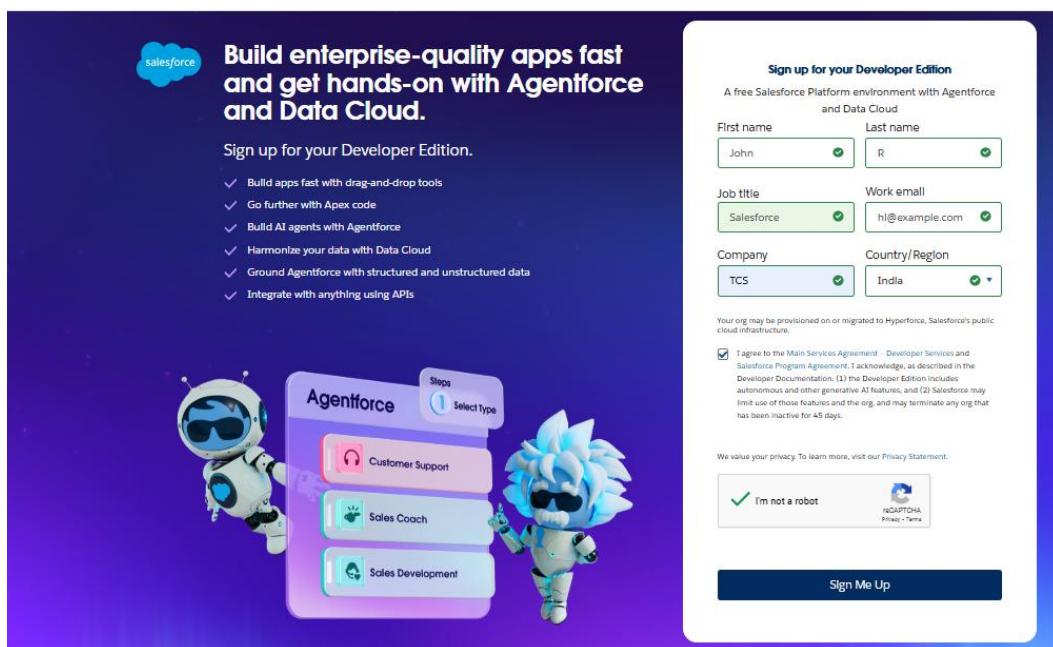


Phase 2: Org Setup & Configuration

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.

The screenshot shows the Salesforce Setup interface with the following details:

Company Information for **TCS**

Organization Detail (Edit button)

Organization Name	TCS	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (United States)
Address	United States	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (United States) - USD
Enable Data Translation	<input type="checkbox"/>	Used Data Space	483 KB (9%) [View]
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) [View]
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00Dg1.000007Sjk
		Organization Edition	Developer Edition
		Instance	CAN98

Created By: OrgFarm EPIC, 7/17/2025, 11:24 AM Modified By: Purva Akshita Velivelu, 9/22/2025, 9:39 AM

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.

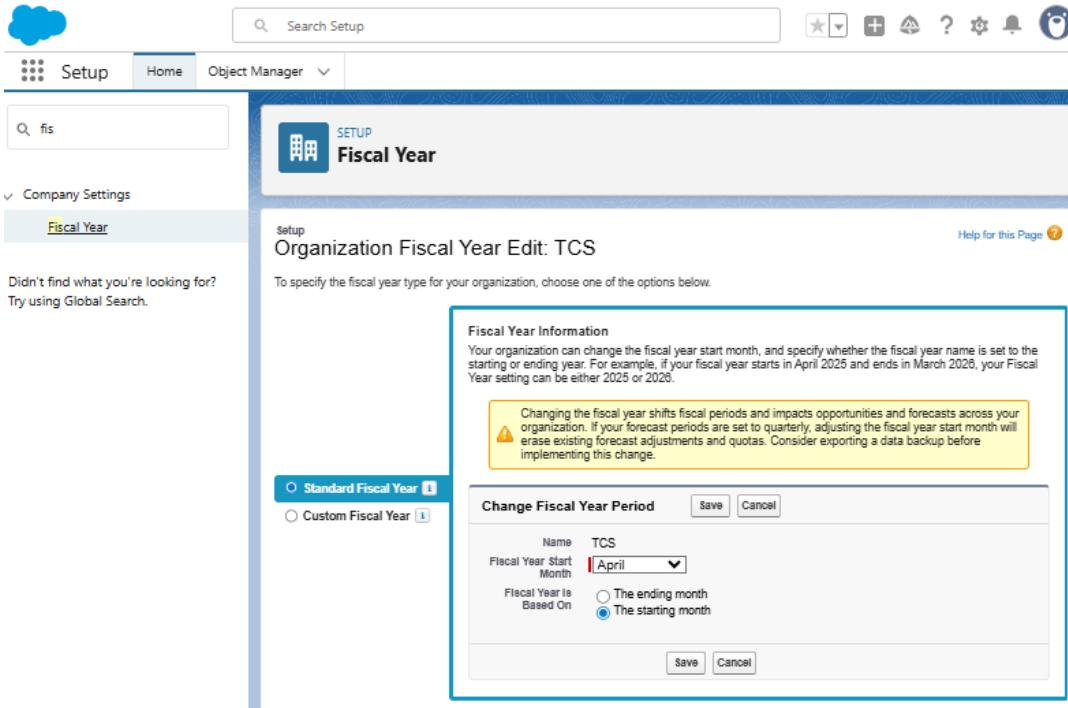
- o Add holidays (e.g., Diwali, National Holidays).

