

# 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**

The screenshot shows the Salesforce Setup interface for the 'Company Information' section. The left sidebar contains navigation links for 'Setup', 'Home', and 'Object Manager'. The main content area displays the 'Company Information' page for the organization 'Epic Vacay'. The page includes a search bar at the top, a 'Setup' button, and a 'Company Information' header. Below the header, there is a section for 'Organization Detail' with fields for Organization Name, Primary Contact, Division, Address, Fiscal Year Starts In, Activate Multiple Currencies, Enable Data Translation, Newsletter, Admin Newsletter, Hide Notices About System Maintenance, Hide Notices About System Downtime, and Locale Formats. The right side of the page shows various settings and status information, including User Licenses, Permission Set Licenses, Feature Licenses, and Usage-based Entitlements. The bottom of the page shows the 'Created By' and 'Modified By' fields.

| Organization Detail                   |                                     |
|---------------------------------------|-------------------------------------|
| Organization Name                     | Epic Vacay                          |
| Primary Contact                       | OrgFarm EPIC                        |
| Division                              |                                     |
| Address                               | India                               |
| Fiscal Year Starts In                 | January                             |
| Activate Multiple Currencies          | <input checked="" type="checkbox"/> |
| Enable Data Translation               | <input type="checkbox"/>            |
| Newsletter                            | <input checked="" type="checkbox"/> |
| Admin Newsletter                      | <input checked="" type="checkbox"/> |
| Hide Notices About System Maintenance | <input type="checkbox"/>            |
| Hide Notices About System Downtime    | <input type="checkbox"/>            |
| Locale Formats                        | ICU                                 |

| Settings and Status                 |  |
|-------------------------------------|--|
| Phone                               |  |
| Fax                                 |  |
| Default Locale                      | English (United States)                        |
| Default Language                    | English  |
| Default Time Zone                   | (GMT+05:30) India Standard Time (Asia/Kolkata) |
| Corporate Currency                  | Indian Rupee                                   |
| Used Data Space                     | 342 KB (7%) <a href="#">View</a>               |
| Used File Space                     | 17 KB (0%) <a href="#">View</a>                |
| 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      | 00DgK000007Y1Mw                                |
| Organization Edition                | Developer Edition                              |
| Instance                            | CAN96  |

Created By: Allen Solly, 7/20/2025, 9:17 AM  
Modified By: Siddhi Ingole, 9/18/2025, 11:47 AM

### 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

The screenshot shows the 'Business Hours' setup page. The left sidebar has a search bar with 'business' and a list of 'Company Settings' including 'Business Hours'. The main content area is titled 'Organization Business Hours' and includes a description: '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.' Below this is a 'Business Hours Detail' table with columns for 'Business Hours Name', 'Standard', 'Time Zone', and 'Default Business Hours'. The table shows a single entry for 'Standard' with a time zone of '(GMT+05:30) India Standard Time (Asia/Kolkata)'. The 'Active' checkbox is checked. The 'Created By' field shows 'Allen Solly' and the 'Last Modified By' field shows 'Siddhi Ingole'. There is also a 'Holidays' section at the bottom with an 'Add/Remove' button and a message 'No records to display'.

| Business Hours Name | Standard  | Time Zone                                      | Default Business Hours |
|---------------------|---|--|------------------------|
| Business Hours      | Sunday 24 Hours<br>Monday 9:00 AM to 5:00 PM<br>Tuesday 9:00 AM to 5:00 PM<br>Wednesday 9:00 AM to 5:00 PM<br>Thursday 9:00 AM to 5:00 PM<br>Friday 9:00 AM to 5:00 PM<br>Saturday 24 Hours | (GMT+05:30) India Standard Time (Asia/Kolkata) | ✓                      |

