Train Ticket Booking System- PHASE_2

Presented By:
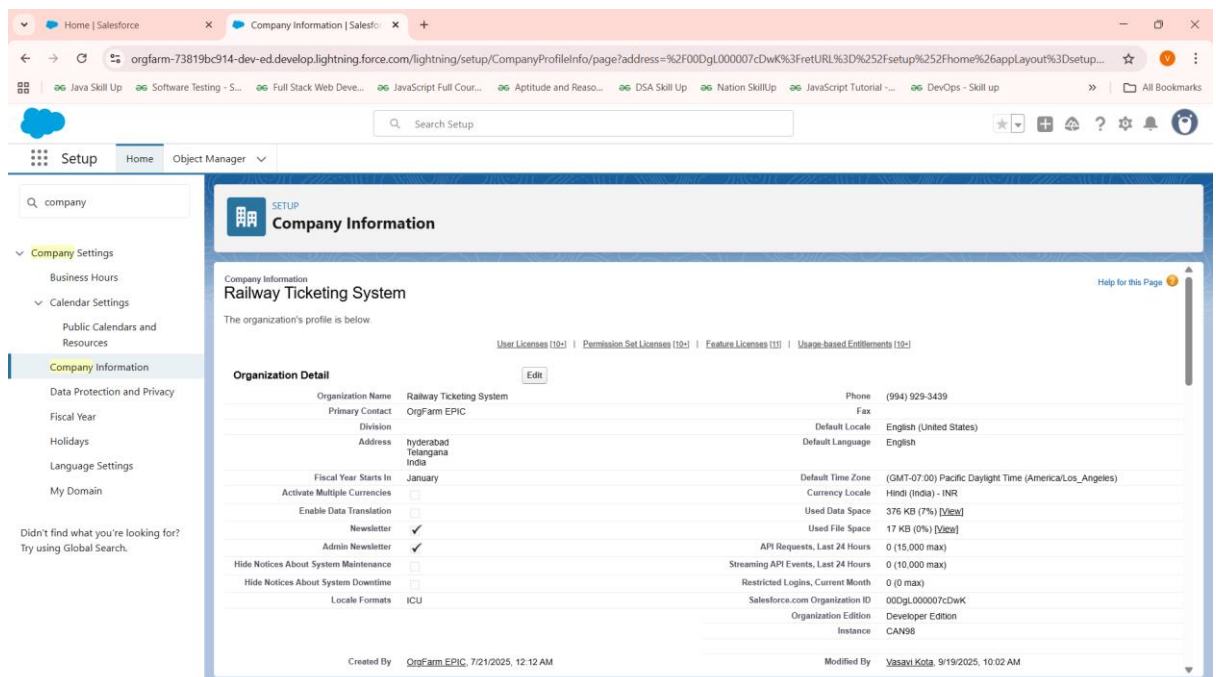
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Phase 2: Org Setup & Configuration

◈ 1. Company Profile Setup

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

◈ 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.
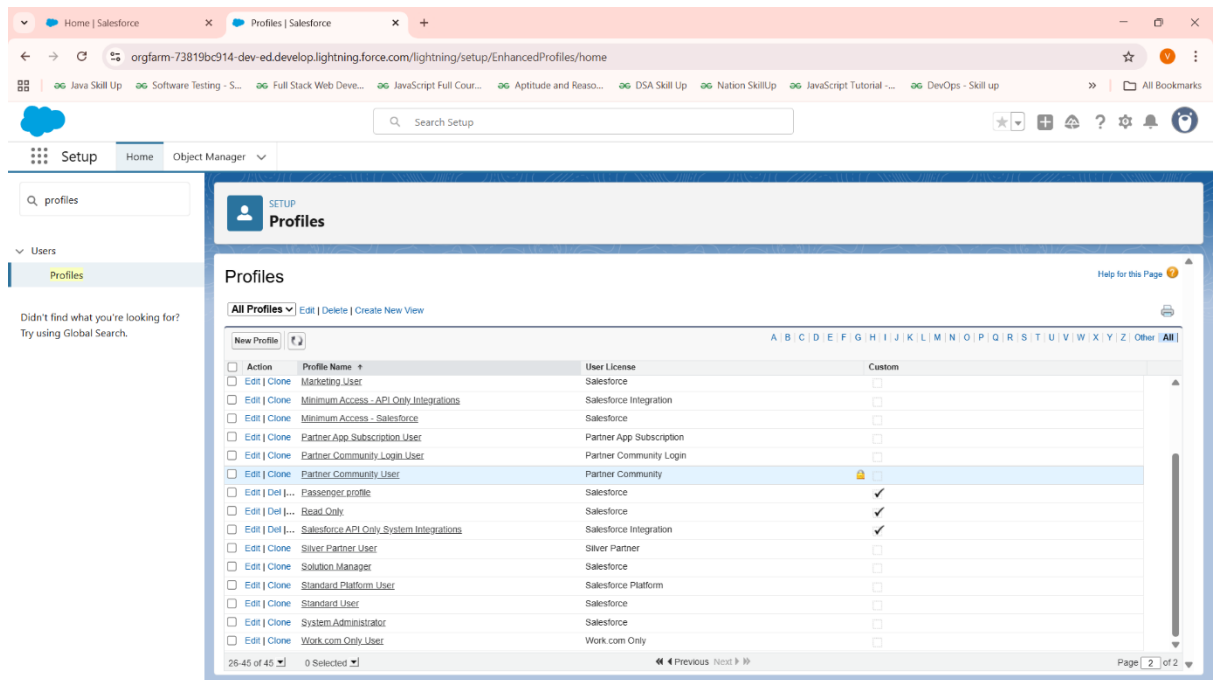- This allows testing from different perspectives.
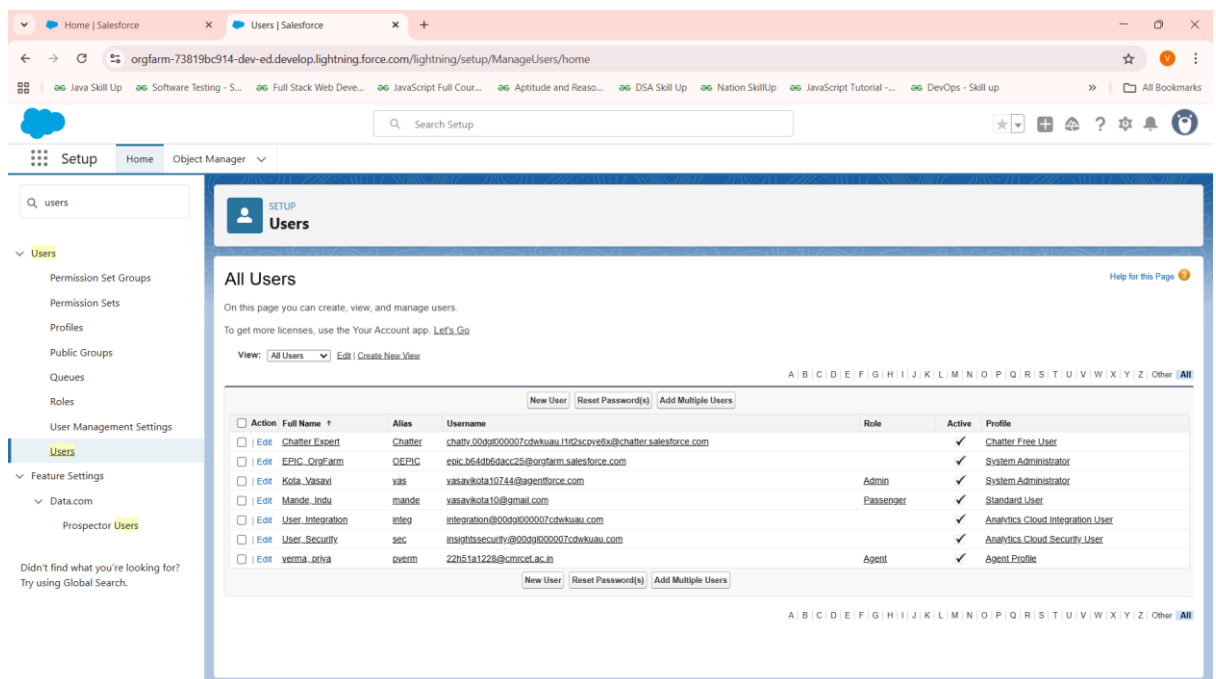
⬥ 5. Profiles

