

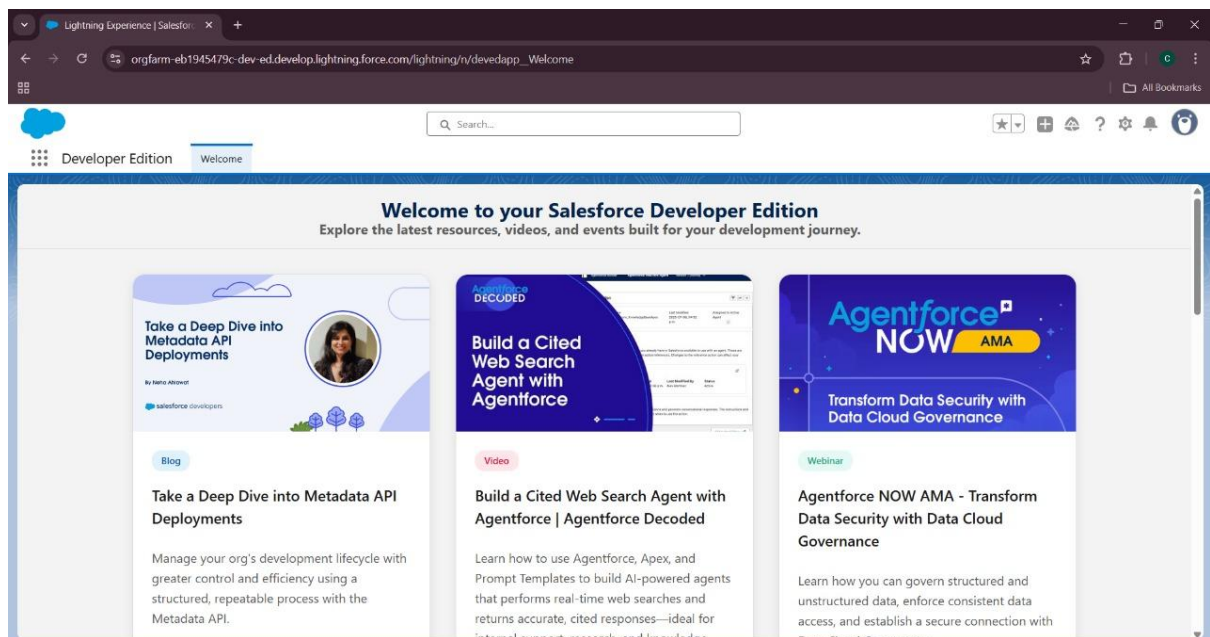
Phase 2: Org Setup & Configuration

Goal: Prepare Salesforce environment.

1. Salesforce Edition Setup

Procedure:

1. Log in to Salesforce Developer Edition.
2. Verify you have a Developer Org (free dev org).



3.Screenshot: Salesforce home page showing Developer Edition.

2. Company Profile Setup

Procedure:

1. Navigate to Setup → Company Settings → Company Information.
2. Update:

Company Name

Address

Default Time Zone

Currency (INR/USD depending on project)

3. Save changes

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar and a list of setup categories: Objects and Fields, Object Manager, Company Settings, Business Hours, Calendar Settings, Public Calendars and Resources, Company Information (highlighted), Data Protection and Privacy, Fiscal Year, Holidays, Language Settings, and My Domain. The main content area is titled 'Company Information' and displays the organization's profile. The profile includes fields for Organization Name, Primary Contact, Division, Address, 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, Phone, Fax, Default Locale, Default Language, 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 next to the Organization Name field. The bottom of the page shows the 'Created By' and 'Modified By' information.

| Organization Name | Primary Contact | Phone |
|---------------------------------------|-------------------------------------|-------|
| Toureae-Travel & Tourism Agency | OrgFarm EPIC | |
| Division | India | |
| Address | | |
| Fiscal Year Starts In | January | |
| 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 | |

Created By: OrgFarm EPIC, 9/18/2025, 9:50 PM
Modified By: Chidwala Tedi, 9/23/2025, 11:42 AM

3. Business Hours & Holidays

Procedure:

1. Go to Setup → Company Settings → Business Hours.
2. Click New Business Hours: o Name: Standard Hours o Working Hours: 8:00 AM – 8:00 PM
3. Click Save.
4. Navigate to Holidays → New Holiday.
5. Add public holidays (no reservations allowed).

