Intelligent Travel & Hospitality Experience CR

Phase 2 – Org Setup & Configuration

1. Salesforce Edition

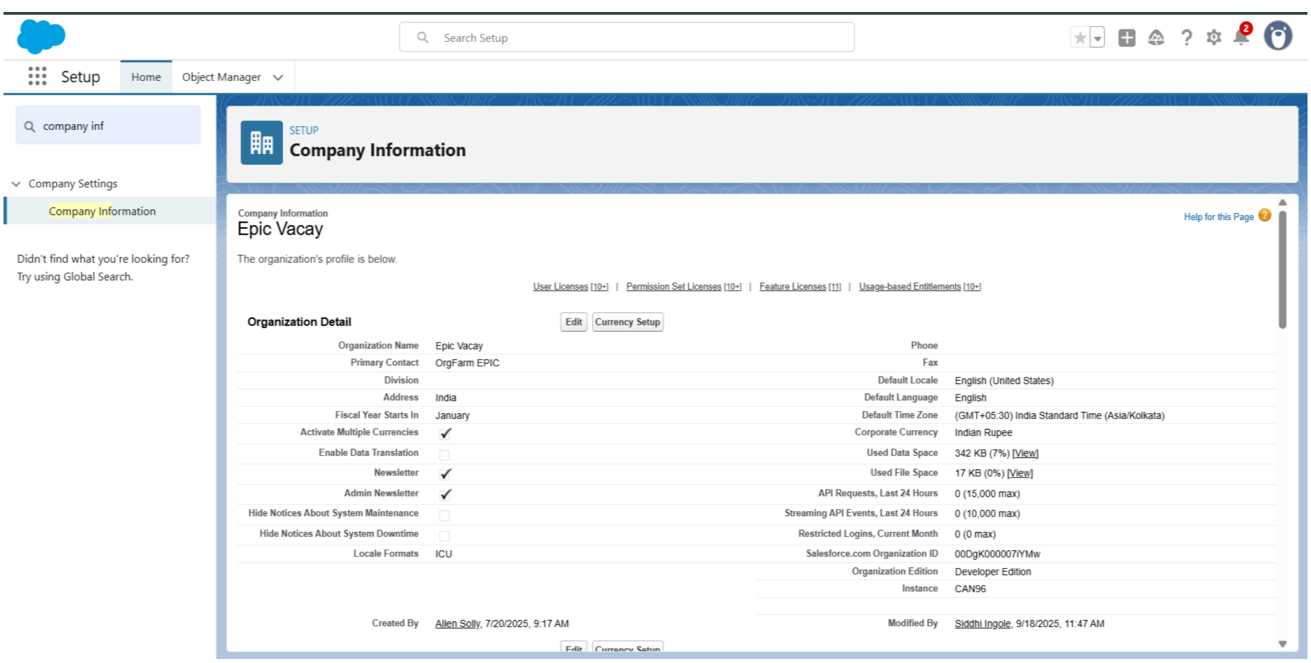
• Use a Salesforce Developer Edition (Free) org for this project.

• A Developer Org provides the Sales Cloud features needed: Accounts, Contacts, Opportunities, Reports, and Dashboards.

• If this were a real company, a Sandbox would be used for development and testing, and configurations would later be deployed to Production.