The screenshot shows the 'Holidays' setup page. The left sidebar has a search bar with 'holid' and a list of 'Company Settings' including 'Holidays'. The main content area is titled 'Holidays' and includes a description: 'Holidays are dates and times at which business hours are suspended. Business hours are the days and hours that your support team is available.' Below this is a 'Holidays' table with columns for 'Action', 'Holiday Name', 'Description', and 'Date and Time'. The table lists three holidays: 'Christmas' (9/1/2026 All Day), 'Independence Day' (8/15/2026 All Day), and 'Republic Day' (9/1/2026 All Day). There is also an 'Elapsed Holidays' section at the bottom with a message 'No records to display'.

| Action                                     | Holiday Name     | Description | Date and Time     |
|--|------------------|-------------|-------------------|
| <a href="#">Edit</a>   <a href="#">Del</a> | Christmas        |             | 9/1/2026 All Day  |
| <a href="#">Edit</a>   <a href="#">Del</a> | Independence Day |             | 8/15/2026 All Day |
| <a href="#">Edit</a>   <a href="#">Del</a> | Republic Day     |             | 9/1/2026 All Day  |

## 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

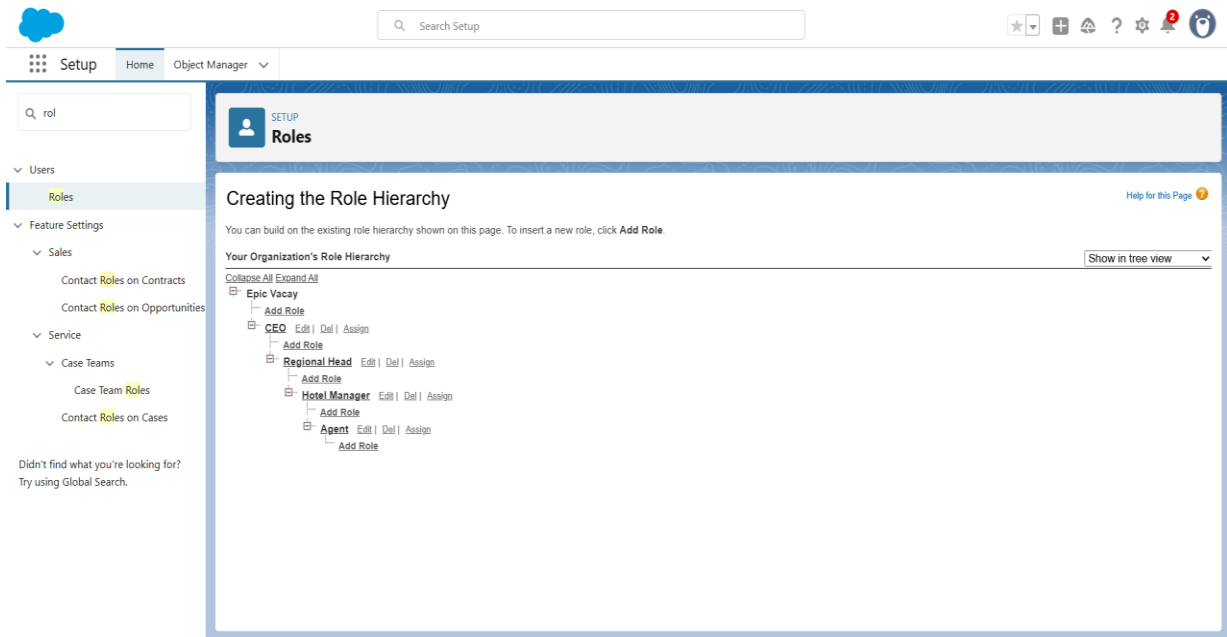
The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with 'Setup' selected, and 'Users' highlighted under 'User Management Settings'. The main content area is titled 'All Users' and includes a search bar, a 'View' dropdown set to 'All Users', and a table of users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. Below the table are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

