

Phase 2: Org Setup & Configuration

(Travel & Tourism Booking System in Salesforce)

1. Salesforce Edition

- Use a **Salesforce Developer Org** (free, Enterprise Edition features).
- If working in a team → create **Sandboxes** for testing.

2. Company Profile Setup

- Set **Company Information**: Travel Agency name, address, primary contact.
- Configure **Default Currency** = INR / USD (based on requirement).
- Enable **Multiple Currencies** if customers come from different countries.

The screenshot shows the Salesforce Setup interface for a Developer Org. The left sidebar contains a search bar with 'company' and a list of setup categories: Company Settings, Calendar Settings, Company Information (selected), Data Protection and Privacy, Fiscal Year, Holidays, Language Settings, and My Domain. The main content area is titled 'Company Information' and shows the profile for 'Tourease-Travel & Tourism Agency'. It includes an 'Edit' button and a table of organization details.

Organization Detail	
Organization Name	Tourease-Travel & Tourism Agency
Primary Contact	OrgFarm EPIC
Phone	
Fax	
Default Locale	English (India)
Default Language	English
Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Currency Locale	English (India) - INR
Used Data Space	376 KB (7%) View
Used File Space	2.8 MB (14%) View
API Requests, Last 24 Hours	0 (15,000 max)
Streaming API Events, Last 24 Hours	0 (10,000 max)
Restricted Logins, Current Month	0 (0 max)
Salesforce.com Organization ID	000f000000bprf
Organization Edition	Developer Edition
Instance	USA1044

3. Business Hours & Holidays

- Business Hours: Mon–Sat, 9:00 AM – 9:00 PM.
- Add public holidays (e.g., Christmas, New Year) → prevents bookings on those days.

Organization Business Hours

Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate.

If you enter blank business hours for a day, that means your organization does not operate on that day.

Business Hours Detail

Business Hours Name	Travel Agency Hours	Time Zone
Business Hours	Sunday: 24 Hours Monday: 9:00 AM to 9:00 PM Tuesday: 9:00 AM to 9:00 PM Wednesday: 9:00 AM to 9:00 PM Thursday: 9:00 AM to 9:00 PM Friday: 9:00 AM to 9:00 PM Saturday: 9:00 AM to 9:00 PM	(GMT+05:30) India Standard Time (Asia/Kolkata)

Holidays

Holiday Name	Description	Date and Time
Christmas		12/25/2026 All Day

4. Fiscal Year Settings

- Standard Fiscal Year (Jan–Dec).
- If reporting follows April–March (common in India) → set Custom Fiscal Year.

Organization Fiscal Year Edit: Tourease-Travel & Tourism Agency

To specify the fiscal year type for your organization, choose one of the options below.

Fiscal Year Information

Your organization can change the fiscal year start month, and specify whether the fiscal year name is set to the starting or ending year. For example, if your fiscal year starts in April 2025 and ends in March 2026, your Fiscal Year setting can be either 2025 or 2026.

Changing the fiscal year shifts fiscal periods and impacts opportunities and forecasts across your organization. If your forecast periods are set to quarterly, adjusting the fiscal year start month will erase existing forecast adjustments and quotas. Consider exporting a data backup before implementing this change.

Change Fiscal Year Period

☒ Standard Fiscal Year
☐ Custom Fiscal Year

Name: Tourease-Travel & Tourism Agency

Fiscal Year Start Month: January

Fiscal Year is Based On:

☒ The ending month

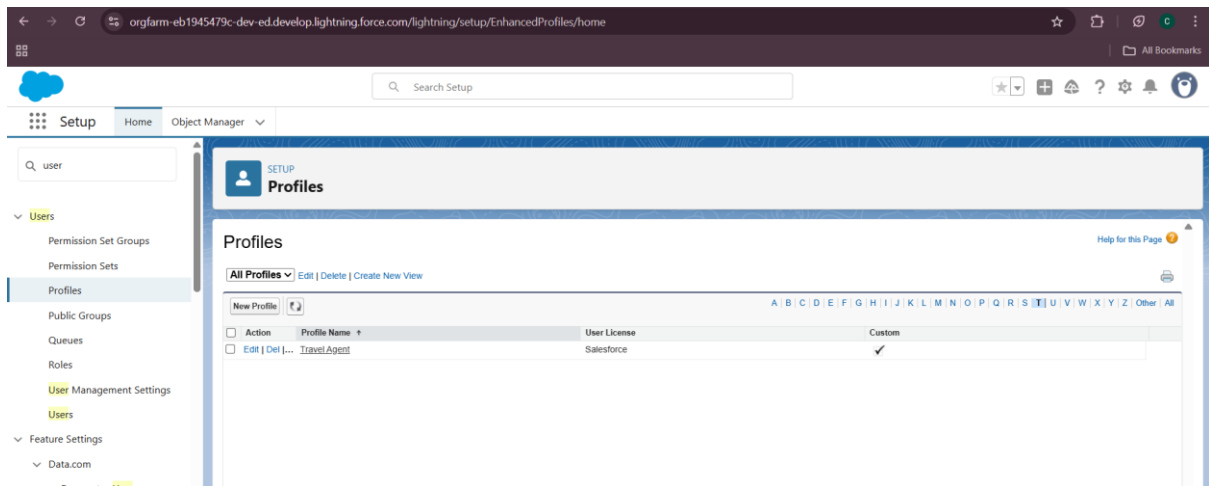
☐ The starting month

5. User Setup & Licenses

- Create users:
 - Travel Admin (System Administrator License).
 - Travel Agent (Salesforce Platform License).
 - Finance Officer (Salesforce Platform License).
 - Customer (Community/Experience Cloud License for portal).

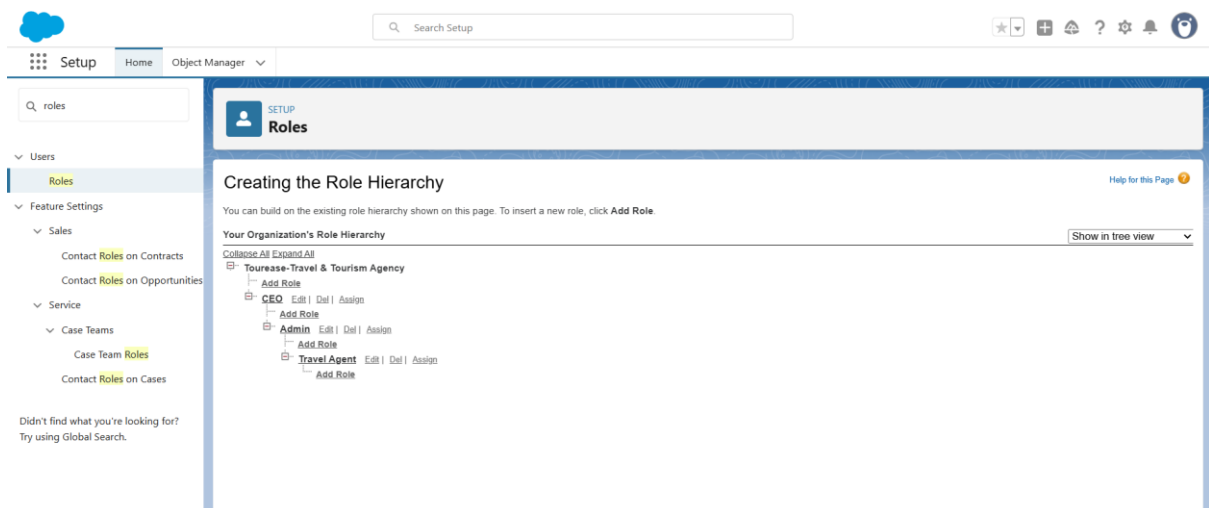
6. Profiles

- **Travel Admin Profile** → Full access to all objects.
- **Travel Agent Profile** → Read/Create/Edit on Packages & Bookings.
- **Finance Profile** → Access to Payments, Reports.
- **Customer Profile** → Read-only access to their Bookings & Itineraries.



7. Roles

- Travel Agency CEO → Admin → Agents → Finance → Customers.
- Role hierarchy ensures data rolls up properly for reporting.



8. Permission Sets

- Create a **Payment Management Permission Set** → assign only to Finance Officers.
- Create a **Discount Approval Permission Set** → assign to Admin.

Permission Sets

On this page you can create, view, and manage permission sets.