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.

All 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](#)

Action	Full Name	Alias	Username	Role	Active	Profile
Edit Login	Ajay	ajay	ajay321@test.com	Test Role	<input checked="" type="checkbox"/>	TCS profile
Edit	Chatter Expert	Chatter	chatty.00dg000007sikjuak.kekndoct2w5@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit Login	EPIC_OrgFarm	OEPI	epic.bc9397190007d@orgfarm.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
Edit Login	Kim.Admin	akim	admink123@gmail.com		<input checked="" type="checkbox"/>	System Administrator
Edit	User_Integration	integ	integration@00dg000007sikjuak.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User_Security	sec	insightssecurity@00dg000007sikjuak.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
Edit	Velivila_Purva_Akshita	pur	purvaakshita527@agentforce.com		<input checked="" type="checkbox"/>	System Administrator

6. Profiles:

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

7. Roles:

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

The screenshot shows the Salesforce Setup Roles page. On the left, there's a sidebar with navigation links like 'Permission Set Groups', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Prospector Users'. The main area displays a hierarchical tree titled 'Your Organization's Role Hierarchy' under 'OGITS'. The tree includes nodes for 'CEO', 'CFO', 'COO', 'TextRole', 'HR', 'Manager', 'Employee', 'SVP Customer Service & Support', 'Customer Support International', 'Customer Support North America', 'Installation & Repair Services', and 'SVP Human Resources'. Each node has 'Edit | Del | Assign' options.

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).

The screenshot shows the 'Permission Sets' Create page. It has a 'Permission Set Create' header with a 'Help for this Page' link. The main form is titled 'Enter permission set information'. It contains fields for 'Label' (set to 'Report Access'), 'API Name' (set to 'Report Access'), and 'Description'. Below these is a 'Selection Activation Required' checkbox. The next section, 'Select the type of users who will use this permission set', asks 'Who will use this permission set?'. It provides three options: 'Choose -None-' (selected), 'Choose a specific user license if you want users with only one license type to use this permission set.', and 'Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.' A note below says 'Not sure what a permission set license is? Learn more here.' A dropdown menu for 'License' shows '-None-'. At the bottom are 'Save' and 'Cancel' buttons.

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.

The screenshot shows the Salesforce Setup page with a search bar containing 'sess'. The left sidebar has sections for Einstein (Einstein Assessors, Einstein Bots Assessor, Einstein Conversation Insights Assessor, Sales Cloud Einstein Assessor, Service Cloud Einstein Assessor) and Security (Session Management, Session Settings). A message at the bottom says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Session Settings' under 'SETUP'. It includes a 'Session Timeout' section with a dropdown set to '2 hours' and checkboxes for 'Disable session timeout warning popup' (unchecked) and 'Force logout on session timeout' (checked). Below that is a 'Session Settings' section with several checkboxes: 'Lock sessions to the IP address from which they originated' (unchecked), 'Lock sessions to the domain in which they were first used' (checked), 'Terminate all of a user's sessions when an admin resets that user's password' (unchecked), 'Force relogin after Login-As-User' (checked), 'Require HttpOnly attribute' (unchecked), 'Use POST requests for cross-domain sessions' (unchecked), 'Enforce login IP ranges on every request' (unchecked), and 'When embedding a Lightning application in a third-party site, use a session token instead of a session cookie' (unchecked).

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.