Global Connect Project Documentation

Project Overview:

The Global Connect project is all about building a modern Travelers Portal for Travellers using Salesforce Experience Cloud. The goal is to make things easier for customers by moving support online instead of relying on expensive phone calls. The portal will have features like a community Q&A forum, a searchable knowledge base with helpful articles, and secure login for travelers to create and track their support cases.

Objectives:

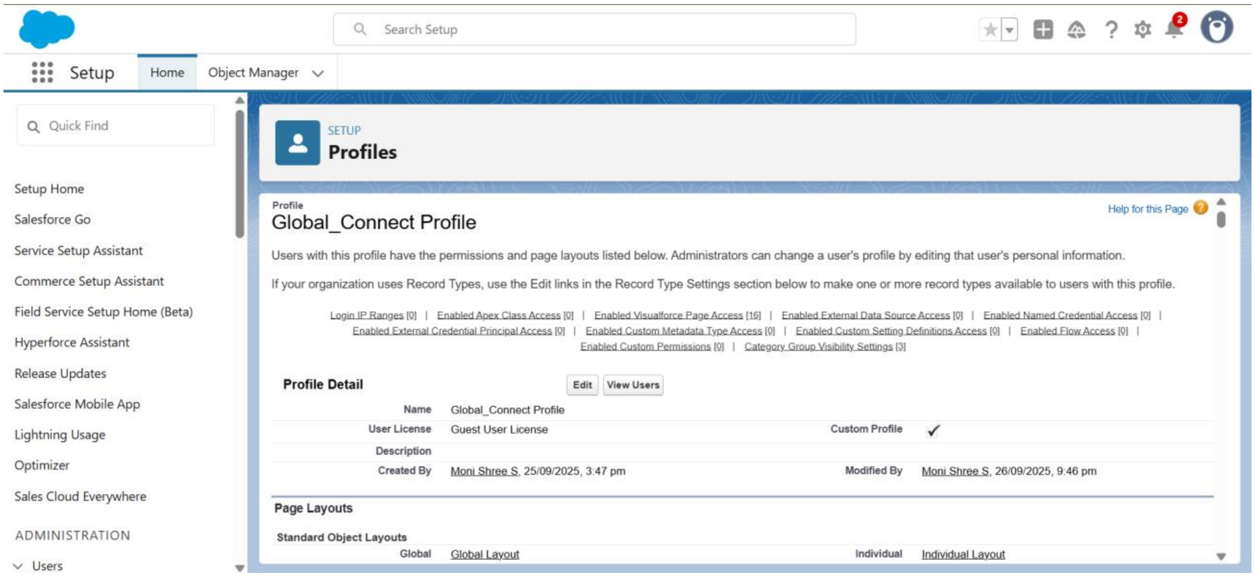
The main goals of building Global Connect are to make customer support better and cut down on service costs. By giving travelers easy self-service tools, we can reduce the number of calls to the support team, making the whole customer experience faster and more convenient. This not only saves money for the company but also keeps customers happier.

Phase 1: Problem Understanding & Industry Analysis

- **Requirement Gathering:**
  The main requirements identified for the portal include self-service through Knowledge Articles, community engagement via Discussion Forums, and secure Case Management for submitting and tracking support requests.
- **Stakeholder Analysis:**
  Key stakeholders include:
  - **Travelers:** Seeking quick answers to their queries.
  - **Service Agents:** Looking to reduce repetitive support calls.
  - **Management:** Focused on lowering operational costs.
- **Business Process Mapping:**
  The customer support process shifts from “Traveler calls the Agent” to “Traveler searches the Portal first.” If the traveler cannot find the required information, they can escalate by creating a Case through the portal.
- **Industry-specific Use Case:**
  The portal addresses the travel industry’s need for 24/7 availability across global time zones. It leverages community knowledge to resolve common, low-complexity questions such as baggage policies and check-in procedures.
- **AppExchange Exploration:**
  To keep the solution scalable and cost-effective, we used Salesforce’s out-of-the-box Customer Service Experience Template. This approach minimizes custom coding and avoids the need for additional third-party AppExchange packages.

Phase 2: Org Setup & Configuration

- ## Salesforce Edition
  The Global Connect project is built on **Salesforce Enterprise Edition** (or Developer Edition for pilot runs). This edition was chosen because it supports all the features we need, like Experience Cloud for digital experiences, advanced sharing rules, and Flow Builder. It also ensures the portal is scalable and secure for public access.
- ## Company Profile Setup
  We set up the company profile with **Global_Connect**, address, and main contact info. This ensures that all automated system communications, like case confirmation emails, are properly branded and follow company standards.



Profile

Global_Connect Profile

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 [16] | 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 Custom Permissions [0] | Category Group Visibility Settings [3]

Profile Detail

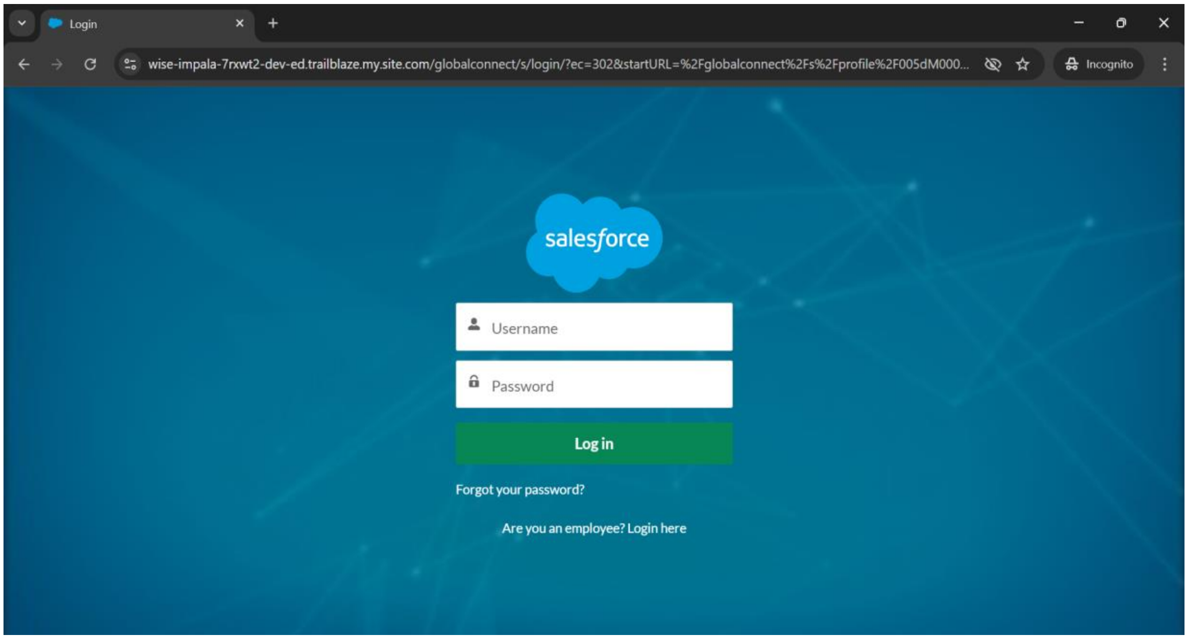
Name	Global_Connect Profile		
User License	Guest User License	Custom Profile	✓
Description			
Created By	Moni Shree S, 25/09/2025, 3:47 pm	Modified By	Moni Shree S, 26/09/2025, 9:46 pm

Page Layouts

Standard Object Layouts

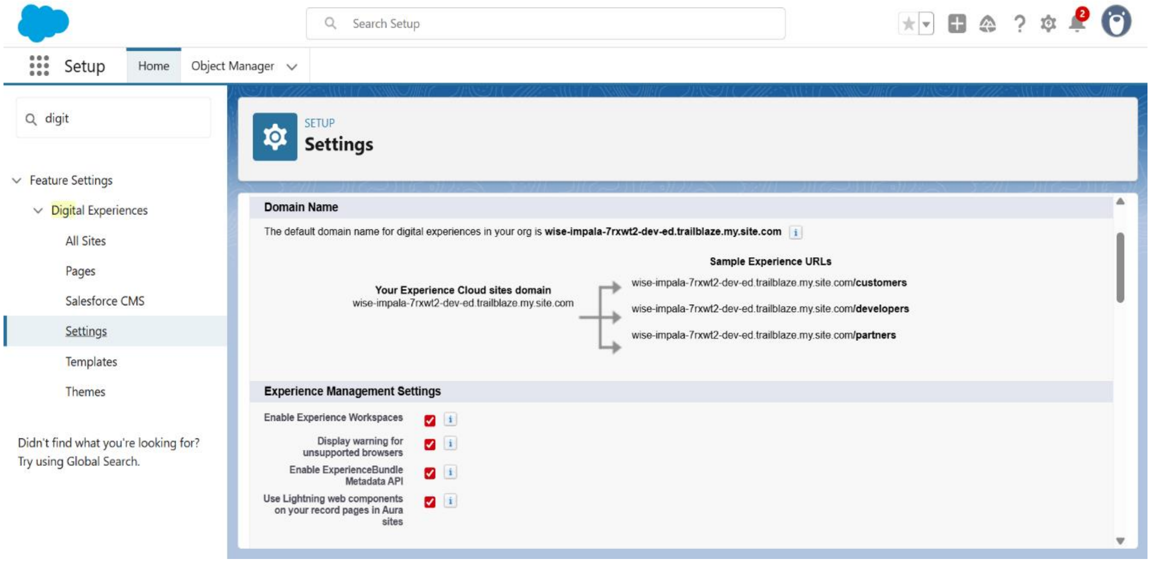
Global	Global Layout	Individual	Individual Layout

