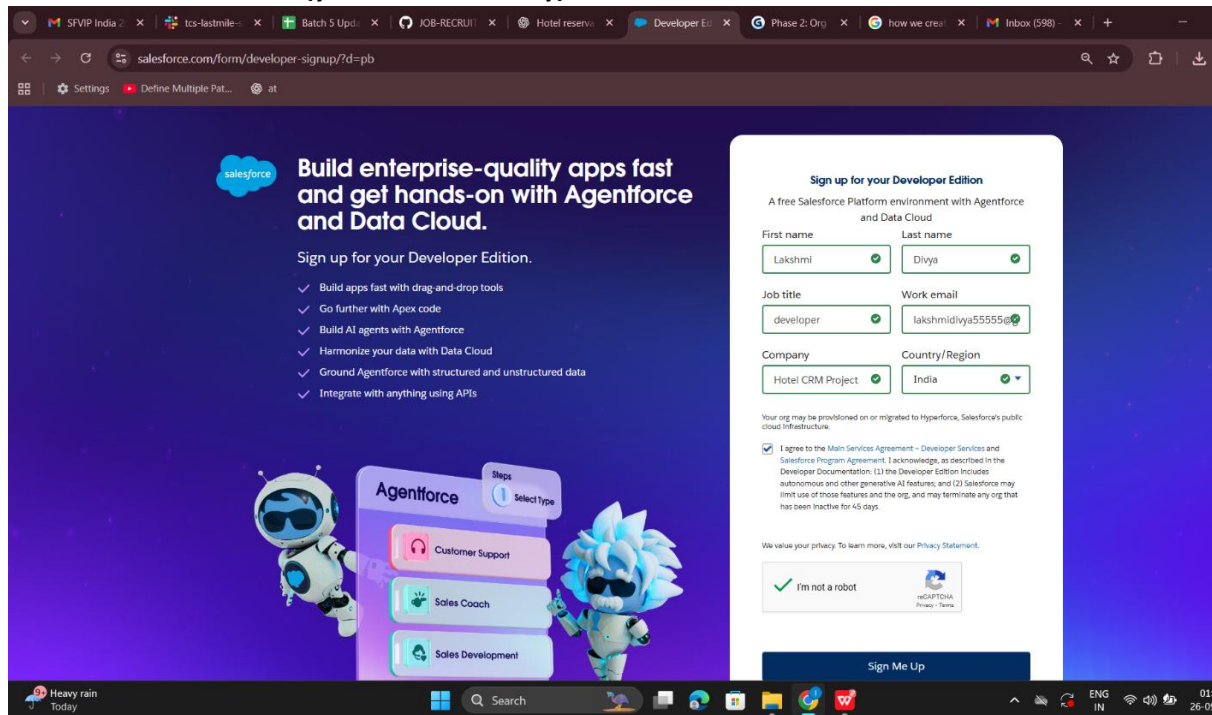


Phase 2: Org Setup & Configuration

Goal: Prepare Salesforce environment for the hotel system.

Step 1: Sign Up for a Salesforce Developer Org

1. Go to Salesforce Developer Sign Up Page:
<https://developer.salesforce.com/signup>
2. Fill in Your Details:
 - First Name / Last Name: Your name
 - Email: Your active email (you'll need to verify)

