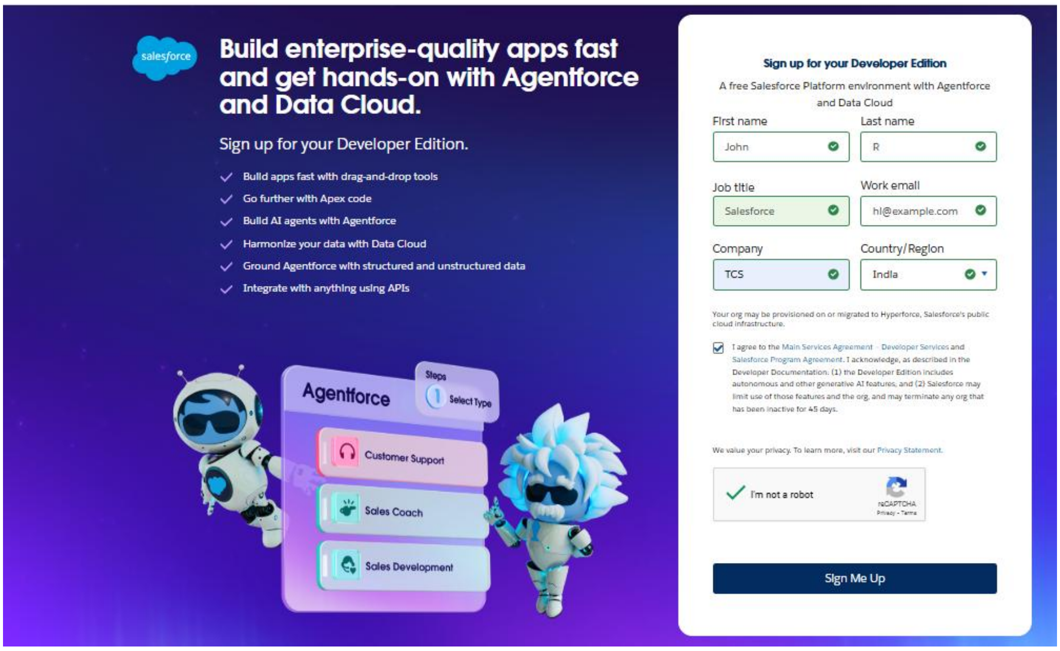
Phase 2: Org Setup & Configuration

1. Salesforce Editions:

- Use Developer Edition (https://developer.salesforce.com/signup).
  Fill in the details as shown in the image
  Click "Sign Me Up" (or similar button).
- Check your email inbox and verify your email by clicking the link Salesforce sends
- This edition supports custom objects, automation (Flows), dashboards, and Apex.



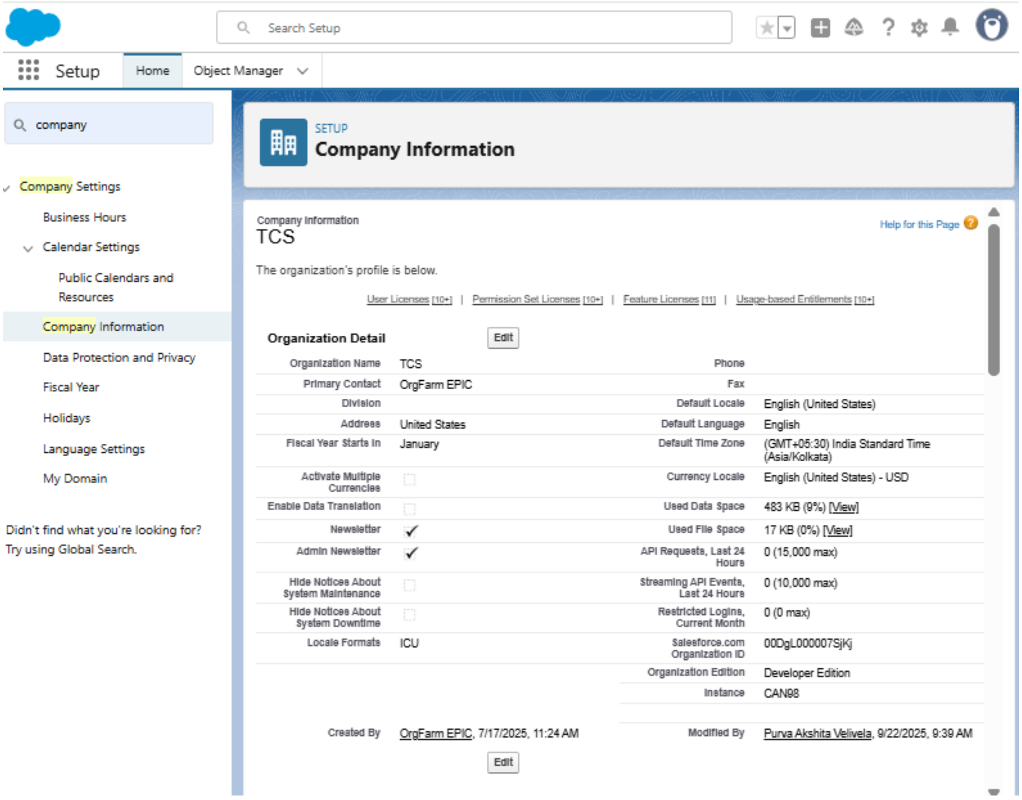
- Once verified, go to: 🔗 https://login.salesforce.com
- Enter your registered email and the password you set.
- You will be redirected to the Salesforce Lightning Experience Dashboard.