- ## Fiscal Year Settings
  The fiscal year was configured to follow the standard calendar (Jan 1 – Dec 31). This is important for accurate financial reporting on bookings and for tracking cost savings from the Global Connect portal.
- ## User Setup & Licenses
  - **Internal Agents:** Standard Salesforce User Licenses were given to internal support agents who handle cases from travelers.
  - **External Travelers:** Customer Community Plus licenses were provided to travelers, giving them secure login access to the portal to submit cases and view private information.
- ## Login Access Policies
  Login access policies were configured to control which Salesforce admins can log in as specific users for troubleshooting. This is strictly defined for Customer Community Plus users to maintain privacy and security.



wise-impala-7rxwt2-dev-ed.trailblaze.my.site.com/globalconnect/s/login/?ec=302&startURL=%2Fglobalconnect%2Fs%2Fprofile%2F005dM000...

- **Dev Org Setup**
  Digital Experiences (Experience Cloud) was enabled in the development org. This was the key administrative step that allowed us to use the Experience Builder to create the Global Connect portal.



Domain Name

The default domain name for digital experiences in your org is **wise-impala-7rxwt2-dev-ed.trailblaze.my.site.com**

Sample Experience URLs

Your Experience Cloud sites domain
wise-impala-7rxwt2-dev-ed.trailblaze.my.site.com

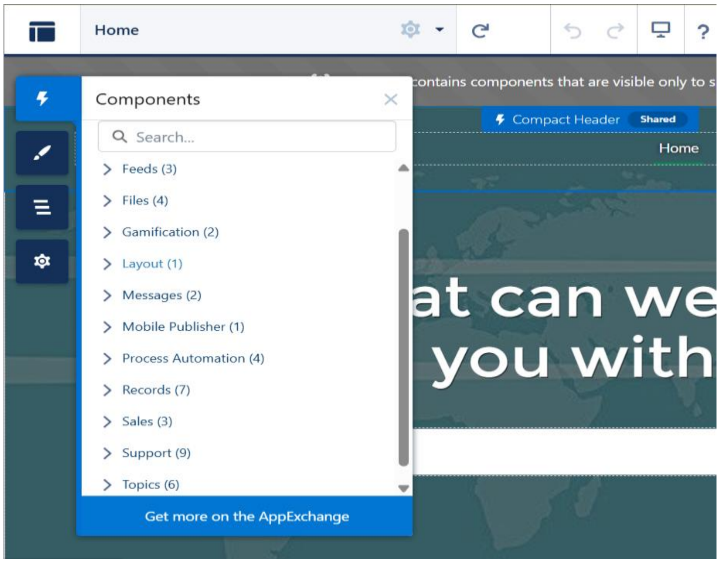
wise-impala-7rxwt2-dev-ed.trailblaze.my.site.com/**customers**
wise-impala-7rxwt2-dev-ed.trailblaze.my.site.com/**developers**
wise-impala-7rxwt2-dev-ed.trailblaze.my.site.com/**partners**

Experience Management Settings

Enable Experience Workspaces ☑
Display warning for unsupported browsers ☑
Enable ExperienceBundle Metadata API ☑
Use Lightning web components on your record pages in Aura sites ☑

- **Sandbox Usage**
  A **Developer Sandbox** was used for initial configuration of Flows, Custom Objects, and portal setup. For testing, a **Partial Copy Sandbox** was used for UAT to simulate real production data and traveler interactions before the final deployment.

- **Deployment Basics**
  We prepared the environment for Change Set deployment by making sure all components (Profiles, Custom Objects, Experience Bundles) were properly named and ready for migration to the testing environments.



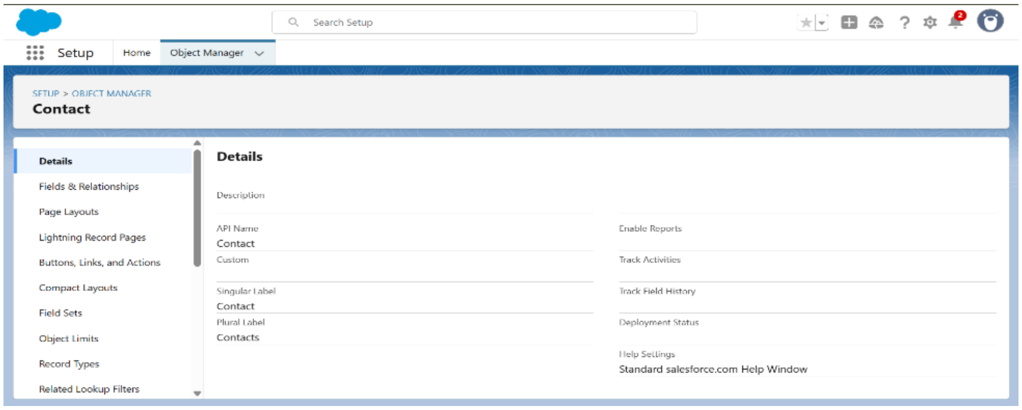
Phase 3: Data Modeling & Relationships

Standard & Custom Objects

- **Standard Object**
  We used Salesforce's built-in **standard objects** to manage key parts of the project.

  - **Contact:** Represents our traveler, who uses the Global Connect portal.
  - **Case:** Tracks every support request submitted by a traveler.

  Using these standard objects helps us take full advantage of Salesforce's native features for customer management and service operations without needing to build everything from scratch.



