Phase 2: Org Setup & Configuration
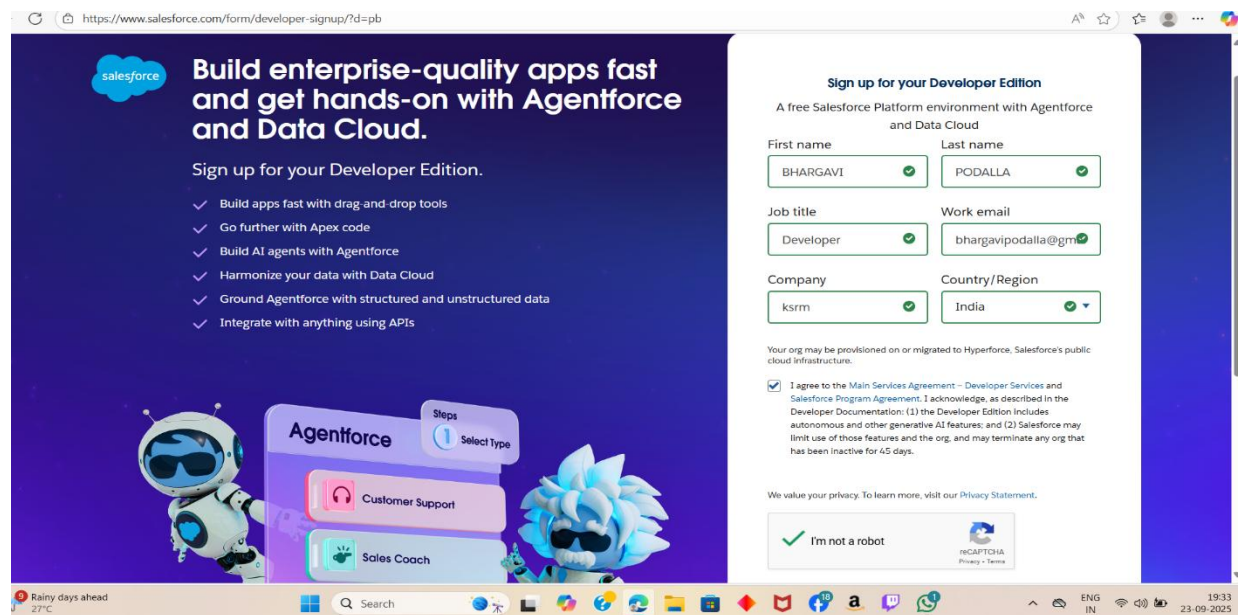
Airline Management System

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).

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)

Step 3: Business Hours & Holidays

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

➢ Added **Holidays** under **Setup → Holidays**:

- Republic Day

- Independence Day
- Dushera
- Diwali

Step 4: Fiscal Year Settings

- Go to **Setup → Company Settings → Fiscal Year**
- Selected **Standard Fiscal Year (April–March)**
- Did not enable **Custom Fiscal Year**
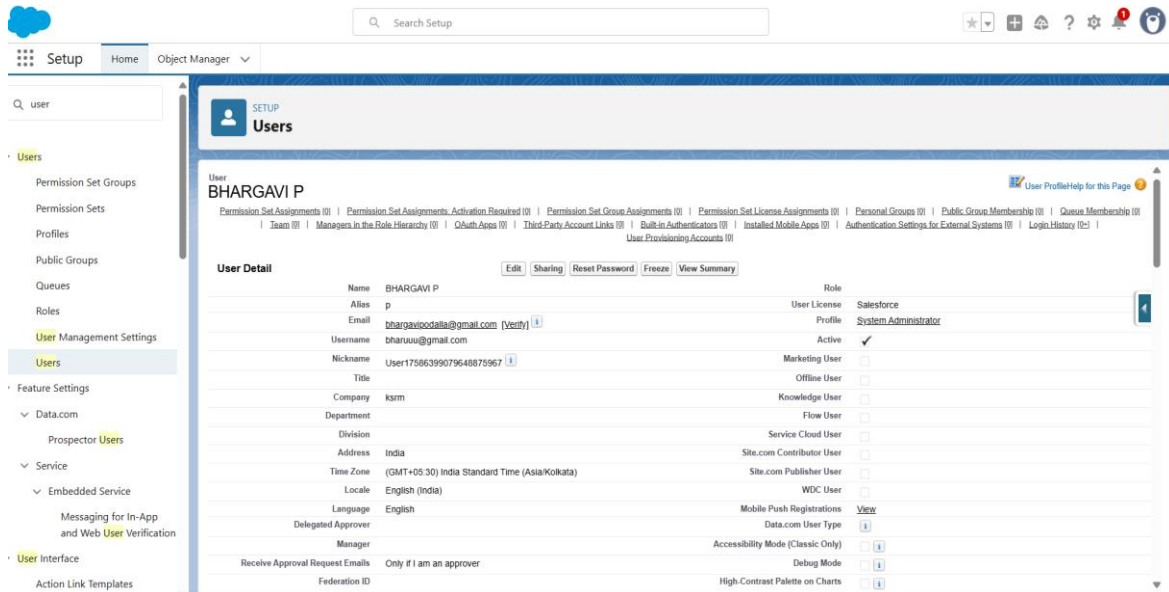
Step 5: User Setup & Licenses

- Setup → Users → New User
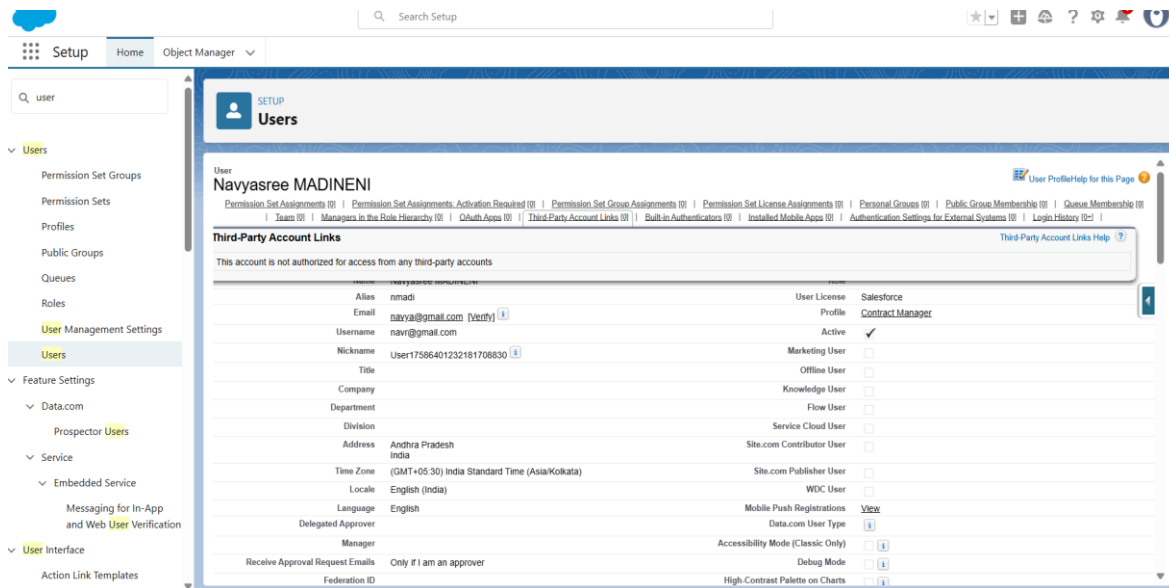
- **Sample Users:**
  - ✓ System Admin — License: Salesforce