| Action                        | Full Name      | Alias    | Username   | Role          | Active | Profile                          |
|-------------------------------|----------------|----------|--|---------------|--------|----------------------------------|
| <input type="checkbox"/> Edit | Chatter Expert | Chatter  | chatter_000gk000007ymvuam.mgemoazogmf@chatter.salesforce.com |               | ✓      | Chatter Free User                |
| <input type="checkbox"/> Edit | Heusen Van     | Van      | integration@000gk000007ymvuam.com                            | Hotel Manager | ✓      | Analytics Cloud Integration User |
| <input type="checkbox"/> Edit | Ingole Siddhi  | ing      | ingolesiddhi637@agentforce.com                               | CEO           | ✓      | System Administrator             |
| <input type="checkbox"/> Edit | Ingole Siddhi  | einstein | ingolesiddhi@gmail.com                                       | CEO           | ✓      | Contract Manager                 |
| <input type="checkbox"/> Edit | Solly Allen    | OEPIG    | epic_e2a21c7a0c9f@orgfarm.salesforce.com                     | Regional Head | ✓      | System Administrator             |
| <input type="checkbox"/> Edit | Vulton Louis   | lou      | insightssecurity@000gk000007ymvuam.com                       | Agent         | ✓      | Analytics Cloud Security User    |

## 5. Roles (Role Hierarchy)

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

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

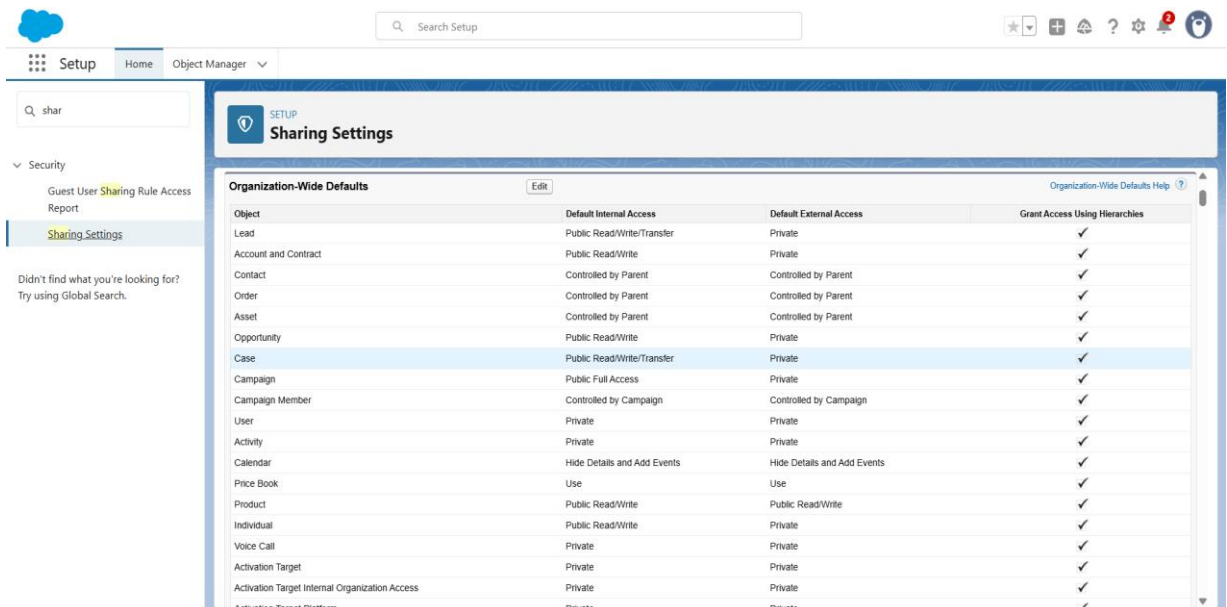


The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'rol' and a navigation menu with 'Users', 'Roles' (selected), 'Feature Settings', 'Sales', 'Service', and 'Case Teams'. The main content area is titled 'Roles' and 'Creating the Role Hierarchy'. It includes a search bar, a 'Help for this Page' link, and a section titled 'Your Organization's Role Hierarchy' with a 'Show in tree view' button. The hierarchy tree shows a top-level role 'Epic Vacay' with a sub-role 'CEO', which has a sub-role 'Regional Head', which has a sub-role 'Hotel Manager', which has a sub-role 'Agent'. Each role in the hierarchy has 'Add Role', 'Edit', 'Del', and 'Assign' links.

