

Phase 2: Org Setup & Configuration

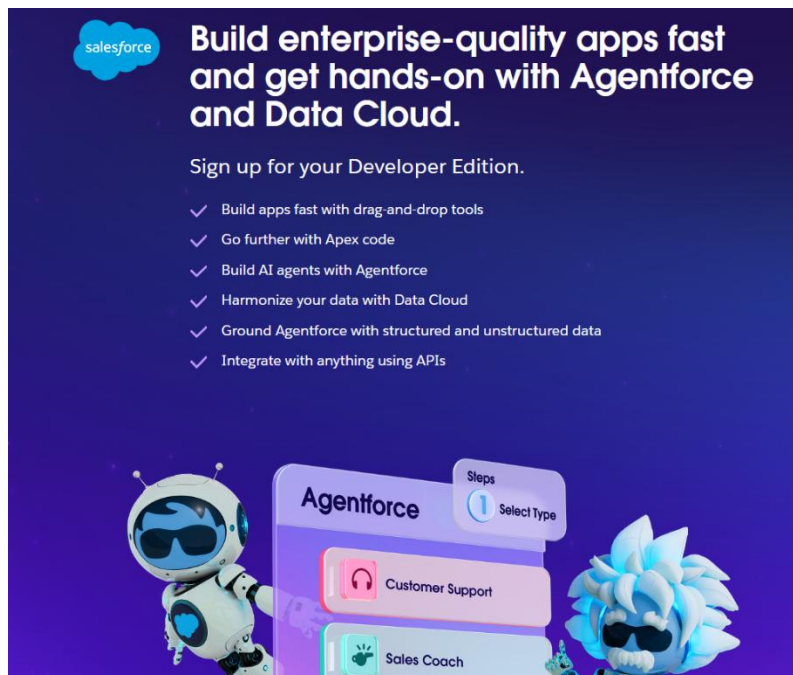
Airline Management System

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
<input type="text" value="Niveditha"/>	<input type="text" value="Paturu"/>


Job title	Work email
<input type="text" value="Developer"/>	<input type="text" value="nivereddy1234@gmail.com"/>

Company	Country/Region
<input type="text" value="ksrm Company"/>	<input type="text" value="India"/>

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.

We value your privacy. To learn more, visit our [Privacy Statement](#).

☒ 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. On the left, the 'Setup' menu is open, and 'Company Information' is selected under 'Company Settings'. The main content area displays the 'Company Information' page. At the top, there's a search bar and navigation tabs for 'Organization Detail', 'Permissions', 'Features', and 'Usage'. The 'Organization Detail' tab is active, showing a table of organization settings. The table has columns for the setting name and its value. The settings include Organization Name (ksrm Company), Primary Contact (Niveditha Paturu), Division, Address (India), Fiscal Year Starts In (January), Activate Multiple Currencies (unchecked), Enable Data Translation (unchecked), Newsletter (checked), Admin Newsletter (checked), Hide Notices About System Maintenance (unchecked), Hide Notices About System Downtime (unchecked), Locale Formats (ICU), Phone, Fax, Default Locale (English (India)), Default Language (English), Default Time Zone (GMT+05:30 India Standard Time (Asia/Kolkata)), Currency Locale (English (India) - INR), Used Data Space (342 KB (7%) [View]), Used File Space (17 KB (0%) [View]), API Requests, Last 24 Hours (39 (15,000 max)), Streaming API Events, Last 24 Hours (0 (10,000 max)), Restricted Logins, Current Month (0 (0 max)), Salesforce.com Organization ID (00Df000008muMg), Organization Edition (Developer Edition), and Instance (USA1044). At the bottom, it shows 'Created By' as OrgFarm EPIC 9/19/2025, 3:05 AM and 'Modified By' as Niveditha Paturu, 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. On the left, the 'Setup' menu is open, and 'Business Hours' is selected under 'Company Settings'. The main content area displays the 'Business Hours' page. At the top, there's a search bar and navigation tabs for 'Organization Business Hours' and 'Holidays'. The 'Organization Business Hours' tab is active, showing a table of business hours settings. The table has columns for the setting name and its value. The settings include Business Hours Name (Business Hours), Default (checked), Time Zone (GMT-07:00 Pacific Daylight Time (America/Los_Angeles)), and Default Business Hours (checked). At the bottom, it shows 'Active' as checked, 'Created By' as OrgFarm EPIC 21/09/2025, 11:20 am, and 'Last Modified By' as OrgFarm EPIC 21/09/2025, 11:20 am.

