Phase 2: Org Setup & Configuration Travel & Tourism Management System
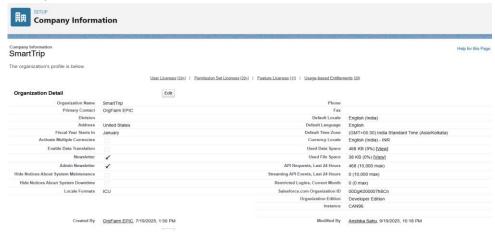
1. Salesforce Editions

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.

Permission Sets

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 |

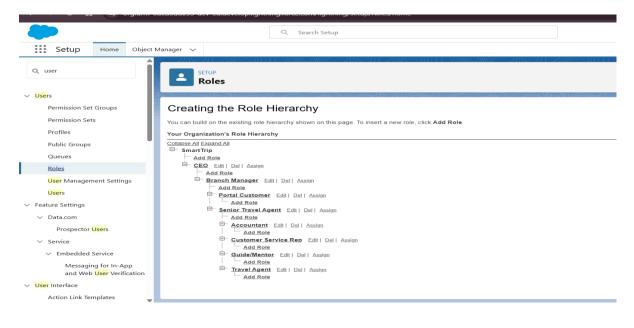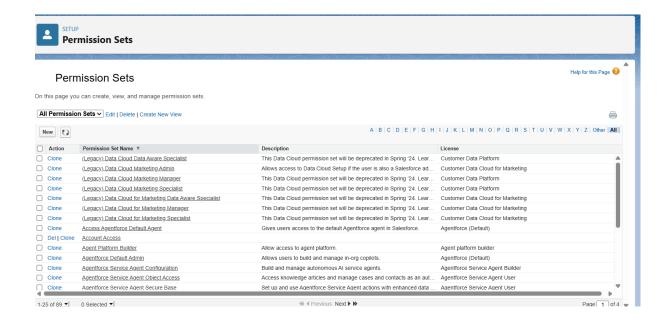| Action	Permission Set Name ↑	Description	License
Clone	(Legacy) Data Cloud Data Aware Specialist	This Data Cloud permission set will be deprecated in Spring '24. Lear...	Customer Data Platform
Clone	(Legacy) Data Cloud Marketing Admin	Allows access to Data Cloud Setup if the user is also a Salesforce 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)
Del	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.

Manager ∨

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.		

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10. Login Access Policies

- Admin login as any user enabled

- Support login allowed for Salesforce technical support

- IP whitelisting and access restrictions configured

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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

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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