

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		Currency Locale	English (India) - INR
Enable Data Translation		Used Data Space	468 KB (9%) [Details]
Newsletter		Used File Space	38 KB (0%) [Details]
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	468 (15,000 max)
Hide Notices About System Maintenance	<input checked="" 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

SETUP

Business Hours

Organization Business Hours

Help for this Page

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 0

Business Hours Detail

Edit

Business Hours Name	Default	Time Zone
Business Hours	<div>SundayNo Hours</div> <div>Monday9:00 AM to 7:00 PM</div> <div>Tuesday9:00 AM to 7:00 PM</div> <div>Wednesday9:00 AM to 7:00 PM</div> <div>Thursday9:00 AM to 7:00 PM</div> <div>Friday9:00 AM to 7:00 PM</div> <div>Saturday9:00 AM to 7:00 PM</div>	<div>Default Business Hours</div> <div>(GMT+05:30) India Standard Time (Asia/Kolkata)</div>

Active

✓

Created By

OrgFarm EPI/C 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

Back To Top

Business hours are found in the associated list

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

SETUP

Fiscal Year

Setup
Organization Fiscal Year Edit: SmartTrip
Help for this Page

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 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

Save
Cancel

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

SETUP

Users

Permission Set Assignments | Permission Set Assignments: Activation Required | Permission Set Group Assignments | Permission Set License Assignments | Personal Groups | Public Group Membership | Queue Membership | Team | Managers in the Role Hierarchy | OAuth Apps | Third-Party Account Links | Built-in Authenticators | Installed Mobile Apps | Authentication Settings for External Systems | Login History

User Detail
Edit
Sharing
Reset Password
Login
Unfreeze
View Summary

Name	Travel Agent1	Role	
Alias	tagen	User License	Salesforce
Email	travelagent@dummy.com [Verify]	Profile	Standard User
Username	travelagent038@dummy.com	Active	<input checked="" type="checkbox"/>
Nickname	TravelAgent1	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/>
App Registration: One-Time Password Authenticator		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>

6. Profiles

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

SETUP

Profiles

Profiles

Help

All Profiles Edit | Delete | Create New View

New Profile

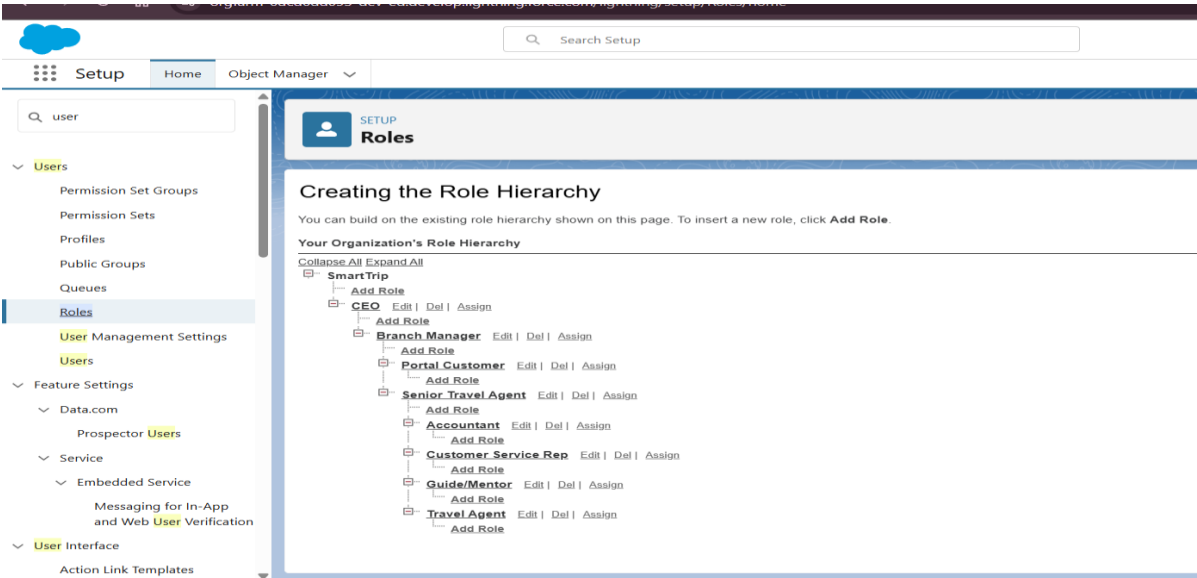
A B C D E F G H I J K L M N O P Q R S T U V W X Y

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Anypoint Integration	Identity	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit Del ...	B2B Reordering Portal Buyer Profile	External Apps Login	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter External User	Chatter External	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Contract Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom: Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom: Sales Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom: Support Profile	Salesforce	<input checked="" type="checkbox"/>

1-25 of 450 Selected0 SelectedPreviousNext

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.

SETUP

Permission Sets

Permission Sets

Help for this Page

On this page you can create, view, and manage permission sets.

All Permission Sets

Edit | Delete | Create New View

New

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Permission Set Name	Description	License
Clone	(Legacy) Data Cloud Data Aware Specialist	This Data Cloud permission set will be deprecated in Spring '24. Lear...	Customer Data Platform
Clone	(Legacy) Data Cloud Marketing Admin	Allows access to Data Cloud Setup if the user is also a Salesforce ad...	Customer Data Cloud for Marketing
Clone	(Legacy) Data Cloud Marketing Manager	This Data Cloud permission set will be deprecated in Spring '24. Lear...	Customer Data Platform
Clone	(Legacy) Data Cloud Marketing Specialist	This Data Cloud permission set will be deprecated in Spring '24. Lear...	Customer Data Platform
Clone	(Legacy) Data Cloud for Marketing Data Aware Specialist	This Data Cloud permission set will be deprecated in Spring '24. Lear...	Customer Data Cloud for Marketing
Clone	(Legacy) Data Cloud for Marketing Manager	This Data Cloud permission set will be deprecated in Spring '24. Lear...	Customer Data Cloud for Marketing
Clone	(Legacy) Data Cloud for Marketing Specialist	This Data Cloud permission set will be deprecated in Spring '24. Lear...	Customer Data Cloud for Marketing
Clone	Access Agentforce Default Agent	Gives users access to the default Agentforce agent in Salesforce.	Agentforce (Default)
Det Clone	Account Access		
Clone	Agent Platform Builder	Allow access to agent platform.	Agent platform builder
Clone	Agentforce Default Admin	Allows users to build and manage in-org copilots.	Agentforce (Default)
Clone	Agentforce Service Agent Configuration	Build and manage autonomous AI service agents.	Agentforce Service Agent Builder
Clone	Agentforce Service Agent Object Access	Access knowledge articles and manage cases and contacts as an aut...	Agentforce Service Agent User
Clone	Agentforce Service Agent Secure Base	Set up and use Agentforce Service Agent actions with enhanced data ...	Agentforce Service Agent User

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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.

SETUP

Sharing Settings

Sharing Rules

Lead Sharing Rules

New Recalculate

Lead Sharing Rules Help

No sharing rules specified.

Account Sharing Rules

New Recalculate

Account Sharing Rules Help

No sharing rules specified.

Opportunity Sharing Rules

New Recalculate

Opportunity Sharing Rules Help

No sharing rules specified.

Case Sharing Rules

New Recalculate

Case Sharing Rules Help

No sharing rules specified.

Campaign Sharing Rules

New Recalculate

Campaign Sharing Rules Help

No sharing rules specified.

User Sharing Rules

New Recalculate

User Sharing Rules Help

No sharing rules specified.

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