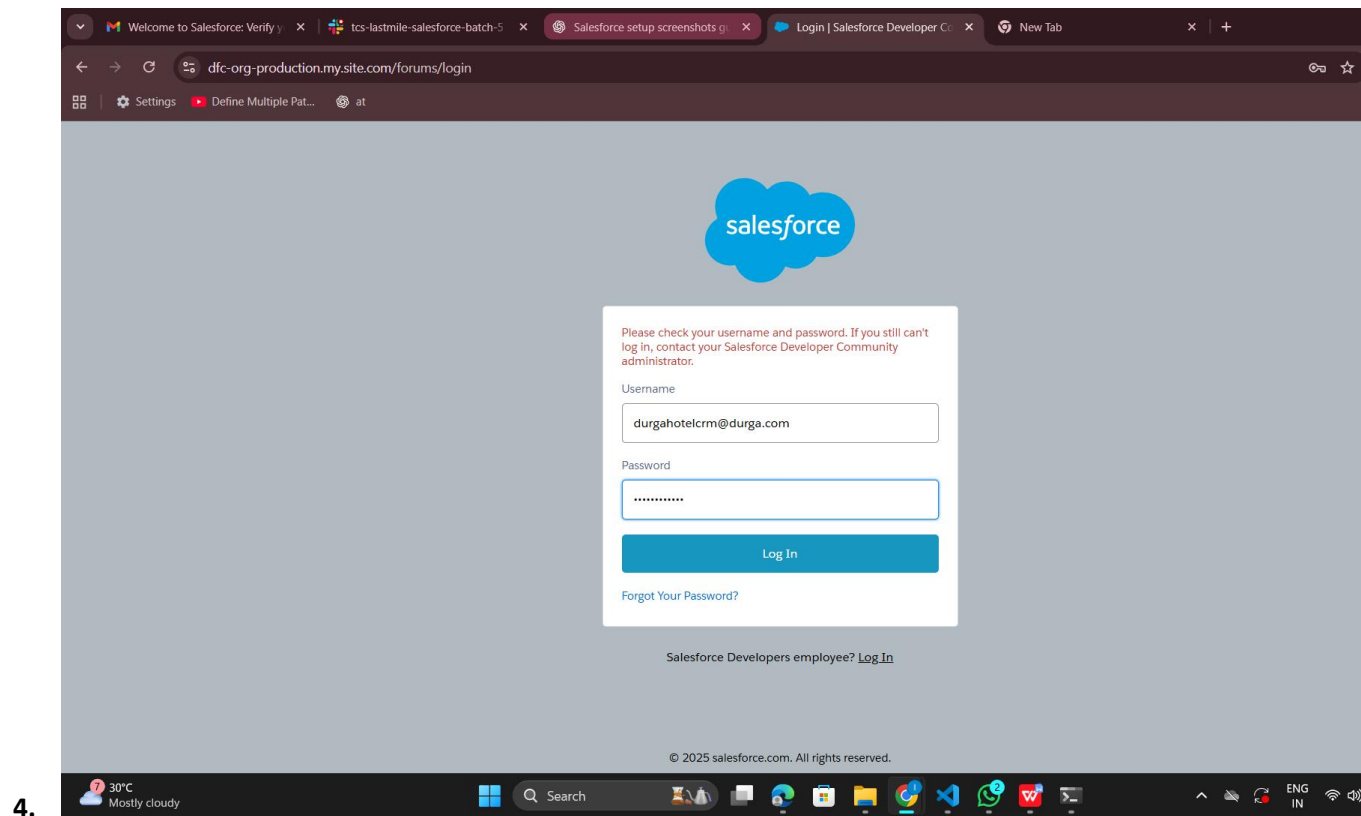


- Username: Must be in email format but unique (example: hoteladmin123@domain.com)
 - Company: Your hotel name or "Personal"
 - Country / Region: India
 - Postal Code
 - Accept Terms → Click Sign me up
3. Check Your Email:
 - Salesforce will send a verification email.

- Click the verification link to activate your org.