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

- Republic Day
- Independence Day
- Dusshera
- Diwali

Setup Home Object Manager

Search Setup

holidays

Company Settings

Holidays

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

SETUP Holidays

Holidays

Holidays are dates and times at which business hours are suspended. Business hours are the days and hours that your support team is available.

Holidays New

Action	Holiday Name	Description	Date and Time
Edit Del	Diwali	It symbolizes the triumph of light over darkness.	30/10/2025 All Day
Edit Del	Dussehra	"Dussehra celebrates the victory of good over evil, symbolized by Lord Rama defeating Ravana."	02/10/2025 All Day
Edit Del	Republic Day	It symbolizes the strength, diversity, and democratic spirit of India.	26/01/2026 All Day

Elapsed Holidays

Action	Holiday Name	Description	Date and Time
Clone	Independence Day	It represents India's independence and the spirit of liberty.	15/08/2025 All Day
Clone	Independence Day	It represents India's independence and the spirit of liberty.	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**

Setup Home Object Manager

Search Setup

fiscal

Company Settings

Fiscal Year

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

SETUP Fiscal Year

Fiscal Year

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.

Custom Fiscal Years New

Action	Year	FY Start Date	FY End Date	Description
New	2025	01/04/2025	30/03/2026	

Custom Fiscal Year Names

Action	Field Label	Description
Edit Replace	Quarter Prefix	
Edit Replace	Period Prefix	
Edit Replace	Quarter Name	
Edit Replace	Period Name	

Step 5: User Setup & Licenses

- Setup → Users → New User
- Sample Users:

System Admin — License: Salesforce

The screenshot shows the Salesforce Setup interface for a new user. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays the user profile for Niveditha Paturu. The user is active and has the role of System Administrator. The user detail table includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, and Language. The user is also assigned the role of Knowledge User. The user detail table includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, and Language. The user is also assigned the role of Knowledge User.

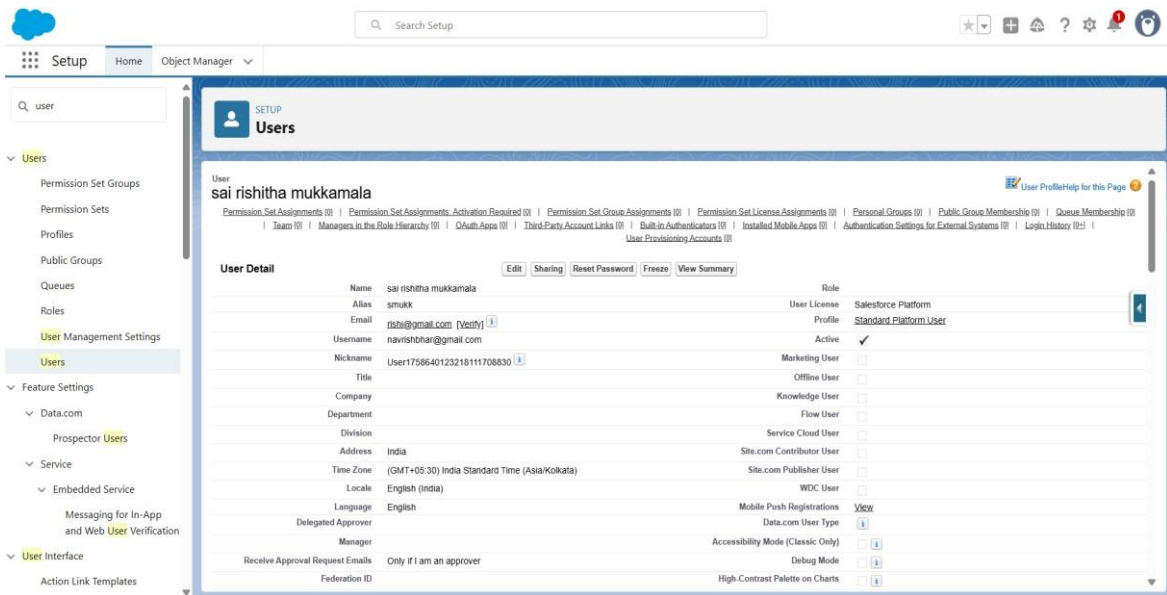
User Detail	
Name	Niveditha Paturu
Alias	niv
Email	nivereddy1234@gmail.com [Verified]
Username	nivereddy1234588@agentforce.com
Nickname	User17586897380722549325
Title	
Company	krm Company
Department	
Division	
Address	
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Locale	English (United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

