

Phase 2: Org Setup & Configuration

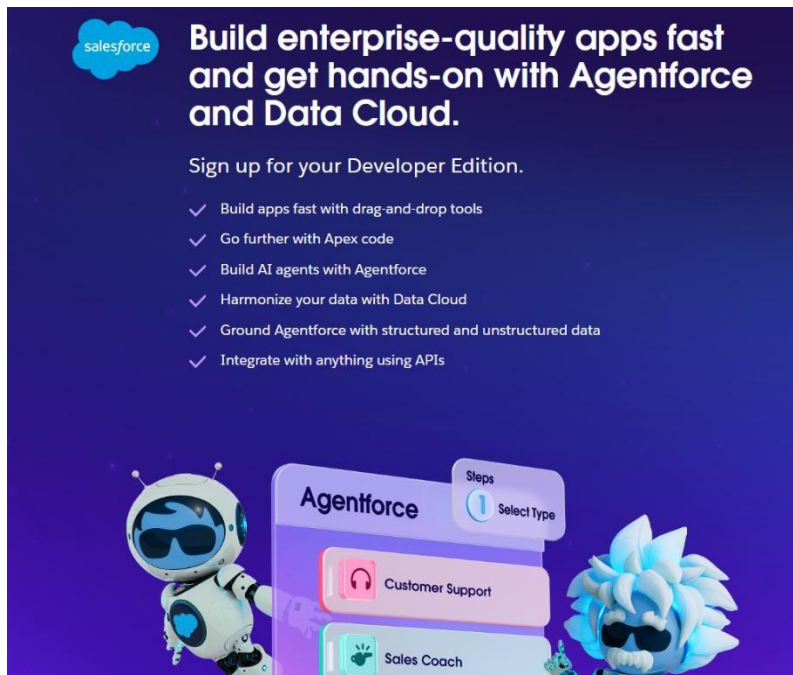
Flight Reservation & Scheduling System

Salesforce-Based Passenger & Operations Management

Step 1: Salesforce Editions

Where to check the Edition:

- Login to your Salesforce Org.
- Click on the Setup (Gear Icon) in the top-right corner.
- From the left menu → Go to Company Settings → Company Information.
- On this page, you will see the Salesforce Edition (e.g., Enterprise Edition, Developer Edition, Professional Edition).



Sign up for your Developer Edition

A free Salesforce Platform environment with Agentforce and Data Cloud

First name Last name


Job title Work email

Company Country/Region

Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

☒ I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement. I acknowledge, as described in the Developer Documentation: (1) the Developer Edition includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

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☒ I'm not a robot 

Step 2: Company Profile Setup

- Go to **Setup** → **Company Settings** → **Company Information**
- Entered details:
 - Company Name: SkyLink Airlines
 - Primary Contact: Operations Manager
 - Address: Head Office address

- Time Zone: Local HQ time (e.g., India Standard Time)
- Default Locale: English (India)
- Default Currency: INR (₹) or airline operating currency
- IATA/ICAO codes (store as Company fields or in custom metadata if needed)

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'compan' and a list of settings including 'Company Settings', 'Business Hours', 'Calendar Settings', 'Public Calendars and Resources', 'Company Information' (selected), 'Data Protection and Privacy', 'Fiscal Year', 'Holidays', 'Language Settings', and 'My Domain'. The main content area is titled 'Company Information' and contains a form for 'Organization Detail'. The form includes fields for Organization Name (ksrm Company), Primary Contact (Niveditha Paturu), Division, Address (India), Fiscal Year Starts In (January), and various system settings like 'Activate Multiple Currencies', 'Enable Data Translation', 'Newsletter', 'Admin Newsletter', 'Hide Notices About System Maintenance', and 'Locale Formats' (ICU). It also displays system information such as 'Used Data Space', 'Used File Space', 'API Requests, Last 24 Hours', 'Streaming API Events, Last 24 Hours', 'Restricted Logins, Current Month', 'Salesforce.com Organization ID', 'Organization Edition', and 'Instance'. The form is created by 'OrgFarm EPIC' on 9/19/2025, 3:05 AM and modified by 'Niveditha Paturu' on 9/23/2025, 10:18 PM.

Step 3: Business Hours & Holidays

- Create **default business hours** (24×7 if airline operates continuously).
- Add **holidays** for national holidays and maintenance blackout dates.