Step 2: Log In to Your Developer Org

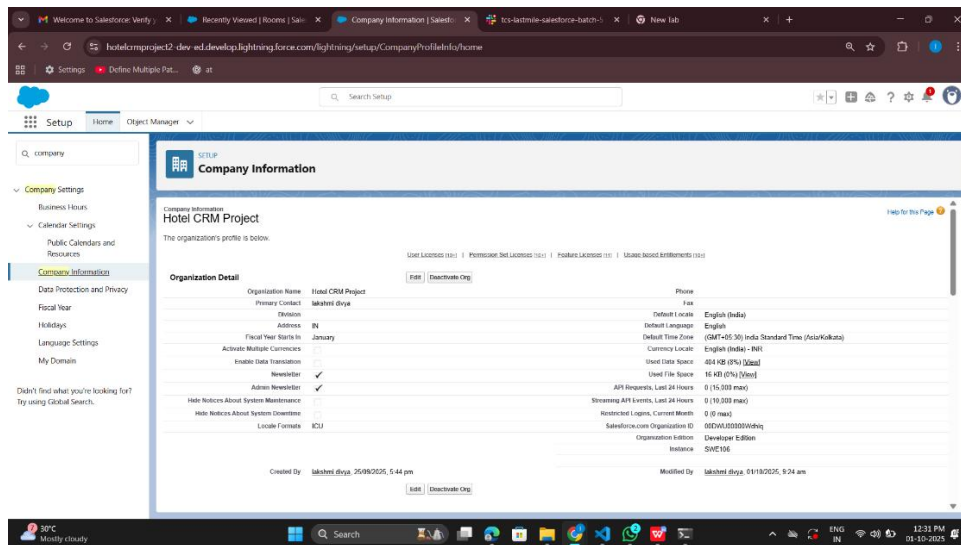
1. Go to <https://login.salesforce.com>
2. Enter your username and password from sign-up.
3. You will land on Salesforce Lightning Home.



Step 3: Basic Salesforce Setup for Hotel System

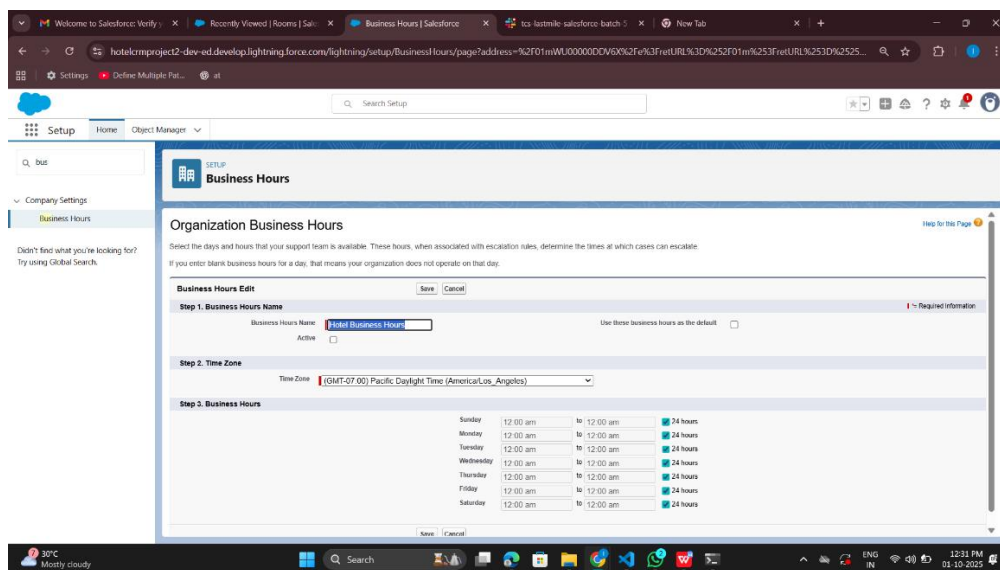
A. Company Profile

1. Setup → Quick Find → Company Information
2. Fill in:
 - Company Name: Your Hotel Name
 - Default Time Zone: [Your Time Zone]
 - Default Currency: INR (or your preferred)



