

# Project Report Template

## 1 INTRODUCTION

### 1.1 Overview

The project aim is to provide real-time knowledge for all the students who have basic knowledge of salesforce and looking for a real-time project. This project will also help to those professionals who are in cross-technology and wanted to switch to Salesforce with the help of this project they will gain knowledge and can include into their resume as well.

An Event Management System provides campus event planners a fully integrated solution to simplify the event management process and keep your customers, faculty and students happy, while maintaining important reports and data for making real estate and future planning decisions.

### 1.2 Purpose

The event is celebrated at some point in his life. It should be something they can remember for the rest of their lives. If this is to be case, we know how to manage an event and how to choose objects for it.

## 2 Problem Definition & Design Thinking

### 2.1 Empathy map

Template



#### Empathy map

Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.



#### Build empathy

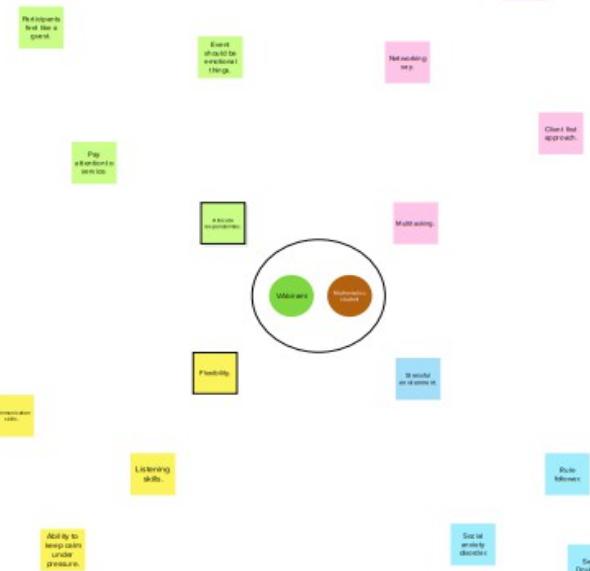
The information you add here should be representative of the observations and research you've done about your users.

##### Says

What have we heard them say?  
What can we imagine them saying?

##### Thinks

What are their wants, needs, hopes, and dreams? What other thoughts might influence their behavior?



##### Does

What behavior have we observed?  
What can we imagine them doing?

##### Feels

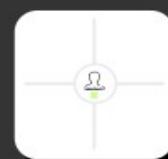
What are their fears, frustrations, and anxieties? What other feelings might influence their behavior?

[Share template feedback](#)



#### Need some Inspiration?

See a finished version of this template to kickstart your work.  
[Open example](#) →



## 2.2 Ideation & Brainstorming Map

Template



### Brainstorm & idea prioritization

Use this template in your own brainstorming sessions so your team can unleash their imagination and start shaping concepts even if you're not sitting in the same room.

- ⌚ 10 minutes to prepare
- ⌚ 1 hour to collaborate
- 👤 2-8 people recommended

Share template feedback



Need some inspiration?

See a finished version of this to replace to kickstart your work.

[Open example](#) →



#### Before you collaborate

A little bit of preparation goes a long way with this session. Here's what you need to do to get going.

⌚ 10 minutes

##### A Team gathering

Define who should participate in the session and send an invite. Share relevant information or pre-work ahead.

##### B Set the goal

Think about the problem you'll be focusing on solving in the brainstorming session.

##### C Learn how to use the facilitation tools

Use the Facilitation Superpowers to run a happy and productive session.

[Open article](#) →

1

### Define your problem statement

What problem are you trying to solve? Frame your problem as a How Might We statement. This will be the focus of your brainstorm.

⌚ 5 minutes

How might we  
prepare  
scheduling for an  
event?



#### Key rules of brainstorming

To run an smooth and productive session:

- |  |                 |  |                         |
|--|-----------------|--|-------------------------|
|  | Stay in topic.  |  | Encourage wild ideas.   |
|  | Defer judgment. |  | Listen to others.       |
|  | Go for volume.  |  | If possible, be visual. |

2

## Brainstorm

Write down any ideas that come to mind that address your problem statement.

⌚ 10 minutes

**TIP**

You can select a sticky note and hit the pencil [pencil] icon to start drawing!

V.Abraham

Come to a meeting	Find someone to help you	Double check the project

S.Gayathri

Include your team in the meeting	Present your ideas to all the stakeholders	Put it up on the board for a review