The screenshot shows the Salesforce Setup interface for 'Business Hours'. The left sidebar contains a search bar with 'business' and a list of settings including 'Company Settings', 'Business Hours' (selected), and 'Holidays'. The main content area is titled 'Business Hours' and contains a form for 'Organization Business Hours'. The form includes fields for Business Hours Name (Default), Time Zone (GMT-07:00 Pacific Daylight Time (America/Los_Angeles)), and a table for Business Hours. The table has columns for Day, Start Time, and End Time. The 'Default Business Hours' are set to 24 Hours for all days of the week. The form is created by 'OrgFarm EPIC' on 21/09/2025, 11:20 am and last modified by 'OrgFarm EPIC' on 21/09/2025, 11:20 am.

○ Added **Holidays** under **Setup** → **Holidays**:

- Republic Day

- Independence Day
- Dushera
- Diwali

The screenshot shows the SAP Setup - Holidays page. The left sidebar has a search bar with 'holidays' and a list of company settings including 'Holidays'. The main content area has a header 'Holidays' and 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, there are two tables. The first table, 'Holidays', has columns: Action, Holiday Name, Description, and Date and Time. It lists three holidays: Diwali (30/10/2025 All Day), Dussehra (02/10/2025 All Day), and Republic Day (26/01/2026 All Day). The second table, 'Elapsed Holidays', has columns: Action, Holiday Name, Description, and Date and Time. It lists one holiday: Independence Day (15/08/2025 All Day).

Step 4: Fiscal Year Settings

- Go to **Setup** → **Company Settings** → **Fiscal Year**
- Selected **Standard Fiscal Year (April–March)**
- Did not enable **Custom Fiscal Year**

The screenshot shows the SAP Setup - Fiscal Year page. The left sidebar has a search bar with 'fiscal' and a list of company settings including 'Fiscal Year'. The main content area has a header 'Fiscal Year' and a description: 'This page allows you to define and edit custom fiscal years, including the names used in reports and forecasts. Click the New button to define a new fiscal year. Click Edit to edit a previously defined fiscal year.' Below this, there are two tables. The first table, 'Custom Fiscal Years', has columns: Action, Year, FY Start Date, FY End Date, and Description. It lists one fiscal year: 2025, starting on 01/04/2025 and ending on 30/03/2026. The second table, 'Custom Fiscal Year Names', has columns: Action, Field Label, and Description. It lists three names: Quarter Prefix, Period Prefix, and Period Name.

Step 5: User Setup & Licenses

- Setup → Users → New User
- **Sample Users:**

System Admin — License: Salesforce

The screenshot shows the Salesforce System Admin interface. The left sidebar contains navigation links: Setup, Home, Object Manager, and a search bar. Below the sidebar, there's a list of users. The main content area displays the user profile for Niveditha Paturu. The profile includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Role, User License, Profile, Active status, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, and Data.com User Type. The user is currently active and has the role of System Administrator.

User Detail

Field	Value	Field	Value
Name	Niveditha Paturu	Role	System Administrator
Alias	niv	User License	Salesforce
Email	nivereddy1234@gmail.com [Verified]	Profile	System Administrator
Username	nivereddy1234588@agentforce.com	Active	<input checked="" type="checkbox"/>
Nickname	User17586897380722549325	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company	ksrm Company	Knowledge User	<input checked="" 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-07:00) Pacific Daylight Time (America/Los_Angeles)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (United States)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	<input type="checkbox"/>

Operations Manager — License: Salesforce

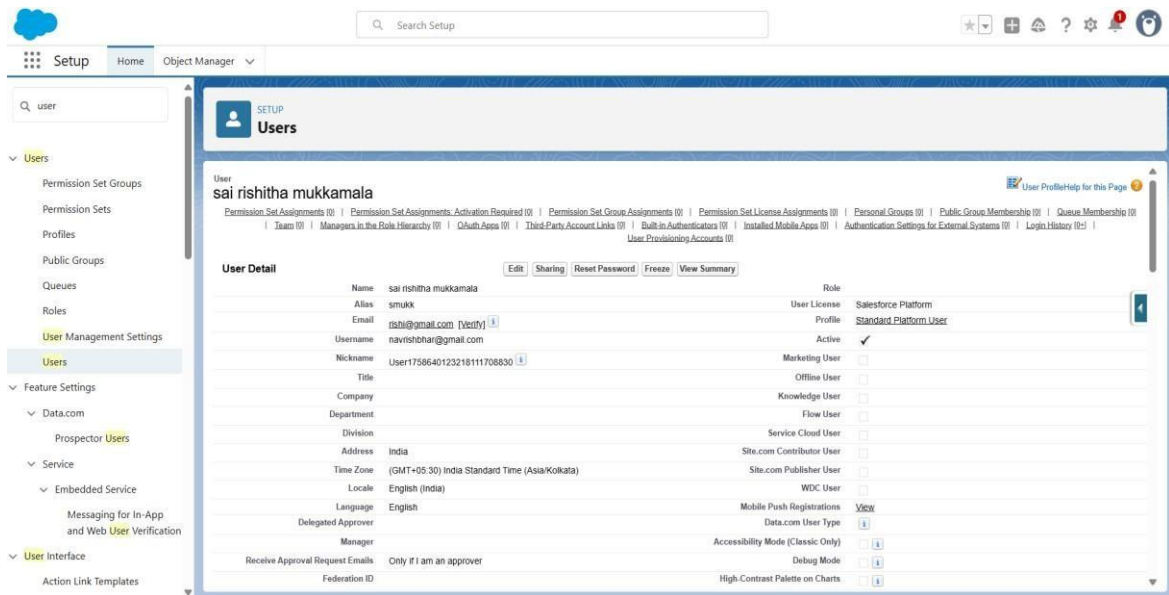
The screenshot shows the Salesforce Operations Manager interface. The left sidebar contains navigation links: Setup, Home, Object Manager, and a search bar. Below the sidebar, there's a list of users. The main content area displays the user profile for Navyasree MADINENI. The profile includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Role, User License, Profile, Active status, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, and Data.com User Type. The user is currently active and has the role of Contract Manager.