2. Company Profile Setup

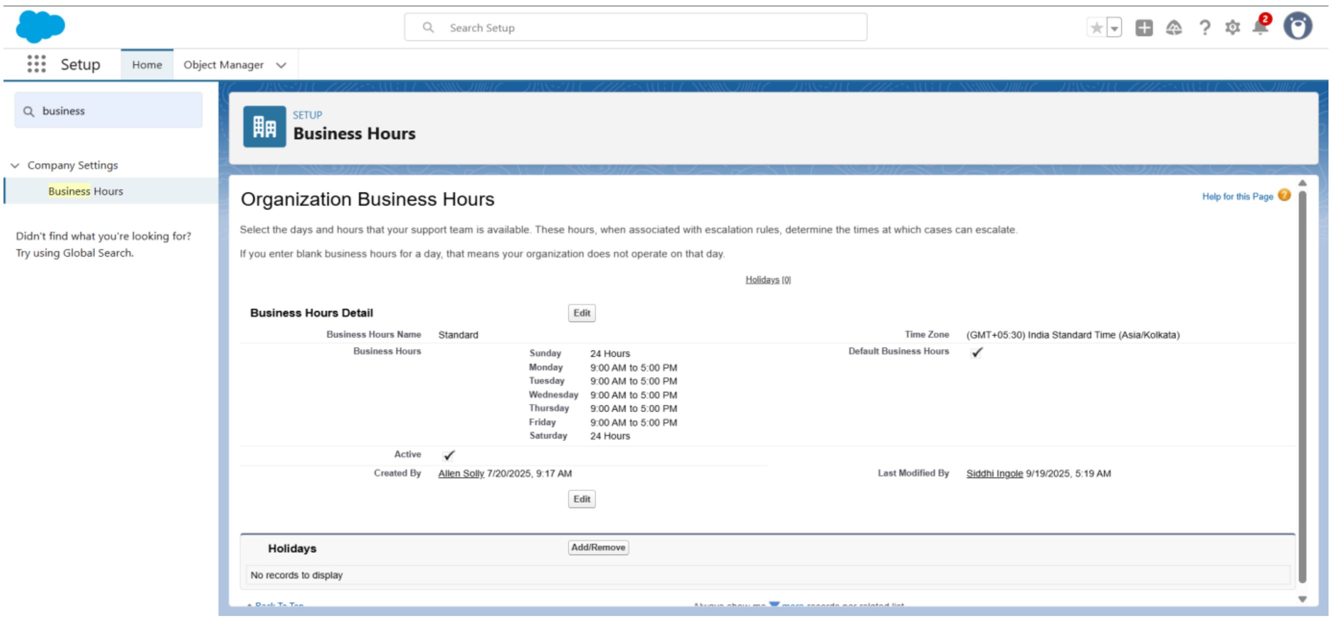
Path: **Setup → Company Information**
- Company Name: Guest360 (Hotels & Airlines)
- Default Locale: English (India)
- Currency: **INR (₹) → Enable Multi-Currency for USD, EUR.**
- Time Zone: **Asia/Kolkata or HQ Time Zone**

