

Project Title: Travolic Smart Travel Agency CRM

Phase 2 - Org Setup & Configuration

2.1 Company Profile Setup

Description: Configure company details like name, currency, locale, and time zone.

Steps:

1. Go to **Setup** → **Company Settings** → **Company Information**.
2. Update details:
 - Company Name: *Smart TravelConnect Pvt. Ltd.*
 - Default Currency: *INR (₹)*
 - Locale: *English (India)*
 - Time Zone: *Asia/Kolkata (IST)*
3. Save changes.

The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is open, and 'Company Information' is selected under 'Company Settings'. The main content area displays the 'Company Information' page for the organization 'Travolic'. The page includes a search bar at the top, a sidebar with navigation links, and a main content area with a table of organization details. The table lists various settings such as Organization Name, Primary Contact, Division, Address, Phone, Fax, Default Locale, Default Language, Fiscal Year Starts In, Activate Multiple Currencies, Enable Data Translation, Newsletter, Admin Newsletter, Hide Notices About System Maintenance, Hide Notices About System Downtime, Locale Formats, Default Time Zone, Currency Locale, Used Data Space, Used File Space, API Requests, Streaming API Events, Restricted Logins, Salesforce.com Organization ID, Organization Edition, and Instance. The 'Edit' button is visible at the bottom of the table.

Organization Detail	
Organization Name	Travolic
Primary Contact	OrgPam EPIC
Division	
Address	Sai Nagar Amravati 444607 Maharashtra India
Phone	(957) 990-6256
Fax	
Default Locale	English (India)
Default Language	English
Fiscal Year Starts In	April
Activate Multiple Currencies	<input type="checkbox"/>
Enable Data Translation	<input type="checkbox"/>
Newsletter	<input checked="" type="checkbox"/>
Admin Newsletter	<input checked="" type="checkbox"/>
Hide Notices About System Maintenance	<input type="checkbox"/>
Hide Notices About System Downtime	<input type="checkbox"/>
Locale Formats	ICU
Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Currency Locale	English (India) - INR
Used Data Space	348 KB (7%) [View]
Used File Space	60 KB (0%) [View]
API Requests, Last 24 Hours	0 (15,000 max)
Streaming API Events, Last 24 Hours	0 (10,000 max)
Restricted Logins, Current Month	0 (0 max)
Salesforce.com Organization ID	00DgK000007dRM7
Organization Edition	Developer Edition
Instance	CAN65
Created By	OrgPam EPIC, 7/18/2025, 3:19 AM
Modified By	Yash Dhyade, 9/15/2025, 6:52 AM

2.2 Business Hours & Holidays

Description: Define working hours and holidays for service-level tracking.

Steps:

1. Navigate to **Setup** → **Company Settings** → **Business Hours**.
2. Create: *Mon-Sat, 9:00 AM – 6:00 PM.*

3. Go to **Holidays** → Add:

- *Diwali*
- *Dussehra*
- *New Year*

The screenshot shows the ServiceNow Setup interface for configuring Business Hours. The left sidebar contains a search bar and a navigation menu with categories like Company Settings, Calendar Settings, Company Information, Data Protection and Privacy, Fiscal Year, Holidays, Language Settings, and My Domain. The main content area is titled 'Organization Business Hours' and includes a description, a 'Business Hours Detail' section with a table of days and hours, and a 'Holidays' section with a table of holiday dates and descriptions.

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.

Business Hours Detail

Business Hours Name	SmartTravel Support Hours	Time Zone
Business Hours	Sunday 24 Hours Monday 24 Hours Tuesday 24 Hours Wednesday 24 Hours Thursday 24 Hours Friday 24 Hours Saturday 24 Hours	(GMT+05:30) India Standard Time (Asia/Kolkata)

Holidays

Holiday Name	Description	Date and Time
Diwali		10/20/2025 All Day
Dussehra		10/2/2025 All Day
New Year		1/1/2026 All Day

2.3 Fiscal Year Settings

Description: Align fiscal year with business reporting cycles.

Steps:

1. Go to **Setup** → **Fiscal Year**.
2. Select *Standard Fiscal Year*.

3. Set to *April – March*.

The screenshot shows the Salesforce Setup interface. On the left is a navigation menu with 'Setup' at the top, followed by 'Home' and 'Object Manager'. Below these are search filters for 'company' and a list of settings including 'Company Settings', 'Calendar Settings', 'Company Information', 'Data Protection and Privacy', 'Fiscal Year' (highlighted), 'Holidays', 'Language Settings', and 'My Domain'. The main content area is titled 'Fiscal Year' and 'Organization Fiscal Year Edit: Travolic'. It contains a 'Fiscal Year Information' section with a warning about changing the fiscal year and a 'Change Fiscal Year Period' section with fields for 'Name' (Travolic), 'Fiscal Year Start Month' (April), and 'Fiscal Year is Based On' (The ending month). The URL at the bottom is <https://orgfarm-cc3334e19-dev-ed.develop.lightning.force.com/lightning/setup/ForecastFiscalYear/home>.