Third-Party Account Links

This account is not authorized for access from any third-party accounts

Field	Value	Field	Value
Name	Navyasree MADINENI	Role	Contract Manager
Alias	nmadi	User License	Salesforce
Email	navya@gmail.com [Verified]	Profile	Contract Manager
Username	navn@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User17586401232181708830	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	Andhra Pradesh, India	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	View
Delegated Approver		Data.com User Type	<input type="checkbox"/>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation ID		High Contrast Palette on Charts	<input type="checkbox"/>

Ticketing Agent — License: Salesforce Platform



Ground Staff / Check-in Agent — License: Salesforce Platform

- Assign Profiles and Roles during user creation

Step 6: Custom Objects Created in Airline

- In Object Manager, click Create → Custom Object.
- Label: e.g., Flight
- Plural Label: Flights
- Object Name: Flight__c (auto-generated)
- Record Name: Choose Auto Number (e.g., FL-{0000}) OR Text (Flight Number).
- Optional Features: Enable Reports, Activities, Track Field History.
- Click Save.
- Repeat this process for each required object.

Setup Home Object Manager

SETUP > OBJECT MANAGER

Flight

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers

Details

EditDelete

Description

API Name
Flight_c

Custom
✓

Singular Label
Flight

Plural Label
Flights

Enable Reports
✓

Track Activities
✓

Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Aircraft – Aircraft ID, Type, Seating Capacity, Maintenance Status

SETUP > OBJECT MANAGER

Aircraft

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers

Details

EditDelete

Description

API Name
Aircraft_c

Custom
✓

Singular Label
Aircraft

Plural Label
Aircrafts

Enable Reports
✓

Track Activities
✓

Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Passenger – Name, Contact, Email, Passport/ID, Frequent Flyer Number, Loyalty Tier

SETUP > OBJECT MANAGER

passenger

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Details

Description

API Name: passenger_c

Custom: ☒

Singular Label: passenger

Plural Label: passengers

Enable Reports: ☒

Track Activities: ☒

Track Field History: ☒

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

Edit Delete

Booking – Booking ID, Flight ID, Passenger ID(s), Seat(s), Fare Class, Booking Status, Payment Info

SETUP > OBJECT MANAGER

Booking

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Details

Description

API Name: Booking_c

Custom: ☒

Singular Label: Booking

Plural Label: Bookings

Enable Reports: ☐

Track Activities: ☐

Track Field History: ☐

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

Edit Delete

Ticket – Ticket No, Booking ID, Issue Date, Fare, Taxes

Check-In / Boarding – Check-In Time, Seat Assigned, Boarding Pass Issued, Gate, Boarding Group, Status

