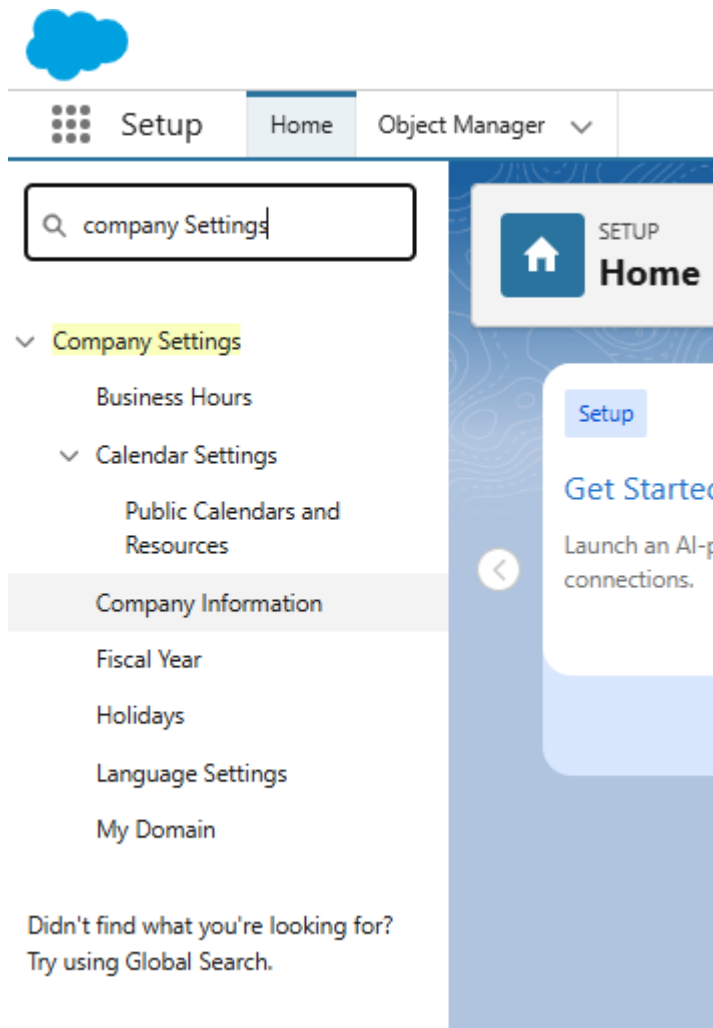
Step 2: Salesforce Editions

- 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.



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- 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.

Company Information
Finance Hub

The organization's profile is below.

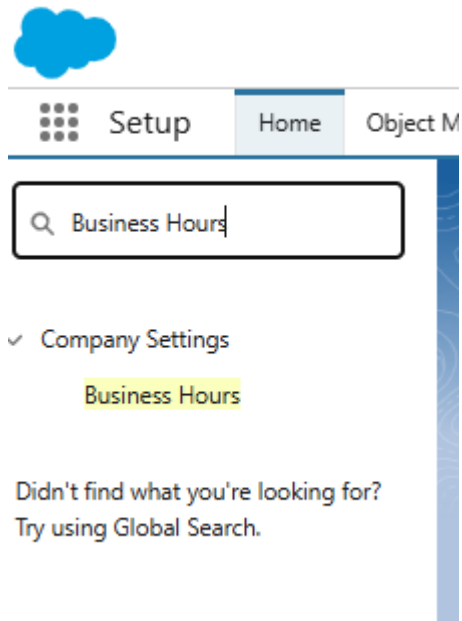
[User Licenses \(10+\)](#) | [Permission Set Licenses \(10+\)](#) | [Feature Licenses \(13\)](#) | [Usage-based Entitlements \(10+\)](#)

Organization Detail [Edit](#) [Deactivate Org](#)

Organization Name	Finance Hub	Phone	
Primary Contact	Vantabathina Siri Madhuri	Fax	
Division		Default Locale	English (India)
Address	IN	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	478 KB (9%) View
Newsletter	<input checked="" type="checkbox"/>	Used File Space	26 KB (0%) View
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)

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.).

Business Hours Detail

Business Hours Name

Finance Hours

Business Hours

Sunday9:00 am to 6:00 pm

Monday9:00 am to 6:00 pm

Tuesday9:00 am to 6:00 pm

Wednesday9:00 am to 6:00 pm

Thursday9:00 am to 6:00 pm

Friday9:00 am to 6:00 pm

Saturday9:00 am to 6:00 pm

Active

✓

Created By

Vantabathina Siri Madhuri 25/09/2025, 5:19 am

Time Zone

(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)

Default Business Hours

✓

Edit

Holidays

Add/Remove

Holiday Name

Description

Date and Time

Christmas

25/12/2025 All Day

New Year

01/01/2026 All Day

Step 5: Fiscal Year Settings

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

Setup

Organization Fiscal Year Edit: Finance Hub

To specify the fiscal year type for your organization, choose one of the options below.