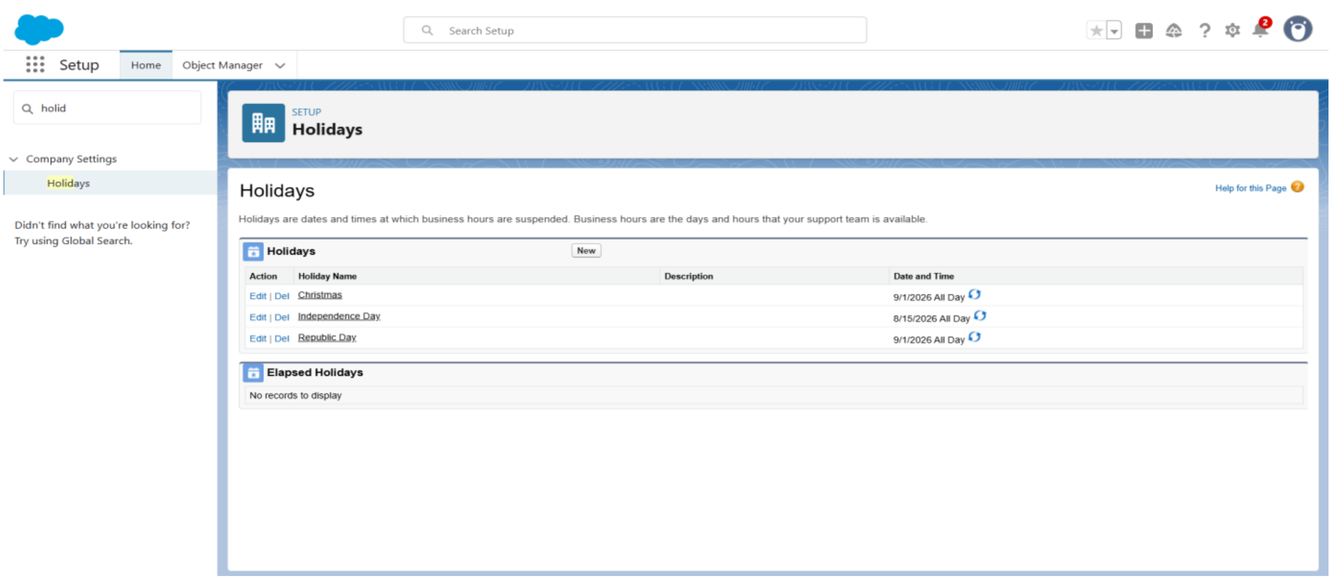


3. Business Hours & Holidays

Path: **Setup → Business Hours → New Business Hours**
- Create Guest360_India: Mon–Fri (9 AM–6 PM IST)
- Create Guest360_USA: Mon–Fri (9 AM–6 PM PST)

Path: **Setup → Holidays → New Holiday**
- Add country holidays (Independence Day, Diwali)
- Assign holidays to business hours

