

# Phase 2: Org Setup & Configuration


## 1.Salesforce Edition

- Used **Developer Edition Org** for project setup.

## 2. Company Profile Setup

- **Company Name:** Smart Hotel CRM
- **Primary Contact:** [shaikyasmin057@gmail.com](mailto:shaikyasmin057@gmail.com)
- **Locale:** English (India)
- **Default Time Zone:** Asia/Kolkata (GMT+05:30)
- **Default Currency:** INR

t Manager ▾

 **SETUP**  
**Company Information**

Company Information

SmartStay Hotel CRM

The organization's profile is below.

[User Licenses \[10+\]](#) | [Permission Set Licenses \[10+\]](#) | [Feature Licenses \[11\]](#) | [Usage-based Entitlements \[10+\]](#)

**Organization Detail** [Edit](#)

Organization Name	SmartStay Hotel CRM	Phone	
Primary Contact	shaikyasmin057@gmail.com	Fax	
Division		Default Locale	English (India)
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	Kannada (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	516 KB (10%) <a href="#">View</a>
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) <a href="#">View</a>
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	00DgK000007f5xd
		Organization Edition	Developer Edition

## 3.Business Hours & Holidays

- **Business Hours Name:** Hotel Operations
- **Time Zone:** Asia/Kolkata (GMT+05:30)
- **Default:** ✓
- **Active:** ✓
- **Business Hours:** Monday – Sunday, 7:00 AM – 11:00 PM (Hotel operation hours)

SETUP

Business Hours

Organization Business Hours

Help for this Page

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.

Holidays

Business Hours Detail

Business Hours Name

Front Desk

Sunday

12:00 AM to 11:59 PM

Monday

12:00 AM to 11:59 PM

Tuesday

12:00 AM to 11:59 PM

Wednesday

12:00 AM to 11:59 PM

Thursday

12:00 AM to 11:59 PM

Friday

12:00 AM to 11:59 PM

Saturday

12:00 AM to 11:59 PM

Time Zone

(GMT+05:30) India Standard Time (Asia/Kolkata)

Default Business Hours

Active

✓

Created By

Shahk Yasmin 9/18/2025, 9:51 AM

Last Modified By

Shahk Yasmin 9/18/2025, 9:51 AM

Add common public holidays (example for India 2025):


- **Republic Day – 26 Jan 2025**
- **Independence Day – 15 Aug 2025**
- **Gandhi Jayanti – 2 Oct 2025**
- **Diwali – 21 Oct 2025**
- **Christmas – 25 Dec 2025**

❖ Each holiday is associated with **Hotel Operations** business hours, so workflows (like bookings, notifications, and housekeeping tasks) consider non-working holidays appropriately.

Holidays		
Add/Remove		
Holiday Name	Description	Date and Time
Christmas		12/25/2025 All Day
Diwali	"Major Hindu festival of lights celebrated across India."	10/21/2025 All Day
Gandhi Jayanti	"National holiday in India to commemorate Mahatma Gandhi's birthday."	10/2/2025 All Day
Independence Day	"National holiday of India to celebrate independence from British rule."	8/15/2025 All Day
Islamic New Year (Muharram)	Marks the beginning of the Islamic lunar calendar.	9/18/2025 All Day
Ramzan	"Islamic festival marking the end of Ramadan, the holy month of fasting."	9/21/2025 All Day
Republic Day	"National holiday of India to honor the adoption of the Constitution".	1/26/2025 All Day

## 4.Fiscal Year Settings

1. Used Standard Fiscal Year (Jan–Dec).

SETUP

Fiscal Year

Setup

Organization Fiscal Year Edit: SmartStay Hotel CRM

Help for this Page

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.