☒ Standard Fiscal Year ⓘ

☐ Custom Fiscal Year ⓘ

Fiscal Year Information

Your organization can change the fiscal year start month, and specify whether the fiscal year starts in April 2025 and ends in March 2026, your Fiscal Year setting can be either 2025 or 2026.

⚠ Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts. Adjusting the fiscal year start month will erase existing forecast adjustments.

Change Fiscal Year Period Save Cancel

Name	Finance Hub
Fiscal Year Start Month	January ▼
Fiscal Year is Based On	<input checked="" type="radio"/> The ending month <input type="radio"/> The starting month

Save Cancel

Step 6: Users & Licenses

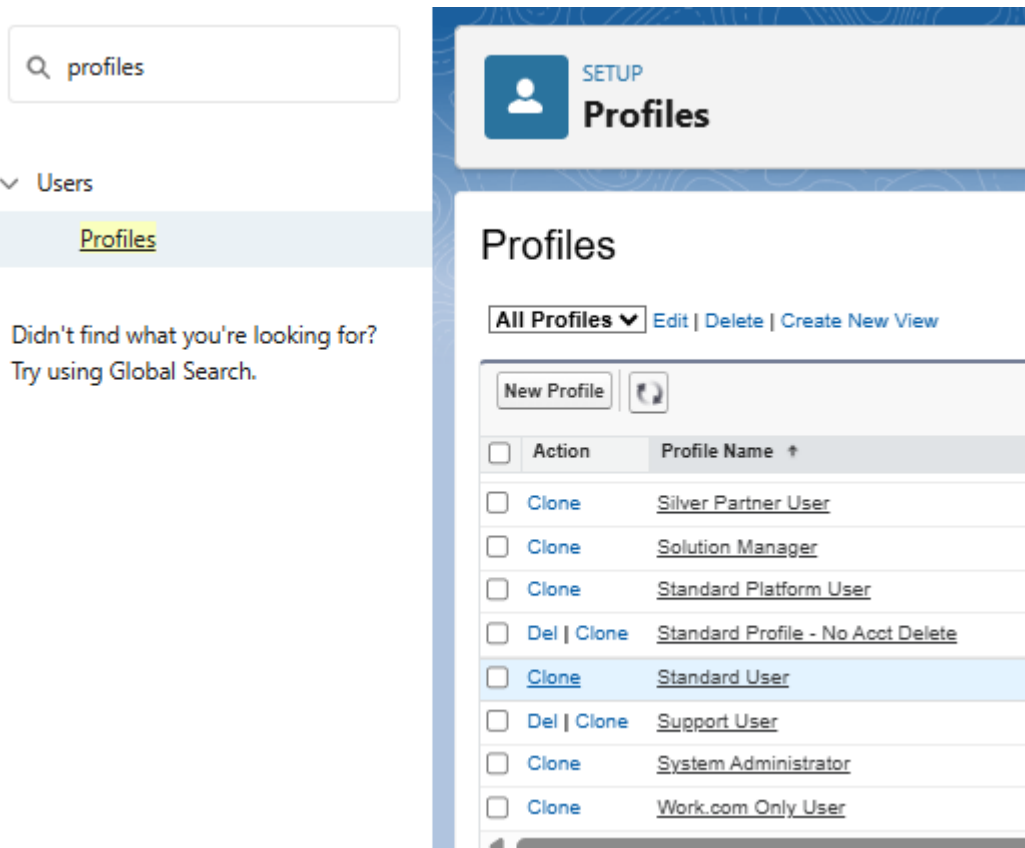
Create sample users to simulate stakeholders:

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

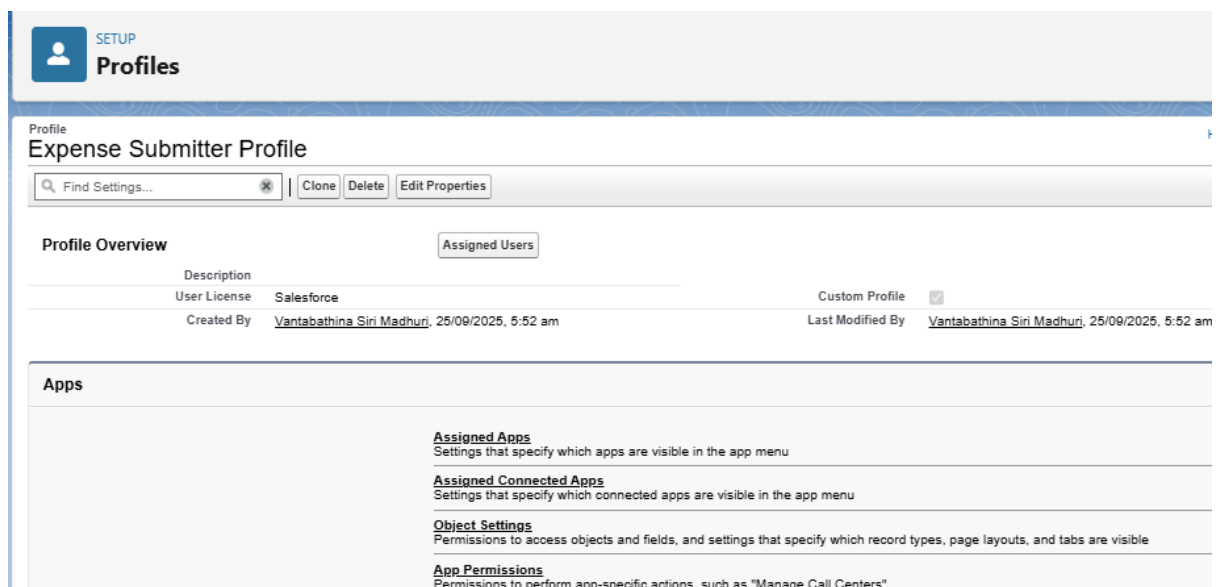
Steps:

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

Step 7: Profiles



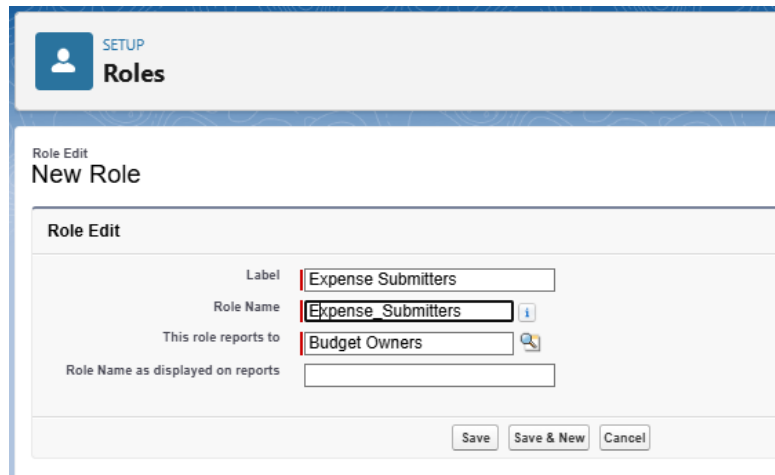
- **Expense Submitter Profile** → Create/Edit their own expenses only.



- **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

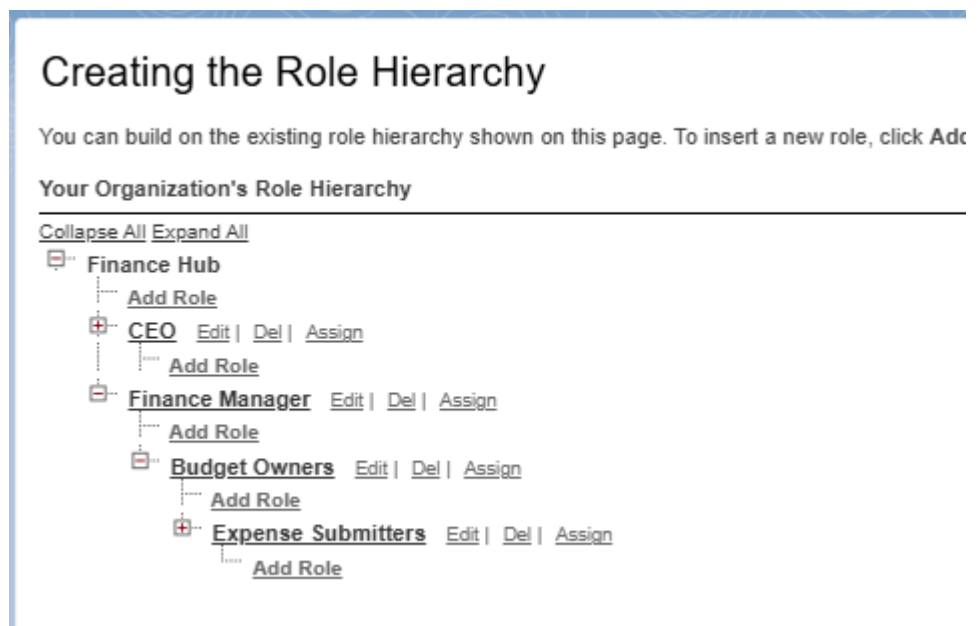
- Role Hierarchy:
 - Finance Manager (Top)
 - Budget Owners (Under Manager)
 - Expense Submitters (Under Budget Owner)



The screenshot shows the 'New Role' form in the 'Roles' setup page. The form is titled 'Role Edit' and 'New Role'. It contains the following fields:

- Label:** Expense Submitters
- Role Name:** Expense_Submitters
- This role reports to:** Budget Owners
- Role Name as displayed on reports:** (Empty field)

At the bottom of the form, there are three buttons: 'Save', 'Save & New', and 'Cancel'.



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.