B. Business Hours

1. Setup → Quick Find → Business Hours
2. Click New → Set 24x7 hours or define shifts



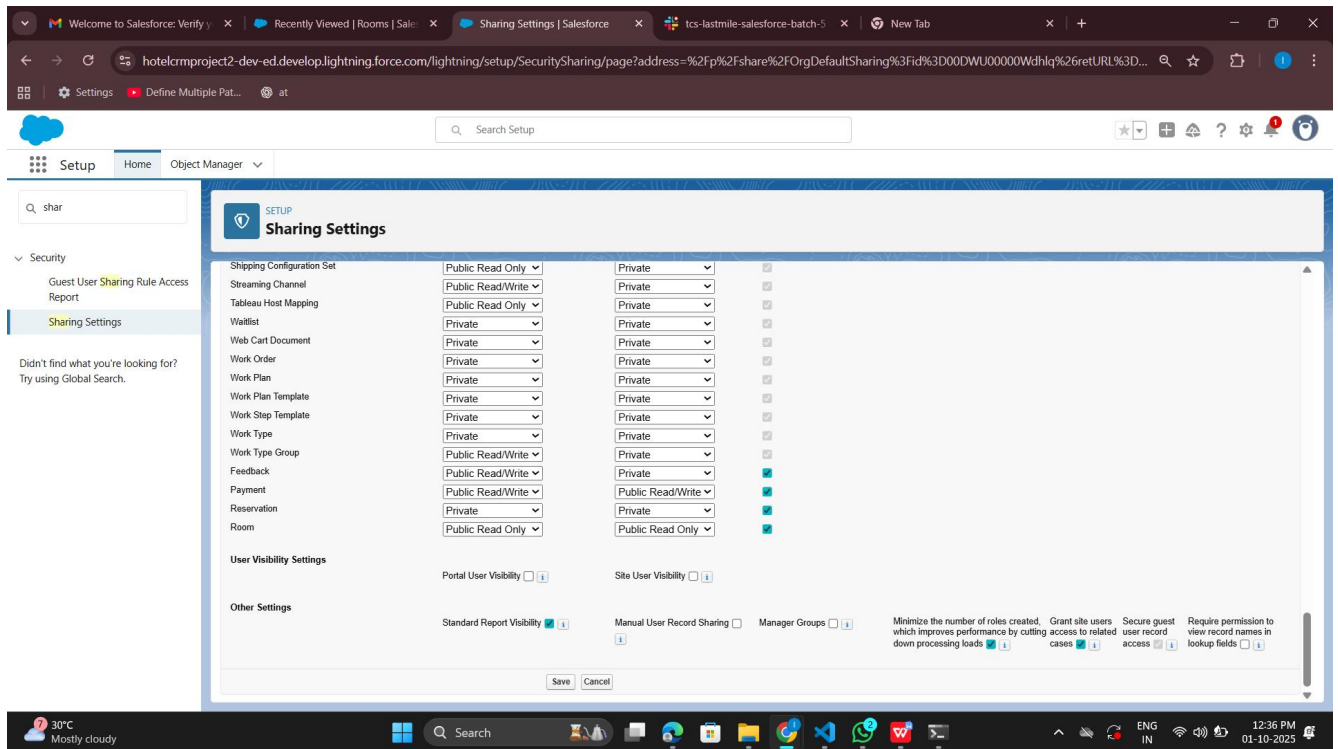
3.

C. Users

1. Setup → Quick Find → Users → Click **New User**
2. Create Roles:
 - Receptionist
 - Manager
3. Assign Profiles:
 - Receptionist Profile: Can create bookings
 - Manager Profile: Full access

- Reservations: Private

2. Create Sharing Rule: Managers can see all reservations



Hotel Roles (Short Version)

Role	Purpose	Visibility	Reports To
Manager	Manages hotel operations	All reservations, rooms, and guest data	Top of hierarchy
Receptionist	Handles bookings	Only own reservations	Manager
Housekeeping	Updates room status	Assigned rooms only	Manager

Hierarchy:

Manager

/ \

Receptionist Housekeeping

Key Points:

- **Manager:** Full access
- **Receptionist:** Create/edit own bookings
- **Housekeeping:** Update room status only

Roles | Salesforce

hotelcrmproject2-dev-ed.develop.lightning.force.com/lightning/setup/Roles/home

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Case Team Roles

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SETUP

Roles

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

Collapse AllExpand All

Hotel CRM Project

Add Role

CEO

Edit | Del | Assign

Add Role

Hotel Manager

Edit | Del | Assign

Add Role

Housekeeping

Edit | Del | Assign

Add Role

Receptionist

Edit | Del | Assign

Add Role

Show in tree view

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