  - ✓ Operations Manager — License: Salesforce

  - ✓ Ticketing Agent — License: Salesforce Platform
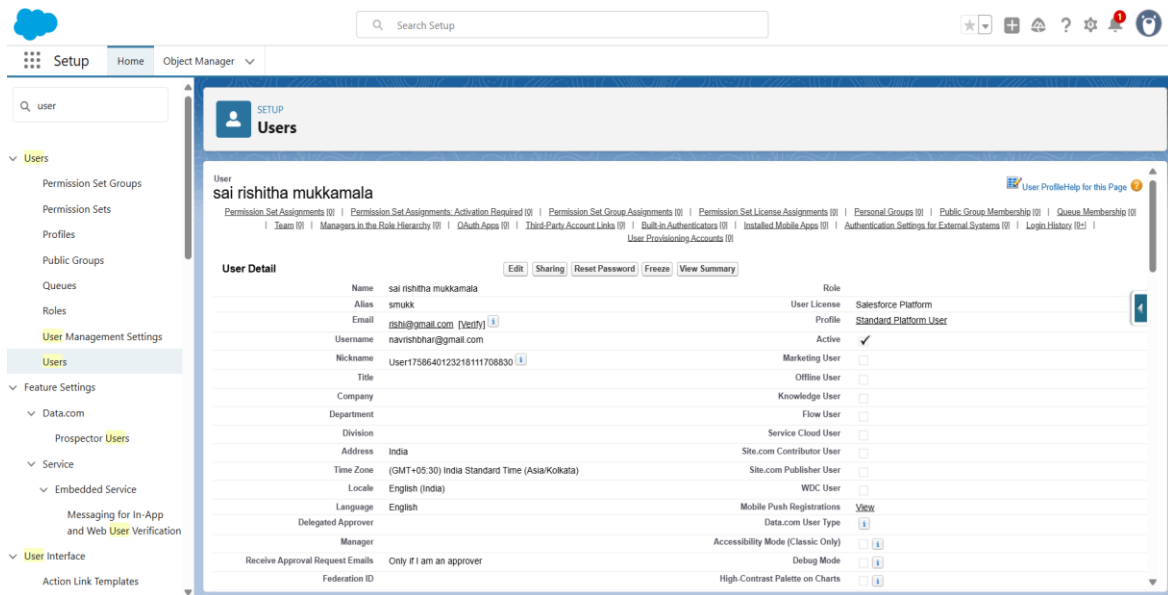
✓ Ground Staff / Check-in Agent — License: Salesforce Platform
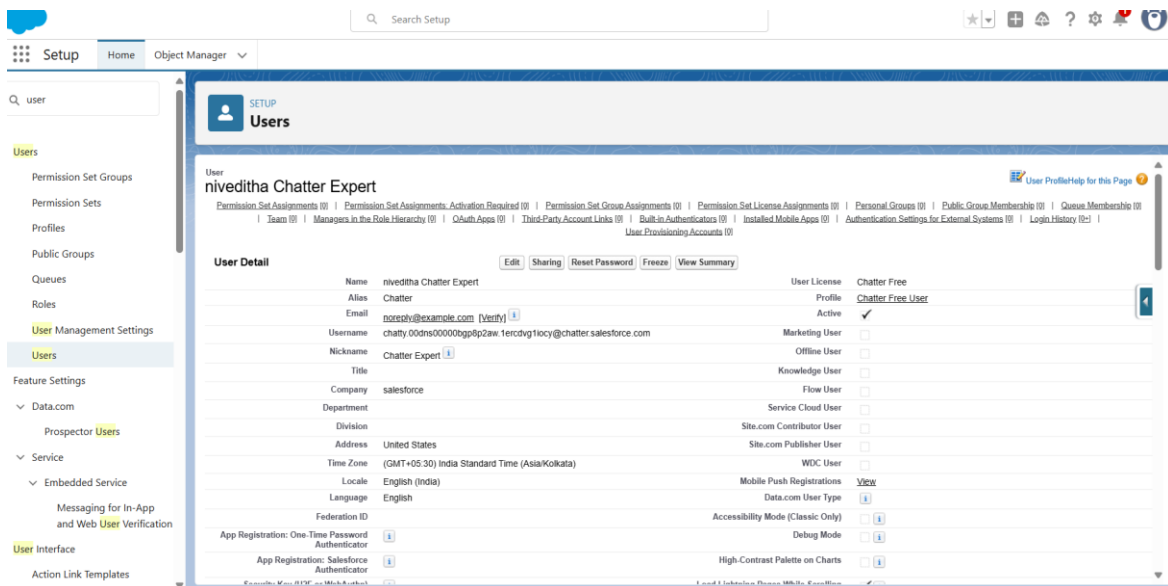
✓ Pilot / Cabin Crew — License: Salesforce Platform

✓ Maintenance Engineer — 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.