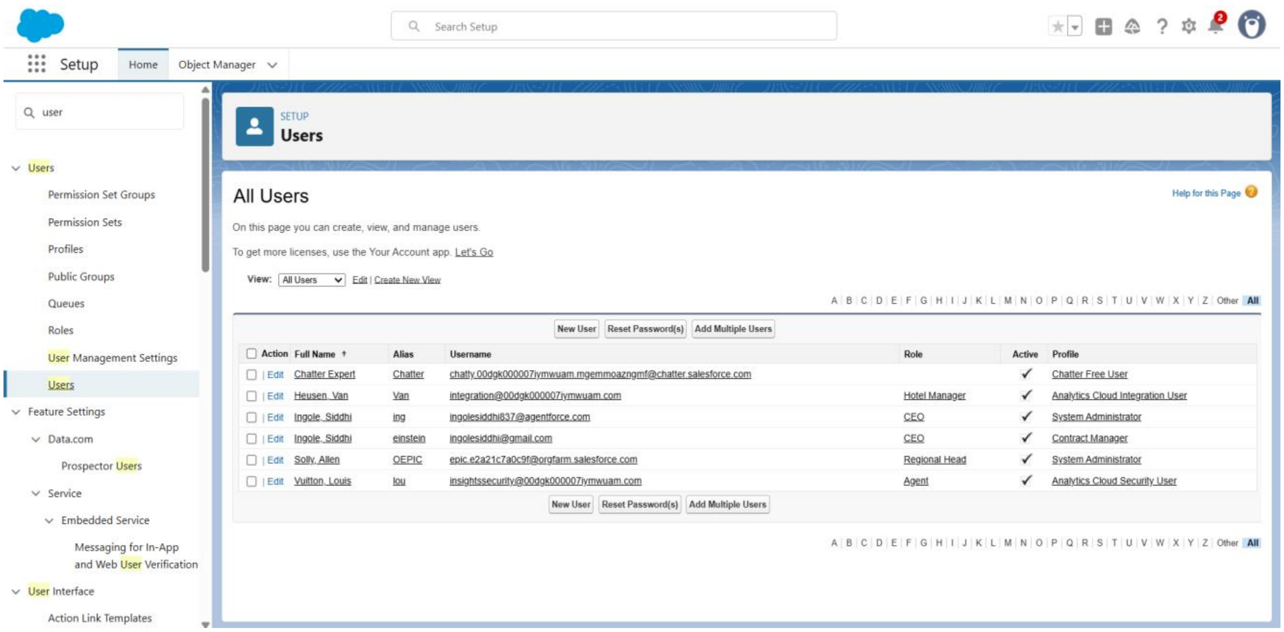




4. User Setup & Licenses

Path: **Setup → Users → New User**

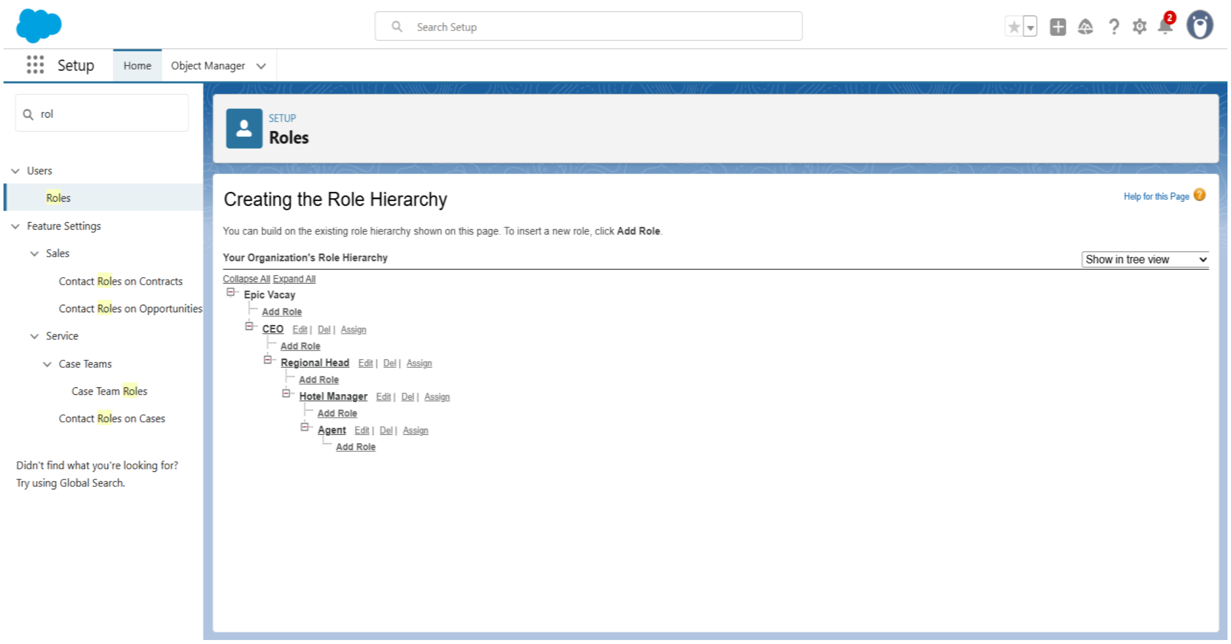
- Front Desk Agent – Guest interactions
- Reservation Manager – Oversees bookings
- Global Admin – Org setup & configurations
- Assign Salesforce / Service Cloud licenses