The screenshot shows the Salesforce Setup interface for the 'Holidays' section. The left sidebar contains a search bar and a list of setup categories: Company Settings, Holidays (highlighted), and a search bar. The main content area is titled 'Holidays' and displays the 'Holiday Detail' form. The form includes fields for Holiday Name, Description, Date and Time, Created By, and Last Modified By. The 'Holiday Name' field is filled with 'Christmas'. The 'Description' field is filled with '12/25/2026 All Day'. The 'Date and Time' field is filled with '12/25/2026 All Day'. The 'Created By' field is filled with 'Chidwala Tedi'. The 'Last Modified By' field is filled with 'Chidwala Tedi'. The 'Business Hours' section is visible below the holiday details, showing 'No records to display'.

| Holiday Name | Description | Date and Time | Created By | Last Modified By |
|--------------|--------------------|--------------------|---------------|------------------|
| Christmas | 12/25/2026 All Day | 12/25/2026 All Day | Chidwala Tedi | Chidwala Tedi |

Business Hours: No records to display

4. Fiscal Year Settings

Procedure:

1. Navigate to Setup → Company Settings → Fiscal Year.
2. Select Standard Fiscal Year (Jan–Dec).
3. Save changes.

The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is open, and 'Fiscal Year' is selected under 'Company Settings'. The main content area is titled 'Organization Fiscal Year Edit: Tourease-Travel & Tourism Agency'. It contains a 'Fiscal Year Information' section with a warning about changing the fiscal year. Below this is the 'Change Fiscal Year Period' section, which has two radio buttons: 'Standard Fiscal Year' (selected) and 'Custom Fiscal Year'. The 'Standard Fiscal Year' section shows the 'Fiscal Year Start Month' as 'January' and 'Fiscal Year is Based On' as 'The ending month'.

5. User Setup & Licenses

Procedure:

1. Go to Setup → Users → Users → New User.
2. Create users with roles: Travel Admin, Travel Agent, .
3. Assign Salesforce Licenses.

The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is open, and 'Users' is selected under 'User Management Settings'. The main content area is titled 'All Users'. It contains a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several users, including 'Admin_Travel', 'Agent_Travel', 'Chatter_Expert', 'EPIC_OrgFarm', 'Officer_Finance', 'Tedia_Chiveta', 'User_Integration', and 'User_Security'. The 'User_Security' user is highlighted.

| Action | Full Name | Alias | Username | Role | Active | Profile |
|----------------------|------------------|---------|--|-----------------------|--------|----------------------------------|
| Edit | Admin_Travel | tadmi | traveladmin@gmail.com | CEO | ✓ | System Administrator |
| Edit | Agent_Travel | tagen | travelsagent@gmail.com | Channel Sales Team | ✓ | Custom: Sales Profile |
| Edit | Chatter_Expert | Chatter | chathy.00d10000080nfcaq.zapauadu7sc@chatter.salesforce.com | | ✓ | Chatter Free User |
| Edit | EPIC_OrgFarm | OEPIQ | epic.3cda2621ebbe@orgfarm.salesforce.com | | ✓ | System Administrator |
| Edit | Officer_Finance | fofi | financeofficer@gmail.com | Director Direct Sales | ✓ | Standard Platform User |
| Edit | Tedia_Chiveta | chi | chidwisa17909@agentforce.com | | ✓ | System Administrator |
| Edit | User_Integration | integ | integration@00d10000080nfcaq.com | | ✓ | Analytics Cloud Integration User |
| Edit | User_Security | sec | insightssecurity@00d10000080nfcaq.com | | ✓ | Analytics Cloud Security User |

6. Profiles

Procedure:

1. Navigate to Setup → Users → Profiles.
2. Create/modify profiles: travel agent, admin
3. Assign profiles to respective users.

