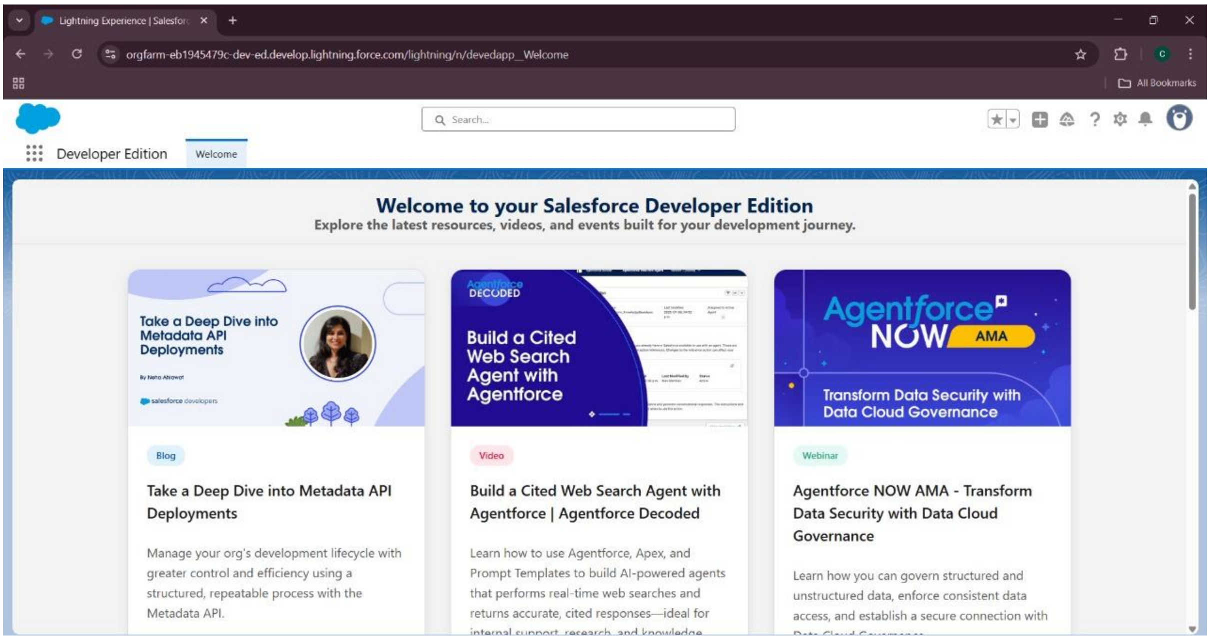
Phase 2: Org Setup & Configuration

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:

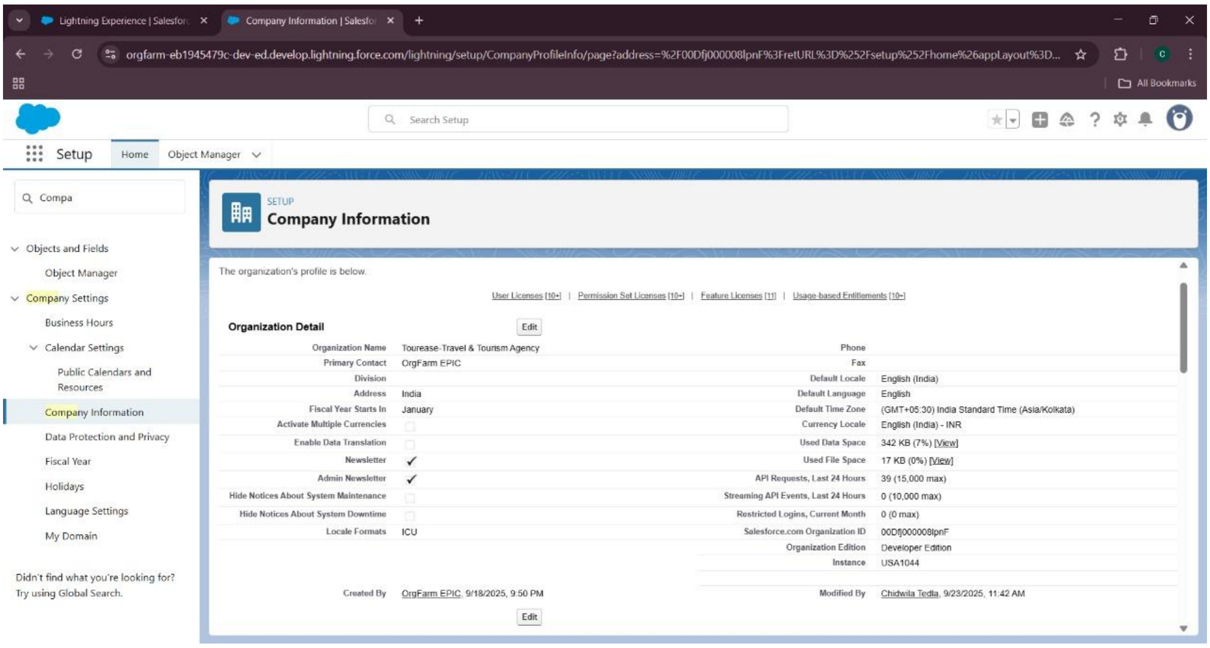
   Company Name

   Address

   Default Time Zone

   Currency (INR/USD depending on project)

3. Save changes



3. Business Hours & Holidays

Procedure:

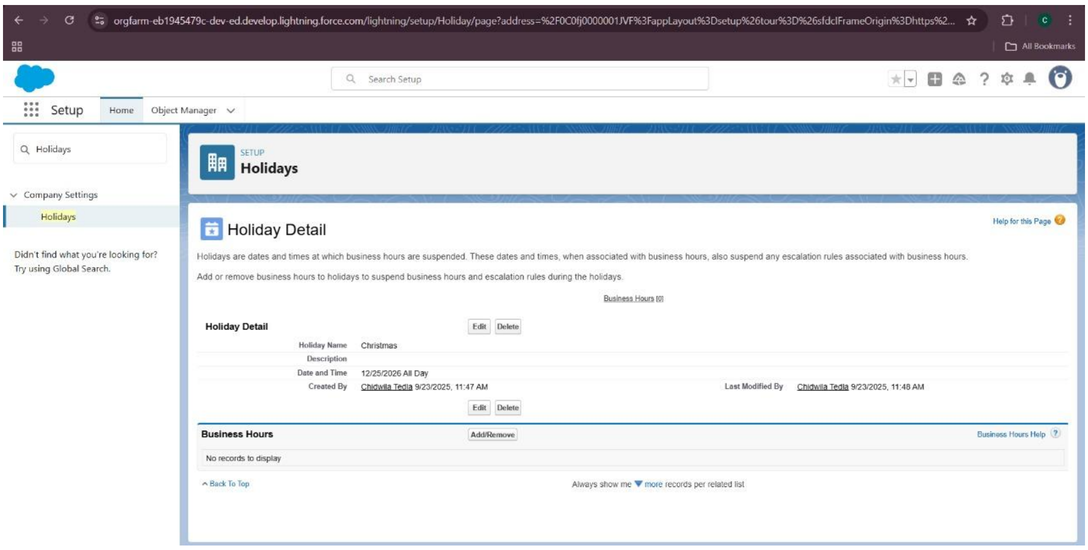
1. Go to Setup → Company Settings → Business Hours.

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.

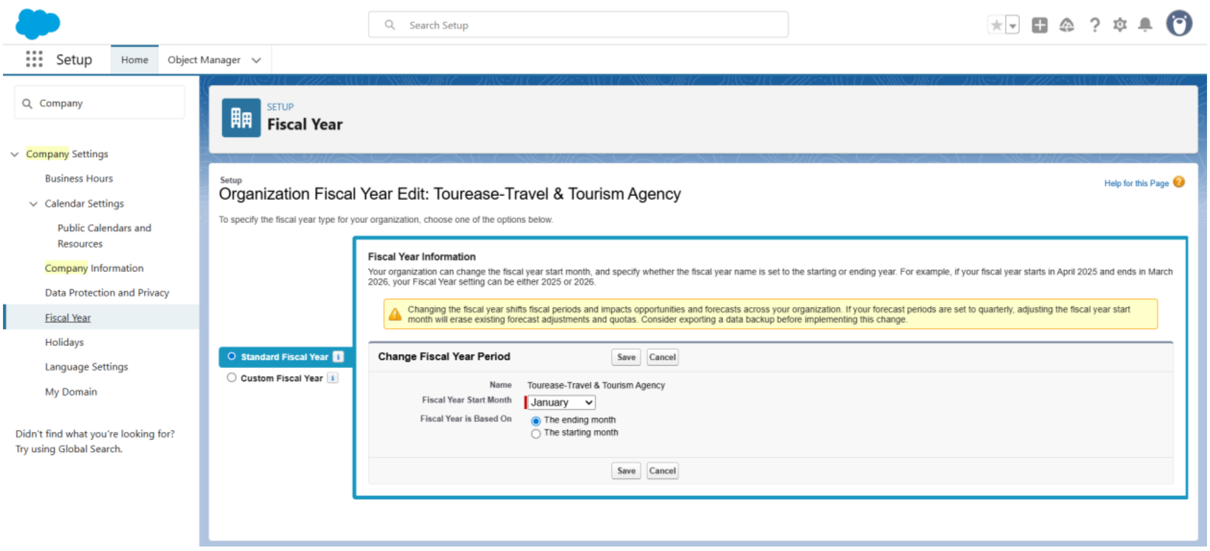
5. Add public holidays (no reservations allowed).