5. Roles (Role Hierarchy)

Path: **Setup → Roles → Set Up Roles → Add Role**

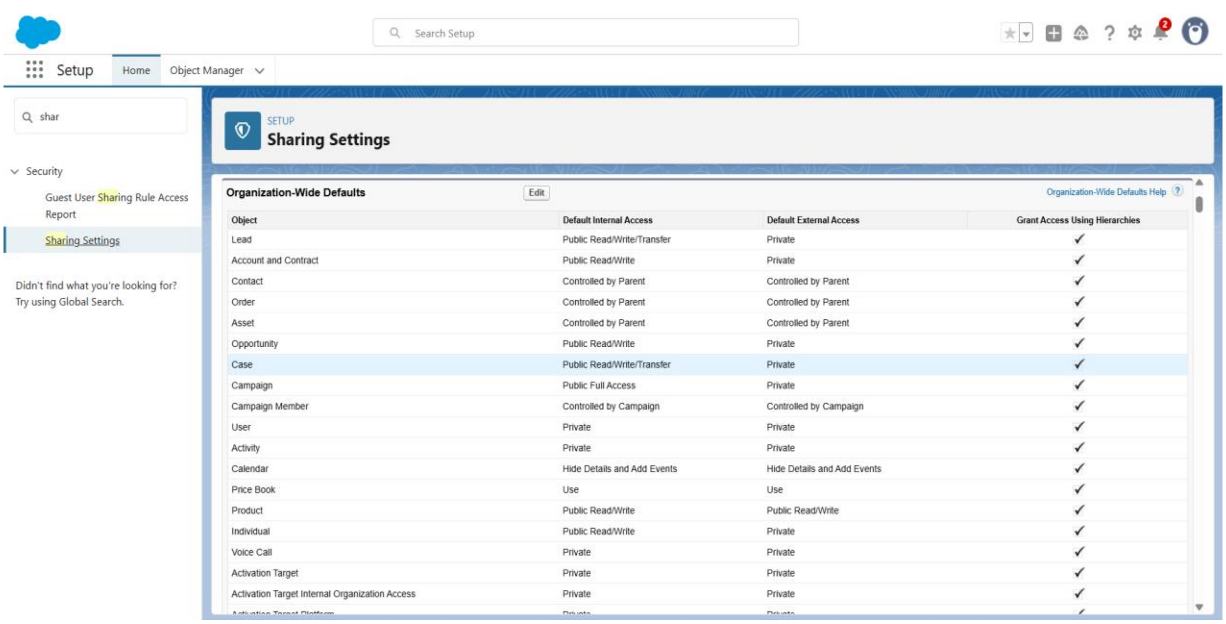
- CEO (Top Role)
  ↳ Regional Head
    ↳ Hotel Manager → Front Desk Agent
    ↳ Agent



6. Organization-Wide Defaults (OWD)

Path: **Setup → Sharing Settings → Edit Defaults**

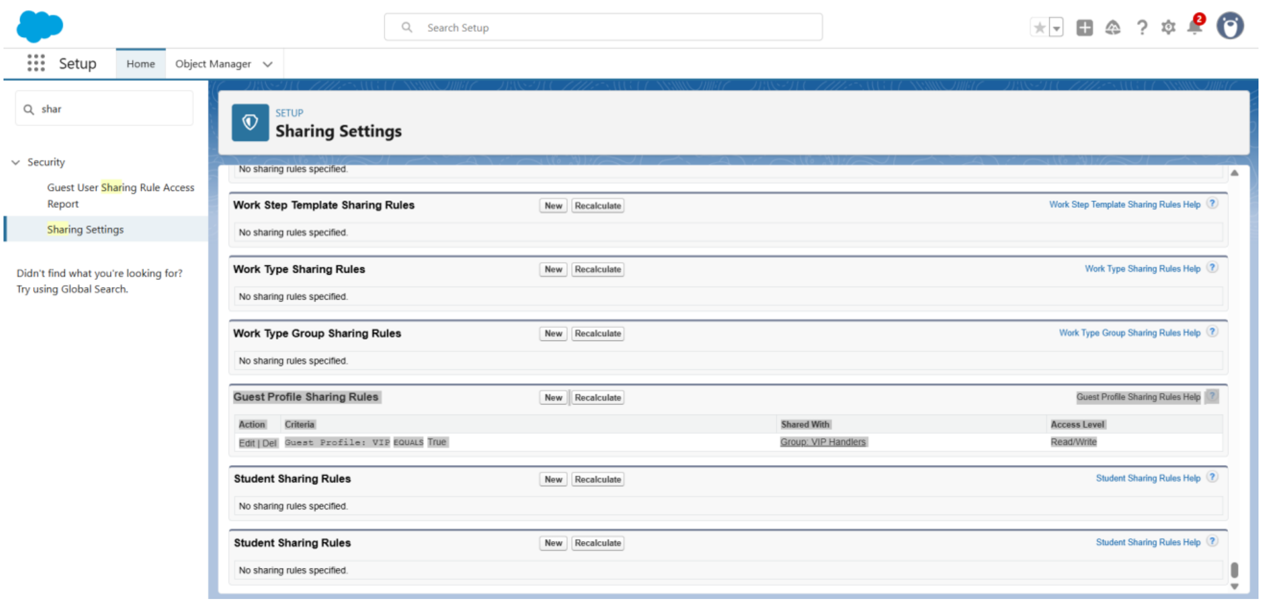
- Guest Profile: Private
- Reservations: Controlled by Parent
- Preferences & Feedback: Read/Write for Service Teams