Operations Manager — License: Salesforce

The screenshot shows the Salesforce Setup interface for a new user. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays the user profile for Navyasree MADINENI. The user is active and has the role of Contract Manager. The user detail table includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, and Language. The user is also assigned the role of Knowledge User. The user detail table includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, and Language. The user is also assigned the role of Knowledge User.

User Detail	
Name	Navyasree MADINENI
Alias	nmadi
Email	navya@gmail.com [Verified]
Username	navi@gmail.com
Nickname	User17586401232161708830
Title	
Company	
Department	
Division	
Address	Andhra Pradesh, India
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Language	English
Role	Salesforce
User License	Contract Manager
Profile	Contract Manager
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Mobile Push Registrations	View
Data.com User Type	View
Accessibility Mode (Classic Only)	<input type="checkbox"/>
Debug Mode	<input type="checkbox"/>
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

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

Edit

Delete

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

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

Edit

Delete

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

SETUP > OBJECT MANAGER

passenger

Edit Delete

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

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

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

SETUP > OBJECT MANAGER

Booking

Edit Delete

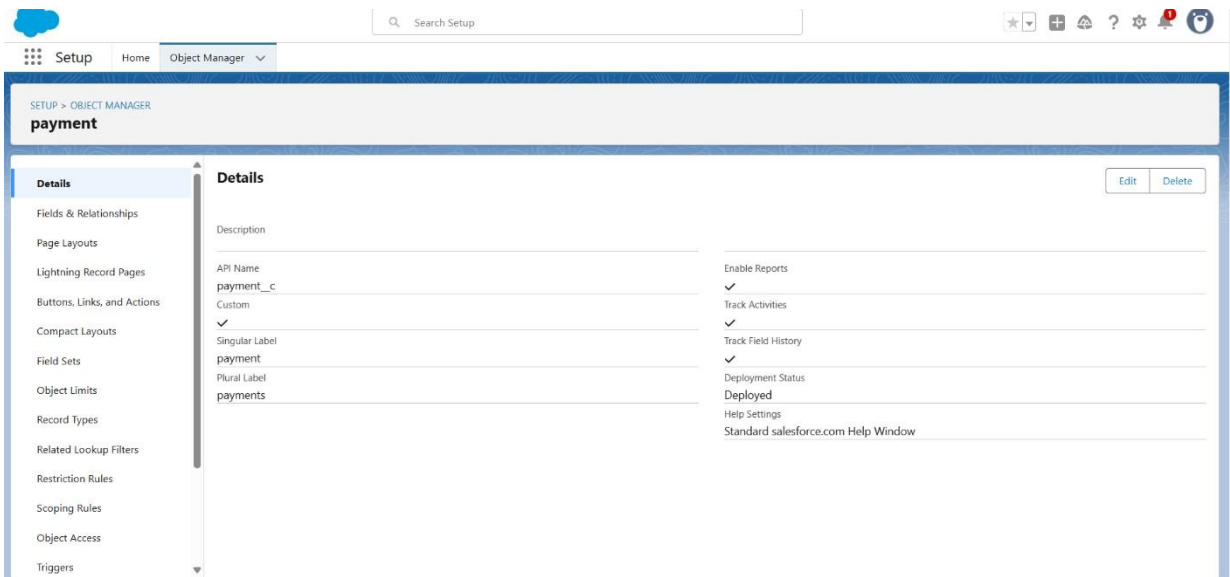
Description	
API Name	Booking__c
Custom	✓
Singular Label	Booking
Plural Label	Bookings
Enable Reports	
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Details