4. Fiscal Year Settings

Procedure:

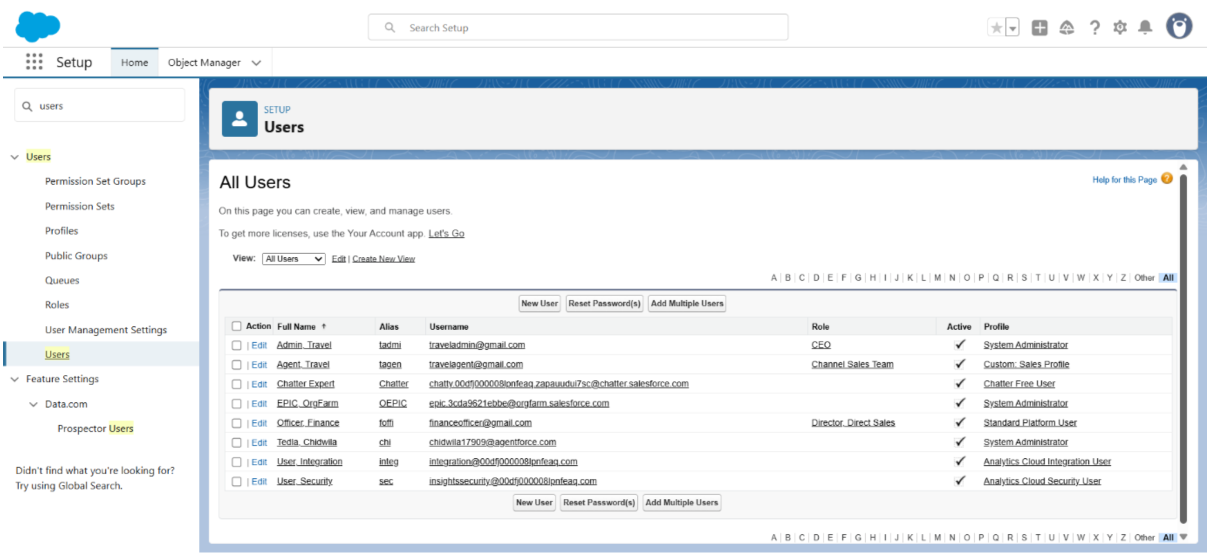
1. Navigate to Setup → Company Settings → Fiscal Year.
2. Select Standard Fiscal Year (Jan–Dec).
3. Save changes.



5. User Setup & Licenses

Procedure:

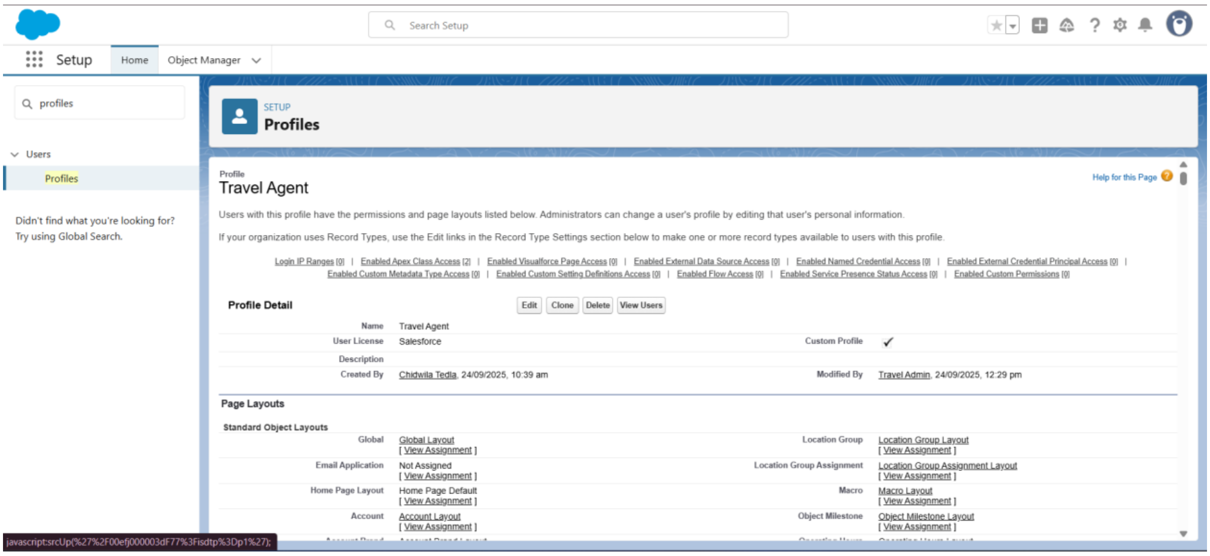
1. Go to Setup → Users → Users → New User.
2. Create users with roles:Travel Admin,Travel Agent,.
3. Assign Salesforce Licenses.



6. Profiles

Procedure:

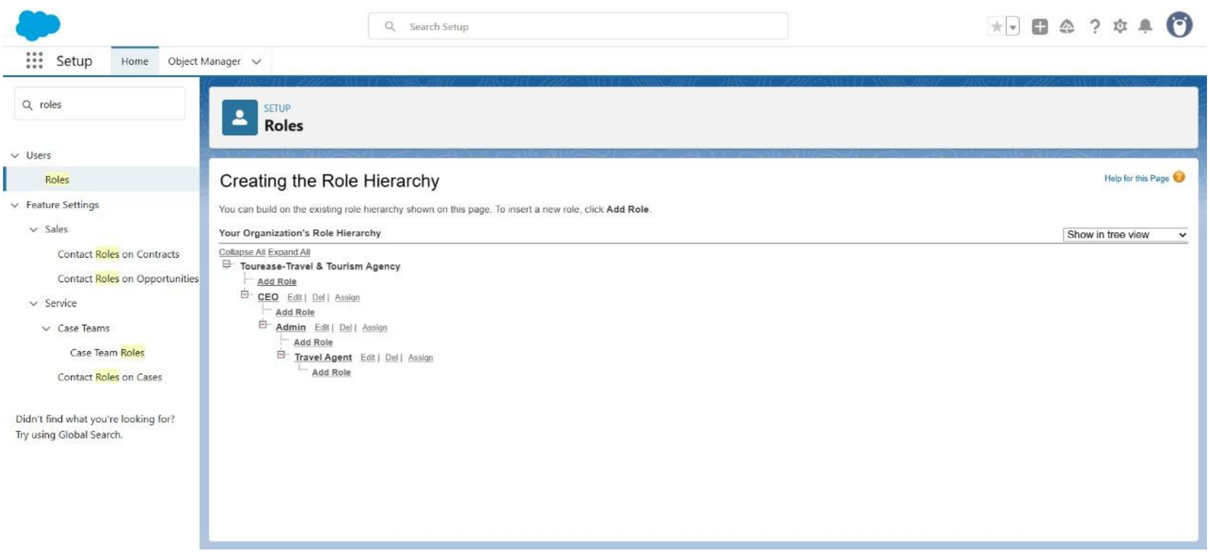
1. Navigate to Setup → Users → Profiles.
2. Create/modify profiles: travel agent,admin
3. Assign profiles to respective users.