7. Sharing Rules

Path: **Setup → Sharing Settings → Guest Profile Sharing Rules → New**

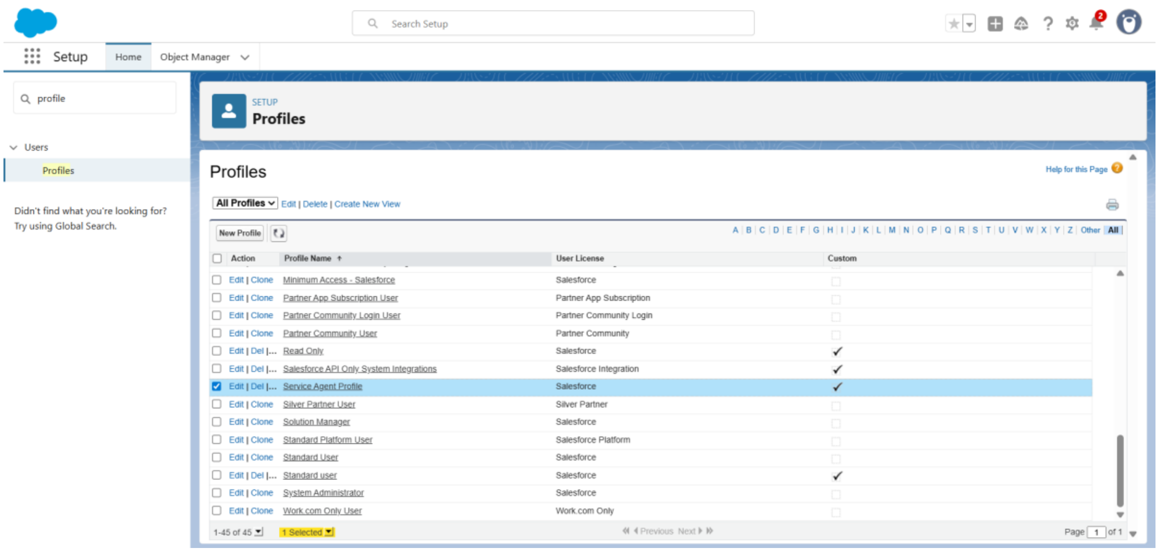
- Rule Name: VIP Guest Access
- Rule Type: Based on Criteria → VIP = True
- Share With: Public Group = VIP Handlers
- Access Level: Read/Write
- Save → Recalculate



8. Profiles

Path: **Setup → Profiles**

- Clone from Minimum Access – Salesforce
- Create Service Agent Profile: Access to Guest Profile, Reservations, Feedback
- Create Global Admin Profile: Full Access



9. Permission Sets

Path: **Setup → Permission Sets → New**

- Create VIP Access Permission Set → Object Settings → Guest Profile → Edit → VIP Field → Read/Edit
- Assign to Users: Permission Set → Manage Assignments → Add Assignments → Select Users → Save