Contact

Details

Description

API Name
Contact

Custom

Singular Label
Contact

Plural Label
Contacts

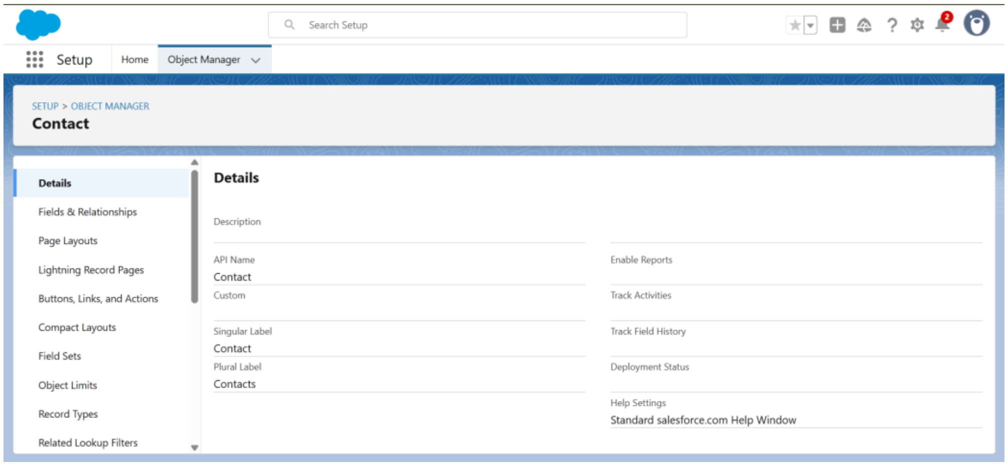
Enable Reports

Track Activities

Track Field History

Deployment Status

Help Settings
Standard salesforce.com Help Window



SETUP > OBJECT MANAGER

Contact

Details

Description

API Name
Contact

Custom

Singular Label
Contact

Plural Label
Contacts

Enable Reports

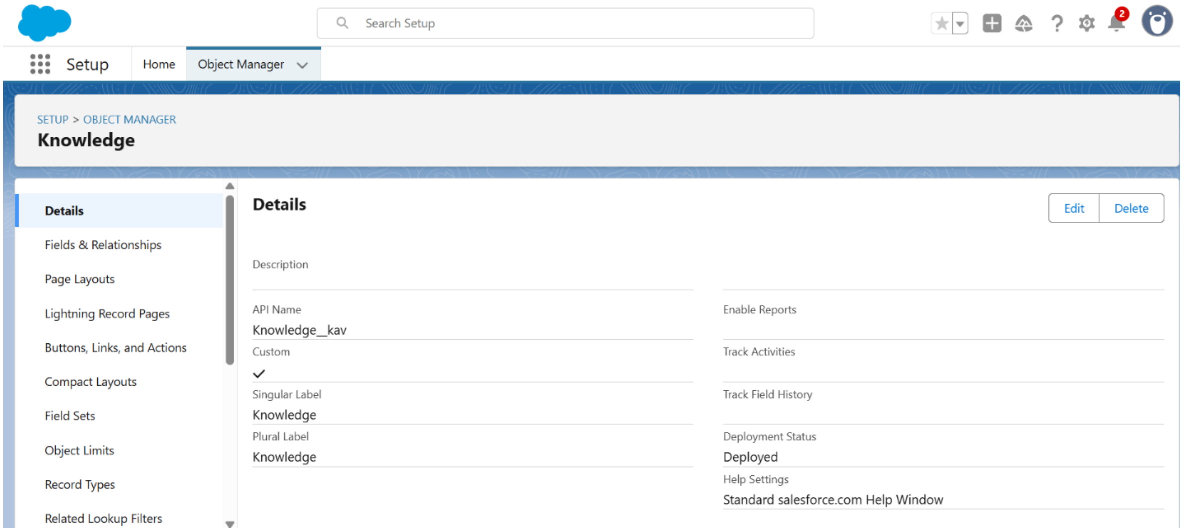
Track Activities

Track Field History

Deployment Status

Help Settings
Standard salesforce.com Help Window

- **Custom Object**
  - We created a custom object called **Knowledge** to store helpful articles for travelers. It works like a mini help center inside the Global Connect portal, where users can find answers to common questions.
  - Each record stores details like the article title, category, content, and last updated date. This helps travelers solve issues on their own without always contacting support.



SETUP > OBJECT MANAGER

Knowledge

Details

Description

API Name
Knowledge__kav

Custom
✓

Singular Label
Knowledge

Plural Label
Knowledge

Enable Reports

Track Activities

Track Field History

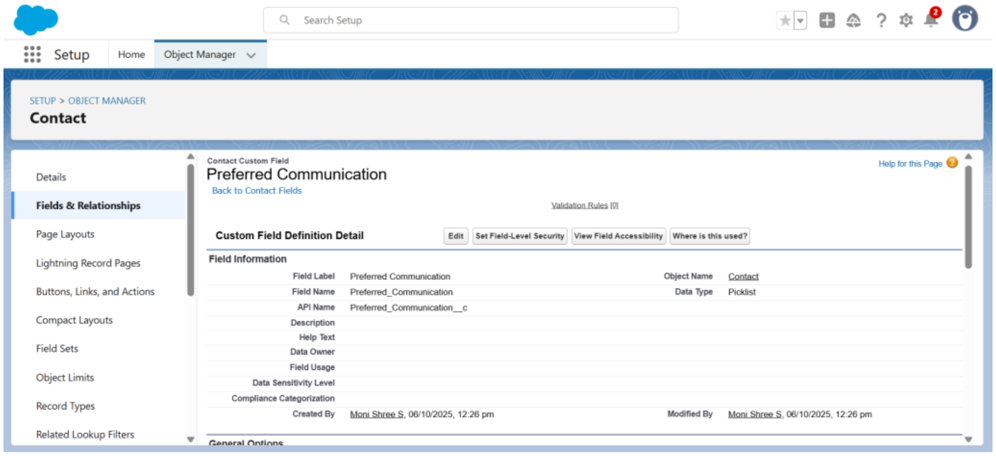
Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

- **Fields**

To make the data more useful and personalized, we added a few custom fields:

  - **On Contact:** A custom picklist field called Preferred Communication Method (values: Email, Portal Notification) to capture the traveler’s communication preference.



Contact Custom Field

Preferred Communication

Custom Field Definition Detail

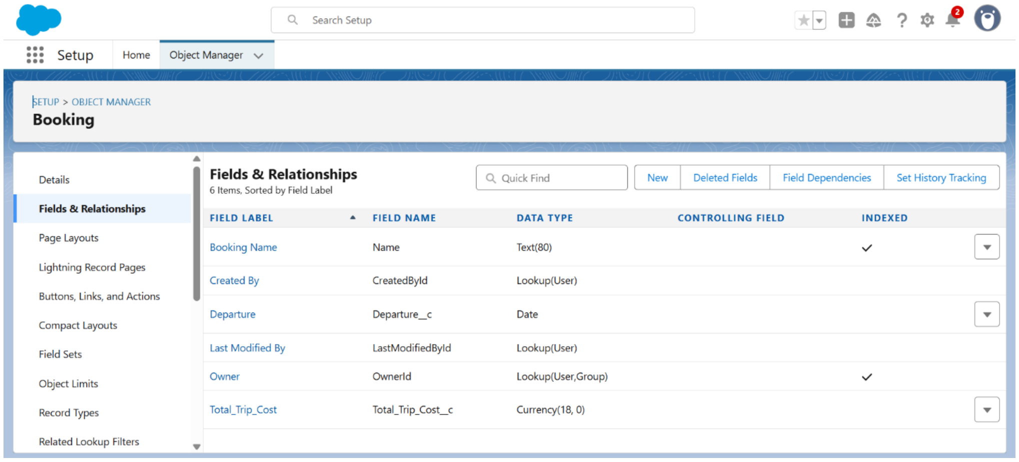
Field Information

Field Label	Preferred Communication	Object Name	Contact
Field Name	Preferred_Communication	Data Type	Picklist
API Name	Preferred_Communication__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Moni Shree S, 06/10/2025, 12:26 pm	Modified By	Moni Shree S, 06/10/2025, 12:26 pm

General Options

- **On Booking:**
  - Departure Date (Date field) – stores the travel start date.
  - Total Trip Cost (Currency field) – stores the total cost of the trip.

These custom fields make our data more meaningful and traveler-friendly.



Fields & Relationships

6 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Booking Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Departure	Departure__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Total_Trip_Cost	Total_Trip_Cost__c	Currency(18, 0)		

- ## Record Types

I created two **Record Types** on the Case object:

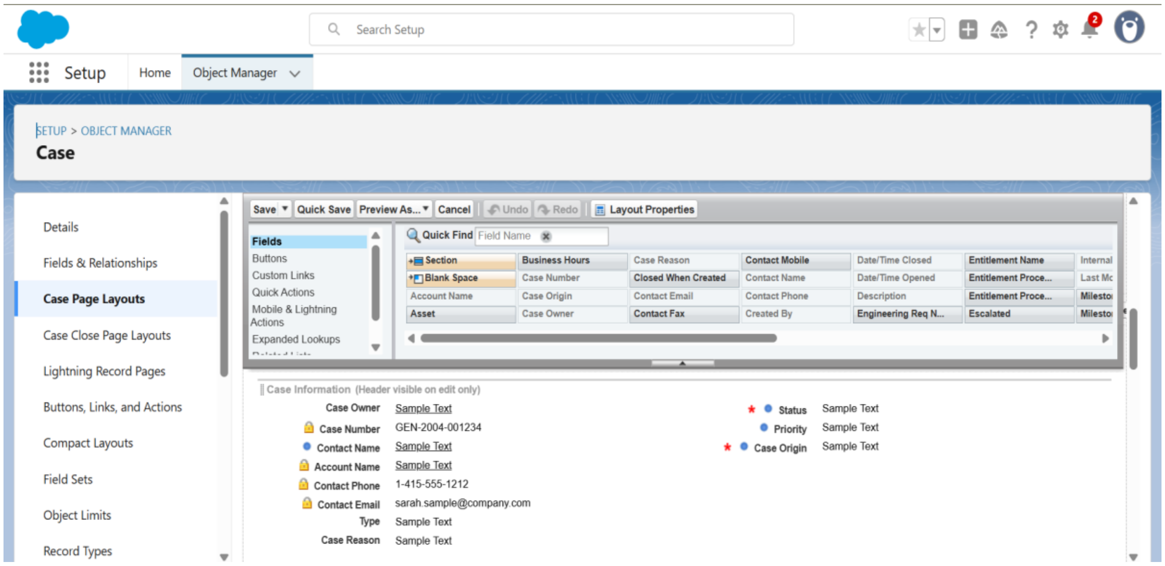
Traveler Portal Case – used by travelers submitting cases through the Global Connect portal.

Internal Agent Case – used by internal support staff.

- This setup lets us use different page layouts for different users, keeping the traveler’s experience simple and the agent’s view detailed.

- ## Page Layouts

  For internal users, I customized the **Case Page Layout** to show important details like internal status flags and escalation history. These fields are hidden from travelers on the portal, ensuring a clean and user-friendly view.



Case Information (Header visible on edit only)

Case Owner	Sample Text	Status	Sample Text
Case Number	GEN-2004-001234	Priority	Sample Text
Contact Name	Sample Text	Case Origin	Sample Text
Account Name	Sample Text		
Contact Phone	1-415-555-1212		
Contact Email	sarah.sample@company.com		
Type	Sample Text		
Case Reason	Sample Text		

- ## Schema Builder

  I frequently used **Schema Builder** to visualize all the object relationships, like Contact ↔ Booking and Case ↔ Booking. This tool helped us confirm that our data model was structured correctly before moving to the UI setup.