Setup Home Object Manager

Search Setup

Setup > OBJECT MANAGER

payment

Details

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers

Details

Description

API Name: payment__c

Custom

Singular Label: payment

Plural Label: payments

Enable Reports: ☒

Track Activities: ☒

Track Field History: ☒

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

Edit Delete

Maintenance Record – Aircraft ID, Maintenance Type, Date, Technician, Next Due

Setup Home Object Manager

Search Setup

Setup > OBJECT MANAGER

Maintenance Record

Details

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers

Details

Description

API Name: Maintenance_Record__c

Custom

Singular Label: Maintenance Record

Plural Label: Maintenance Records

Enable Reports: ☒

Track Activities: ☒

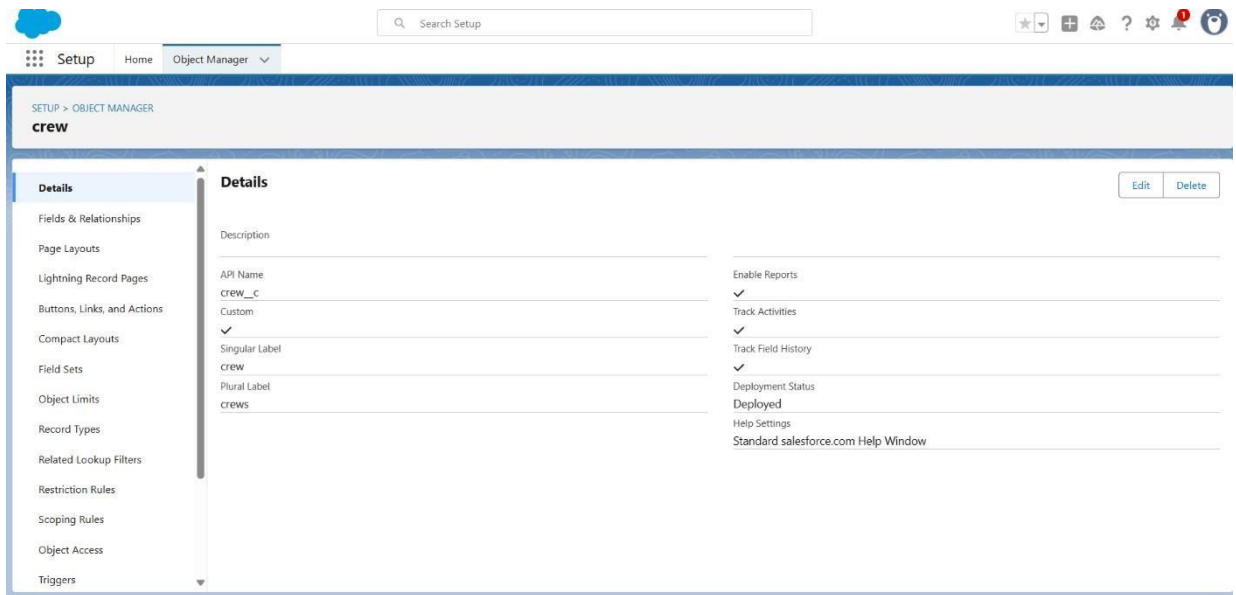
Track Field History: ☒

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

Edit Delete

Crew Assignment – Flight ID, Crew Member ID, Role, Duty Status



Step 7: Profiles

- Setup → Quick Find → **Profiles** → click **Profiles**.
- Click **Clone** on an existing profile (e.g., Standard User).
- Enter **Profile Name** (e.g., Ticketing Agent) → **Save**.
- Click the newly created profile → **Object Settings**.
- Select an object (e.g., **Booking**) → **Edit**.
- Grant appropriate permissions (Read, Create, Edit, Delete, View All / Modify All if needed) → **Save**.

○ Set Field-Level Security

- In the profile, go to **Field-Level Security** or within Object Settings click each field and set visible/editable flags.
- **Hide** sensitive fields (Passport No, Payment Info) from non-admin profiles.

○ Configure App & Tab Settings

- In the profile: **App Settings** → make required apps available.
- **Object Tab Settings** → set Default On / Hidden for object tabs.

○ Login Hours / IP Ranges (optional per profile)

- In the profile: **Login Hours** / **Login IP Ranges** → configure if you need time/IP restrictions.

○ Assign Users to Profile

- Setup → **Users** → click a user → **Edit** → set **Profile** → **Save**.

Setup

Home

Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Didn't find what you're looking for? Try using Global Search.

SETUP

Profiles

Profile

passenger

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 (2) | 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	passenger		
User License	Salesforce	Custom Profile	✓
Description			
Created By	Niveditha Paturu, 9/23/2025, 10:44 PM	Modified By	Niveditha Paturu, 9/23/2025, 10:44 PM

Page Layouts

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

Setup

Home

Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Didn't find what you're looking for? Try using Global Search.

SETUP

Profiles

Profile

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 (2) | 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	Staff		
User License	Salesforce	Custom Profile	✓
Description			
Created By	Niveditha Paturu, 9/23/2025, 10:42 PM	Modified By	Niveditha Paturu, 9/23/2025, 10:42 PM

Page Layouts

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

Setup

Home

Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Didn't find what you're looking for? Try using Global Search.