Standard Fiscal Year

Custom Fiscal Year

Change Fiscal Year Period

Save

Cancel

Name

SmartStay Hotel CRM

Fiscal Year Start Month

January

Fiscal Year is Based On

☒ The ending month

☐ The starting month

Save

Cancel

## 5.User Setup & Licenses

### ❖ Created Users:

- Hotel Admin
- Front Desk Agent
- Housekeeping Staff
- Manager/Owner
- Marketing & Sales Team
- Customer Service

SETUP

Users

User

Hotel Owner Admin

Permission Set Assignments (0) | Permission Set Assignments: Activation Required (0) | Permission Set Group Assignments (0) | Permission Set License Assignments (0) | Personal Groups (0) | Public Group Membership (1) | Queue Membership (0) | Team (0) | Managers in the Role Hierarchy (0) | OAuth Apps (0) | Third-Party Account Links (0) | Built-in Authenticators (0) | Installed Mobile Apps (0) | Authentication Settings for External Systems (0) | Login History (0+) | User Provisioning Accounts (0)

User Detail

Edit | Sharing | Reset Password | Login | Freeze | View Summary

Name	Hotel Owner Admin	Role	Hotel Admin
Alias	hadmi	User License	Salesforce
Email	hotelmanager@gmail.com <a href="#">Verify</a>	Profile	Standard User
Username	hotelmanager124@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User17582687094439454672 <a href="#">i</a>	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<a href="#">View</a>
Delegated Approver		Data.com User Type	<a href="#">i</a>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> <a href="#">i</a>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> <a href="#">i</a>

SETUP

Users

SETUP

Users

User

Yasmin Manager

Permission Set Assignments (0) | Permission Set Assignments: Activation Required (0) | Permission Set Group Assignments (0) | Permission Set License Assignments (0) | Personal Groups (0) | Public Group Membership (1) | Queue Membership (0) | Team (0) | Managers in the Role Hierarchy (3) | OAuth Apps (0) | Third-Party Account Links (0) | Built-in Authenticators (0) | Installed Mobile Apps (0) | Authentication Settings for External Systems (0) | Login History (0+) | User Provisioning Accounts (0)

User Detail

Edit | Sharing | Reset Password | Login | Freeze | View Summary

Name	Yasmin Manager	Role	Manager/Owner
Alias	y	User License	Salesforce
Email	hotelmanager@gmail.com <a href="#">Verify</a>	Profile	Hotel Owner/Admin Profile
Username	hotelmanager123@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User17582682908819973348 <a href="#">i</a>	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<a href="#">View</a>
Delegated Approver		Data.com User Type	<a href="#">i</a>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> <a href="#">i</a>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> <a href="#">i</a>

SETUP

Users

User Detail

Edit

Sharing

Reset Password

Login

Freeze

View Summary

Name	Ravi Cleaner s	Role	<a href="#">Housekeeping Staff</a>
Alias	ravi	User License	Salesforce Platform
Email	<a href="mailto:housekeeping1@smarthotel.com">housekeeping1@smarthotel.com</a> <a href="#">Verify</a> <a href="#">i</a>	Profile	<a href="#">Housekeeping Staff Profile</a>
Username	housekeeping1@smarthotel.com	Active	<input checked="" type="checkbox"/>
Nickname	User17582698019843723151 <a href="#">i</a>	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<a href="#">View</a>
Delegated Approver		Data.com User Type	<a href="#">i</a>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> <a href="#">i</a>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> <a href="#">i</a>

User Detail

Edit

Sharing

Reset Password

Login

Freeze

View Summary

Name	samantha Technician	Role	<a href="#">Maintenance Technician</a>
Alias	stech	User License	Salesforce Platform
Email	<a href="mailto:arjun.technician@smarthotel.com">arjun.technician@smarthotel.com</a> <a href="#">Verify</a> <a href="#">i</a>	Profile	<a href="#">Standard Platform User</a>
Username	arjun.technician@smarthotel.com	Active	<input checked="" type="checkbox"/>
Nickname	User17582702932397604470 <a href="#">i</a>	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<a href="#">View</a>
Delegated Approver		Data.com User Type	<a href="#">i</a>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> <a href="#">i</a>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/> <a href="#">i</a>

