

Train Ticket Booking System- PHASE_2

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Phase 2: Org Setup & Configuration

◆ 1. Company Profile Setup

- Go to **Setup → Company Information → Edit.**
- I Set **Company Name = Railway Ticketing System.**

The screenshot shows the Salesforce Setup interface for 'Company Information'. The main title is 'Company Information' for 'Railway Ticketing System'. The 'Organization Detail' section includes fields like Organization Name (Railway Ticketing System), Primary Contact (OrgFarm EPIC), Division (Hyderabad, Telangana, India), and Phone number ((994) 929-3439). Other details include Default Locale (English (United States)), Default Language (English), and Default Time Zone (Pacific Daylight Time (America/Los_Angeles)). The 'Used Data Space' is 376 KB (7%). The 'Created By' field shows 'OrgFarm EPIC' and the 'Modified By' field shows 'Vasavi Kota'.

◆ 2. Business Hours & Holidays

- **Setup → Business Hours** → Defining as 24/7 as they can book tickets anytime.
- **Holidays** → Not adding any sample holidays because agents can manage the bookings .
- If needed we can add for **approval processes** and **flows** (like refunds not processed on holidays).

◆ 3. Fiscal Year Settings

- **Setup → Fiscal Year** → Use Standard Fiscal Year.
- Defines reporting cycles for dashboards and revenue tracking.

◆ 4. User Setup & Licenses

- Created users for **Admin, Agent, Passenger**.
- **Admin** → System Administrator license (My own account).
- **Agent** → Salesforce Platform license.
- **Passenger** → Simulated as a Contact (Standard User) and salesforce licence.
- This allows testing from different perspectives.

| Action | Full Name | Alias | Username | Role | Active | Profile |
|--------------------------|------------------|---------|--|-----------|-------------------------------------|----------------------------------|
| <input type="checkbox"/> | Chatter Expert | Chatter | chatty:00dg000007cdwkuau1!f2scpye8x@chatter.salesforce.com | | <input checked="" type="checkbox"/> | Chatter Free User |
| <input type="checkbox"/> | EPIC_OnFarm | EPIC | epic:b64db65acc25@onfarm.salesforce.com | | <input checked="" type="checkbox"/> | System Administrator |
| <input type="checkbox"/> | Kota_Yasavi | yas | yasavikota10744@agentforce.com | Admin | <input checked="" type="checkbox"/> | System Administrator |
| <input type="checkbox"/> | Mande_Indu | mande | yasavikota10@gmail.com | | <input checked="" type="checkbox"/> | Standard User |
| <input type="checkbox"/> | User_Integration | integ | integration@00dg000007cdwkuau.com | Passenger | <input checked="" type="checkbox"/> | Analytics Cloud Integration User |
| <input type="checkbox"/> | User_Security | sec | insightssecurity@00dg000007cdwkuau.com | | <input checked="" type="checkbox"/> | Analytics Cloud Security User |
| <input type="checkbox"/> | verma_anya | verm | 22h51a1228@cmrcet.ac.in | Agent | <input checked="" type="checkbox"/> | Agent Profile |

◆ 5. Profiles

Profiles control object and field-level access.

- **Passenger Profile:**
 - Access only to their own Tickets/Bookings.
 - Read-Only access to Trains & Routes.
- **Agent Profile:**
 - Create/Edit Tickets for passengers.
 - Manage Passenger records.
 - Read access to Trains & Routes.
- **Admin Profile:**

- Full access (System Administrator).

The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The page title is 'Profiles'. There is a search bar at the top labeled 'Search Setup' and a global search bar below it with the query 'profiles'. A message says 'Didn't find what you're looking for? Try using Global Search.' On the left, there's a sidebar with 'Users' and 'Profiles' sections. The main content area shows a table of profiles:

| Action | Profile Name | User License | Custom |
|--------------------------|---|--------------------------|-------------------------------------|
| <input type="checkbox"/> | Marketing User | Salesforce | <input type="checkbox"/> |
| <input type="checkbox"/> | Minimum Access - API Only Integrations | Salesforce Integration | <input type="checkbox"/> |
| <input type="checkbox"/> | Minimum Access - Salesforce | Salesforce | <input type="checkbox"/> |
| <input type="checkbox"/> | Partner App Subscription User | Partner App Subscription | <input type="checkbox"/> |
| <input type="checkbox"/> | Partner Community Login User | Partner Community Login | <input type="checkbox"/> |
| <input type="checkbox"/> | Partner Community User | Partner Community | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> | Passenger profile | Salesforce | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> | Read Only | Salesforce | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> | Salesforce API Only System Integrations | Salesforce Integration | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> | Silver Partner User | Silver Partner | <input type="checkbox"/> |
| <input type="checkbox"/> | Solution Manager | Salesforce | <input type="checkbox"/> |
| <input type="checkbox"/> | Standard Platform User | Salesforce Platform | <input type="checkbox"/> |
| <input type="checkbox"/> | Standard User | Salesforce | <input type="checkbox"/> |
| <input type="checkbox"/> | System Administrator | Salesforce | <input type="checkbox"/> |
| <input type="checkbox"/> | Work.com Only User | Work.com Only | <input type="checkbox"/> |

At the bottom, there are buttons for 'New Profile', 'Edit | Delete', and 'Create New View'. A navigation bar at the bottom right includes links for A through Z and 'All'.

◆ 6. Roles

Roles control data visibility in the hierarchy.

- Created hierarchy: **Admin** → **Agent** → **Passenger**.
- Assigned users to each role.
- Ensures Agents can see their customers' Tickets, while Passengers can only see their own.

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

- Collapse All Expand All
 - Railway Ticketing System
 - Add Role
 - Admin
 - Agent
 - CEO

Help for this Page Show in tree view

◆ 7. Permission Sets

Permission sets give additional access beyond profiles.

- **Manage Refunds** Permission Set:
 - Grants edit access to `Refund_Status__c` field on Ticket.
 - Assigned to **Agents & Admins** only.
 - Ensures passengers cannot manipulate refunds.

| Object | Work Plans | Work Plan Templates | Work Step Templates | Work Types | Work Type Groups |
|----------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Data Share Definitions | <input checked="" type="checkbox"/> |
| Data Share SageMaker Connections | <input checked="" type="checkbox"/> |
| Data Share Snowflake Connections | <input checked="" type="checkbox"/> |
| Data Share Targets | <input checked="" type="checkbox"/> |
| Data Share Target Connection | <input checked="" type="checkbox"/> |

| Custom Object Permissions | Basic Access | Data Administration | Basic Access | Data Administration | | | | | | | | | | |
|---------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|
| | Read | Create | Edit | Delete | View All Records | Modify All Records | View All Fields | Read | Create | Edit | Delete | View All Records | Modify All Records | View All Fields |
| Bookings_no | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Passengers | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Routes | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

| Session Settings | Session Times Out After | Session Security Level Required at Login |
|------------------|-------------------------|--|
| | 2 hours of inactivity | -None- |

| Password Policies | User passwords expire in | Enforce password history |
|-------------------|--------------------------|--------------------------|
| | 90 days | 3 passwords remembered |

The top screenshot shows the 'Permission Sets' page with 'Manage Refunds' selected. It displays Object Permissions for the 'Tickets' object, where 'Read', 'Edit', and 'Delete' are checked. It also shows Field Permissions for fields like 'Created By', 'Journey_Date__c', 'Last Modified By', and 'Owner'. The bottom screenshot shows the 'Manage Assignments' screen for the same permission set, displaying an 'Assignment Summary' table with two entries: 'Vasavi Kota' and 'priya verma', both marked as 'Success'.