SETUP

Profiles

Profile

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 (2) | 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	Manager		
User License	Salesforce	Custom Profile	✓
Description			
Created By	Niveditha Paturu, 9/23/2025, 10:43 PM	Modified By	Niveditha Paturu, 9/23/2025, 10:43 PM

Page Layouts

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

Step 8: Roles

Go to **Setup** → **Users** → **Roles** → **Set Up Roles**

Configured hierarchy:

CEO → Head

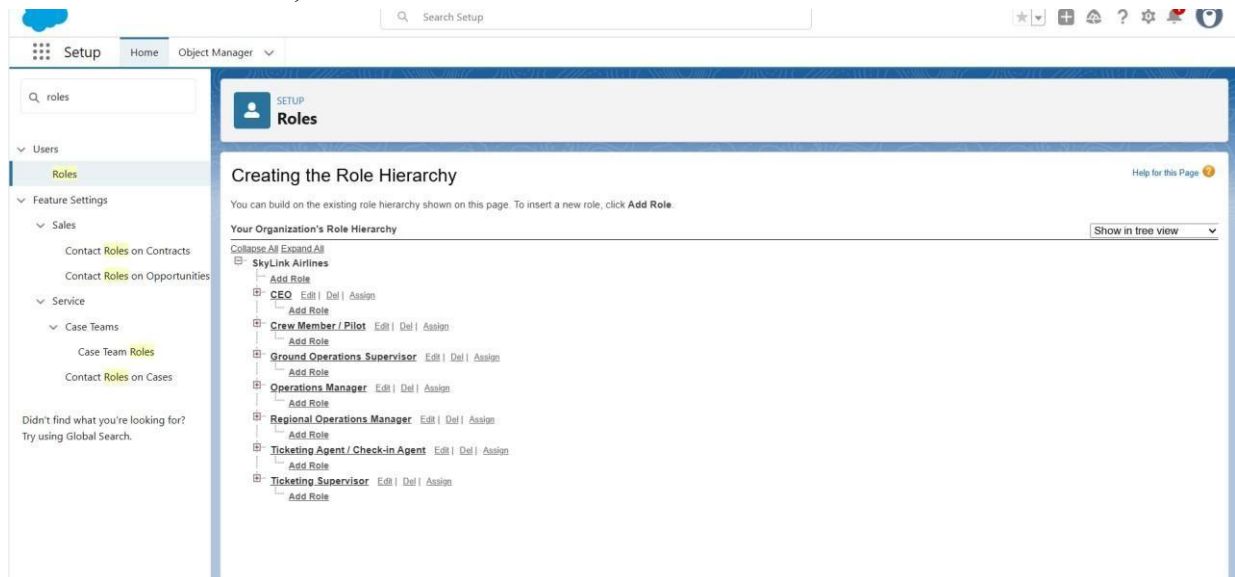
Ops Manager → Regional heads

Ticketing Agents → Sales staff

Ground Staff → Airport staff

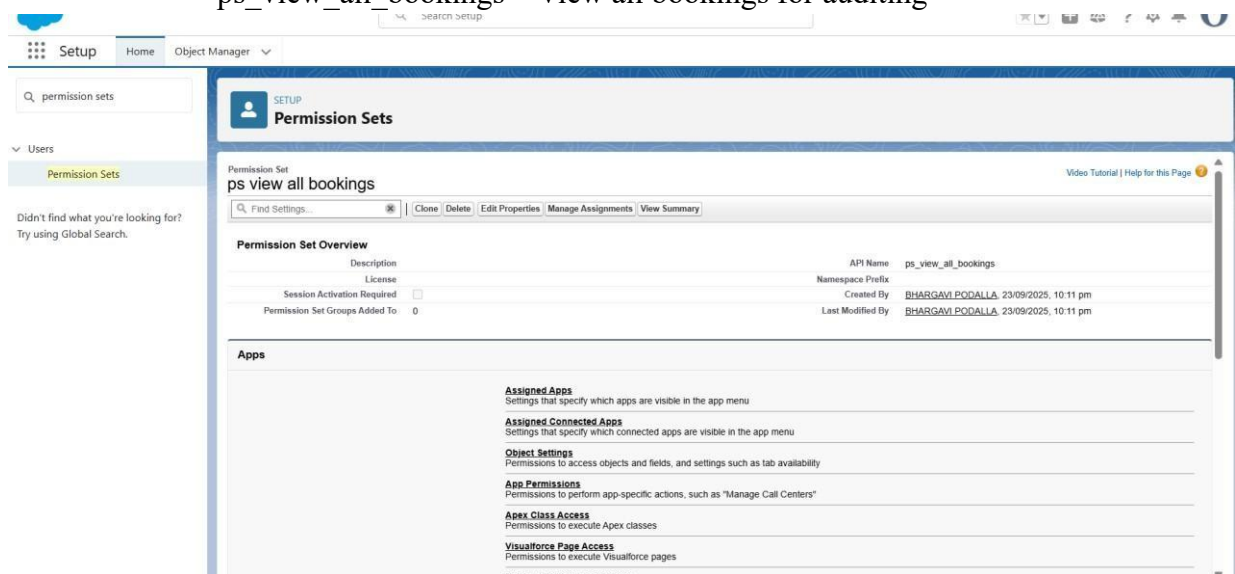
Maintenance → Engineers

Crew → Pilots, Cabin crew

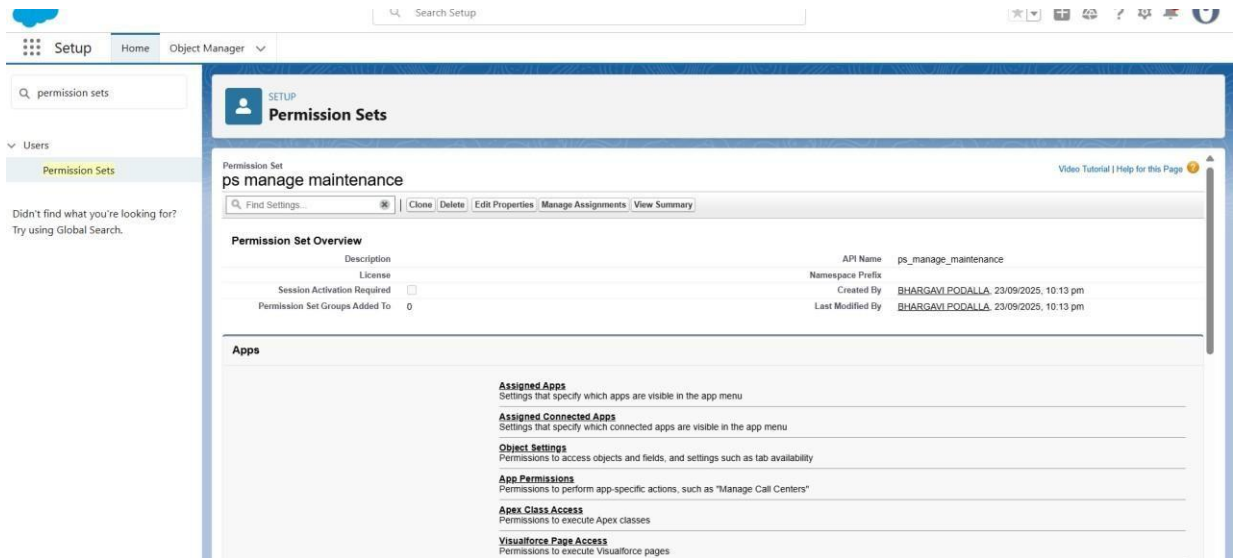


Step 9: Permission Sets

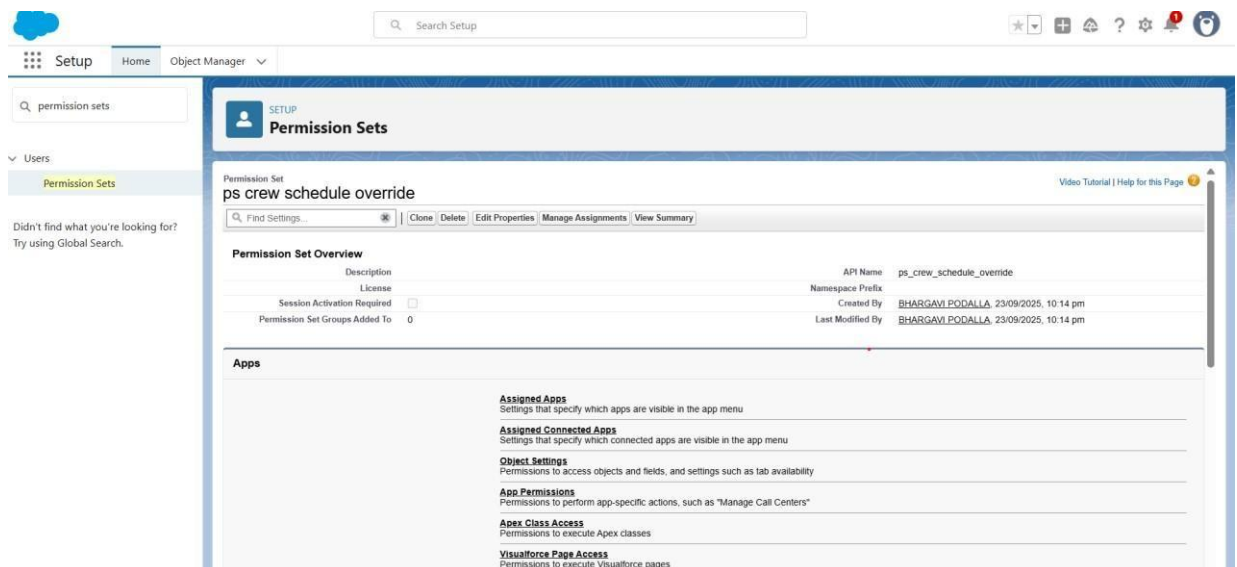
ps_view_all_bookings – View all bookings for auditing