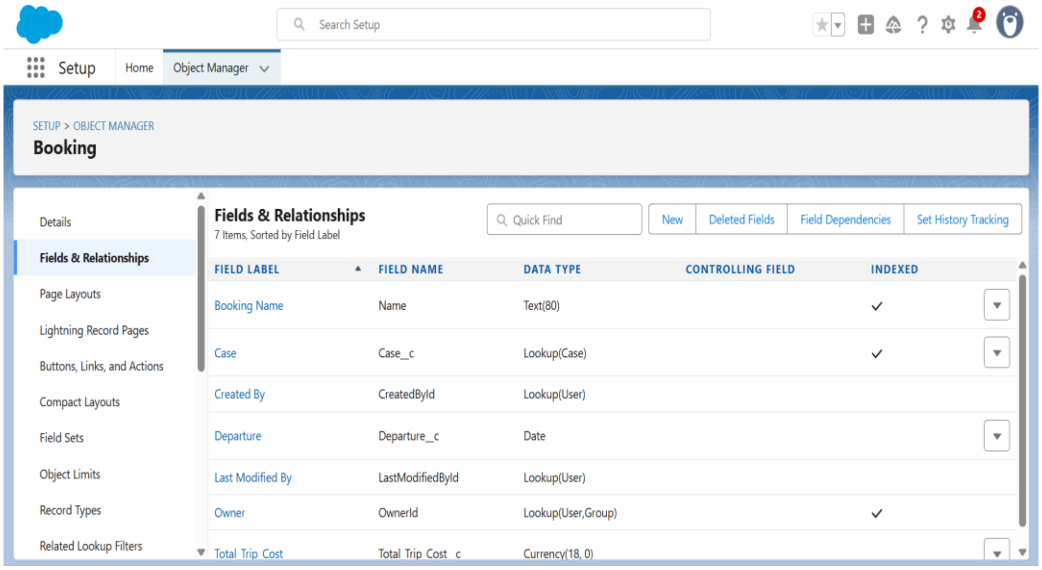
- ## Lookup vs Master-Detail vs Hierarchical Relationships

  - ### Lookup Relationship

    I used a **Lookup Relationship** to connect the **Case** object with the **Booking** object. This way, agents can easily see which specific booking a traveler's issue is related to. If a case is deleted, the related booking stays safe and unchanged.

  - ### Master-Detail Relationship

    I had created a custom object like **Booking Line Item** (for individual flights or hotel stays), we would use a **Master-Detail Relationship** to link it to **Booking**. This ensures the line items can't exist without their main booking — and if the booking is deleted, its related records are deleted too.



Booking

Fields & Relationships

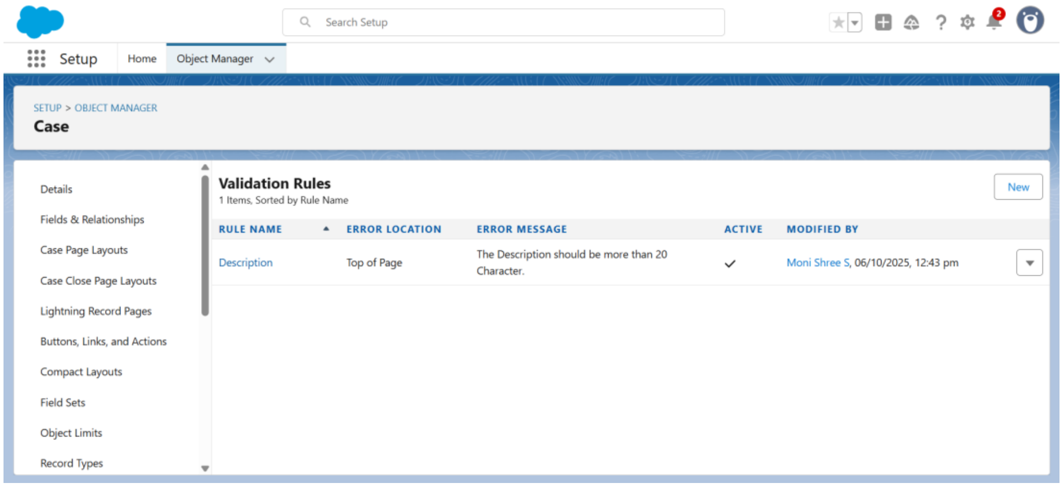
7 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Booking Name	Name	Text(80)		✓
Case	Case__c	Lookup(Case)		✓
Created By	CreatedById	Lookup(User)		
Departure	Departure__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Total_Trip_Cost	Total_Trip_Cost__c	Currency(18, 0)		

Phase 4: Process Automation (Admin)

- ## Validation Rules

  To make sure travelers submit clear and useful requests, I added a **Validation Rule** on the Case object. It prevents users from submitting a case if the **Description** is less than 20 characters. This helps agents get enough details upfront and avoids vague issues.



Case

Validation Rules

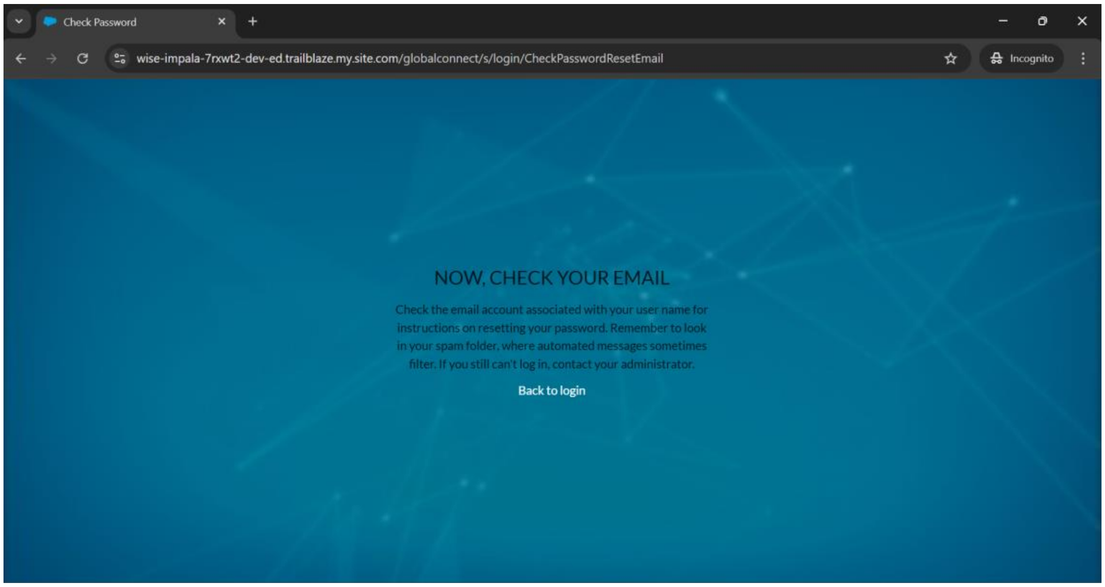
1 Items, Sorted by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Description	Top of Page	The Description should be more than 20 Character.	✓	Moni Shree S, 06/10/2025, 12:43 pm

- ## Flow Builder
  - I created a **Screen Flow** and added it directly to the Global Connect portal. It guides travelers step-by-step while submitting a case — asking for the required details and letting them link the case to an existing booking. This makes the process smooth and user-friendly compared to the normal record page.
  - A **Record-Triggered Flow** runs automatically whenever a new case is created from the portal. It performs three actions in sequence: updates certain fields, sends an email alert, and creates a follow-up task.

- ## Email Alerts

  Right after submission, an **Email Alert** is sent to the traveler confirming their case. It includes the case number and gives them instant confirmation, so they don’t need to contact support just to check if their case went through.



Check Password
wise-impala-7rxwt2-dev-ed.trailblaze.my.site.com/globalconnect/s/login/CheckPasswordResetEmail
Incognito

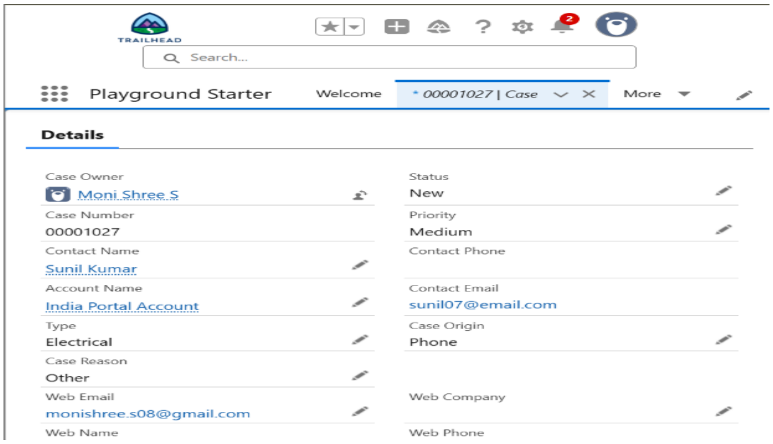
NOW, CHECK YOUR EMAIL

Check the email account associated with your user name for instructions on resetting your password. Remember to look in your spam folder, where automated messages sometimes filter. If you still can't log in, contact your administrator.