## 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



The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'shar' and a navigation menu with 'Security' and 'Sharing Settings' (selected). The main content area is titled 'Sharing Settings' and 'Organization-Wide Defaults'. It includes a search bar, a 'Help' link, and a table with columns: 'Object', 'Default Internal Access', 'Default External Access', and 'Grant Access Using Hierarchies'. The table lists various objects and their default access settings.

| Object   | Default Internal Access     | Default External Access     | Grant Access Using Hierarchies |
|--|-----------------------------|-----------------------------|--------------------------------|
| Lead   | Public Read/Write/Transfer  | Private                     | ✓                              |
| Account and Contract                           | Public Read/Write           | Private                     | ✓                              |
| Contact  | Controlled by Parent        | Controlled by Parent        | ✓                              |
| Order  | Controlled by Parent        | Controlled by Parent        | ✓                              |
| Asset  | Controlled by Parent        | Controlled by Parent        | ✓                              |
| Opportunity                                    | Public Read/Write           | Private                     | ✓                              |
| Case   | Public Read/Write/Transfer  | Private                     | ✓                              |
| Campaign                                       | Public Full Access          | Private                     | ✓                              |
| Campaign Member                                | Controlled by Campaign      | Controlled by Campaign      | ✓                              |
| User   | Private                     | Private                     | ✓                              |
| Activity                                       | Private                     | Private                     | ✓                              |
| Calendar                                       | Hide Details and Add Events | Hide Details and Add Events | ✓                              |
| Price Book                                     | Use                         | Use                         | ✓                              |
| Product  | Public Read/Write           | Public Read/Write           | ✓                              |
| Individual                                     | Public Read/Write           | Private                     | ✓                              |
| Voice Call                                     | Private                     | Private                     | ✓                              |
| Activation Target                              | Private                     | Private                     | ✓                              |
| Activation Target Internal Organization Access | Private                     | Private                     | ✓                              |
| Activation Target Platform                     | Private                     | Private                     | ✓                              |

## 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

The screenshot shows the Salesforce Setup interface. The left sidebar contains the navigation menu with 'Setup' selected. The main content area is titled 'Sharing Settings'. Under 'Guest Profile Sharing Rules', a table lists the following rule:

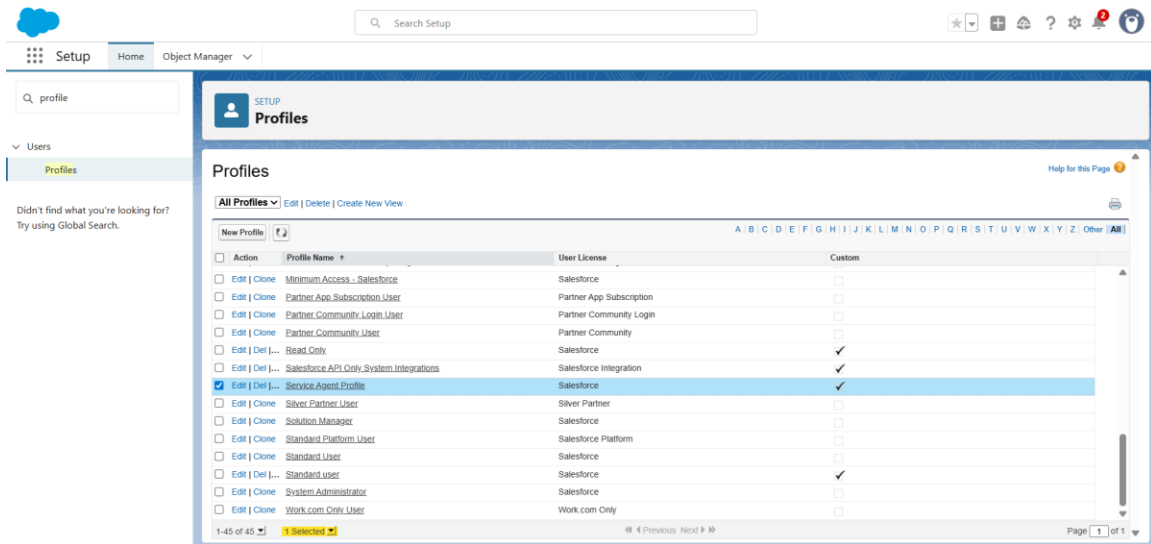
| Action                                     | Criteria                       | Shared With         | Access Level |
|--|--------------------------------|---------------------|--------------|
| <a href="#">Edit</a>   <a href="#">Del</a> | Guest Profile: VIP EQUALS TRUE | Group: VIP Handlers | Read/Write   |