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'profiles' entered. The main content area is titled 'Profiles' and shows the 'Travel Agent' profile. Below the title, there is a section for 'Page Layouts' with a table listing various layouts and their assignments.

| Standard Object Layouts | Global | Location Group |
|-------------------------|--|--|
| Global | Global Layout [View Assignment] | Location Group [View Assignment] |
| Email Application | Not Assigned [View Assignment] | Location Group Assignment [View Assignment] |
| Home Page Layout | Home Page Default [View Assignment] | Macro [View Assignment] |
| Account | Account Layout [View Assignment] | Object Milestone [View Assignment] |

7. Roles

Procedure:

1. Navigate to Setup → Users → Roles → Set Up Roles.
2. Create Role Hierarchy: Admin -> travel agent
3. Assign roles to users.

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'roles' entered. The main content area is titled 'Roles' and shows a 'Creating the Role Hierarchy' section. Below this, there is a diagram showing the role hierarchy for 'Toureaase-Travel & Tourism Agency'.

```
graph TD
    CEO[CEO] --> Admin[Admin]
    Admin --> TravelAgent[Travel Agent]
    TravelAgent --> AddRole[Add Role]
```

8. Permission Sets

Procedure:

1. Go to Setup → Users → Permission Sets → New.
2. Create a permission set for additional access.
3. Assign to specific users.

The screenshot shows the Salesforce Setup interface for the 'Profiles' page. The left sidebar contains a search bar with 'profile' and a list of navigation items: 'Users' and 'Profiles'. The main content area is titled 'SETUP Profiles' and includes several sections: 'Data Share Targets' with checkboxes for 'Data Share Target Connection' and 'Data Share Target Definition'; 'Custom Object Permissions' with tables for 'Bookings' and 'Travel Packages' showing permissions for 'Read', 'Create', 'Edit', 'Delete', 'View All Records', 'Modify All Records', and 'View All Fields'; 'Session Settings' with options for 'Session Times Out After' (2 hours of inactivity), 'Separate Experience Cloud site and Salesforce login authentication', 'Relax login IP restrictions', 'Skip employee device activation during Experience Cloud site login', and 'Allow OAuth for employees'; and 'Password Policies' with settings for 'User passwords expire in' (90 days), 'Enforce password history' (3 passwords remembered), and 'Minimum password length' (8).

9. Org-Wide Defaults (OWD)

Procedure:

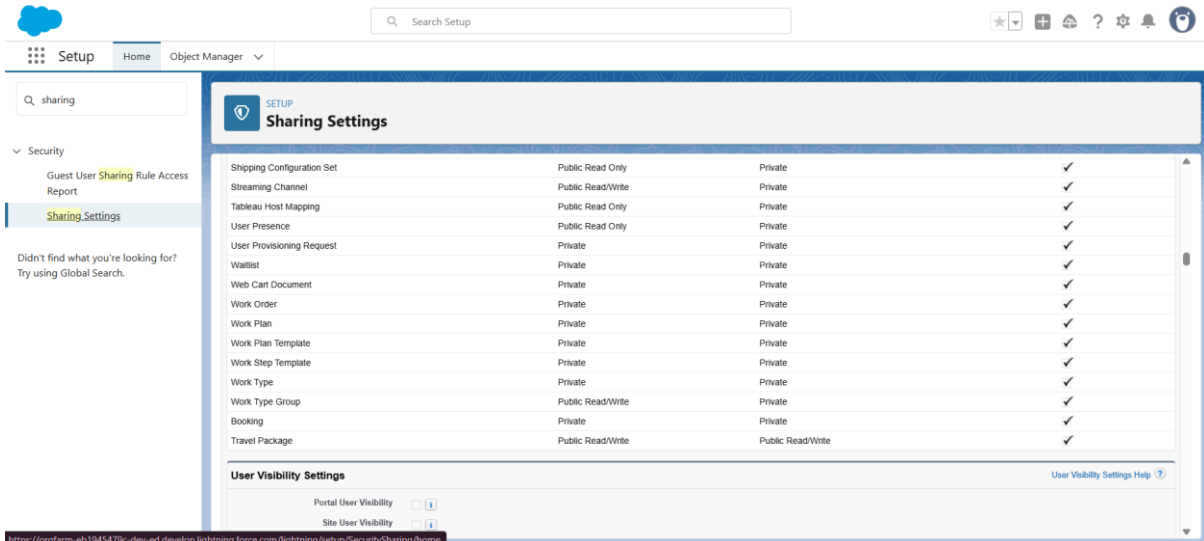
1. Navigate to Setup → Security → Sharing Settings.
2. Set Travel package object to Public Read Only.
3. Set Booking object to Private.
4. Save changes.