All Permission Sets | Edit | Delete | Create New View

Action	Permission Set Name	Description	License
<input type="checkbox"/>	Clone (Legacy) Data Cloud Data Aware Specialist	This Data Cloud permission set will be deprecated in Spring '24. Learn ...	Customer Data Platform
<input type="checkbox"/>	Clone (Legacy) Data Cloud Marketing Admin	Allows access to Data Cloud Setup if the user is also a Salesforce admi...	Customer Data Cloud for Marketing
<input type="checkbox"/>	Clone (Legacy) Data Cloud Marketing Manager	This Data Cloud permission set will be deprecated in Spring '24. Learn ...	Customer Data Platform
<input type="checkbox"/>	Clone (Legacy) Data Cloud Marketing Specialist	This Data Cloud permission set will be deprecated in Spring '24. Learn ...	Customer Data Platform
<input type="checkbox"/>	Clone (Legacy) Data Cloud for Marketing Manager	This Data Cloud permission set will be deprecated in Spring '24. Learn ...	Customer Data Cloud for Marketing
<input type="checkbox"/>	Clone (Legacy) Data Cloud for Marketing Specialist	This Data Cloud permission set will be deprecated in Spring '24. Learn ...	Customer Data Cloud for Marketing
<input type="checkbox"/>	Clone Access Agentforce Default Agent	Gives users access to the default Agentforce agent in Salesforce.	Agentforce (Default)
<input type="checkbox"/>	Clone Agent Platform Builder	Allow access to agent platform.	Agent platform builder
<input type="checkbox"/>	Clone Agentforce Default Admin	Allows users to build and manage in-org copilots.	Agentforce (Default)
<input type="checkbox"/>	Clone Agentforce Service Agent Configuration	Build and manage autonomous AI service agents.	Agentforce Service Agent Builder
<input type="checkbox"/>	Clone Agentforce Service Agent Object Access	Access knowledge articles and manage cases and contacts as an auto...	Agentforce Service Agent User

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9. Organization-Wide Defaults (OWD)

- **Trip Package__c** → Public Read Only (customers can browse).
- **Booking__c** → Private (customer sees only their bookings).
- **Payment__c** → Private (finance only).

Organization-Wide Addresses

Save | Save and New | Cancel

Organization-Wide Email Address | Required Information

Display Name: Trip Package

Email Address: chidwatedia@gmail.com

Purpose: User Selection

☐ Allow All Profiles to Use this From Address

☒ Allow Only Selected Profiles to Use the From Address

Profiles: System Administrator, Analytics Cloud Integration User, Analytics Cloud Security User, External Apps Login User, Minimum Access - Salesforce, B2B Reordering Portal Buyer Profile, Salesforce API Only System Integrations, Standard Platform User, Customer Community Login User, Cross Org Data Proxy User

Permission Sets: No Permission Sets configured

10. Sharing Rules

- Share Bookings with related Customers automatically.
- Share Payments with Finance role only.

Sharing Settings

Minimize the number of roles created, which improves performance by cutting down processing loads. ☒ [Help](#)

Grant site users access to related cases. ☒ [Help](#)

Secure guest user record access. ☒ [Help](#)

Require permission to view record names in lookup fields. ☐ [Help](#)

Sharing Rules

Booking Sharing Rules [New](#) [Recalculate](#) [Booking Sharing Rules Help](#)

Action	Criteria	Shared With	Access Level
Edit Del	Owner in Role: Travel Agent	Role: Admin	Read Only

Sharing Overrides [Sharing Overrides Help](#)

Profiles That Override Booking Sharing

Organization-wide permissions affect all objects in the organization. Object permissions affect only the given object.

Profile	Custom Profile	View All Data	Organization-Wide Permissions	Modify All Data	View All Records	Booking Permissions	Modify All Records
Analytics Cloud Integration User	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
System Administrator	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

11. Login Access Policies

- Restrict login IP ranges for Admins & Agents.
- Enable **Two-Factor Authentication** for Finance users.

Login Access Policies

Control which support organizations your users can grant login access to.

Manage Support Options [Save](#) [Cancel](#)

Setting: Administrators Can Log in as Any User ☒ **Enabled**

Support Organization	Packages	Available to Users	Available to Administrators Only
Salesforce.com Support	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

[Save](#) [Cancel](#)

12. Developer Org Setup

- Enable **Lightning Experience**.
- Enable **Experience Cloud Sites** (for customer booking portal).
- Install Salesforce CLI (SFDX) + VS Code for development.

13. Sandbox Usage

- Use **Developer Sandbox** → for testing automation and Apex.

- Deploy to **Production Org** after successful testing.
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14. Deployment Basics

- Use **Change Sets** for Admin configurations.
- Use **VS Code** for Developer components (Apex, LWC).