User Detail

Edit

Sharing

Reset Password

Login

Freeze

View Summary

Name	meena Marketing	Role	Marketing Executive
Alias	mmark	User License	Salesforce Platform
Email	<a href="mailto:meena14@gmail.com">meena14@gmail.com</a> <a href="#">[Verify]</a> <a href="#">i</a>	Profile	<a href="#">Standard Platform User</a>
Username	meena14@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User17582708724171516160 <a href="#">i</a>	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<a href="#">View</a>
Delegated Approver		Data.com User Type	<a href="#">i</a>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> <a href="#">i</a>
Receive Approval Request Emails	<a href="#">Only if I am an approver</a>	Debug Mode	<input type="checkbox"/> <a href="#">i</a>

User Detail

Edit

Sharing


Reset Password

Login


Freeze

View Summary

Name	Front Desk User 1 my	Role	
Alias	fmy	User License	Salesforce Platform
Email	<a href="mailto:frontdesk1@smart_hotel.com">frontdesk1@smart_hotel.com</a> <a href="#">[Verify]</a> <a href="#">i</a>	Profile	<a href="#">Housekeeping</a>
Username	frontdesk1@smart_hotel.com	Active	<input checked="" type="checkbox"/>
Nickname	User17583053902363645042 <a href="#">i</a>	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<a href="#">View</a>
Delegated Approver		Data.com User Type	<a href="#">i</a>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/> <a href="#">i</a>
Receive Approval Request Emails	<a href="#">Only if I am an approver</a>	Debug Mode	<input type="checkbox"/> <a href="#">i</a>



Smart Hotel Bookin...
Accounts
Home
Reports
Service Appointments
Service Resources
Operating Hours
Da


**Booking**

**Test Booking 001**

Check-in Date  
9/24/2025

Check-out Date  
10/4/2025

Guest Name  
muya

Status  
Cancelled

Related

Details

Booking Name

Test Booking 001

Guest Name ⓘ

muya

Check-in Date

9/24/2025

Check-out Date

10/4/2025

Room Number / Room Type ⓘ

3


Status ⓘ

Cancelled


Payment

₹10,000


Created By

 Shaik Yasmin, 9/19/2025, 3:50 AM

Owner

 Shaik Yasmin


Last Modified By

 Shaik Yasmin, 9/19/2025, 3:53 AM

## 6.Profiles

- Hotel Admin Profile: Full system access.

Object Manager



SETUP

Profiles

Profile

Hotel Owner/Admin Profile

Help for this Page

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \[0\]](#) | 
 [Enabled Apex Class Access \[0\]](#) | 
 [Enabled Visualforce Page Access \[0\]](#) | 
 [Enabled External Data Source Access \[0\]](#) | 
 [Enabled Named Credential Access \[0\]](#) | 
 [Enabled External Credential Principal Access \[0\]](#) | 
 [Enabled Custom Metadata Type Access \[0\]](#) | 
 [Enabled Custom Setting Definitions Access \[0\]](#) | 
 [Enabled Flow Access \[0\]](#) | 
 [Enabled Agent Access \[0\]](#) | 
 [Enabled Service Presence Status Access \[0\]](#) | 
 [Enabled Custom Permissions \[0\]](#)

Profile Detail

Edit

Clone

Delete

View Users

Name

Hotel Owner/Admin Profile

User License

Salesforce

Custom Profile

✓

Description

Created By

Shaik Yasmin, 9/18/2025, 10:26 AM

Modified By

Shaik Yasmin, 9/18/2025, 10:26 AM

Page Layouts

Standard Object Layouts

Global

[Global Layout](#)  
[\[ View Assignment \]](#)

Location Group

[Location Group Layout](#)  
[\[ View Assignment \]](#)

Email Application

Not Assigned  
[\[ View Assignment \]](#)

Location Group Assignment

[Location Group Assignment Layout](#)  
[\[ View Assignment \]](#)

- ❖ Front Desk Agent Profile: Access to Booking and Guest objects.