Other sections visible include 'Work Step Template Sharing Rules', 'Work Type Sharing Rules', 'Work Type Group Sharing Rules', and 'Student Sharing Rules', each with 'New' and 'Recalculate' buttons.

## 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



The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The left sidebar contains navigation links for 'Users' and 'Profiles'. The main content area displays a table of profiles with columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The 'Service Agent Profile' is highlighted.

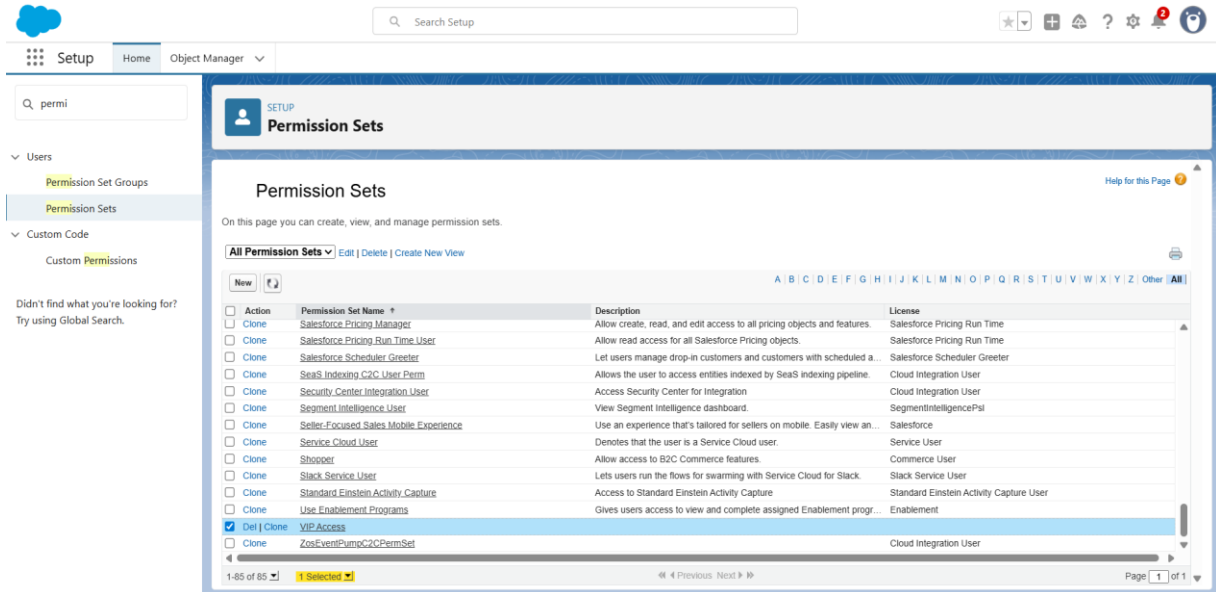
| Action   | Profile Name                            | User License             | Custom                              |
|--|---|--------------------------|-------------------------------------|
| <input type="checkbox"/> Edit   Clone                | Minimum Access - Salesforce             | Salesforce               | <input type="checkbox"/>            |
| <input type="checkbox"/> Edit   Clone                | Partner App Subscription User           | Partner App Subscription | <input type="checkbox"/>            |
| <input type="checkbox"/> Edit   Clone                | Partner Community Login User            | Partner Community Login  | <input type="checkbox"/>            |
| <input type="checkbox"/> Edit   Clone                | Partner Community User                  | Partner Community        | <input type="checkbox"/>            |
| <input type="checkbox"/> Edit   Del [...]            | Read Only                               | Salesforce               | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> Edit   Del [...]            | Salesforce API Only System Integrations | Salesforce Integration   | <input checked="" type="checkbox"/> |
| <input checked="" type="checkbox"/> Edit   Del [...] | Service Agent Profile                   | Salesforce               | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> Edit   Clone                | Silver Partner User                     | Silver Partner           | <input type="checkbox"/>            |
| <input type="checkbox"/> Edit   Clone                | Solution Manager                        | Salesforce               | <input type="checkbox"/>            |
| <input type="checkbox"/> Edit   Clone                | Standard Platform User                  | Salesforce Platform      | <input type="checkbox"/>            |
| <input type="checkbox"/> Edit   Clone                | Standard User                           | Salesforce               | <input type="checkbox"/>            |
| <input type="checkbox"/> Edit   Del [...]            | Standard user                           | Salesforce               | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> Edit   Clone                | System Administrator                    | Salesforce               | <input type="checkbox"/>            |
| <input type="checkbox"/> Edit   Clone                | Work.com Only User                      | Work.com Only            | <input type="checkbox"/>            |