2.4 User Setup & Licenses

Description: Create users and assign licenses for each role.

Steps:

1. Go to **Setup** → **Users** → **Users**.
2. Add:
 - Admin (System Administrator License)
 - 2 Sales Agents (Platform User License)
 - Finance Manager (Platform User License)

- Marketing Manager (Platform User License)

Setup Home Object Manager

Search Setup

Users

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. Let's Go

View: All Users Edit Create New View

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	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Admin_Smart	sadmi	admin@travolic.dev	CEO	✓	System Administrator
<input type="checkbox"/> Edit	Agent_Sales	sagen	agent1@travolic.dev	Eastern Sales Team	✓	Standard Platform User
<input type="checkbox"/> Edit	Chatter_Expert	Chatter	chatty00d96000007dm7uam.xhoopemr7q0b@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Digihade_Yash	yas	yash.digihade2003219@agentforce.com		✓	System Administrator
<input type="checkbox"/> Edit	Digihade_Yash	ydqtb	yash.agent@travoly.dev		✓	System Administrator
<input type="checkbox"/> Edit	EPIC_OrgFarm	OEPIIC	epic.55905344b568@orgfarm.salesforce.com		✓	System Administrator
<input type="checkbox"/> Edit	Manager_Marketing	mmana	marketing@travolic.dev		✓	Chatter Free User
<input type="checkbox"/> Edit	User_Integration	integ	integration@00d9k000007dm7uam.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightsssecurity@00d9k000007dm7uam.com		✓	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

2.5 Profiles

Description: Define baseline access levels for users.

Steps:

- Go to **Setup** → **Profiles**.
- Clone *Standard Platform User*.
- Create:
 - Sales_Agent_Profile*: Leads, Bookings, Customers.
 - Finance_Manager_Profile*: Payments, Invoices.
 - Marketing_Manager_Profile*: Leads, Campaigns.
- Assign profiles to users.

Setup Home Object Manager

Search Setup

Q profil

Users

Profiles

Didn't find what you're looking for? Try using Global Search.

SETUP Profiles

Profiles

All Profiles Edit Delete Create New View

New Profile

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Clone	External Apps Login User	External Apps Login	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	External Identity User	External Identity	<input type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Finance Manager Profile	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Force.com - App Subscription User	Force.com - App Sub...	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Force.com - Free User	Force.com - Free	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Gold Partner User	Gold Partner	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	High Volume Customer Portal	High Volume Custom...	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	High Volume Customer Portal User	High Volume Custom...	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Identity User	Identity	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Marketing User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Marketing Manager Profile	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Minimum Access - API Only Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Minimum Access - Salesforce	Salesforce	<input type="checkbox"/>

1-46 of 46 0 Selected

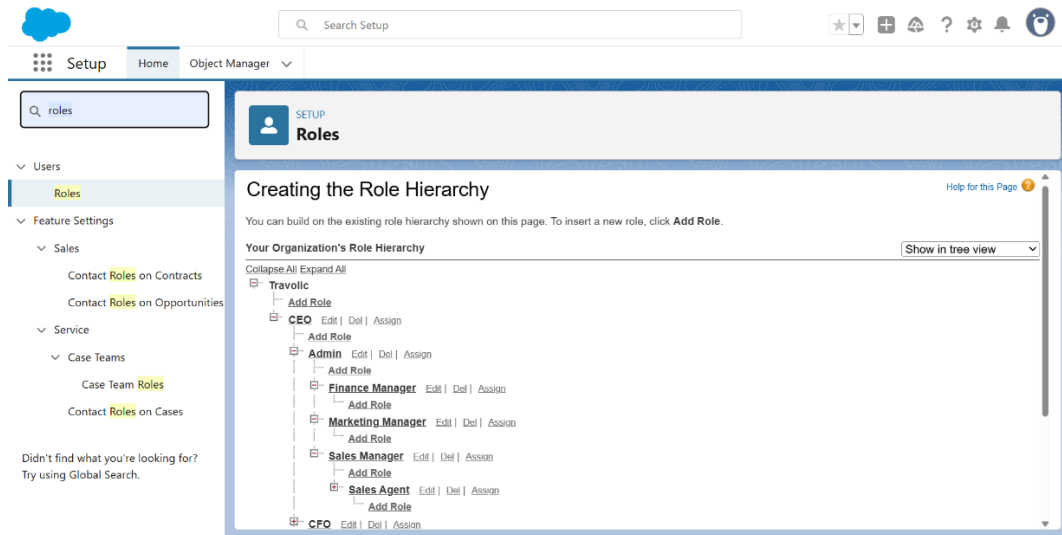
Page 1 of 1

2.6 Roles

Description: Define hierarchy for data visibility.