Back to login

- ## Field Updates

  In the same flow, we added a **Field Update** that automatically sets the case **Status** to “New - Portal Submission” and **Priority** to “Medium.” This helps organize and queue the case correctly for the support team.



Case Owner	Moni Shree S	Status	New
Case Number	00001027	Priority	Medium
Contact Name	Sunil Kumar	Contact Phone	
Account Name	India Portal Account	Contact Email	sunil07@email.com
Type	Electrical	Case Origin	Phone
Case Reason	Other		
Web Email	monishree.s08@gmail.com	Web Company	
Web Name		Web Phone	

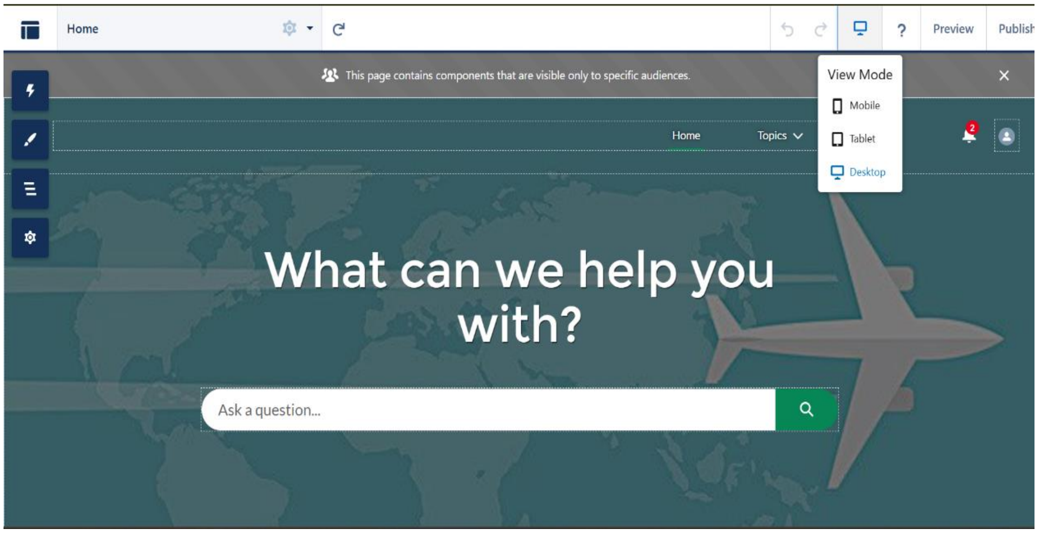
- ## Tasks

  the flow creates a **Task** assigned to the Travel Support Queue with the subject “Review New Global Connect Case.” This makes sure a support agent is notified and responsible for reviewing the new case on time.

Phase 5: Apex Programming (Developer)

In this project, no Apex programming was used, as the Global Connect portal was fully built using Salesforce’s declarative tools. However, I learned about **Apex programming concepts** such as Triggers, Classes, and SOQL, which are useful for automating processes when declarative tools are not enough.

If required in the future, Apex can be used to extend this project by adding advanced logic, custom automation, or integrations with external systems. For now, the project remains fully functional without any Apex code, ensuring low maintenance and easy updates.



This page contains components that are visible only to specific audiences.

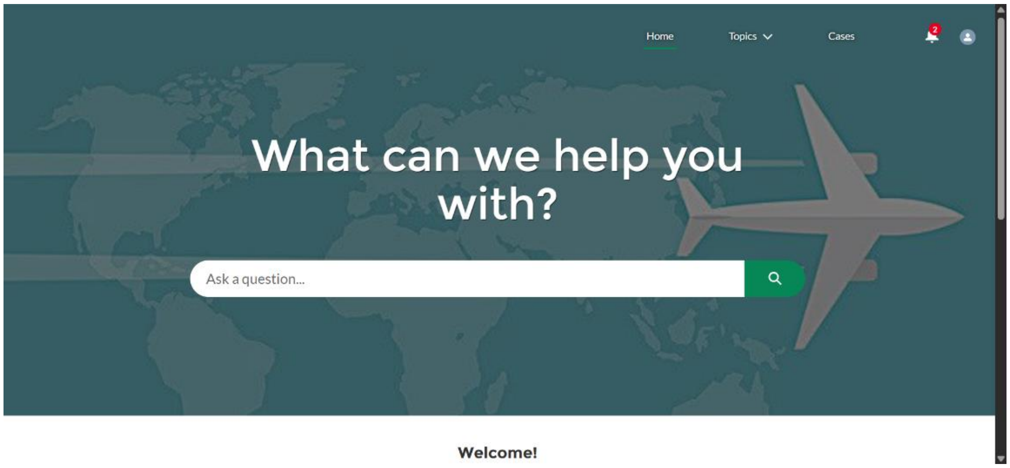
What can we help you with?

Ask a question...

Phase 6: User Interface Development

- ## Lightning App Builder

Use Case: Agent Service Console



What can we help you with?

Ask a question...

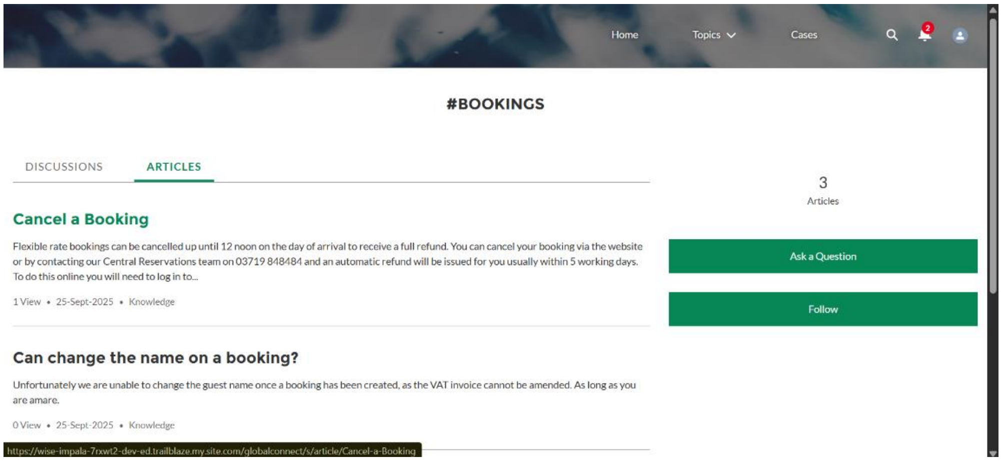
Welcome!

I used the Lightning App Builder to create the internal **"Global Connect Service"** app.

This app helps support agents work more efficiently by providing a single, well-organized Console. With multi-tab navigation, agents can easily handle traveler-related tasks like managing **Cases, Bookings, and Knowledge Articles** all in one place.

- ## Record Pages & Tabs

Use Case: Organizing Data
To make data navigation easier, I added custom tabs for **Booking** and **Knowledge** in the Service Console. I also customized the **Case Record Page** using the App Builder — organizing it into **Details, Feed, and Related Records** tabs. This setup reduced unnecessary scrolling and helped agents quickly find what they need.



#BOOKINGS

Cancel a Booking

Flexible rate bookings can be cancelled up until 12 noon on the day of arrival to receive a full refund. You can cancel your booking via the website or by contacting our Central Reservations team on 03719 848484 and an automatic refund will be issued for you usually within 5 working days. To do this online you will need to log in to...

1 View • 25-Sept-2025 • Knowledge

Can change the name on a booking?

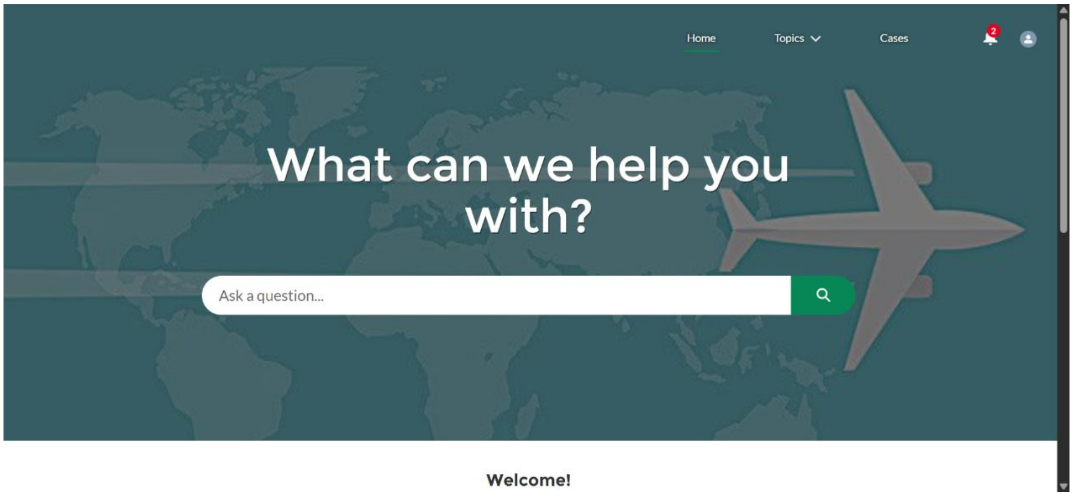
Unfortunately we are unable to change the guest name once a booking has been created, as the VAT invoice cannot be amended. As long as you are amare.