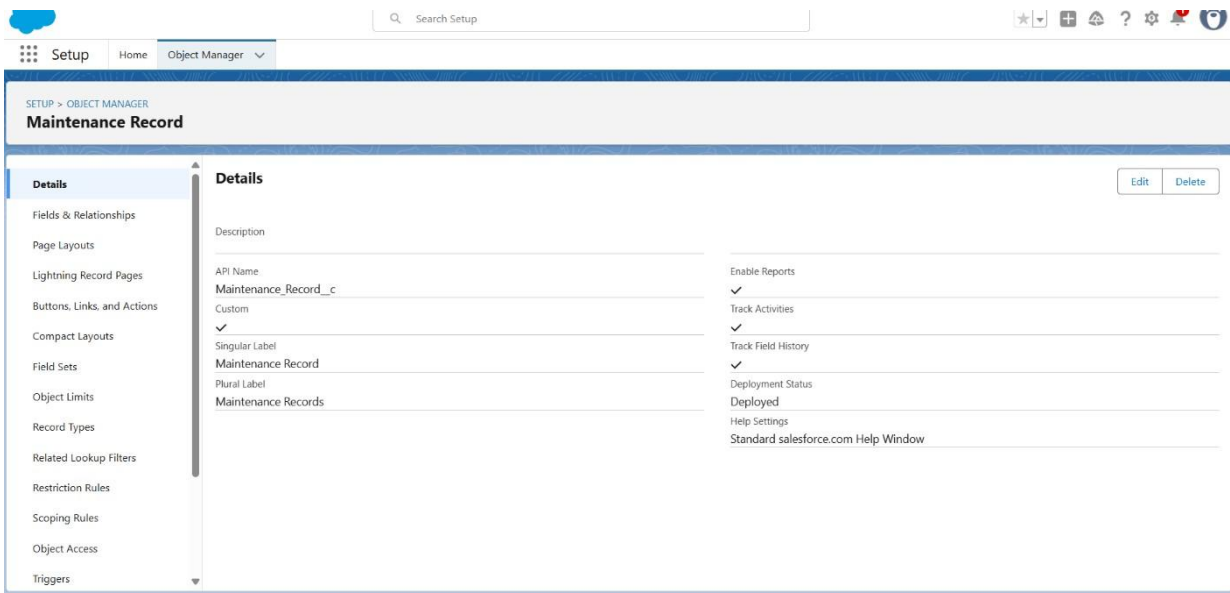
- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers

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

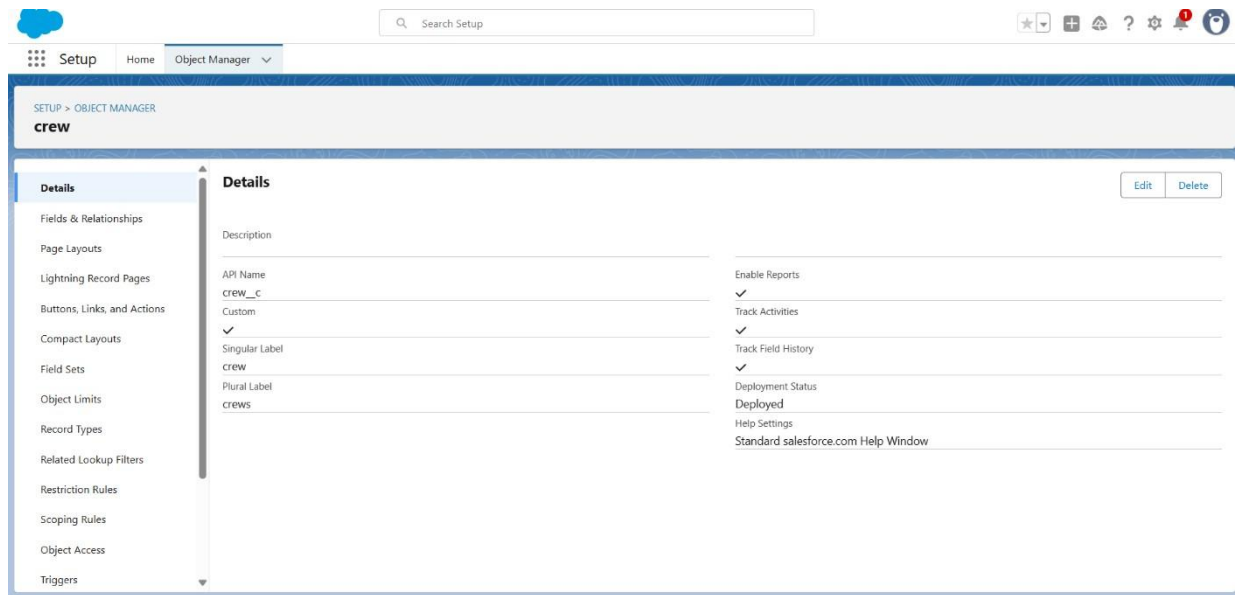
Check-In / Boarding – Check-In Time, Seat Assigned, Boarding Pass Issued, Gate, Boarding Group, Status



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



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**.

SetupHomeObject 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.

SetupProfiles

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

EditCloneDeleteView Users

Name	passenger	Custom Profile	✓
User License	Salesforce		
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

SetupHomeObject 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.

SetupProfiles

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

EditCloneDeleteView Users

Name	Staff	Custom Profile	✓
User License	Salesforce		
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

SetupHomeObject 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.

SetupProfiles

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

EditCloneDeleteView Users

Name	Manager	Custom Profile	✓
User License	Salesforce		
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