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

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

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

✓ 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
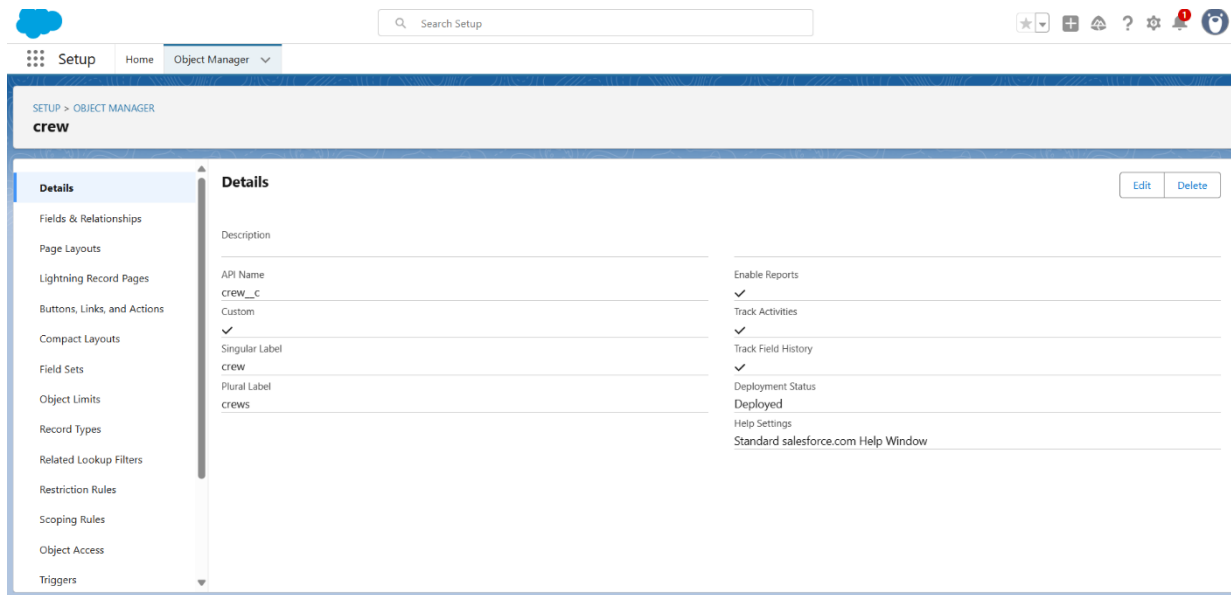
Step 7: Profiles

- 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**.

Profile 1: passenger

Profile
passenger

Help for this Page

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 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 Agent Access [0] | Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]

Profile Detail   Edit | Clone | Delete | View Users

Name	passenger		
User License	Analytics Cloud Integration User	Custom Profile	✓
Description			
Created By	BHARGAVI PODALLA, 23/09/2025, 9:39 pm	Modified By	BHARGAVI PODALLA, 23/09/2025, 9:40 pm

Page Layouts

Standard Object 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]	Messaging Channel	Messaging Channel Layout [View Assignment]
Account	Account Layout [View Assignment]	Messaging Session	Messaging Session Layout [View Assignment]
Account Brand	Account Brand Layout [View Assignment]	Messaging User	Messaging User Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]

Profile 2: staff

Profile
staff

Help for this Page

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 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 Agent Access [0] | Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]