0 View • 25-Sept-2025 • Knowledge

https://wise-impala-7rxwt2-dev-ed.trailblaze.my.site.com/globalconnect/s/article/Cancel-a-Booking

3
Articles

- ## Home Page Layouts



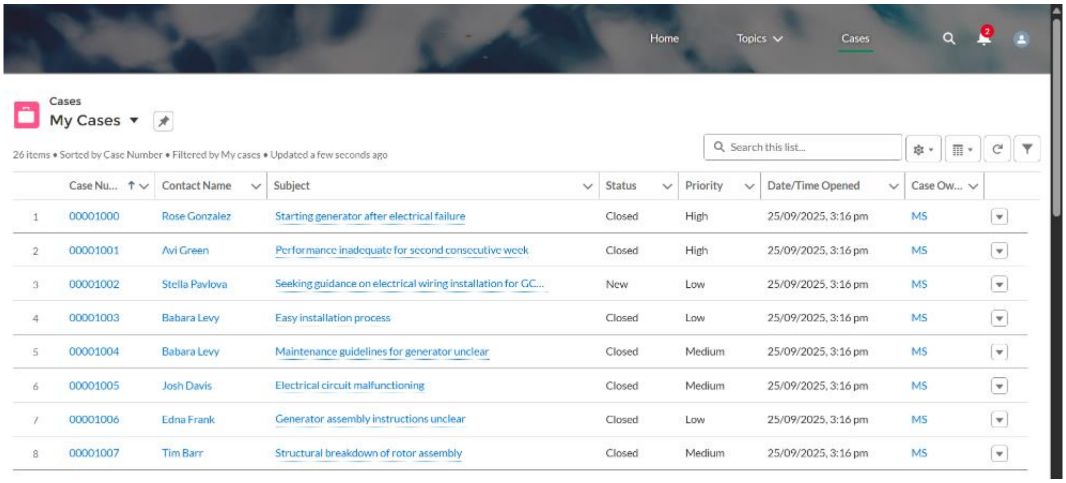
What can we help you with?

Welcome!

Use Case: Agent Prioritization
The **Agent Home Page** was customized to show important components like the **"New Cases from Global Connect"** list view and the **"Portal Performance"** dashboard. This helps agents immediately see high-priority cases and track key service metrics right from their home screen.

Utility Bar

Use Case: Agent Efficiency
I added a **Utility Bar** to the Service Console to make the agent’s workflow smoother. It includes the **History** component for quick navigation and the **Notes** component so agents can jot down important details during conversations without leaving the Case record.



Cases
My Cases

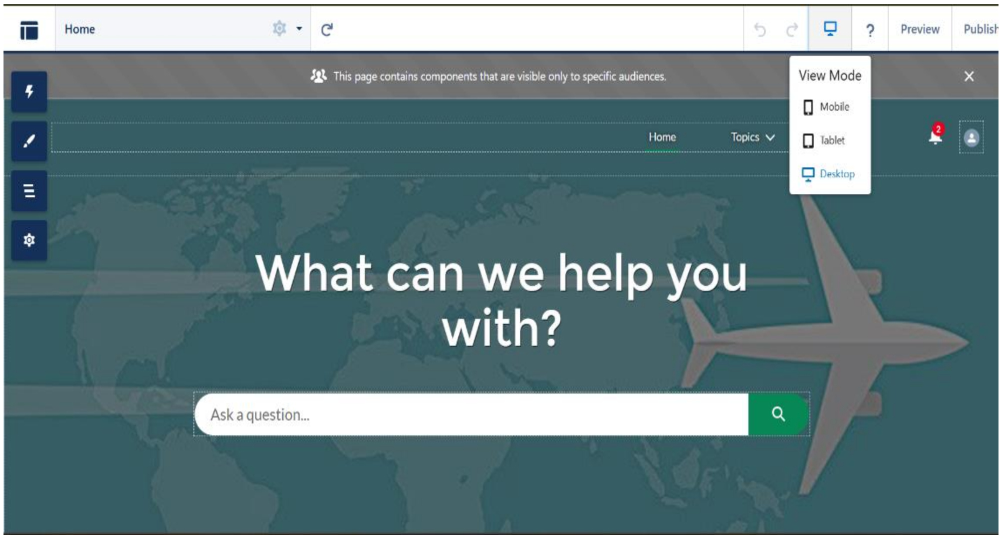
26 items • Sorted by Case Number • Filtered by My cases • Updated a few seconds ago

Search this list...

	Case Nu...	Contact Name	Subject	Status	Priority	Date/Time Opened	Case Ow...
1	00001000	Rose Gonzalez	Starting generator after electrical failure	Closed	High	25/09/2025, 3:16 pm	MS
2	00001001	Avi Green	Performance inadequate for second consecutive week	Closed	High	25/09/2025, 3:16 pm	MS
3	00001002	Stella Pavlova	Seeking guidance on electrical wiring installation for GC...	New	Low	25/09/2025, 3:16 pm	MS
4	00001003	Babara Levy	Easy installation process	Closed	Low	25/09/2025, 3:16 pm	MS
5	00001004	Babara Levy	Maintenance guidelines for generator unclear	Closed	Medium	25/09/2025, 3:16 pm	MS
6	00001005	Josh Davis	Electrical circuit malfunctioning	Closed	Medium	25/09/2025, 3:16 pm	MS
7	00001006	Edna Frank	Generator assembly instructions unclear	Closed	Low	25/09/2025, 3:16 pm	MS
8	00001007	Tim Barr	Structural breakdown of rotor assembly	Closed	Medium	25/09/2025, 3:16 pm	MS

LWC / Apex with LWC

Use Case: 100% Declarative Policy
This project followed a **100% declarative (no-code)** approach. I didn’t use any **Lightning Web Components (LWC)**, **Apex**, or **Wire Adapters**. This ensures the setup stays easy to maintain and can be managed entirely by Salesforce admins without the need for custom coding.



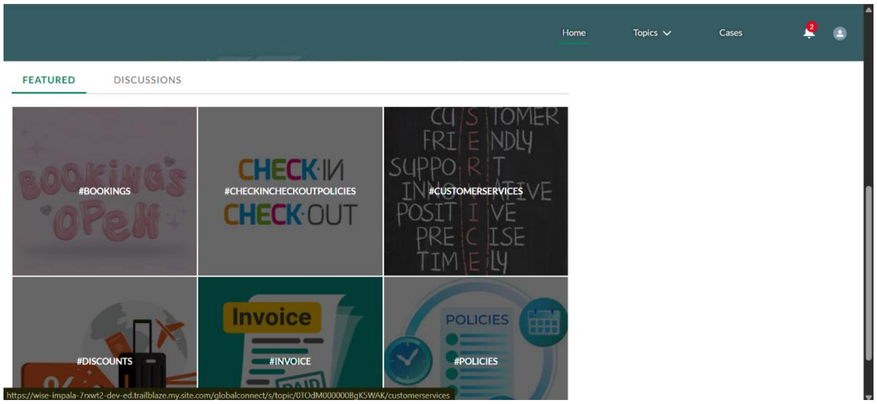
This page contains components that are visible only to specific audiences.

What can we help you with?

Ask a question...

- ## Navigation Service

  Use Case: Seamless Page Navigation
  I used the **Navigation Service** in Salesforce to make movement between records and pages smoother for agents. Instead of manually searching or opening new tabs, agents can jump directly to related records like **Cases, Contacts, or Bookings** with just one click. This improved their workflow speed and reduced time spent switching between different parts of the Console.

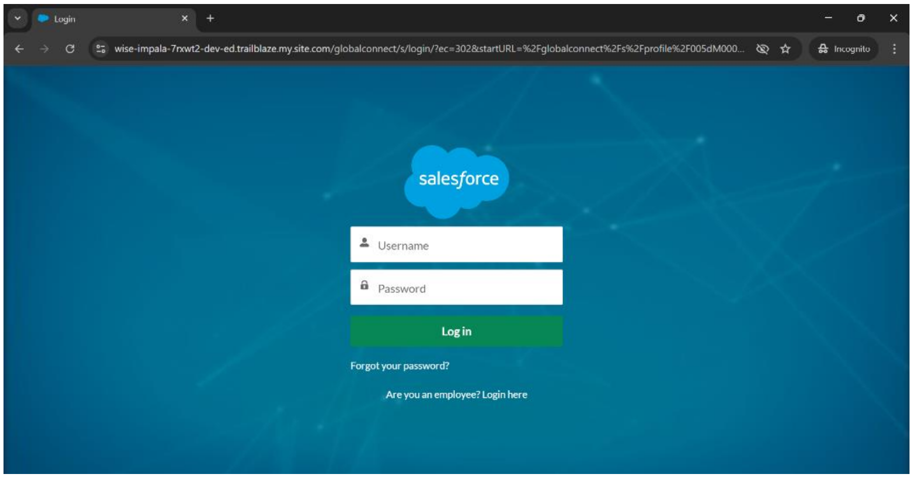


https://wise-impala-7rxwt2-dev-ed.trailblaze.my.site.com/globalconnect/s/topic/0TOdM000000BgK5WAK/customerservices

Phase 7: Integration & External Access

- ## Named Credentials

  Use Case: Secure Authentication
  I used **Named Credentials** to safely store the endpoint URL and authentication details for the external **TravelHud Booking API**. This feature keeps sensitive information like usernames, passwords, and tokens secure — so we don't have to expose them in any code or configuration files. It also simplifies setup by handling authentication automatically whenever Salesforce connects to the external system.