ps_manage_maintenance – Full maintenance permissions



ps_crew_schedule_override – Temporary override for crew scheduling

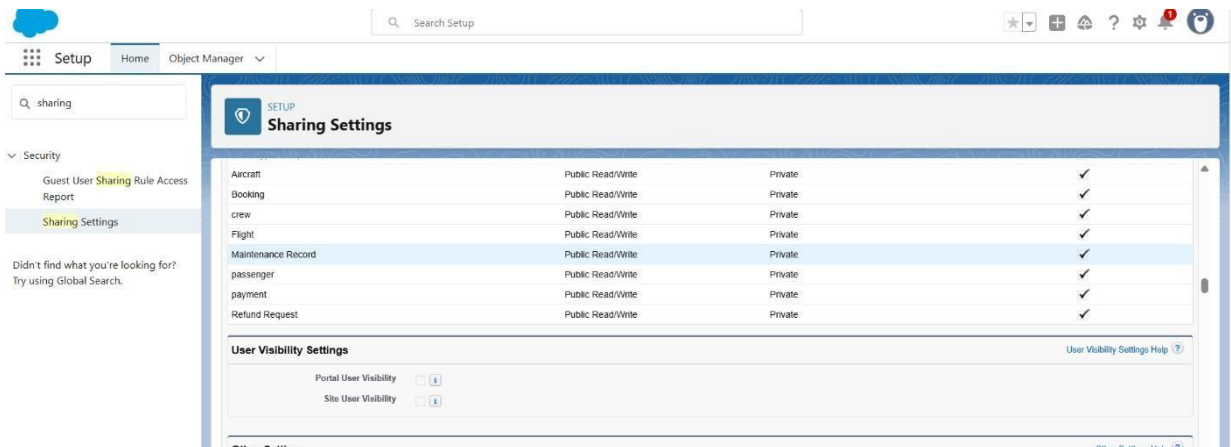


- Assigned permission sets to specific users in addition to profiles

Step 10: Organization-Wide Defaults (OWD)

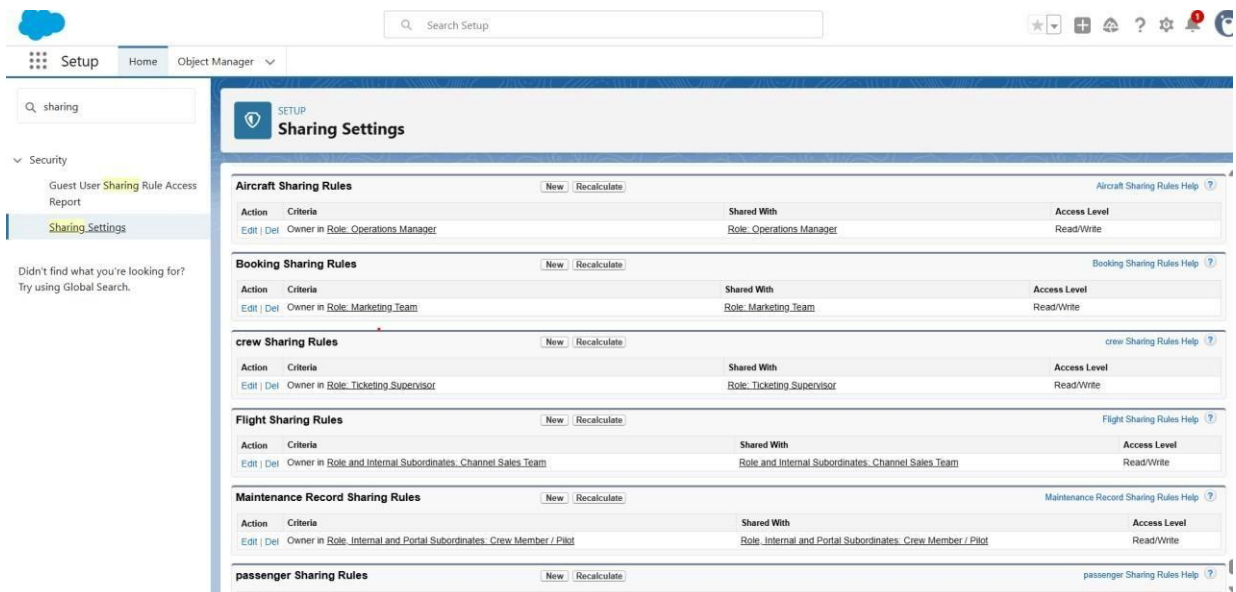
- Go to Setup → Security → Sharing Settings
- Set OWD as:
 - assenger → Private
 - Booking → Private (shared with agent/manager)
 - Flight → Public Read Only
 - Aircraft → Public Read Only

