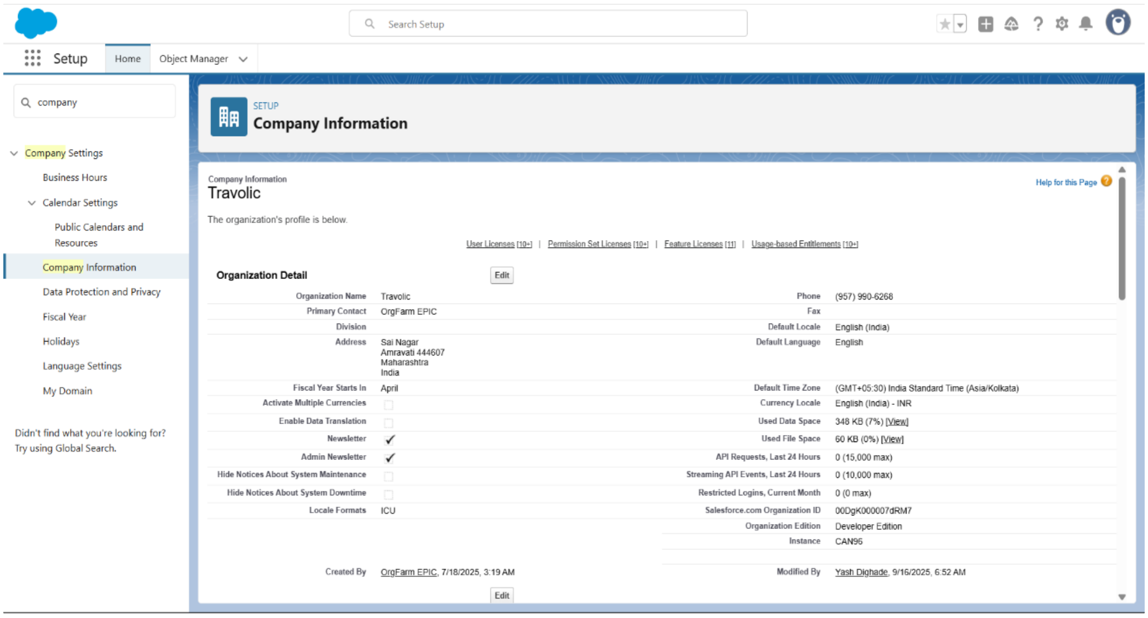
Project Title: Travolic Smart Travel Agency CRM

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.