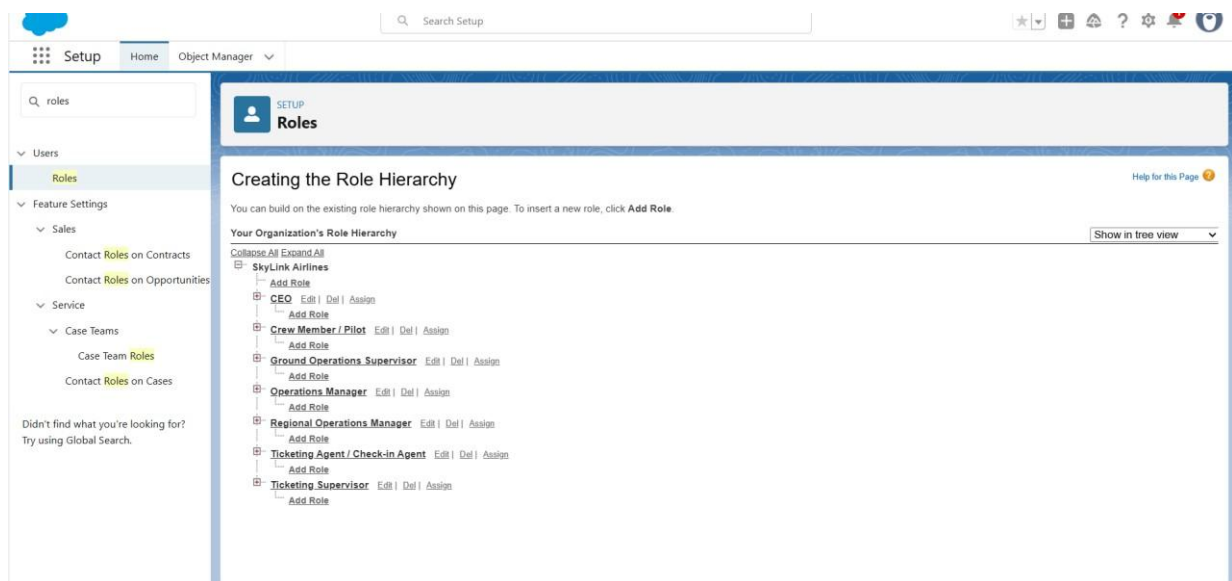
Ops Manager → Regional heads

Ticketing Agents → Sales staff

Ground Staff → Airport staff

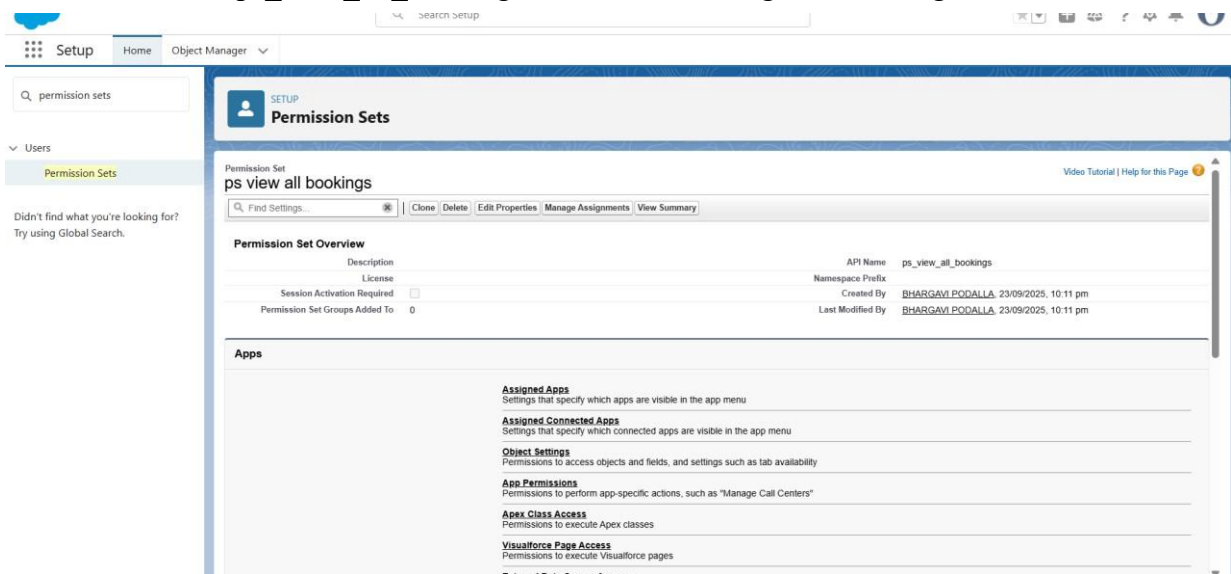
Maintenance → Engineers

Crew → Pilots, Cabin crew



Step 9: Permission Sets

ps_view_all_bookings – View all bookings for auditing



ps_manage_maintenance – Full maintenance permissions

The screenshot shows the Salesforce Setup interface for a Permission Set named 'ps_manage_maintenance'. The left sidebar shows the 'Setup' menu with 'Permission Sets' selected. The main content area displays the 'Permission Set Overview' for 'ps_manage_maintenance'. The overview includes fields for Description, License, Session Activation Required, and Permission Set Groups Added To. It also lists the API Name, Namespace Prefix, Created By, and Last Modified By. Below the overview, there are sections for 'Apps', 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings', 'App Permissions', 'Apex Class Access', and 'Visualforce Page Access'.

