Phase 2: Org Setup & Configuration

Travel & Tourism Management System

1. Salesforce Editions

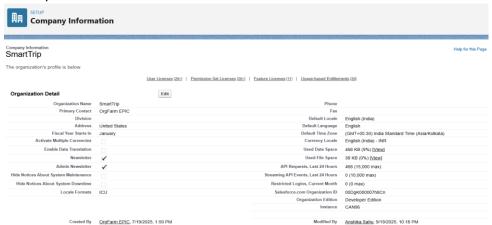
We selected **Salesforce Developer Edition Org** for the Travel & Tourism Management System implementation. This edition was chosen because it provides:

- 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



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

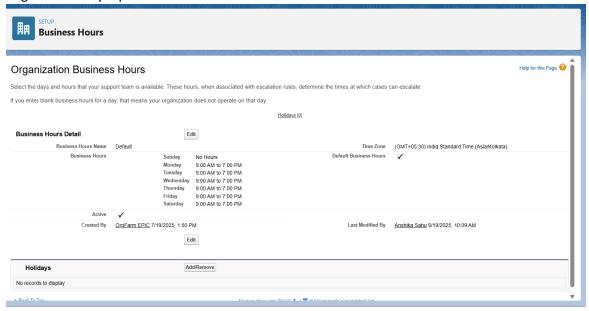
Time Zone: Asia/Kolkata

Setup → Holidays

• Major Indian holidays added:

• Diwali (Festival of Lights)

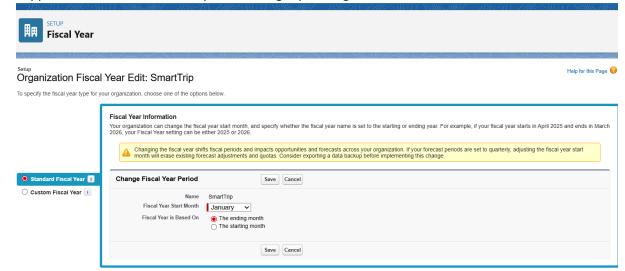
- Republic Day (January 26)
- Independence Day (August 15)
- Gandhi Jayanti (October 2)
- Eid (based on lunar calendar)
- Christmas (December 25)
- New Year (January 1)
- Regional holidays specific to business location



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



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