

Phase 2: Org Setup & Configuration

Travel & Tourism Management System

1. Salesforce Editions

We selected **Salesforce Developer Edition Org** for the Travel & Tourism Management System implementation. This edition was chosen because it provides:

- All core CRM features required for our travel business
- Custom objects for Tours, Bookings, Customers, and Payments
- Advanced roles, profiles, and security features
- Automation tools including workflows, process builder, and flows
- API access for third-party integrations
- AppExchange support for travel-specific add-ons
- No user license limitations for development and testing

2. Company Profile Setup

Setup → Company Information

- Organization Name: Travel & Tourism Management System
- Default Currency: INR (Indian Rupees) aligned with the local market
- Multi-Currency enabled (USD, EUR) for international bookings
- Locale: English (India) for formatting numbers, dates, currency
- Time Zone: (GMT+5:30) Asia/Kolkata
- Country: India
- Full business address with postal code
- Primary contact details for administration

SETUP

Company Information

Company Information

SmartTrip

The organization's profile is below.

User Licenses (20)

Permission Set Licenses (20)

Feature Licenses (11)

Usage-based Entitlements (20)

Organization Detail

Edit

Organization Name	SmartTrip	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (India)
Address	United States	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	468 KB (9%) View
Newsletter	<input checked="" type="checkbox"/>	Used File Space	38 KB (0%) View
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	468 (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)
Locale Formats	ICU	Salesforce.com Organization ID	00Dgk000007h8Cn
		Organization Edition	Developer Edition
		Instance	CAN96

Created By

OrgFarm EPIC, 7/19/2025, 1:50 PM

Modified By

Anshika Sahu, 9/19/2025, 10:18 PM

3. Business Hours & Holidays

Setup → Business Hours

- Travel Business Hours: "Tourism Office Hours"
 - Monday to Friday: 9:00 AM to 6:00 PM
 - Saturday: 10:00 AM to 4:00 PM
 - Sunday: Closed
 - Time Zone: Asia/Kolkata
 - Setup → Holidays
 - Major Indian holidays added:
 - Diwali (Festival of Lights)
 - Republic Day (January 26)
 - Independence Day (August 15)
 - Gandhi Jayanti (October 2)
 - Eid (based on lunar calendar)
 - Christmas (December 25)
 - New Year (January 1)
 - Regional holidays specific to business location

Business Hours

Organization Business Hours

Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate.

If you enter blank business hours for a day, that means your organization does not operate on that day.

[Holidays](#)

Business Hours Detail [Edit](#)

Business Hours Name	Default	Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Business Hours	Sunday Monday Tuesday Wednesday Thursday Friday Saturday	No Hours 9:00 AM to 7:00 PM 9:00 AM to 7:00 PM 9:00 AM to 7:00 PM 9:00 AM to 7:00 PM 9:00 AM to 7:00 PM 9:00 AM to 7:00 PM	Default Business Hours ✓

Active ☒

Created By [OrgFarm EPLC](#) 7/19/2025, 1:50 PM

Last Modified By [Anshika Sahu](#) 9/19/2025, 10:09 AM

[Edit](#)

Holidays [Add/Remove](#)

No records to display

4. Fiscal Year Settings

- Standard Fiscal Year used

- Period: April 1 to March 31 aligned with Indian financial year
- Aligned with Indian taxation and accounting cycles
- Supports seasonal tourism analysis and budget planning

Fiscal Year

Setup
Organization Fiscal Year Edit: SmartTrip

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

☒ Standard Fiscal Year **1**

☐ Custom Fiscal Year **1**

Fiscal Year Information
Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example, if your 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 across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing this change.

Change Fiscal Year Period

Name: SmartTrip

Fiscal Year Start Month: **January**

Fiscal Year is Based On:
☒ The ending month
☐ The starting month

Save Cancel

5. User Setup & Licenses

Created user roles with appropriate licenses:

- System Administrator: Full system ownership
- Travel Manager: Oversees tour operations
- Travel Agent: Manages customer bookings
- Finance Officer: Manages payments and financial reports
- Customer Service Rep: Handles post-booking support

6. Profiles

Custom profiles created for each user type defining permissions aligned with their responsibilities.

7. Roles

Organizational role hierarchy modeled for data visibility and security.

8. Permission Sets

Permission sets assigned for enhanced reporting, bulk operations, and API integration access.

9. Organization-Wide Defaults (OWD)

- Tour Packages: Public Read Only
- Customers: Private
- Bookings: Private
- Payments: Private
- Leads: Public Read/Write

Sharing rules created for regional and team-based access.



10. Login Access Policies

- Admin login as any user enabled
- Support login allowed for Salesforce technical support
- IP whitelisting and access restrictions configured

11. Developer Org & Sandbox Setup

- Dedicated developer org configured
- Tooling integration with Salesforce CLI, VS Code, GitHub
- Sandbox environment strategy established for dev, test, UAT

12. Deployment Basics

- Change sets for configuration deployments

- Salesforce CLI commands for source deployments
- GitHub version control implemented
- Deployment best practices and rollback plans created