ps_crew_schedule_override – Temporary override for crew scheduling

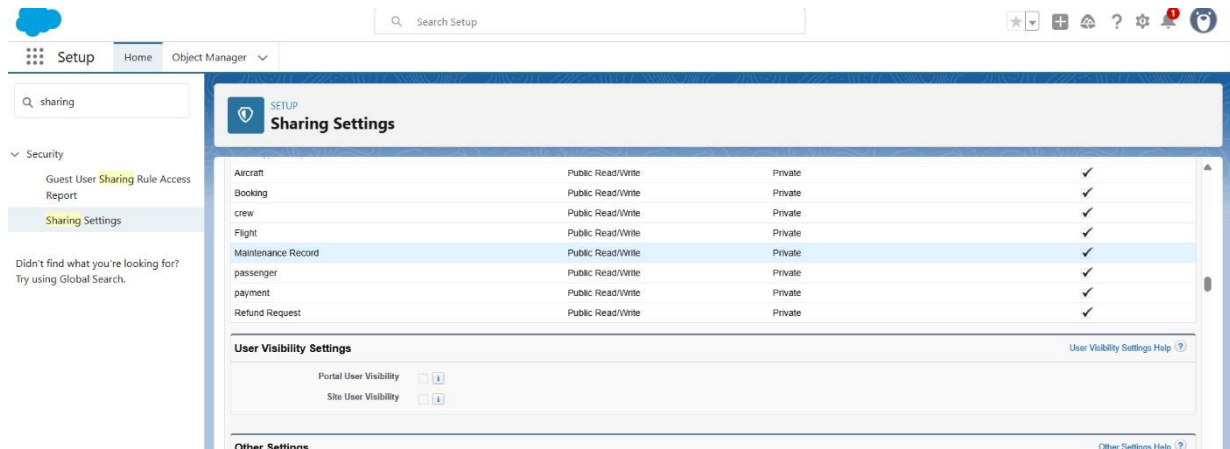
The screenshot shows the Salesforce Setup interface for a Permission Set named 'ps_crew_schedule_override'. The left sidebar shows the 'Setup' menu with 'Permission Sets' selected. The main content area displays the 'Permission Set Overview' for 'ps_crew_schedule_override'. The overview includes fields for Description, License, Session Activation Required, and Permission Set Groups Added To. It also lists the API Name, Namespace Prefix, Created By, and Last Modified By. Below the overview, there are sections for 'Apps', 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings', 'App Permissions', 'Apex Class Access', and 'Visualforce Page Access'.

- Assigned permission sets to specific users in addition to profiles

Step 10: Organization-Wide Defaults (OWD)