Profile Detail   Edit | Clone | Delete | View Users

Name	staff		
User License	Salesforce Integration	Custom Profile	✓
Description			
Created By	BHARGAVI PODALLA, 23/09/2025, 9:41 pm	Modified By	BHARGAVI PODALLA, 23/09/2025, 9:41 pm

Page Layouts

Standard Object 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]	Messaging Channel	Messaging Channel Layout [View Assignment]
Account	Account Layout [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Account Brand	Account Brand Layout [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Opportunity	Opportunity Layout [View Assignment]

Profile 3: manager

Profile
manager

Help for this Page

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 Agent 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	BHARGAVI PODALLA, 23/09/2025, 9:42 pm	Modified By	BHARGAVI PODALLA, 23/09/2025, 9:42 pm

Page Layouts

Standard Object 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]	Messaging Channel	Messaging Channel Layout [View Assignment]
Account	Account Layout [View Assignment]	Messaging Session	Messaging Session Layout [View Assignment]
Account Brand	Account Brand Layout [View Assignment]	Messaging User	Messaging User Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]

Step 8:Roles

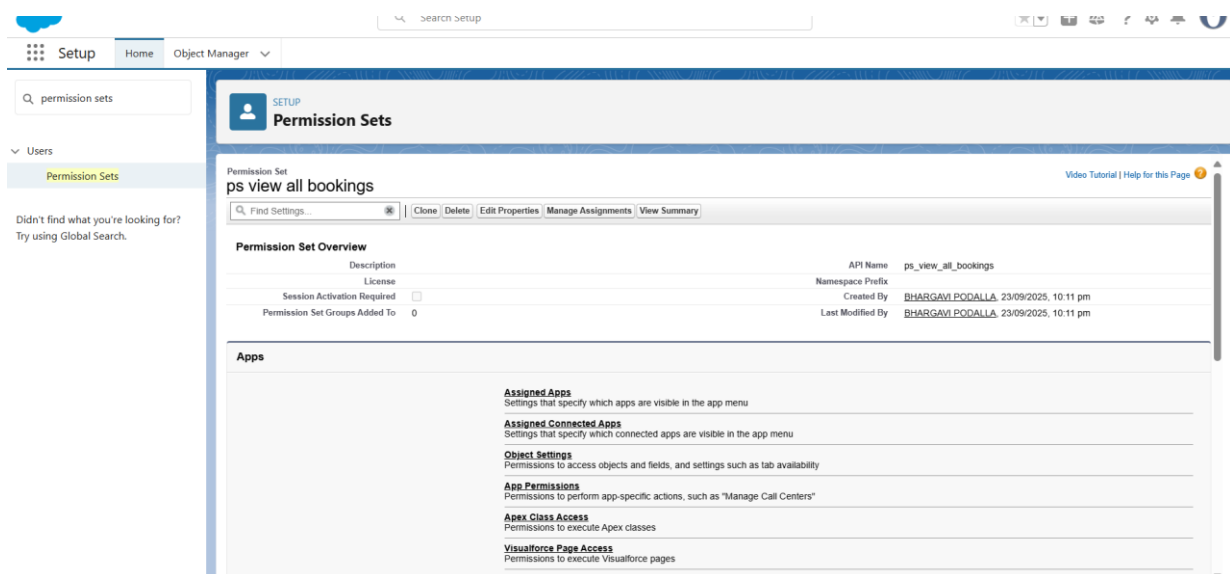> Go to **Setup → Users → Roles → Set Up Roles**

Configured hierarchy:

- ✓ CEO → Head
- ✓ Ops Manager → Regional heads
- ✓ Ticketing Agents → Sales staff
- ✓ Ground Staff → Airport staff
- ✓ Maintenance → Engineers
- ✓ Crew → Pilots, Cabin crew
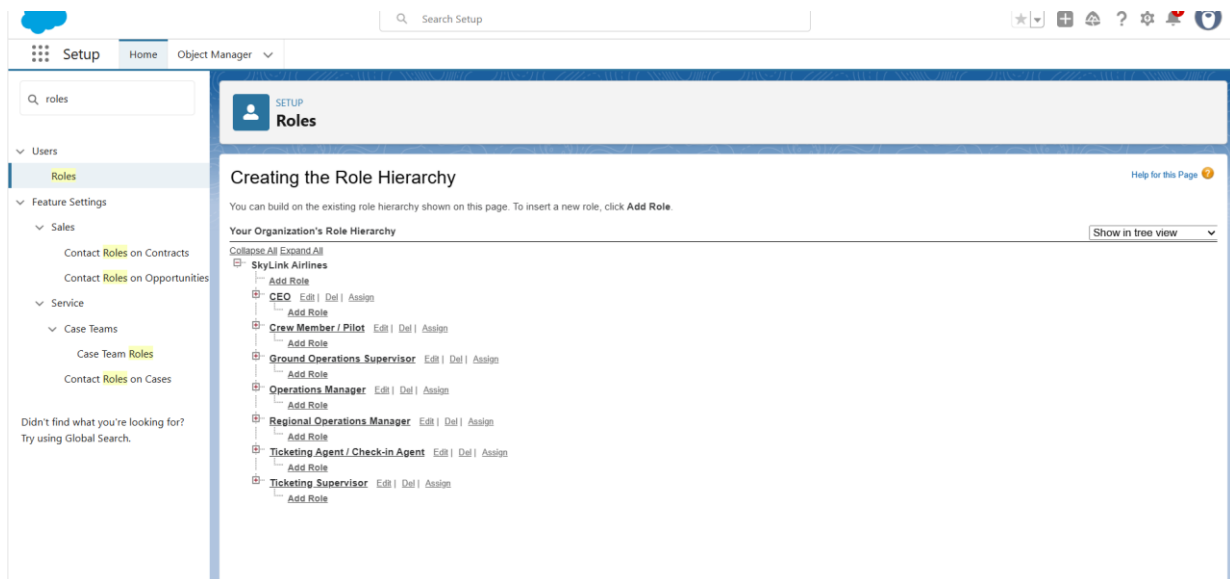
Step 9: Permission Sets

- ✓ 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 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
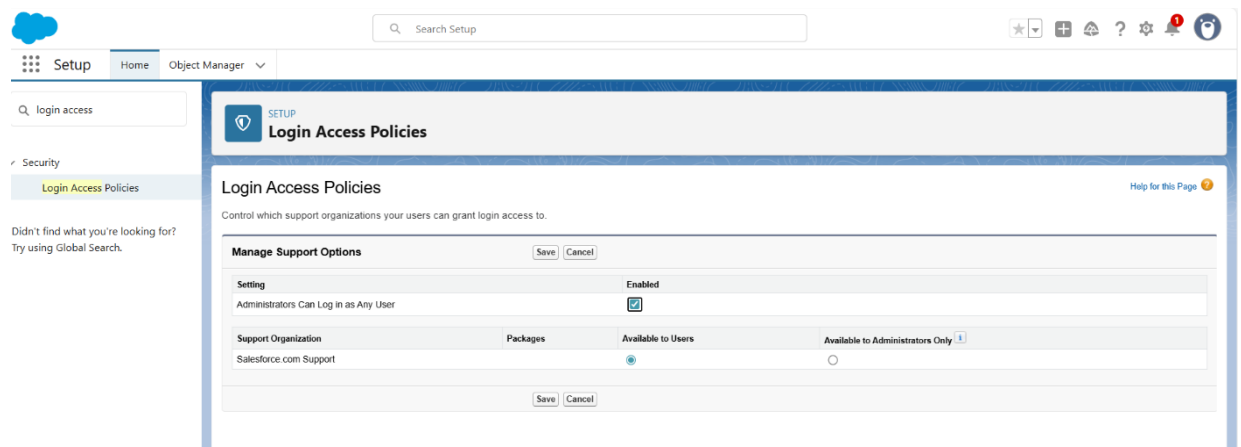
Step 13: Dev Org Setup & Sandboxes

- **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.