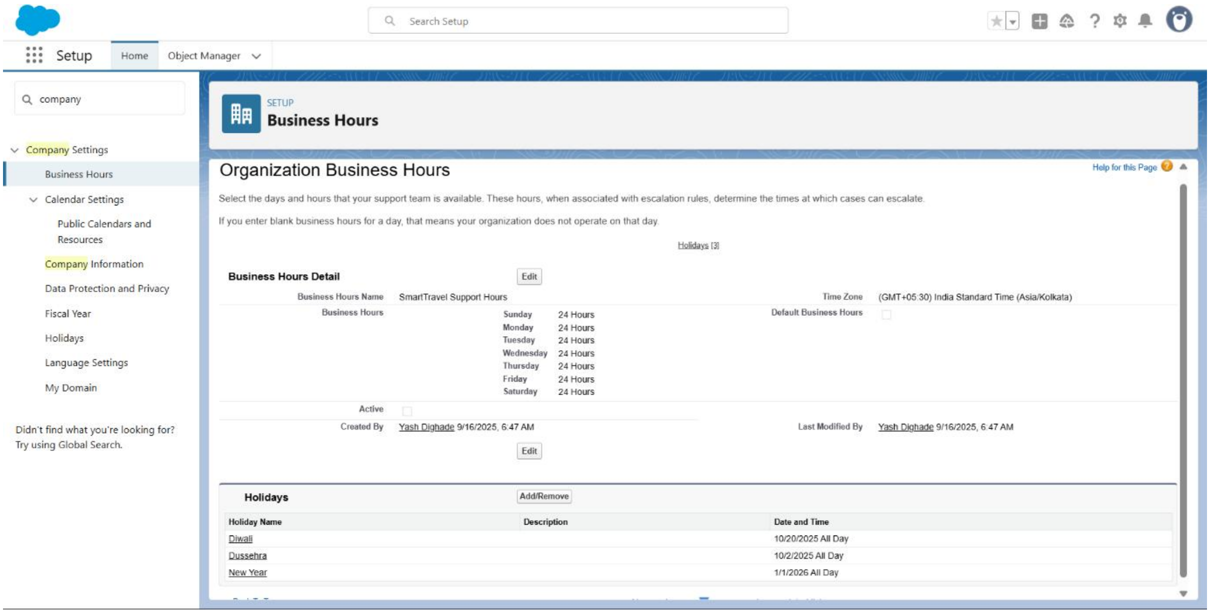


2.2 Business Hours & Holidays

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*

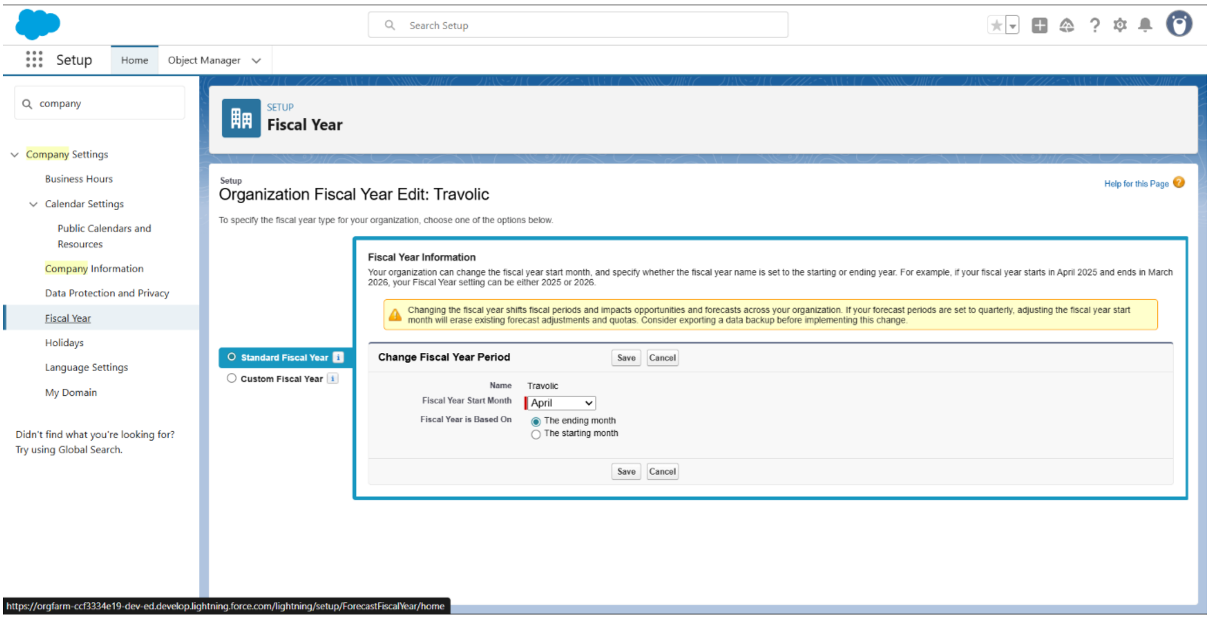


2.3 Fiscal Year Settings

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*.

