

Phase 2: Org Setup & Configuration

Goal: Prepare the Salesforce environment and configure essential settings for project and timesheet management.

Introduction

This document outlines the steps required to set up and configure a Salesforce Developer Org for a project management system, including user management, security settings, and custom object configuration such as Timesheets. The instructions are based on visual content and supplementary guidance from the referenced video tutorial.

Flight, Flight Schedule & Pilot Objects Configuration

Flight Object Setup

Basic Information

- **Object Label:** Flight
- **Plural Label:** Flights
- **API Name:** Flight_O
- **Description:** Manage the flights data in this object
- **Deployment Status:** Deployed

Enabled Features

- Reports
- Track Activities
- Track Field History

Configuration Sections

Fields & Relationships

- Create custom fields for flight management
- Establish relationships with Flight Schedule and Pilot objects

Page Layouts

- Design Lightning Record Pages for flight information display
- Arrange fields logically for flight operations

Buttons, Links, and Actions

- Configure actions like "Schedule Flight", "Assign Pilot"
- Custom buttons for flight operations

Compact Layouts

- Define summary views for mobile and quick preview

Record Types

- Possible types: Domestic, International, Charter, Cargo

The screenshot shows the Salesforce Setup interface for managing the Flight object. The top navigation bar includes tabs for Setup, Home, and Object Manager. A search bar is at the top right. The main area displays the 'Flight' object details. On the left, a sidebar lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main 'Details' section shows the object's API name as 'Flight_c'. It also lists Singular Label ('Flight') and Plural Label ('Flights'). To the right, there are checkboxes for enabling Reports, Activities, and Field History, along with deployment status ('Deployed') and help settings. At the bottom, the system status shows '28°C Rain showers' and a toolbar with various icons.

Flight Schedule Object

Purpose

- Manage flight timetables and scheduling
- Track departure/arrival times and frequencies

Key Fields

- **Flight Reference** (Lookup to Flight object)
- **Scheduled Departure Time**
- **Scheduled Arrival Time**
- **Frequency** (Daily, Weekly, Specific days)
- **Effective Date Range**

- **Status** (Active, Inactive, Seasonal)

Relationships

- Master-Detail or Lookup to Flight object
- Lookup to Pilot for assigned crew

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for Setup, Home, and Object Manager. The main title is "SETUP > OBJECT MANAGER" followed by "Flight Schedule". On the left, a sidebar lists various configuration options under the "Details" tab, such as Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area displays the "Details" section for the Flight Schedule object, which includes fields like API Name (Flight_Schedule_c), Singular Label (Flight Schedule), Plural Label (Flight Schedules), and various status and reporting checkboxes. At the bottom, there are standard Salesforce navigation icons and a footer showing weather information (28°C Rain showers), a search bar, and system status (ENG IN 10:57 26-09-2025).

Pilot Object

Purpose

- Store pilot information and credentials
- Manage pilot assignments and availability

Key Fields

- **Pilot ID/Number**
- **Name** (First, Last)
- **License Type**
- **Ratings** (Aircraft types certified for)
- **License Expiry Date**
- **Status** (Active, On Leave, Retired)
- **Contact Information**
- **Emergency Contact**

Relationships

- Lookup from Flight Schedule for assigned pilots
- Possible relationship to Flight for flight history

Object Relationships

text

Pilot (1) \leftrightarrow (Many) Flight Schedule (Many) \leftrightarrow (1) Flight

Key Lookup Fields

1. **Flight Schedule → Flight** (Lookup Relationship)
 - Each schedule entry references a specific flight
 - Enables tracking of which flight operates on which schedule
2. **Flight Schedule → Pilot** (Lookup Relationship)
 - Assigns pilots to specific scheduled flights
 - Supports multiple pilots per flight (Captain, First Officer)

The screenshot shows the Salesforce Lightning Experience setup interface. The top navigation bar includes tabs for 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER' under the 'Pilot' object. On the left, a sidebar lists various configuration sections: 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, and Triggers. The right panel displays the 'Details' section for the Pilot object. It includes fields for Description, API Name (Pilot_c), Singular Label (Pilot), Plural Label (Pilots), and several checkboxes for reports and activities. At the bottom of the page, there's a weather widget showing '28°C Rain showers', a search bar, and a system status bar with the date '26-09-2025'.

Security Configuration

Org-Wide Defaults

- Set appropriate sharing models for each object
- Consider private or public read/write based on operational needs

Page Layouts

- Create unified layouts showing flight + schedule + pilot information
- Use related lists to display connected records

Validation Rules

- Prevent scheduling conflicts for pilots
- Ensure flight schedules don't overlap
- Validate pilot qualifications match aircraft type requirements