- Check-In / Boarding → Private or Controlled by Parent



Step 11: Sharing Rules

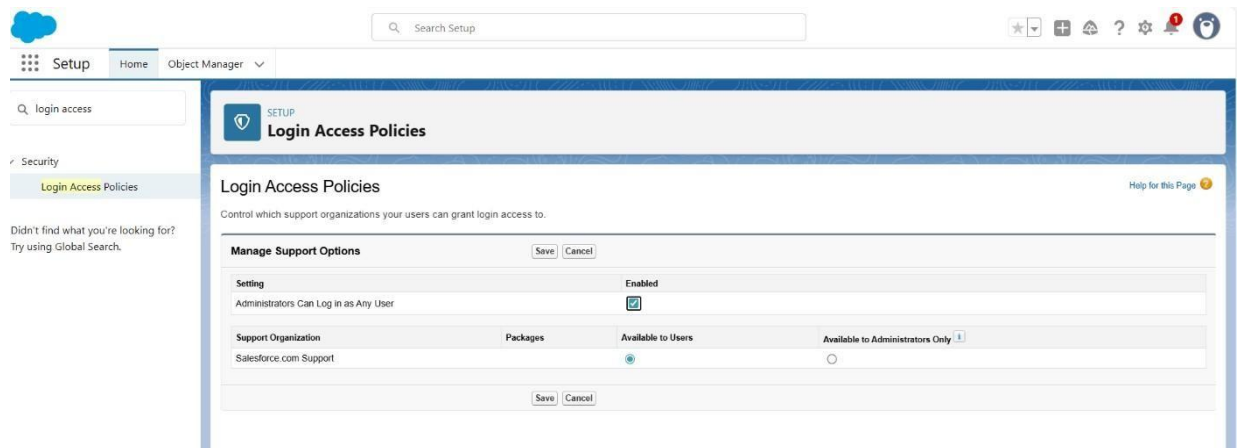
- Go to **Setup** → **Security** → **Sharing Settings** → **Sharing Rules** ○ Created rule:
- Share Bookings → Regional Ops Managers → Read/Write
- Share Flight Records → Ground Ops Supervisors → Read/Write
- Share Maintenance Records → Maintenance Group → Read/Write



Step 12: Login Access Policies

- Go to **Setup** → **Security** → **Login Access Policies**
- Enabled:
- **Admin Login Access** for troubleshooting

- **Delegated Admin Access** for selected managers



Step 13: Dev Org Setup & Sandboxes

- **Developer Org** → Used for proof of concept and initial setup.
- **Developer Sandbox** → Safe space to build and test features (Apex, LWC, Flows).
- **Partial/Full Sandboxes** → Enable UAT, system integration, and data testing with masked PII.

Step 14: Deployment Basics

- **Deployment Tools** → Use Change Sets or Salesforce CLI (SFDX).
- **Lifecycle** → Dev → Sandbox → QA → UAT → Production.
- **Governance** → Maintain detailed release notes, change logs, and ensure automated Apex & Flow tests run successfully.

Step 15: Security & Compliance

- **Data Security** → Encrypt and mask sensitive information (e.g., passport, payment).
- **Access Controls** → Apply field-level security and principle of least privilege.
- **Monitoring** → Enable Audit Trail and Event Monitoring to ensure compliance and detect anomalies.

Conclusion

Phase 2 has laid a solid operational foundation for the Airline Management System in Salesforce. Through careful setup of company settings, users, roles, profiles, custom objects, security, and sandboxes, the system is now well-structured, secure, and scalable. This ensures efficient management of flights, bookings, passengers, and crew, while safeguarding sensitive data. With this groundwork complete, the org is fully prepared to advance into Phase 3: Data Modeling & Relationships, enabling deeper process automation and optimized airline operations.