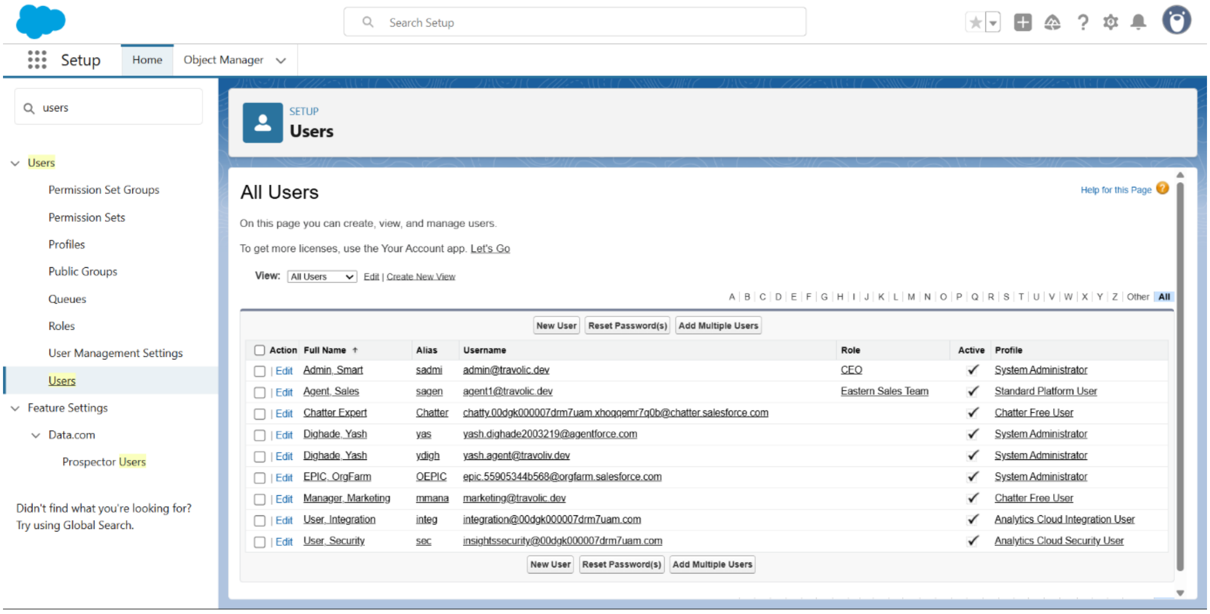


2.4 User Setup & Licenses

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)

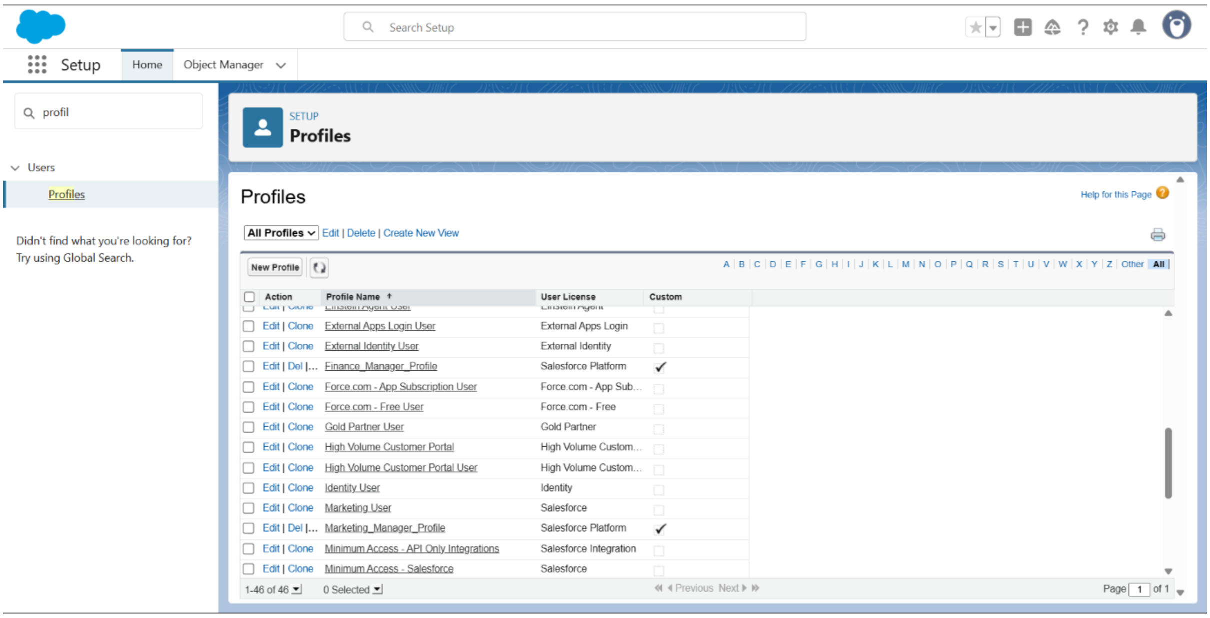
- Marketing Manager (Platform User License)



2.5 Profiles

Description: Define baseline access levels for users.
Steps:

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



2.6 Roles

Description: Define hierarchy for data visibility.
Steps:

1. Go to **Setup → Roles → Set Up Roles**.
2. Create hierarchy:
3. Admin

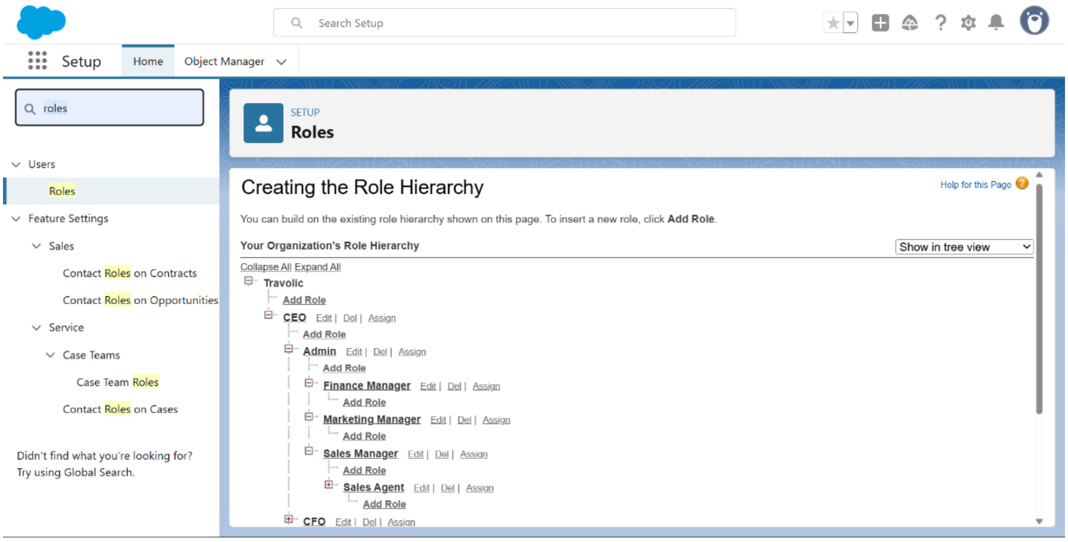
   ├── Sales Manager

   │ └── Sales Agent

   ├── Finance Manager

   └── Marketing Manager

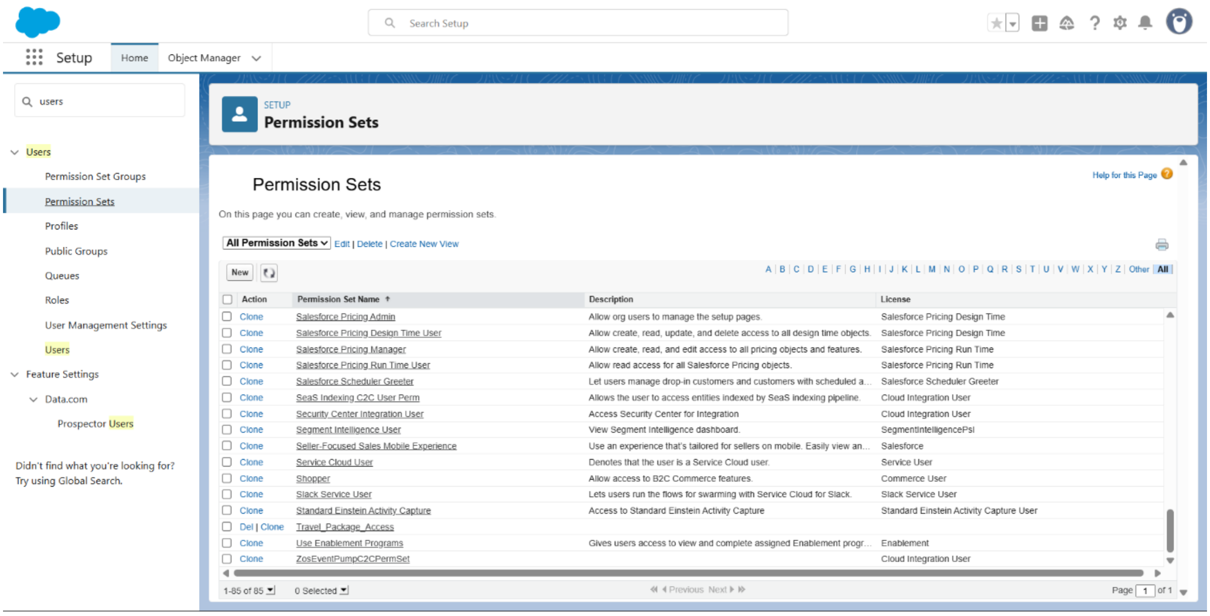
4. Assign users to roles.



2.7 Permission Sets

Description: Extend access beyond profiles.
Steps:

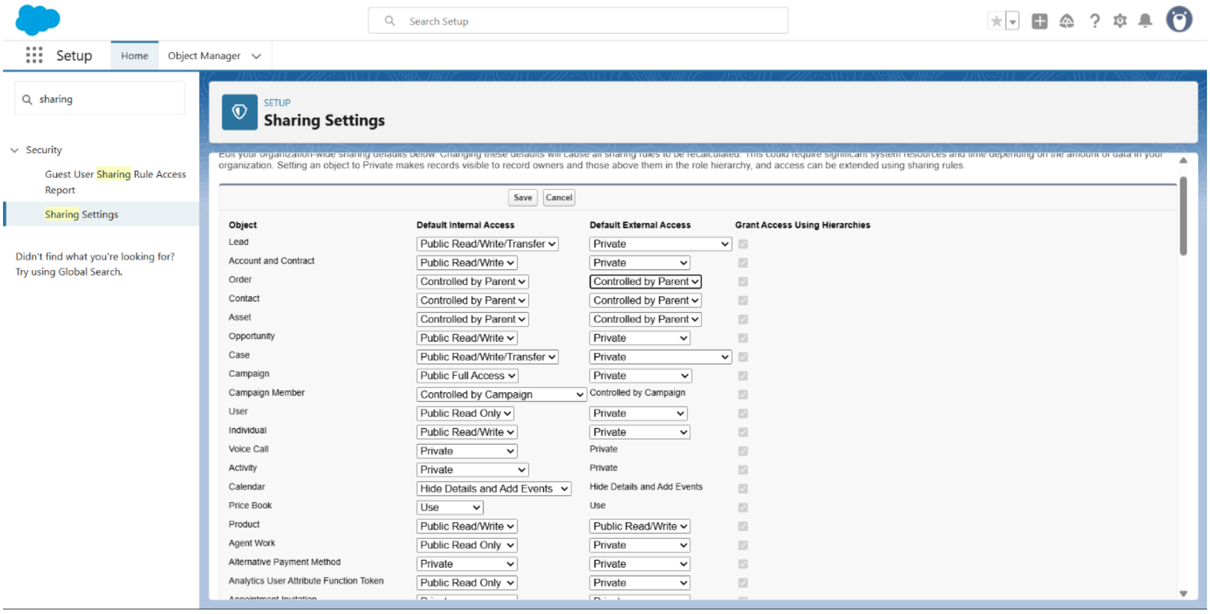
1. Go to **Setup → Permission Sets → New**.
2. Create:
   - *Travel_Package_Access* (for Sales Agents).
   - *Reports_Access* (for Managers).
3. Assign permission sets to users.



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.

---

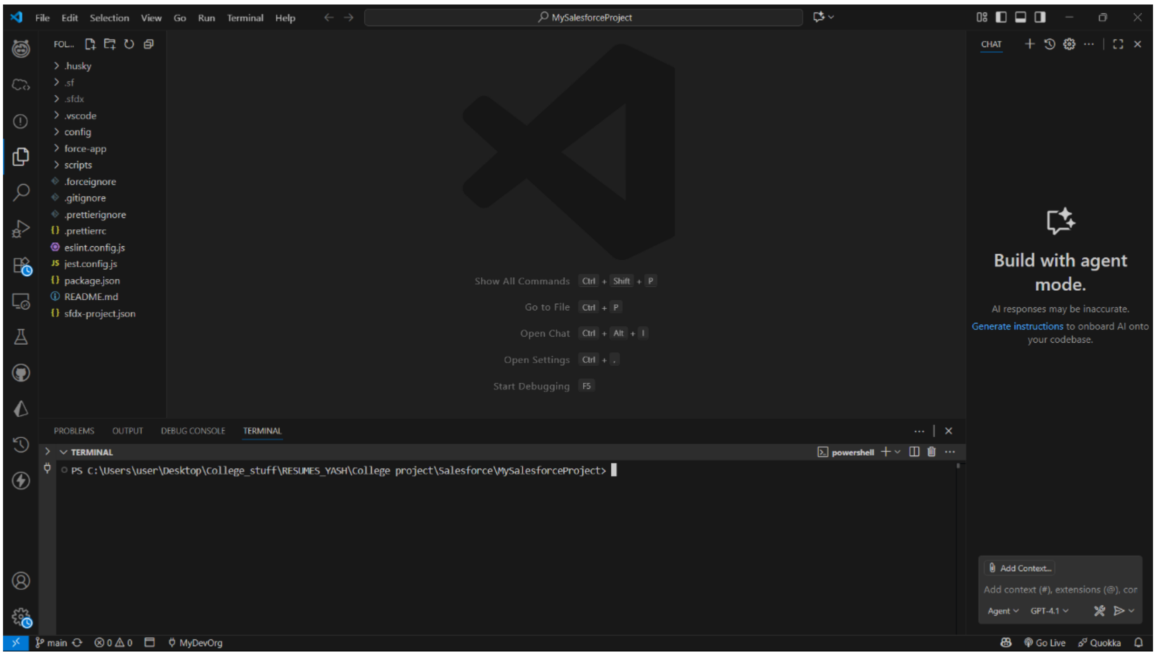
10. Login Access Policies

• 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.