SETUP

Profiles

Profile

Front Desk Profile

Help for this Page

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \(0\)](#) | 
 [Enabled Apex Class Access \(0\)](#) | 
 [Enabled Visualforce Page Access \(0\)](#) | 
 [Enabled External Data Source Access \(0\)](#) | 
 [Enabled Named Credential Access \(0\)](#) | 
 [Enabled External Credential Principal Access \(0\)](#) | 
 [Enabled Custom Metadata Type Access \(0\)](#) | 
 [Enabled Custom Setting Definitions Access \(0\)](#) | 
 [Enabled Flow Access \(0\)](#) | 
 [Enabled Agent Access \(0\)](#) | 
 [Enabled Service Presence Status Access \(0\)](#) | 
 [Enabled Custom Permissions \(0\)](#)

Profile Detail

Edit

Clone

Delete

View Users

Name	Front Desk Profile		
User License	Salesforce	Custom Profile	✓
Description			
Created By	Shaik Yasmin	9/19/2025, 12:18 AM	Modified By Shaik Yasmin 9/19/2025, 2:26 AM

Page Layouts

Standard Object Layouts	Global	Global Layout [ View Assignment ]	Location Group	Location Group Layout [ View Assignment ]
	Email Application	Not Assigned [ View Assignment ]	Location Group Assignment	Location Group Assignment Layout [ View Assignment ]
	Home Page Layout	Home Page Default [ View Assignment ]	Macro	Macro Layout [ View Assignment ]
	Account	Account Layout [ View Assignment ]	Object Milestone	Object Milestone Layout [ View Assignment ]
	Alternative Payment Method	Alternative Payment Method Layout [ View Assignment ]	Operating Hours	Operating Hours Layout [ View Assignment ]

- Housekeeping Staff Profile:** Access to Housekeeping Task and Room objects.

SETUP

Profiles

Profile

Housekeeping Profile

Help for this Page

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \(0\)](#) | 
 [Enabled Apex Class Access \(0\)](#) | 
 [Enabled Visualforce Page Access \(0\)](#) | 
 [Enabled External Data Source Access \(0\)](#) | 
 [Enabled Named Credential Access \(0\)](#) | 
 [Enabled External Credential Principal Access \(0\)](#) | 
 [Enabled Custom Metadata Type Access \(0\)](#) | 
 [Enabled Custom Setting Definitions Access \(0\)](#) | 
 [Enabled Flow Access \(0\)](#) | 
 [Enabled Agent Access \(0\)](#) | 
 [Enabled Service Presence Status Access \(0\)](#) | 
 [Enabled Custom Permissions \(0\)](#)

Profile Detail

Edit

Clone

Delete

View Users

Name	Housekeeping Profile		
User License	Salesforce Platform	Custom Profile	✓
Description			
Created By	Shaik Yasmin	9/19/2025, 10:03 PM	Modified By Shaik Yasmin 9/19/2025, 10:04 PM

Page Layouts

Standard Object Layouts	Global	Global Layout [ View Assignment ]	Lead	Lead Layout [ View Assignment ]
	Email Application	Not Assigned [ View Assignment ]	Location	Location Layout [ View Assignment ]
	Home Page Layout	Home Page Default [ View Assignment ]	Location Group	Location Group Layout [ View Assignment ]
	Account	Account Layout [ View Assignment ]	Location Group Assignment	Location Group Assignment Layout [ View Assignment ]
	Alternative Payment Method	Alternative Payment Method Layout [ View Assignment ]	Object Milestone	Object Milestone Layout [ View Assignment ]

- Marketing & Sales Profile:** Access to Guest and Booking for promotions.