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**:

o Full access (System Administrator).

◈ 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.

◈ 7. Permission Sets

Permission sets give additional access beyond profiles.

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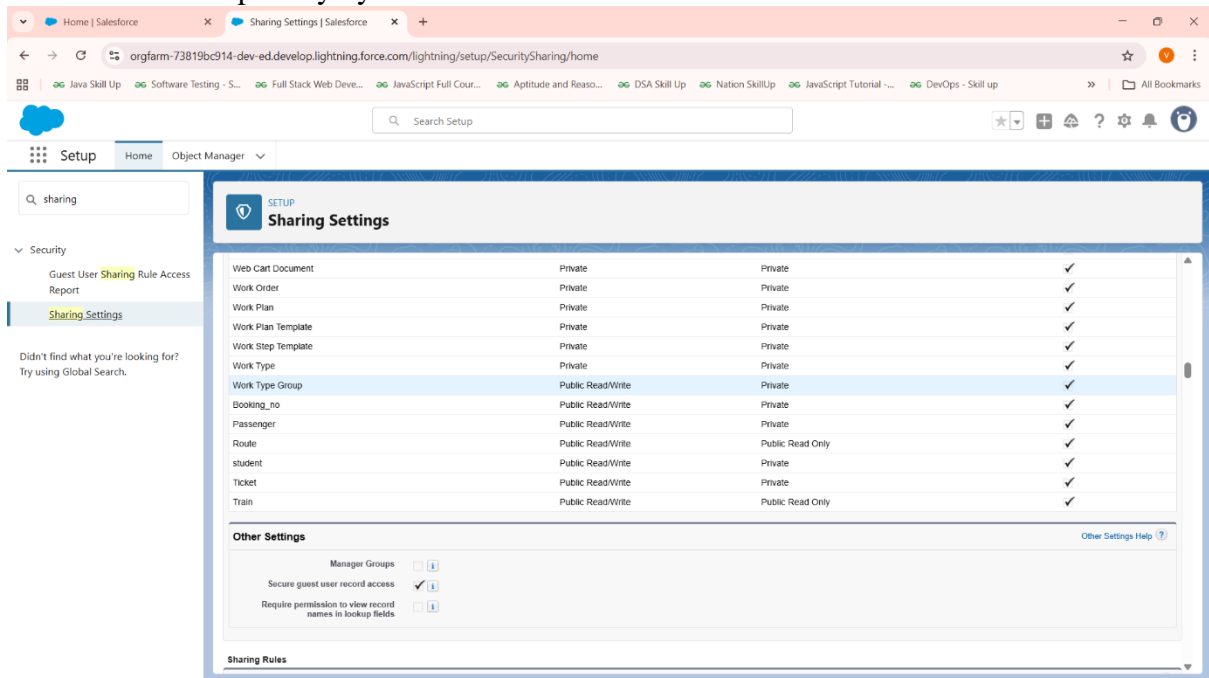 o Ensures passengers cannot manipulate refunds.

♦ 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.

⬗ 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.