Steps:

1. Go to **Setup** → **Roles** → **Set Up Roles**.
2. Create hierarchy:
 - └─ Sales Manager
 - | └─ Sales Agent
 - └─ Finance Manager
 - └─ Marketing Manager
4. Assign users to roles.

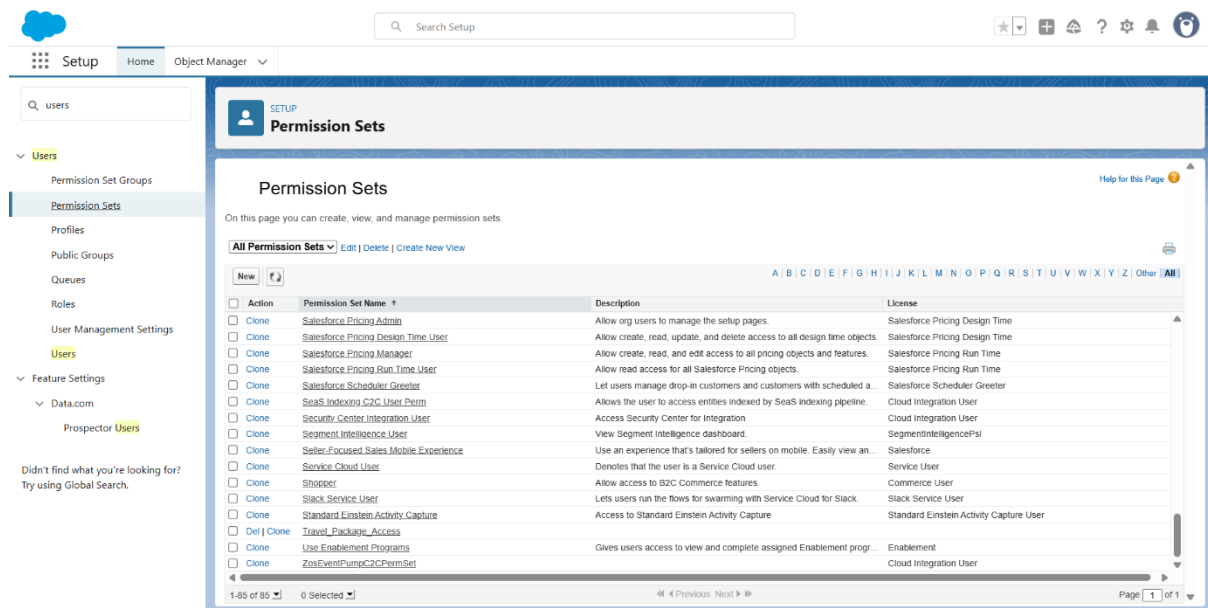


2.7 Permission Sets

Description: Extend access beyond profiles.

Steps:

1. Go to **Setup** → **Permission Sets** → **New**.
2. Create:
 - *Travel_Package_Access* (for Sales Agents).
 - *Reports_Access* (for Managers).
3. Assign permission sets to users.