SETUP

Profiles

Profile

Marketing Staff

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \(0\)](#) | 
 [Enabled Apex Class Access \(0\)](#) | 
 [Enabled Visualforce Page Access \(0\)](#) | 
 [Enabled External Data Source Access \(0\)](#) | 
 [Enabled Named Credential Access \(0\)](#) | 
 [Enabled External Credential Principal Access \(0\)](#) | 
 [Enabled Custom Metadata Type Access \(0\)](#) | 
 [Enabled Custom Setting Definitions Access \(0\)](#) | 
 [Enabled Flow Access \(0\)](#) | 
 [Enabled Agent Access \(0\)](#) | 
 [Enabled Service Presence Status Access \(0\)](#) | 
 [Enabled Custom Permissions \(0\)](#)

Profile Detail

Edit Clone Delete View Users

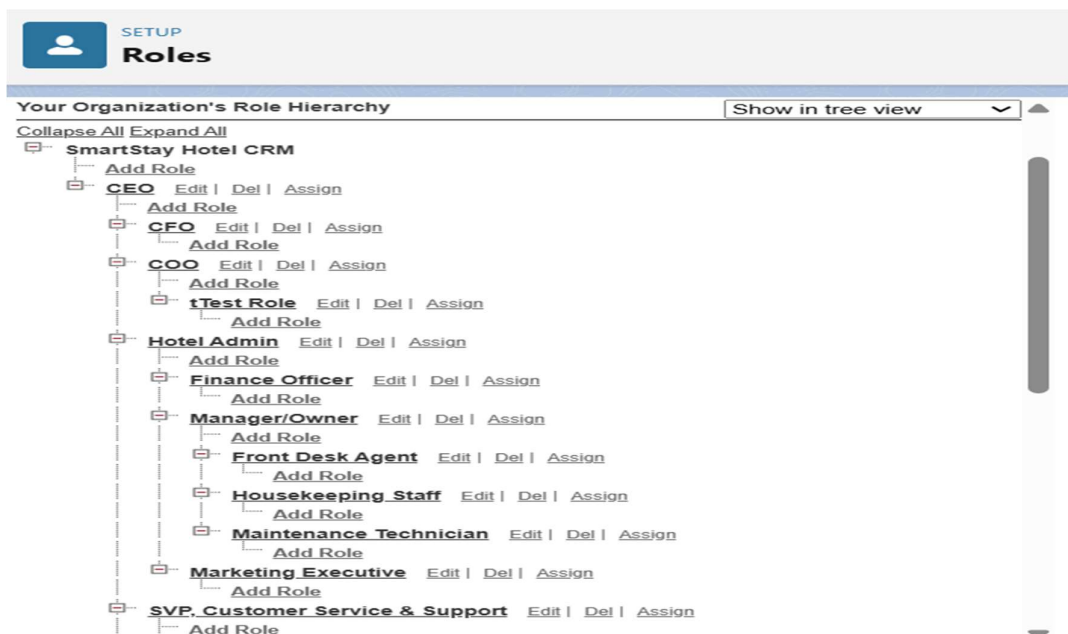
Name	Marketing Staff		
User License	Salesforce	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	Shaik Yasmin, 9/19/2025, 4:00 AM	Modified By	Shaik Yasmin, 9/19/2025, 4:19 AM

Page Layouts

Standard Object Layouts	Global	Global Layout [ View Assignment ]	Location Group	Location Group Layout [ View Assignment ]
	Email Application	Not Assigned [ View Assignment ]	Location Group Assignment	Location Group Assignment Layout [ View Assignment ]
	Home Page Layout	Home Page Default [ View Assignment ]	Macro	Macro Layout [ View Assignment ]
	Account	Account Layout [ View Assignment ]	Object Milestone	Object Milestone Layout [ View Assignment ]
	Alternative Payment Method	Alternative Payment Method Layout [ View Assignment ]	Operating Hours	Operating Hours Layout [ View Assignment ]

## 7.Roles

- **Hotel Admin (top)** → full visibility
- **Manager/Owner** → below Admin
- **Front Desk Agent & Marketing Team** → below Manager
- **Housekeeping Staff & Customer Service** → below Manager