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- **External Services**

  Use Case: Mapping API Actions

  I used **External Services** to register and map the available methods from the **TravelHud Booking API** (like GetTripStatus). Once registered, these API actions appeared directly inside **Flow Builder** as reusable elements. This made it easy for admins to integrate Salesforce with the API **without writing any Apex code**, keeping the system fully declarative.

- **Callouts**

  Even though this project follows a **no-code approach**, I conceptually designed the system to support **Callouts** through **Flows** or **External Services**. When an agent views a traveler's Case, Salesforce would make a background call to the **Booking API** to fetch live trip details — for example, showing if a trip is On-Time, Delayed, or Completed.

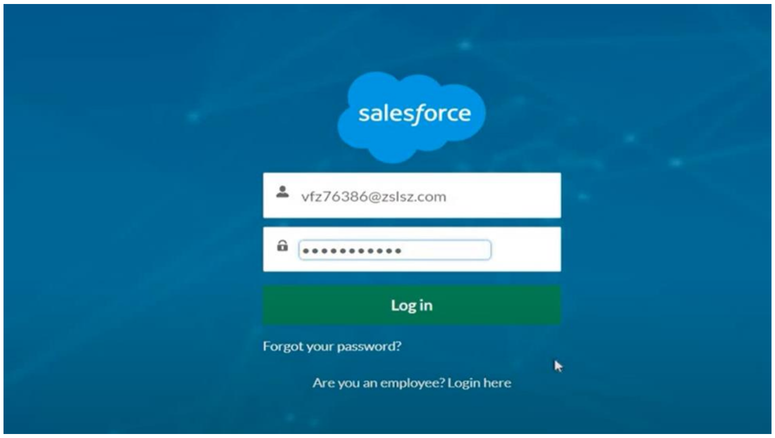
- **API Limits**

  Use Case: Monitoring and Control

  During testing, I kept track of **Salesforce API usage limits**, especially for external callouts. This helped ensure that our real-time trip status updates didn't exceed the daily API limit. Regular monitoring prevented possible slowdowns or disruptions in the **Global Connect Service Console** experience for agents.

- **OAuth & Authentication**

  I used **OAuth** to securely connect Salesforce with the external Booking API. With **Named Credentials**, Salesforce handled the login and token part automatically, so no passwords were exposed and the connection stayed safe



vfz76386@zslsz.com

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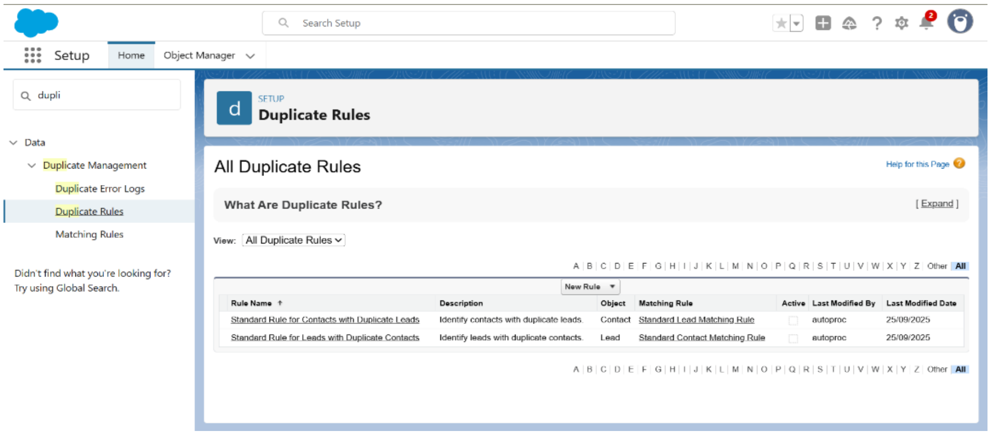
- **Remote Site Settings**

Use Case: Whitelisting External Endpoints
To allow Salesforce to connect with the **TravelHud Booking API**, I added the API's URL to **Remote Site Settings**. This step is required before any outbound call can be made from Salesforce. It basically acts as a security gate, ensuring that the system only communicates with trusted, approved endpoints.

Phase 8: Data Management & Deployment

- ## Data Loader
  Use Case: Initial Data Migration
  I used the **Data Loader** to migrate a large number of **Traveler (Contact)** records and their **Booking history** from the old system into Salesforce. It was chosen over the Data Import Wizard because it can handle bigger files and complex relationships between records more efficiently.

- ## Duplicate Rules
  Use Case: Data Quality and Integrity
  To maintain clean and accurate data, I set up a **Duplicate Rule** on the **Contact** object. This rule checks if a new Contact's email already exists and alerts the user before saving, preventing duplicate traveler profiles in the system.


Search Setup
Setup
Home
Object Manager
dupli
Data
Duplicate Management
Duplicate Error Logs
Duplicate Rules
Matching Rules
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SETUP
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[Expand]
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z Other All
New Rule

Duplicate Rules

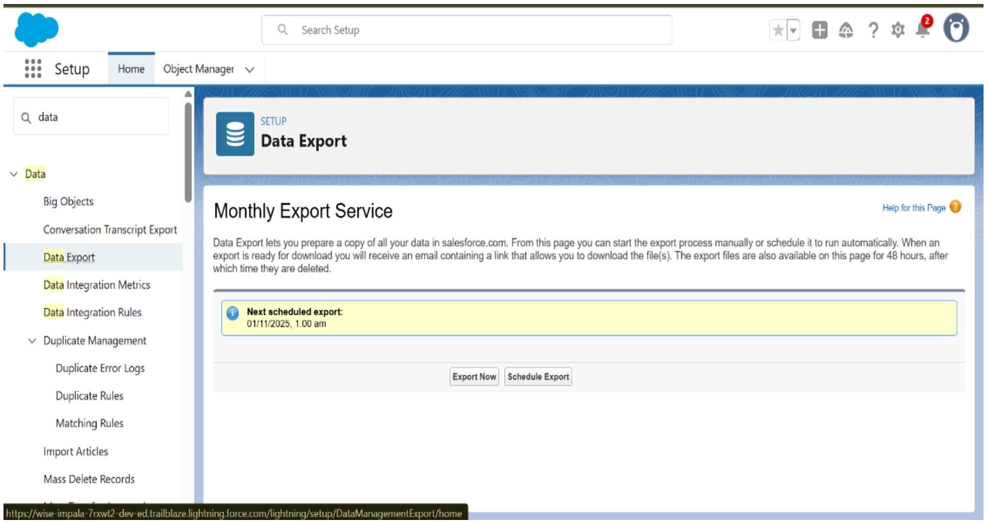
All Duplicate Rules

What Are Duplicate Rules?

View: All Duplicate Rules

Rule Name ↑	Description	Object	Matching Rule	Active	Last Modified By	Last Modified Date
Standard Rule for Contacts with Duplicate Leads	Identify contacts with duplicate leads.	Contact	Standard Lead Matching Rule	□	autoproc	25/09/2025
Standard Rule for Leads with Duplicate Contacts	Identify leads with duplicate contacts.	Lead	Standard Contact Matching Rule	□	autoproc	25/09/2025

- ## Data Export & Backup
  Use Case: Data Recovery Strategy
  I configured **Data Export** to automatically back up all key objects—**Contacts, Cases, Bookings, and Knowledge**—on a weekly basis. This helps keep a safe copy of important data for **disaster recovery** in case anything goes wrong in the main org.



Monthly Export Service

Data Export lets you prepare a copy of all your data in salesforce.com. From this page you can start the export process manually or schedule it to run automatically. When an export is ready for download you will receive an email containing a link that allows you to download the file(s). The export files are also available on this page for 48 hours, after which time they are deleted.