2. Company Profile Setup:

1. Go to Setup → Company Settings → Company Information.
2. Update details:
    - Company Name = Travel Agency Name (TCS)
    - Default Currency = INR (₹)
    - Default Time Zone = (GMT+05:30) India Standard Time

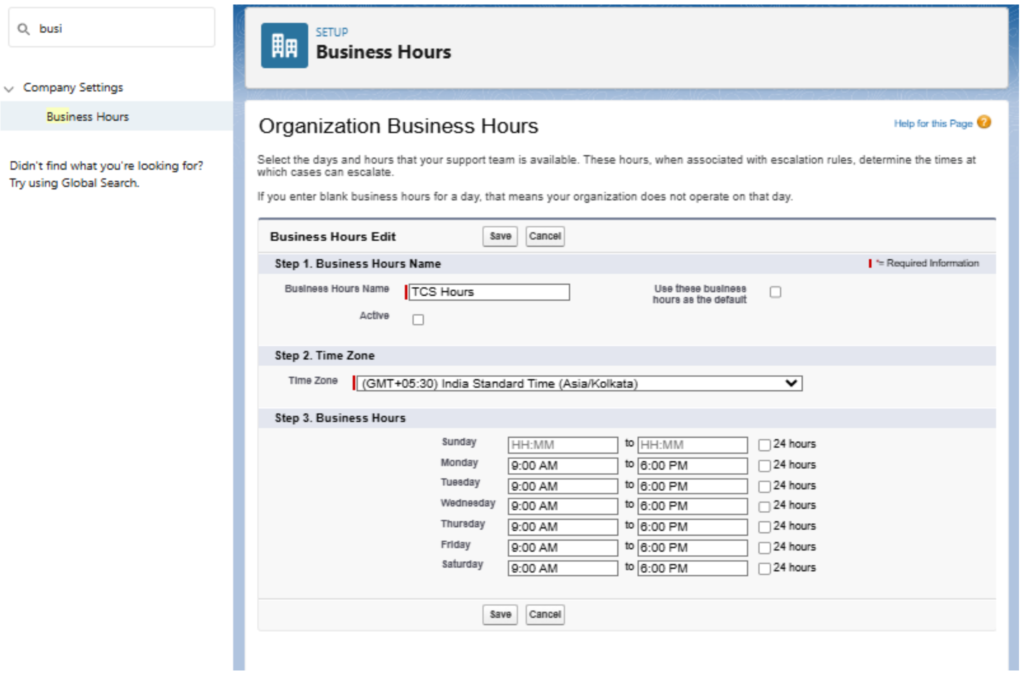
- Language = English (India)