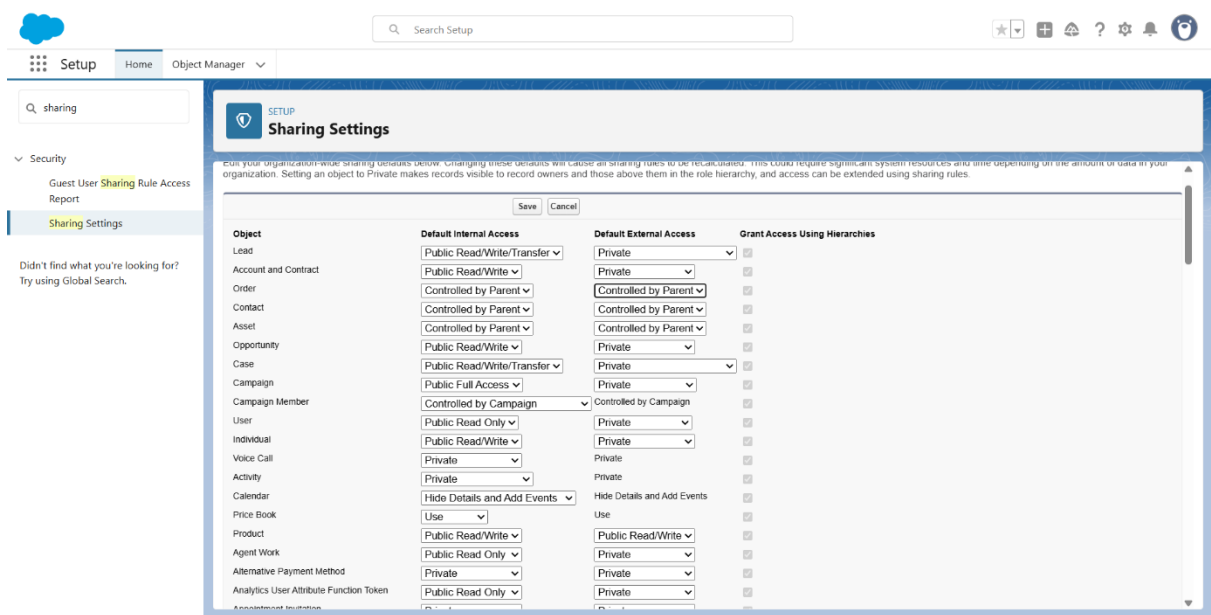


2.8 Organization-Wide Defaults (OWD)

Description: Set baseline record access across the org.

Steps:

1. Go to **Setup** → **Sharing Settings**.
2. Configure OWD:
 - Leads → *Private*
 - Bookings → *Controlled by Parent (Customer)*
 - Payments → *Private*
 - Travel Packages → *Public Read Only*



2.9 Sharing Rules

Description: Open up access where required.

Steps:

1. Go to **Setup** → **Sharing Settings** → **New Sharing Rule**.
2. Add rules:
 - Share Leads among agents in the same region.
 - Share Bookings with Finance Manager.

10. Login Access Policies

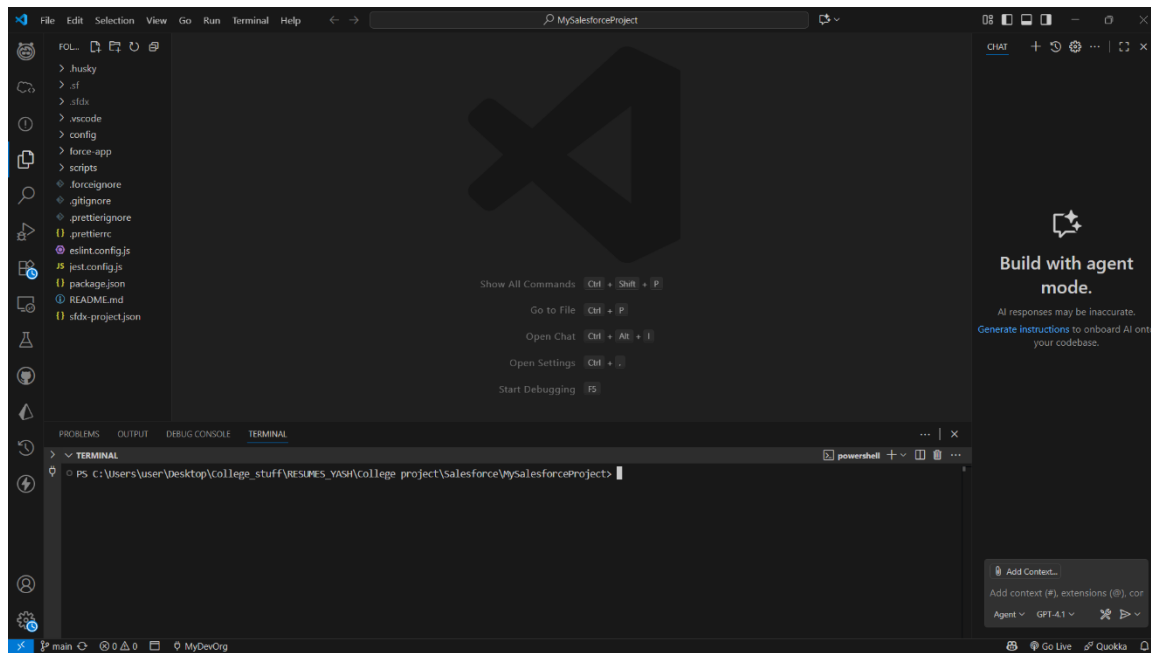
- Allow Managers/Admins 24/7 access.

2.10 Dev Org Setup

Description: Configure developer org for building and testing.

Steps:

- Use Developer Org created earlier.
- Install **Salesforce CLI (SFDX)** for metadata management.



2.11 Sandbox Usage

Description: Test changes before production (not in Dev Edition).

Steps:

- Developer Edition doesn't support sandboxes.
- In Enterprise Edition, use *Full Sandbox* for UAT.

2.12 Deployment Basics

Description: Move customizations between environments.

Steps:

1. Use **Change Sets** for simple deployments.
2. For advanced projects, use **Salesforce CLI (SFDX)**.
3. Path: Dev Org → Sandbox (UAT) → Production.