The screenshot shows the Salesforce Setup interface for the 'Sharing Settings' page. The left sidebar contains a search bar with 'sharing' and a list of navigation items: 'Security' and 'Sharing Settings'. The main content area is titled 'SETUP Sharing Settings' and includes several sections: 'Object Sharing' with a table of objects and their sharing settings (e.g., 'Web Cart Document' is Private, 'Work Order' is Private, 'Work Plan' is Private, 'Work Plan Template' is Private, 'Work Step Template' is Private, 'Work Type' is Private, 'Work Type Group' is Public Read/Write, 'Booking' is Private, 'Travel Package' is Public Read/Write); 'User Visibility Settings' with checkboxes for 'Portal User Visibility' and 'Site User Visibility'; and 'Other Settings' with checkboxes for 'Standard Report Visibility', 'Manual User Record Sharing', 'Manager Groups', and 'Minimize the number of roles created'. At the bottom, there are 'Save' and 'Cancel' buttons.

10. Sharing Rules

Procedure:

1. In Sharing Settings, click New Sharing Rule for reservations.
2. Define criteria: e.g., make Booking visible to User and admin.
3. Save.



The screenshot shows the Salesforce Setup interface. The left sidebar contains the 'Setup' menu with 'Home' and 'Object Manager' options. The main content area is titled 'Sharing Settings' and displays a table of sharing rules. The table has three columns: 'Object', 'Sharing Method', and 'Sharing Model'. The 'Object' column lists various Salesforce objects, and the 'Sharing Model' column shows the sharing settings for each object. The 'Sharing Method' column is currently empty. The 'Sharing Model' column shows 'Public Read Only' for 'Shipping Configuration Set', 'Public Read/Write' for 'Streaming Channel', 'Public Read Only' for 'Tableau Host Mapping', 'Public Read Only' for 'User Presence', 'Private' for 'User Provisioning Request', 'Private' for 'Waitlist', 'Private' for 'Web Cart Document', 'Private' for 'Work Order', 'Private' for 'Work Plan', 'Private' for 'Work Plan Template', 'Private' for 'Work Step Template', 'Private' for 'Work Type', 'Public Read/Write' for 'Work Type Group', 'Private' for 'Booking', and 'Public Read/Write' for 'Travel Package'. All objects have a checkmark in the 'Sharing Model' column. Below the table, there are 'User Visibility Settings' for 'Portal User Visibility' and 'Site User Visibility', both set to 'On'. A 'User Visibility Settings Help' link is also present.

| Object | Sharing Method | Sharing Model |
|----------------------------|----------------|-------------------|
| Shipping Configuration Set | | Public Read Only |
| Streaming Channel | | Public Read/Write |
| Tableau Host Mapping | | Public Read Only |
| User Presence | | Public Read Only |
| User Provisioning Request | | Private |
| Waitlist | | Private |
| Web Cart Document | | Private |
| Work Order | | Private |
| Work Plan | | Private |
| Work Plan Template | | Private |
| Work Step Template | | Private |
| Work Type | | Private |
| Work Type Group | | Public Read/Write |
| Booking | | Private |
| Travel Package | | Public Read/Write |

User Visibility Settings

Portal User Visibility ☒ [Help](#)

Site User Visibility ☒ [Help](#)

[User Visibility Settings Help](#)