3. Save.

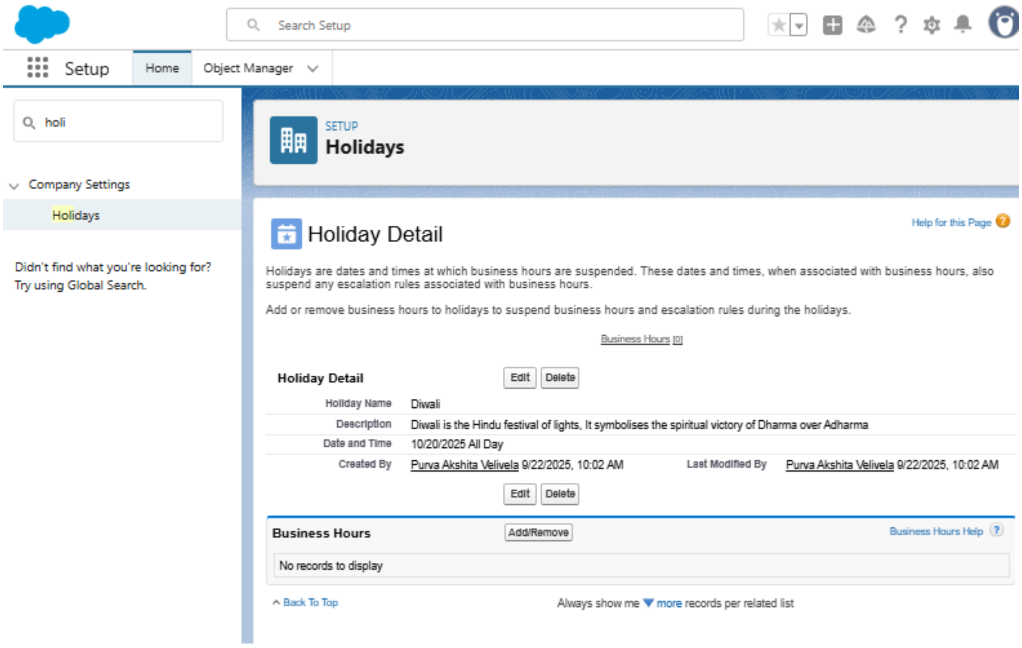


3. Business Hours & Holidays:

1. Go to Setup → Business Hours → New Business Hours.
   - Label: Agency Hours
   - Time Zone: IST
   - Mon–Sat: 9 AM – 6 PM
   - Sunday: Closed



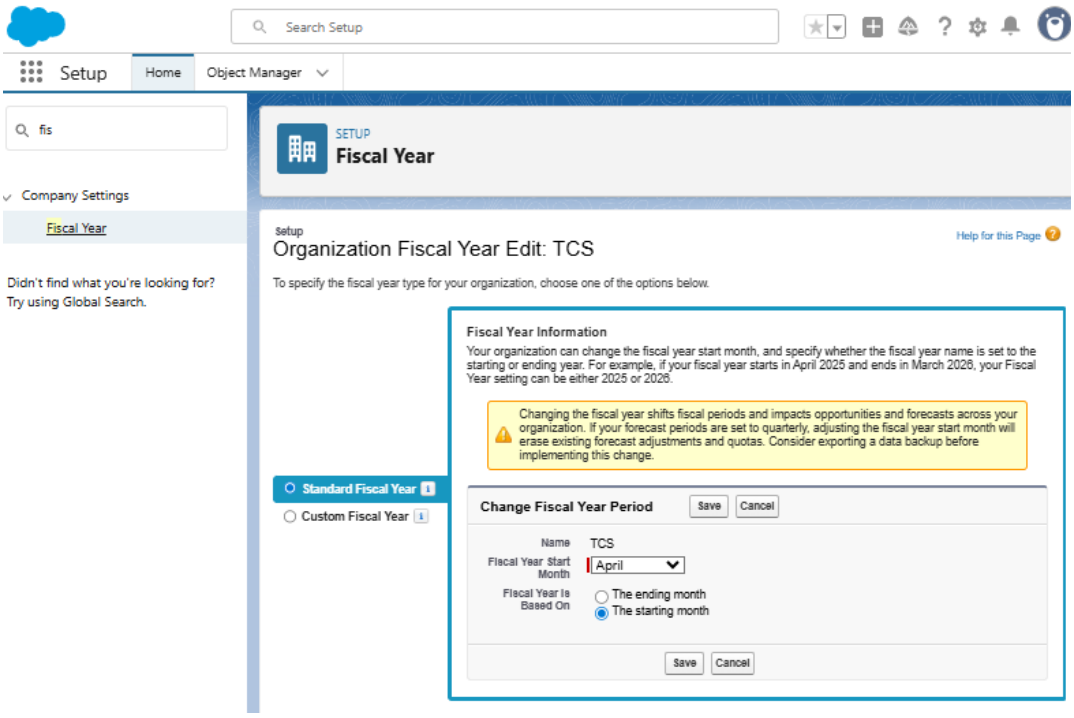
2. Go to Setup → Holidays → New Holiday.
   - Add holidays (e.g., Diwali, National Holidays).