7. Roles

Procedure:

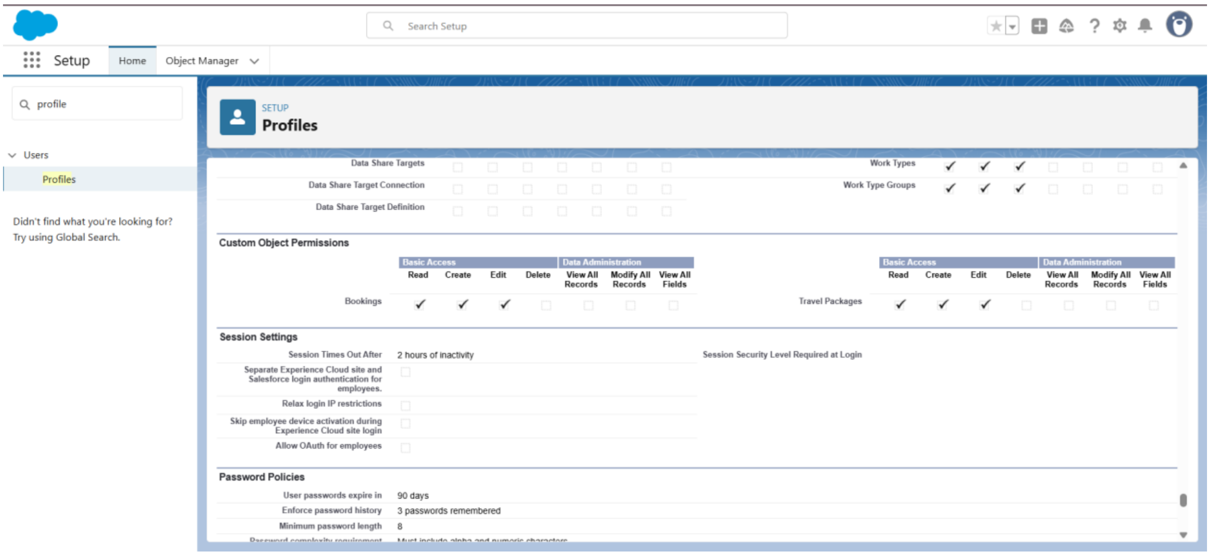
1. Navigate to Setup → Users → Roles → Set Up Roles.
2. Create Role Hierarchy: Admin ->travel agent
3. Assign roles to users.



8. Permission Sets

Procedure:

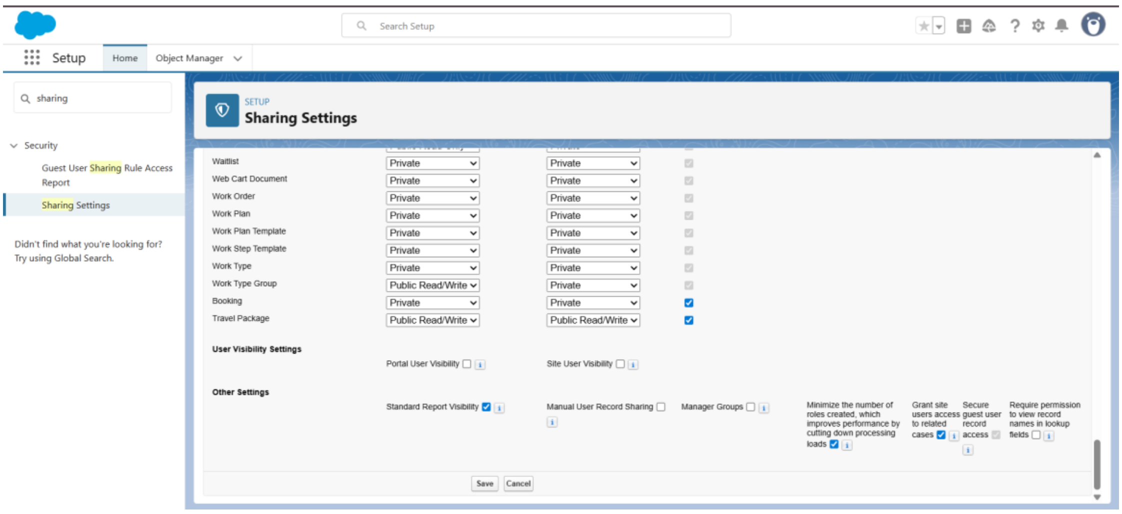
1. Go to Setup → Users → Permission Sets → New.
2. Create a permission set for additional access.
3. Assign to specific users.



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.



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.