**Permission Sets**

Permission Set: **Booking Full Access**

Find Settings... | Manage Assignments | View Summary

**Permission Set Overview**

Description	API Name
Booking Full Access	Booking_Full_Access

License: ☐ Session Activation Required: ☐ Permission Set Groups Added To: 0

Created By: Shaik Yasmin, 19/09/2025, 11:30 pm  
Last Modified By: Shaik Yasmin, 19/09/2025, 11:36 pm

**Apps**

- Assigned Apps**  
Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**  
Settings that specify which connected apps are visible in the app menu
- Object Settings**  
Permissions to access objects and fields, and settings such as tab availability
- App Permissions**  
Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**  
Permissions to execute Apex classes
- Visualforce Page Access**  
Permissions to execute Visualforce pages
- External Data Source Access**  
Permissions to authenticate against external data sources
- Flow Access**  
Permissions to execute Flows

## 9.OWD (Org-Wide Defaults)

- **Booking:** Private (owner & manager only)
- **Guest:** Public Read Only
- **Hotel Room:** Public Read Only
- **Housekeeping Task:** Private (assigned staff & manager only)
- **Payment:** Private

**Sharing Settings**

**Housekeeping Task Sharing Rules** | New | Recalculate | Housekeeping Task Sharing Rules Help

Action	Criteria	Shared With	Access Level
Edit   Del	Owner in Role: Housekeeping Staff	Group: Housekeeping Staff	Read/Write

**Housekeeping Tasks Sharing Rules** | New | Recalculate | Housekeeping Tasks Sharing Rules Help

Action	Criteria	Shared With	Access Level
Edit   Del	Owner in Role: Housekeeping Staff	Group: Housekeeping Staff	Read/Write

**Marketing Staff Sharing Rules** | New | Recalculate | Marketing Staff Sharing Rules Help

No sharing rules specified.

## 10) Sharing Rules:

- Analysts/Managers can view all bookings created by Front Desk Agents.
- Housekeeping staff can view tasks assigned to their department only.

**Sharing Settings**

**Room Sharing Rules** | New | Recalculate | Room Sharing Rules Help

A sharing rule operation is currently in progress. The initiating user will receive an email when each operation finishes.

Action	Criteria	Shared With	Access Level
Edit   Del	Room: Status EQUALS Available	Role: Housekeeping Staff	Read/Write

Logged in as Ravi Cleaner s (housekeeping1@smarthotel.com) | Log out as Ravi Cleaner s

Search...


Sales | \* John Doe - 101 | Booking | \* Deluxe Suite 101 | Room

**Room: Deluxe Suite 101** | New Contact | Clone | Printable View

**Details**

Room Name	Deluxe Suite 101	Owner	Shaik Yasmin
Room Type	Double		
Currency	₹12,345		
Status	Available		
Created By	Shaik Yasmin, 19/09/2025, 10:16 pm	Last Modified By	Shaik Yasmin, 19/09/2025, 10:28 pm

## 11.login Access Policies :

 **Profiles**

[Edit](#) [Clone](#) [Delete](#) [View Users](#)

**Login Hours** [Edit](#) [Delete](#) [Login Hours Help](#)

Day	Start Time	End Time
Sunday	5:30 PM PDT	10:30 AM PDT
Monday	5:30 PM PDT	10:30 AM PDT
Tuesday	5:30 PM PDT	10:30 AM PDT
Wednesday	5:30 PM PDT	10:30 AM PDT
Thursday	5:30 PM PDT	10:30 AM PDT
Friday	5:30 PM PDT	10:30 AM PDT
Saturday	5:30 PM PDT	10:30 AM PDT

- Restricted login hours for Front Desk Agents: 7 AM – 11 PM
- Housekeeping staff: 6 AM – 10 PM

## 12.Dev Org Setup

- Used **Developer Org as Sandbox** for building and testing.

## 13.Sandbox Usage

- If this were a real company, we'd build in Sandbox, then deploy to Production.

## 14.Deployment Basics

- This project has no Production, as no Sandbox used.