4. Fiscal Year Settings:

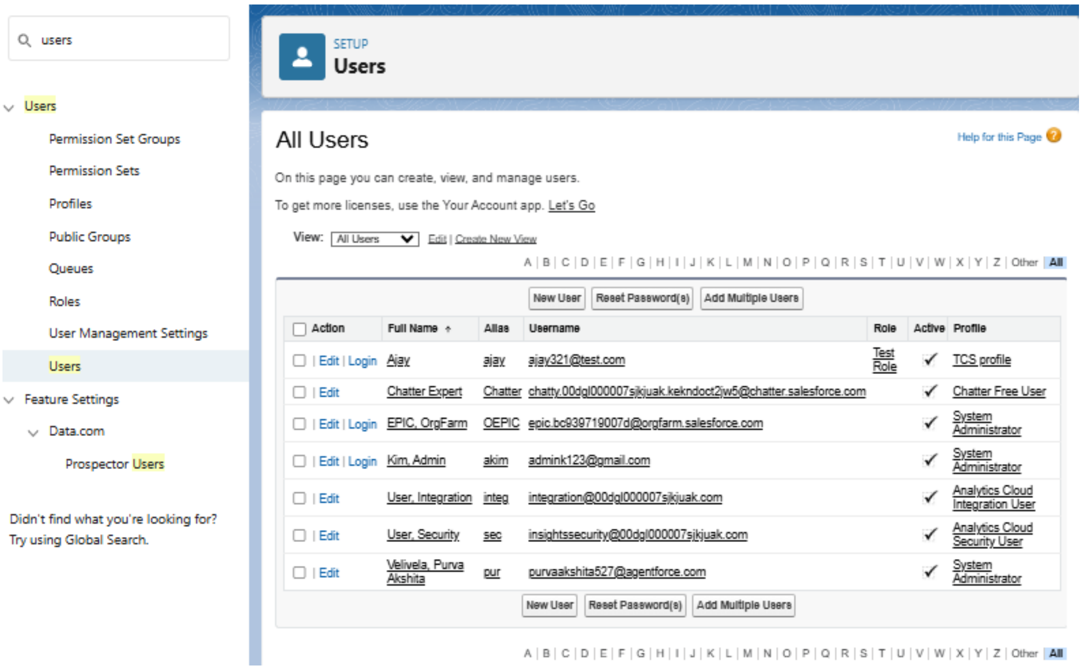
1. Go to **Setup → Company Settings → Fiscal Year**.
2. Select **Standard Fiscal Year**.

3. Set Start Month: April (for April–March cycle).
4. Save



5. User Setup & Licenses:

1. Go to Setup → Users → New User.
2. Create:
    - Admin (1 user) – System Administrator Profile
    - Agents (2–3 users) – Custom Agent Profile
    - Manager (1 user) – Custom Manager Profile
3. Assign Salesforce License → Salesforce Platform.

