

## Phase 2: Org Setup & Configuration

### 1. Salesforce Edition

- The Developer Org used for implementation

The screenshot displays the Salesforce Setup interface for a Developer Edition organization. The left sidebar shows the 'Setup' menu with 'Company Information' selected. The main content area is titled 'Company Information' and shows the organization's profile for 'Prof. Ram Meghe Institute of Technology and Research'. The 'Organization Detail' section includes 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 'Usage-based Fulfillments' section shows API Requests, Streaming API Events, Restricted Logins, Salesforce.com Organization ID, Organization Edition, and Instance. The 'Created By' and 'Modified By' fields are also visible.

Field	Value
Organization Name	Prof. Ram Meghe Institute of Technology and Research
Primary Contact	OrgFarm EPIC
Division	
Address	United States
Fiscal Year Starts In	January
Activate Multiple Currencies	<input 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
Default Locale	English (United States)
Default Language	English
Default Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Currency Locale	English (United States) - USD
Used Data Space	356 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	000gk000007IESz
Organization Edition	Developer Edition
Instance	CAN96
Created By	OrgFarm EPIC, 7/23/2025, 7:29 AM
Modified By	OrgFarm EPIC, 7/29/2025, 7:43 AM

### 2. Company Profile Setup

- The Company Profile in Salesforce was configured to set up the basics organizational details for the Project. This ensures the platform functions correctly with accurate date, time and currency formats.
- **Settings Configured:**
- **Company Name:** Prof. Ram Meghe Institute of Technology and Research
- **Currency Locale:** English (India) – INR
- **Default Time Zone:** (GMT+05:30) India Standard Time (Asia/Kolkata)



## 4. User Setup & Licenses

### ❖ Admin:

- Top level user with full access to all objects and records.
- Manages user, roles, profiles, and system settings.
- Generates reports and oversees theatre operations.
- Role: CEO | Profile: System Administrator | License: Salesforce

<input type="checkbox"/> Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/>   <a href="#">Edit</a>	Ajay.	ajay.	<a href="#">ajay123456@test.com</a>	<a href="#">CEO</a>	<input checked="" type="checkbox"/>	<a href="#">System Administrator</a>

### ❖ User Manager:

- Middle level user manages shows, schedules, bookings and seat availability for their theater.
- Approve bookings and generate theatre-level reports.
- Role: Director Channel Sales | Profile: Standard User | License: Salesforce

<input type="checkbox"/>   <a href="#">Edit</a>	User Manager	mgr	<a href="#">manager21@example.com</a>	<a href="#">Director Channel Sales</a>	<input checked="" type="checkbox"/>	<a href="#">Standard User</a>
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### ❖ User Staff:

- Currently I deactivate these user when need I will activate it.
- Handles bookings and manages seats for shows reports to theatre Manager
- Role: Customer Support North America | Profile: System Administrator | License: Salesforce

<input type="checkbox"/>   <a href="#">Edit</a>	User Staff	staff	<a href="#">staff123@example.com</a>	<a href="#">Customer Support North America</a>	<input type="checkbox"/>	<a href="#">System Administrator</a>
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## 5. Profiles

- Customer Profile (cloned from Standard User): Allows users to book tickets and view shows; read-only access to Movies and Shows.

**SETUP Profiles**

Profile: **Customer**

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 Service Presence Status Access \(0\)](#) | 
 [Enabled Custom Permissions \(0\)](#)

**Profile Detail** [Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name	Customer		
User License	Salesforce	Custom Profile	✓
Description			
Created By	OrgFarm EPIC, 9/22/2025, 12:33 AM	Modified By	OrgFarm EPIC, 9/22/2025, 12:33 AM

- **Theater Manager Profile (cloned from Standard User):** Manages shows, bookings, seats, and generates theater reports.

**SETUP Profiles**

Profile: **Theater Manager**

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 Service Presence Status Access \(0\)](#) | 
 [Enabled Custom Permissions \(0\)](#)

**Profile Detail** [Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name	Theater Manager		
User License	Salesforce	Custom Profile	✓
Description			
Created By	OrgFarm EPIC, 9/22/2025, 12:36 AM	Modified By	OrgFarm EPIC, 9/22/2025, 12:36 AM

- **User Staff Profile (cloned from Standard User):** Handles customer bookings and seat assignments with limited access to Shows.

**SETUP Profiles**

Profile: **Ticketing 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.

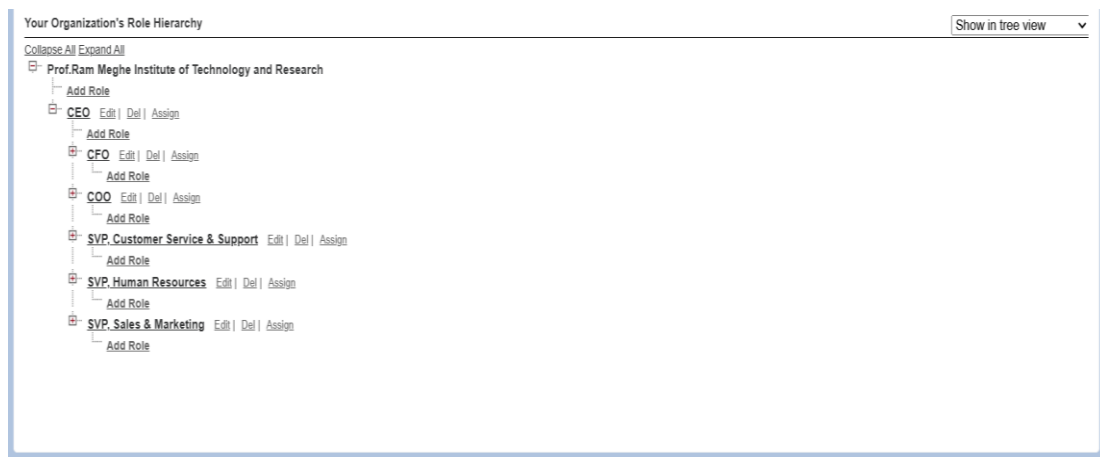
[Login IP Ranges \(0\)](#) | 
 [Enabled Apex Class Access \(0\)](#) | 
 [Enabled Visualforce Page Access \(0\)](#) | 
 [Enabled External Data Source Access \(0\)](#) | 
 [Enabled Named Credential Access \(0\)](#) | 
 [Enabled External Credential Principal Access \(0\)](#) | 
 [Enabled Custom Metadata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

**Profile Detail** [Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name	Ticketing Staff		
User License	Salesforce	Custom Profile	✓
Description			
Created By	OrgFarm EPIC, 9/22/2025, 12:37 AM	Modified By	OrgFarm EPIC, 9/22/2025, 12:37 AM

## 6. Roles Hierarchy

- Role Hierarchy: Ticketing Staff → Theater Manager → Admin for controlled access.



## 7. Permission Sets

- **Admin:** Full access via System Administrator profile; no permission set needed.
- **Theater Manager:** Permission Set allows managing bookings, seats, refunds, and reports.
- **User Staff:** Permission Set allows managing their own bookings and seat assignments.

## 8. OWD

- Set Booking and Customer to Private to protect customer and booking data.
- For Both the Objects Default Internal Access → Private
- Default External Access → Private

Booking	Private	Private	✓
Customer	Private	Private	✓