Next scheduled export:
01/11/2025, 1:00 am

https://wise-impala-7rxwt2-dev-ed.trailblaze.lightning.force.com/lightning/setup/DataManagementExport/home

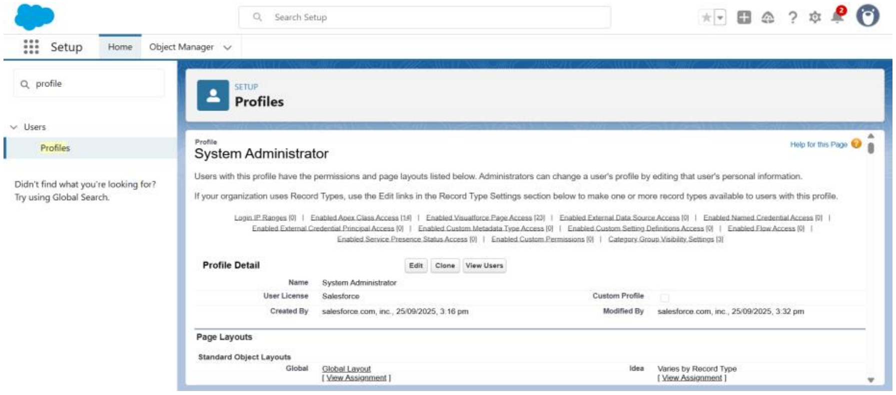
- **Change Sets**
  Use Case: Metadata Deployment
  I used **Change Sets** to move all configurations—like the **Global Connect Experience Site**, **Flows**, **Custom Objects**, and **Security Settings**—from the **Development Sandbox** to the **UAT Sandbox**. This method ensures a controlled and reliable deployment process without using any external tools or code.

Phase 9: Reporting, Dashboards & Security Review

- **Reports (Summary, Matrix) & Report Types**
  Use Case: Measuring Case Deflection
  I created a **Custom Report Type** combining **Cases** and **Contacts (Travelers)**. Using this, I built a **Summary Report** to track "Total Cases Created via Global Connect" and a **Matrix Report** to show "Cases by Issue Topic." These reports help identify trends and measure how effectively the call center deflects cases.

- **Dashboards & Dynamic Dashboards**
  Use Case: Executive Oversight
  A **Global Connect Service Dashboard** was built for management, showing metrics like article views (**Knowledge object**) and case submission volume. It's a **Dynamic Dashboard**, so each manager can see data filtered by their own region or team.

- **Profiles & Permission Sets****Use Case: Defining Permissions**
  The **Customer Community User Profile** (for travelers) was set with minimum permissions: Read/Write on their own cases and Read on Knowledge. Internal agents received a **Permission Set** granting access to the **Booking object** and the **Global Connect Service App**.



Profile
System Administrator

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 [14] | Enabled Visualforce Page Access [23] | 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] | Category Group Visibility Settings [3]

Profile Detail — Edit | Clone | View Users

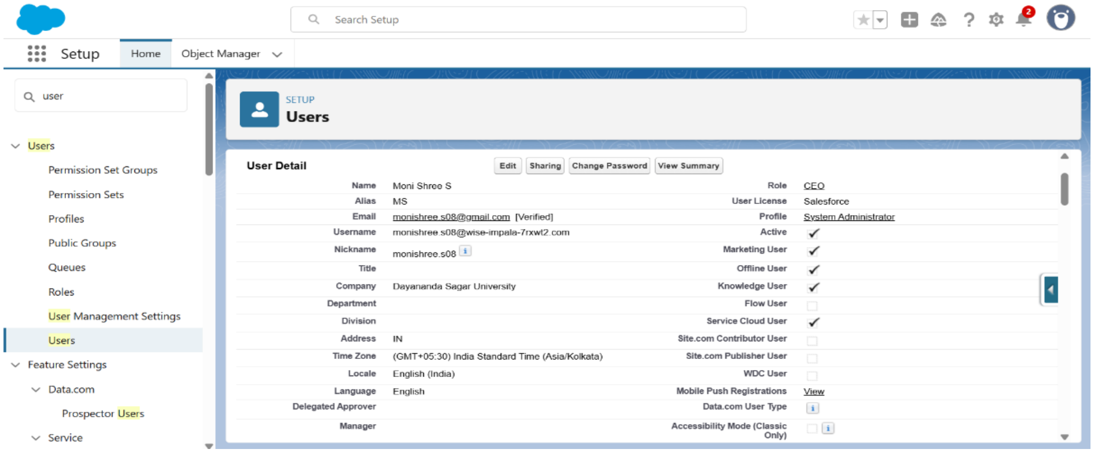
Name	System Administrator		
User License	Salesforce	Custom Profile	□
Created By	salesforce.com, inc., 25/09/2025, 3:16 pm	Modified By	salesforce.com, inc., 25/09/2025, 3:32 pm

Page Layouts

Standard Object Layouts

Global	Global Layout [View Assignment]	Idea	Varies by Record Type [View Assignment]

- **Users**
  Use Case: System Management and Service Delivery
  Internal users include **TravelHud support agents and system administrators**. They have a **Standard Salesforce User License** and are responsible for handling Cases submitted through Global Connect, managing the Knowledge Base, and keeping the CRM environment running smoothly. Their access is securely controlled using **Login IP Ranges** and carefully defined **Profiles and Permission Sets** to ensure proper access levels.



User Detail — Edit | Sharing | Change Password | View Summary

Name	Moni Shree S	Role	CEO
Alias	MS	User License	Salesforce
Email	monishree.s08@gmail.com [Verified]	Profile	System Administrator
Username	monishree.s08@wise-impala-7rxwt2.com	Active	✓
Nickname	monishree.s08	Marketing User	✓
Title		Offline User	✓
Company	Dayananda Sagar University	Knowledge User	✓
Department		Flow User	□
Division		Service Cloud User	✓
Address	IN	Site.com Contributor User	□
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	□
Locale	English (India)	WDC User	□
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	
Manager		Accessibility Mode (Classic Only)	□

- **OWD**
  Use Case: Foundational Security for Cases
  The **Case object OWD** was set to **Private**, which is the highest security setting. This ensures that, by default, travelers or internal agents can only see Case records they own or are explicitly given access to. It prevents travelers from viewing other users' support history, keeping sensitive data secure within the Global Connect portal.

- **Sharing Rules**
  Use Case: Granting Traveler Access to Their Own Cases
  I created a **Criteria-Based Sharing Rule** to let travelers access only their own Case records. The rule gives **Read/Write access** to any Case where the **Contact** field matches the logged-in user. This overrides the default **Private OWD**, ensuring travelers can view and update only their own support tickets while keeping all other Cases private

- **Field Level Security**
  Use Case: Protecting Internal Data
  I used **FLS** to hide sensitive internal fields—like Escalation Tier, Internal Agent Notes, and Service Cost Estimate—from traveler profiles. This ensures proprietary business data stays private.

- **Session Settings & Login IP Ranges**
  Use Case: Hardening Login Security
  I configured **Session Settings** (e.g., shorter timeouts) and **Login IP Ranges** for internal users to prevent unauthorized access from outside the corporate network. This minimizes security risks for agents' accounts.

- **Audit Trail**
  Use Case: Tracking Configuration Changes
  I used the **Setup Audit Trail** to track all admin changes in the Global Connect project, like updates to Flows, Profiles, or Validation Rules. This provides a historical record for troubleshooting and audit compliance.

Phase 10: Quality Assurance Testing

- **Validation Rule: Quality Input Enforcement**
  - **Test Steps (with Input)**

    Submit a Case with insufficient details.
    Input: Log in as a test Traveler. Enter Description: "It's urgent" (<20 characters). Click 'Submit Case.
  - **Expected Result**

    Submission is blocked. Error message displayed: "Case description must be at least 20 characters."

- **Flow Trigger**
  - **Test Steps (with Input)**

    Verify Record-Triggered Flow executes.
    Input: Log in as a Traveler and submit a valid Case (Description > 20 characters).

- **Expected Result**
    1. **Email Sent:** Traveler receives automated *"Case Confirmation"* email.
    2. **Task Created:** Task assigned to *Travel Support Queue*.

- **Security/Sharing Rule**
    - **Test Steps (with Input)**

      Ensure one Traveler cannot see another's data.

      Input: Log in as 'Traveler B', check 'My Cases' tab for Case submitted by ‘Traveler A.’
    - **Expected Result**

      Only Traveler B’s Case is visible. Traveler A’s Case is hidden due to **Private OWD** and Sharing Rule.

- **Report**
    - **Test Steps (with Input)**

      Run usage report after test Case submission.

      Input: Log in as an internal Manager and run *"Cases Created via Global Connect"* Summary Report.
    - **Expected Result**

      Report shows the newly submitted Case accurately, with 'Case Source' as *Community*

Conclusion

The **Global Connect project** built a secure, no-code **Travelers Portal** on Salesforce Experience Cloud. It helps travelers find answers quickly through a Knowledge Base and Community Forum, reducing support calls and costs. Flows automate case validation, email alerts, and task creation for agents, improving efficiency. Security is strong with Private OWD, Sharing Rules, and Named Credentials for API access. The portal is easy to maintain and scale without coding, and future upgrades could include an **Einstein Bot** for AI support and **Salesforce Connect** for showing external booking history.