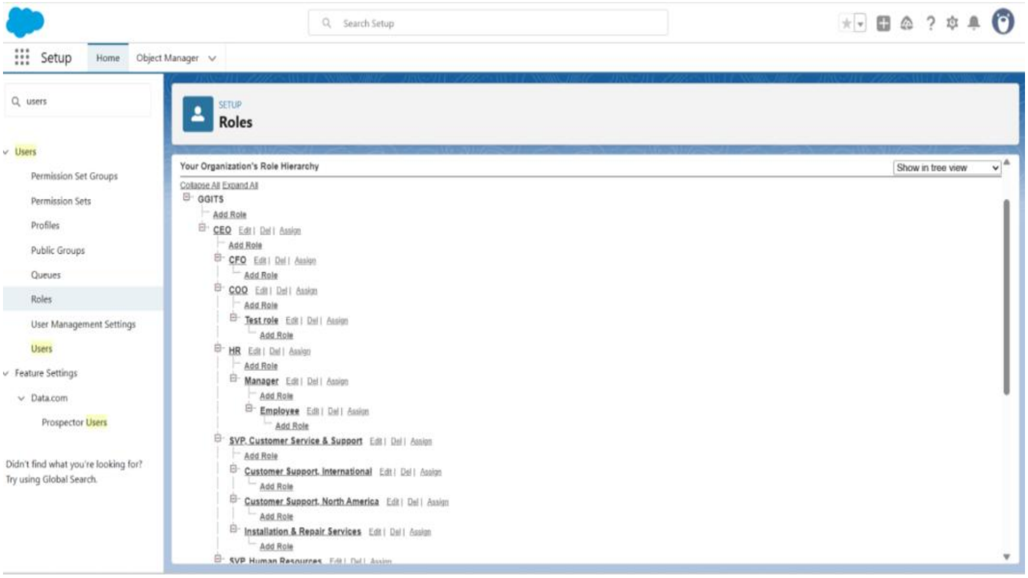


6. Profiles:

1. Go to Setup → Profiles → Clone Profile.
   - Clone *Standard User* to create Agent Profile.
   - Clone *Standard User* to create Manager Profile.
2. Configure:
   - Agent Profile → Access to Traveler, Trip, Booking, Payment (Read/Create/Edit).
   - Manager Profile → Full access to all objects + Reports/Dashboards.

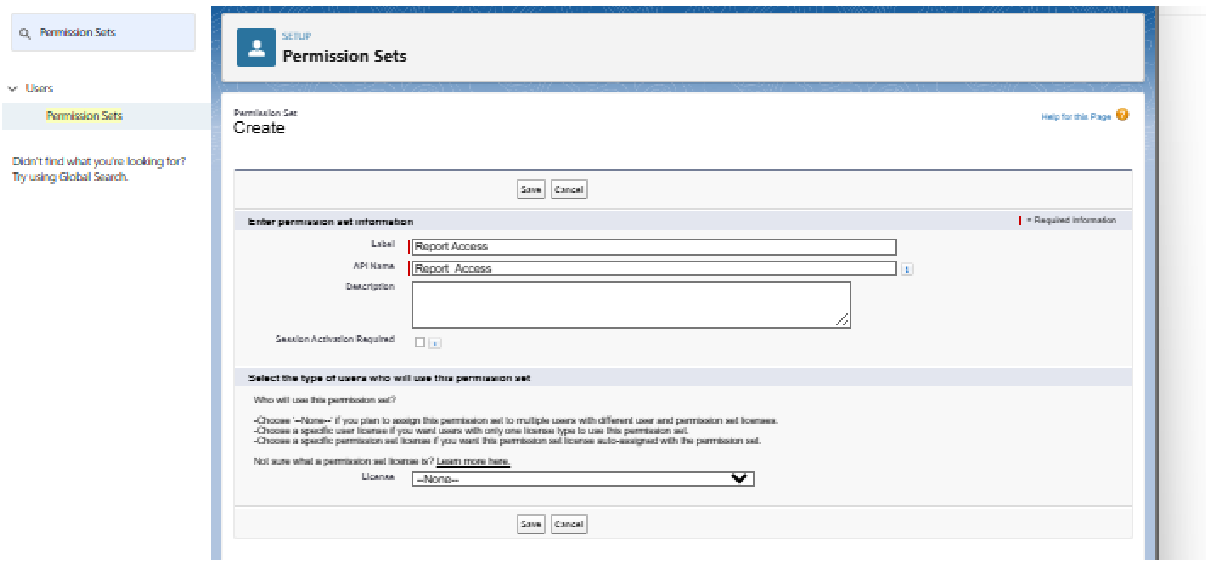
7. Roles:

1. Go to Setup → Roles → Set Up Roles.
2. Create hierarchy:
   - Manager (Top Role)
   - Agent (Child Role under Manager)
   - (Travelers are records, so no role needed).
3. Assign users to their respective roles.