## 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



The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page selected. The left sidebar contains navigation links for 'Users', 'Permission Set Groups', 'Permission Sets', and 'Custom Code'. The main content area displays a table of permission sets with columns for 'Action', 'Permission Set Name', 'Description', and 'License'. The 'VIP Access' permission set is highlighted.

| Action  | Permission Set Name                    | Description  | License                                 |
|---|--|--|---|
| <input type="checkbox"/> Clone                  | Salesforce Pricing Manager             | Allow create, read, and edit access to all pricing objects and features.   | Salesforce Pricing Run Time             |
| <input type="checkbox"/> Clone                  | Salesforce Pricing Run Time User       | Allow read access for all Salesforce Pricing objects.                      | Salesforce Pricing Run Time             |
| <input type="checkbox"/> Clone                  | Salesforce Scheduler Greeter           | Let users manage drop-in customers and customers with scheduled a...       | Salesforce Scheduler Greeter            |
| <input type="checkbox"/> Clone                  | SeaS Indexing C2C User Perm            | Allows the user to access entities indexed by SeaS indexing pipeline.      | Cloud Integration User                  |
| <input type="checkbox"/> Clone                  | Security Center Integration User       | Access Security Center for integration                                     | Cloud Integration User                  |
| <input type="checkbox"/> Clone                  | Segment Intelligence User              | View Segment Intelligence dashboard.                                       | SegmentIntelligencePai                  |
| <input type="checkbox"/> Clone                  | Seller Focused Sales Mobile Experience | Use an experience that's tailored for sellers on mobile. Easily view an... | Salesforce                              |
| <input type="checkbox"/> Clone                  | Service Cloud User                     | Denotes that the user is a Service Cloud user.                             | Service User                            |
| <input type="checkbox"/> Clone                  | Shopper                                | Allow access to B2C Commerce features.                                     | Commerce User                           |
| <input type="checkbox"/> Clone                  | Stack Service User                     | Lets users run the flows for swarming with Service Cloud for Slack.        | Stack Service User                      |
| <input type="checkbox"/> Clone                  | Standard Einstein Activity Capture     | Access to Standard Einstein Activity Capture                               | Standard Einstein Activity Capture User |
| <input type="checkbox"/> Clone                  | Use Enablement Programs                | Gives users access to view and complete assigned Enablement progr...       | Enablement                              |
| <input checked="" type="checkbox"/> Del   Clone | VIP Access                             |  |   |
| <input type="checkbox"/> Clone                  | ZosEventPumpC2CPermSet                 |  | Cloud Integration User                  |