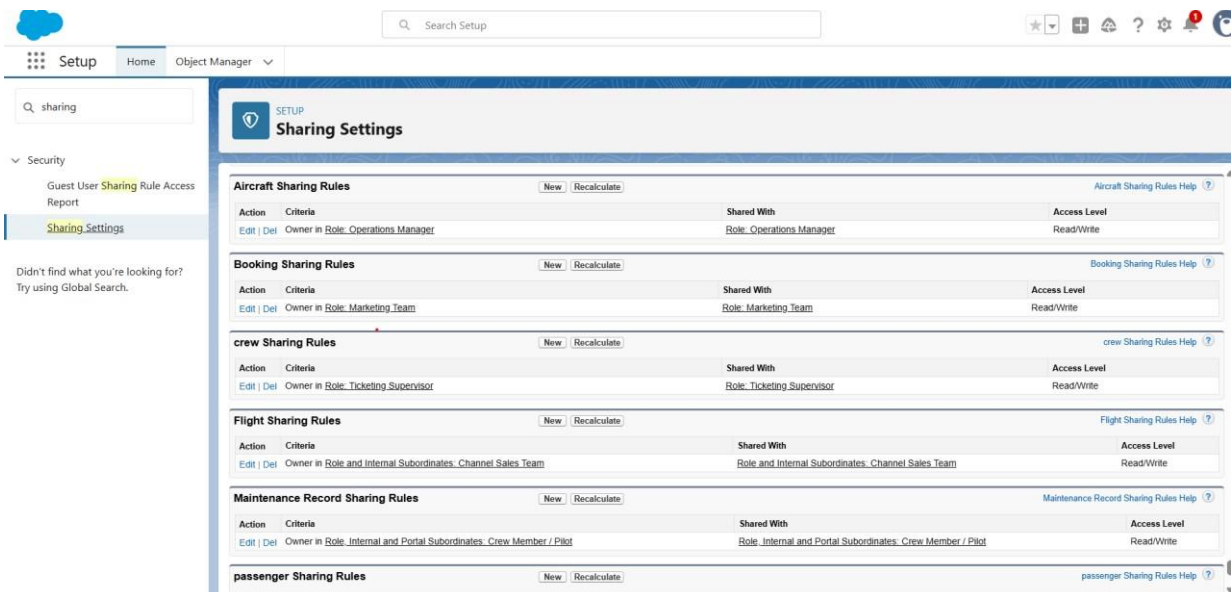
- Go to Setup → Security → Sharing Settings
- Set OWD as:
 - assenger → Private
 - Booking → Private (shared with assigned agent/manager)
 - Flight → Public Read Only

- Aircraft → Public Read Only
- Check-In / Boarding → Private or Controlled by Parent



Step 11: Sharing Rules

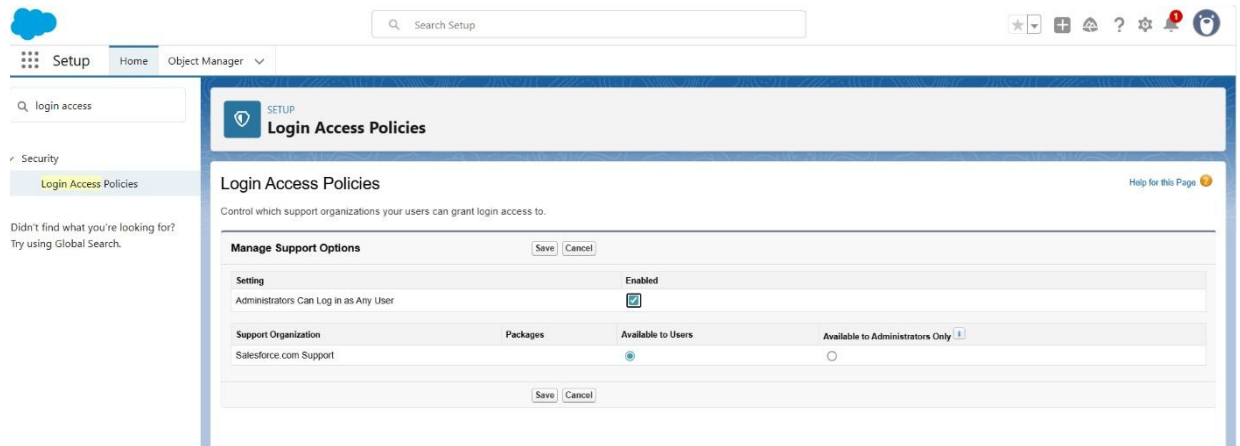
- Go to **Setup** → **Security** → **Sharing Settings** → **Sharing Rules** ○ Created rule:
- Share Bookings → Regional Ops Managers → Read/Write
- Share Flight Records → Ground Ops Supervisors → Read/Write
- Share Maintenance Records → Maintenance Group → Read/Write



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.