8. Permission Sets:

1. Go to Setup → Permission Sets → New.
2. Create: Reports Access.
3. Add object permission for Reports & Dashboards.
4. Assign it to Agents (so they can view dashboards even if not in profile).



9. Organization-Wide Defaults (OWD):

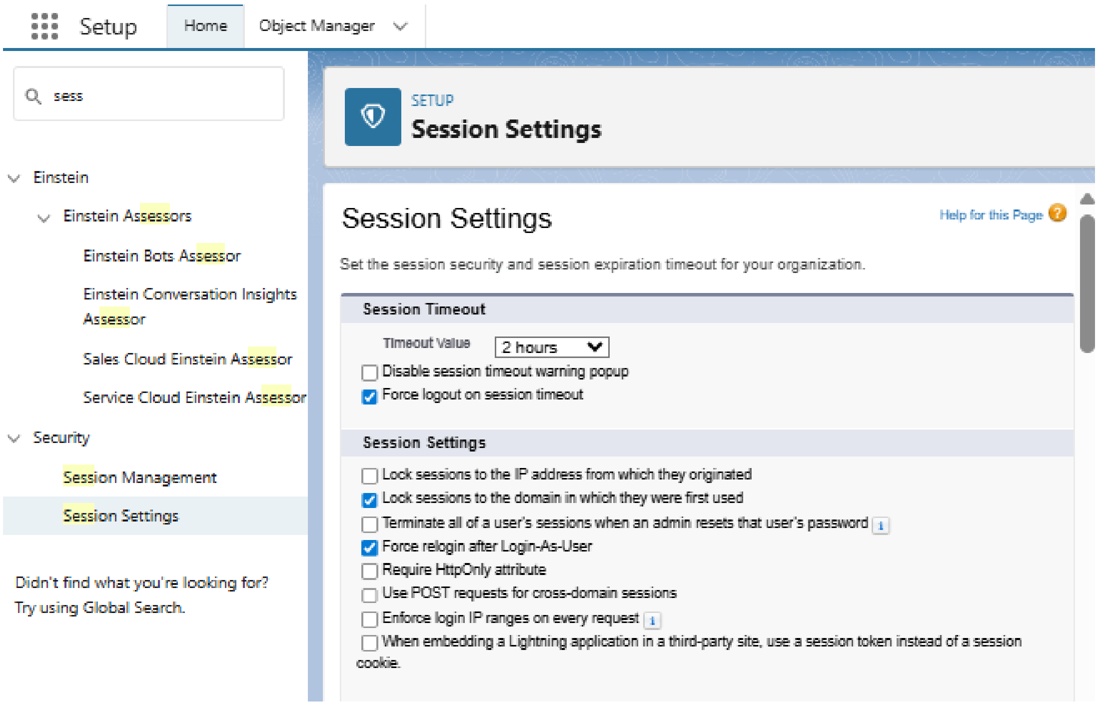
1. Go to Setup → Sharing Settings.
2. Set OWD:
   - Traveler → Public Read/Write
   - Trip → Public Read Only
   - Booking → Private
   - Payment → Private
3. Save.

10. Sharing Rules:

1. Go to Setup → Sharing Settings → Booking Sharing Rules → New.
2. Create rule:
   - Criteria = Booking Status = "Confirmed"
   - Share with: Role = Manager
   - Access: Read/Write
3. Repeat for Payment → Share with Manager Role.

11. Login Access Policies:

1. Go to **Setup → Session Settings**.
   - Session Timeout = 2 hours
   - Enforce IP restrictions (optional for stricter security).
2. Go to **Setup → Login Hours (Profiles)**.
   - Restrict login for Agents to business hours if required.



12. Dev Org Setup:

- Dev Org.is ready to build Objects, Fields, Flows, Reports, Dashboards.
- This org will be used for all the testing and configuration.