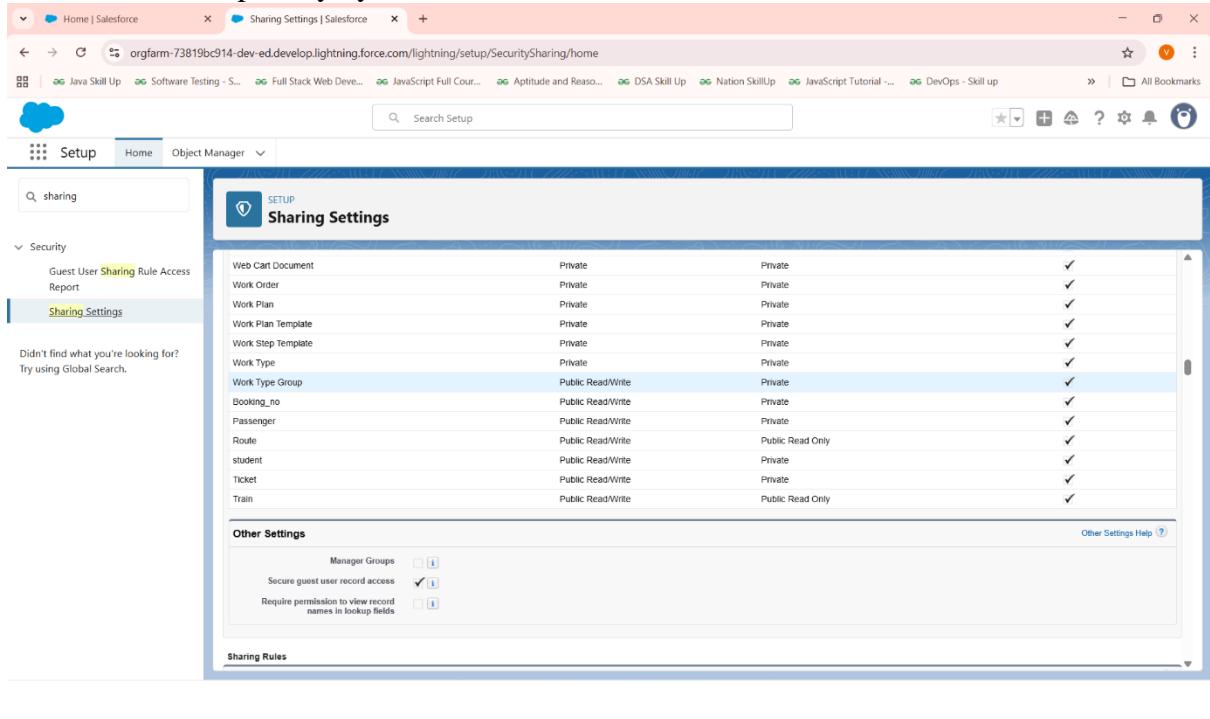
◆ 8. Organization-Wide Defaults (OWD)

Defines the baseline sharing level for all records.

- **Ticket** = Private (only owner/Admin sees by default).
- **Booking** = Private.
- **Passenger** = Private.
- **Train** = Public Read Only.

- **Route** = Public Read Only.

This ensures data privacy by default.



The screenshot shows the Salesforce Sharing Settings page. The left sidebar has a search bar and sections for Security, Guest User Sharing Rule Access Report, and Sharing Settings. The main area is titled "Sharing Settings" and contains a table of sharing rules:

| Object | Access Type | Sharing Rule |
|--------------------|-------------------|--------------|
| Web Cart Document | Private | |
| Work Order | Private | |
| Work Plan | Private | |
| Work Plan Template | Private | |
| Work Step Template | Private | |
| Work Type | Private | |
| Work Type Group | Public Read/Write | |
| Booking_no | Public Read/Write | |
| Passenger | Public Read/Write | |
| Route | Public Read/Write | ✓ |
| student | Public Read/Write | |
| Ticket | Public Read/Write | |
| Train | Public Read/Write | ✓ |

Below the table are "Other Settings" and "Sharing Rules" sections.

◆ 9. Sharing Rules

Used to open access where needed.

- Created a Sharing Rule on **Ticket**:
 - Criteria: Assigned Agent is not blank.
 - Shared with **Role: Agent**.
 - Access: Read/Write.
- This allows Agents to see Tickets assigned to them while Passengers remain restricted.

◆ 10. Login Access Policies

- **Setup → Login Access Policies** → Enabled “Administrators Can Log in as Any User.”
- Allows Admin to test flows by logging in as Passenger or Agent without needing passwords.

✓ Phase-2 Outcome

At the end of Phase 2, the Salesforce org is fully prepared with:

- Company information and working hours.
- Users, roles, profiles, and permission sets.
- Data access secured through OWD and Sharing Rules.
- Admin can impersonate users for testing.