A.Amanthi

Show the day's outcome with your team	Choose stakeholders	Share the outcome

R.Sneha

Select the right stakeholders	Double check the project	Share the outcome

Person 5


Person 6


Person 7


Person 8




3

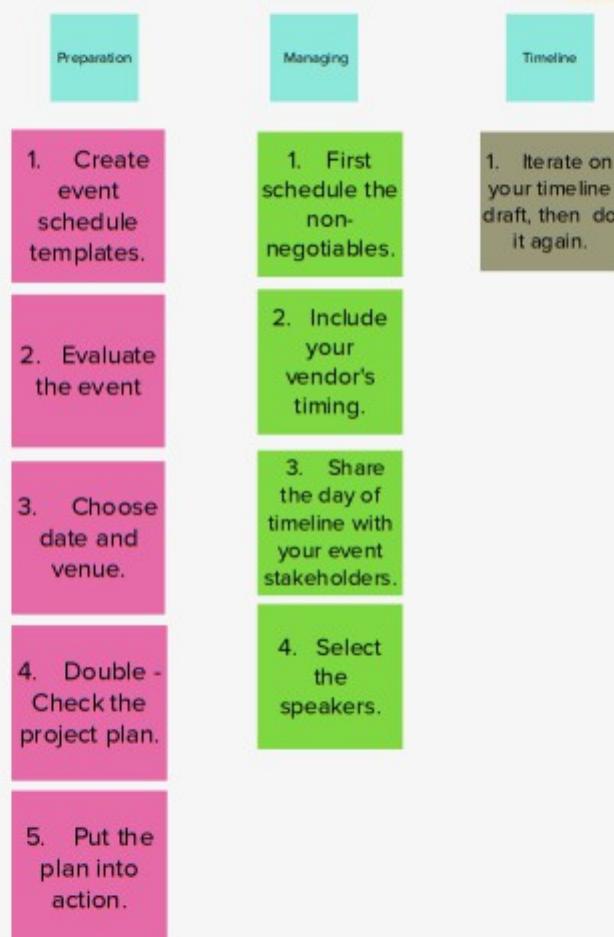
### Group ideas

Take turns sharing your ideas while clustering similar or related notes as you go. Once all sticky notes have been grouped, give each cluster a sentence-like label. If a cluster is bigger than six sticky notes, try and see if you can break it up into smaller sub-groups.

⌚ 20 minutes

TIP

Add customizable tags to sticky notes to make it easier to find, browse, organize, and categorize important ideas as themes within your mind.

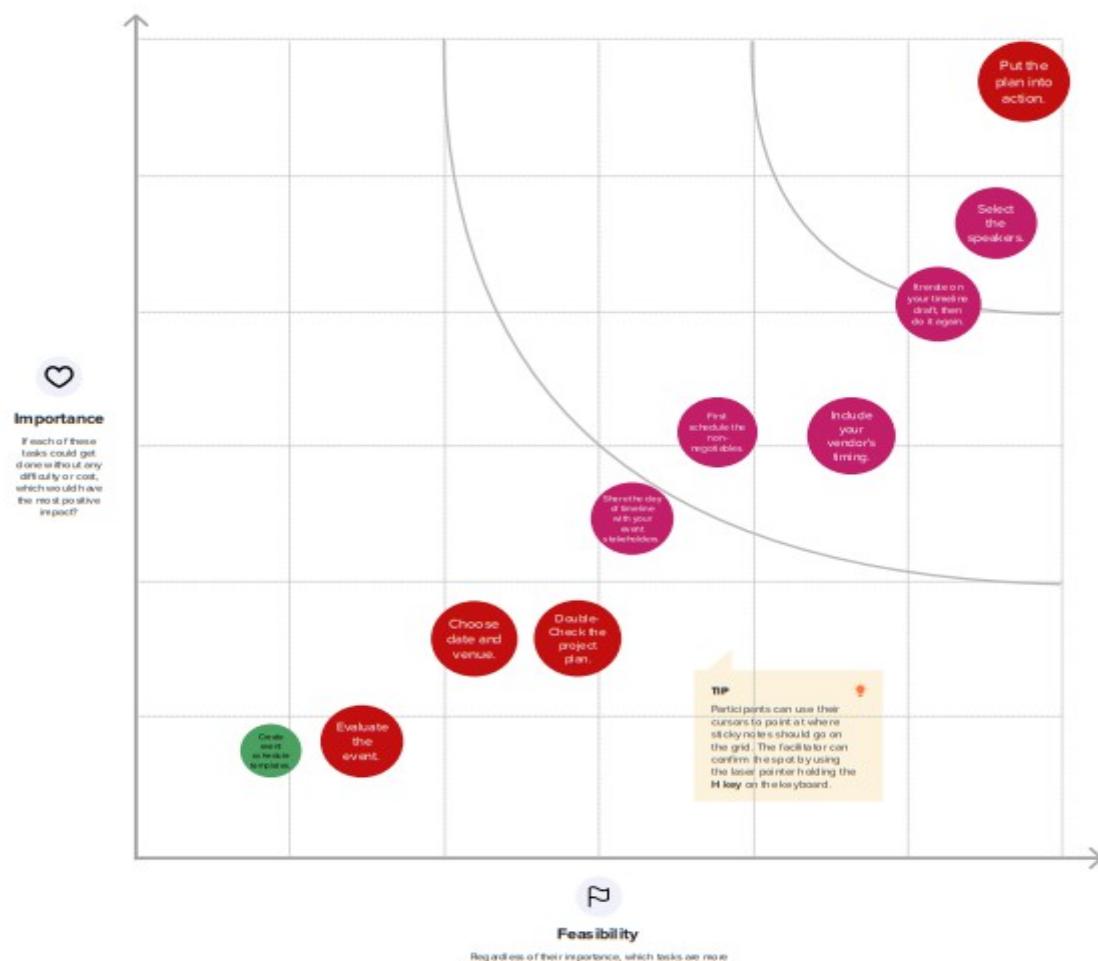


#### 4

### Prioritize

Your team should all be on the same page about what's important moving forward. Place your ideas on this grid to determine which ideas are important and which are feasible.

⌚ 20 minutes



→

### After you collaborate

You can export the mural as an image or pdf to share with members of your company who might find it helpful.

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#### Quick add-ons

**A Share the mural**  
Share a view link to the mural with stakeholders to keep them in the loop about the outcomes of the session.

**B Export the mural**  
Export a copy of the mural as a PNG or PDF to attach to emails, include in slides, or save in your drive.

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#### Keep moving forward

 **Strategy Blueprint**  
Define the components of a new idea or strategy.  
[Open the template →](#)

 **Customer experience journey map**  
Understand customer needs, motivations, and obstacles for an experience.  
[Open the template →](#)

 **Strengths, weaknesses, opportunities & threats**  
Identify strengths, weaknesses, opportunities, and threats (SWOT) to develop a plan.  
[Open the template →](#)

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 [Share template feedback](#)

## 3 RESULT

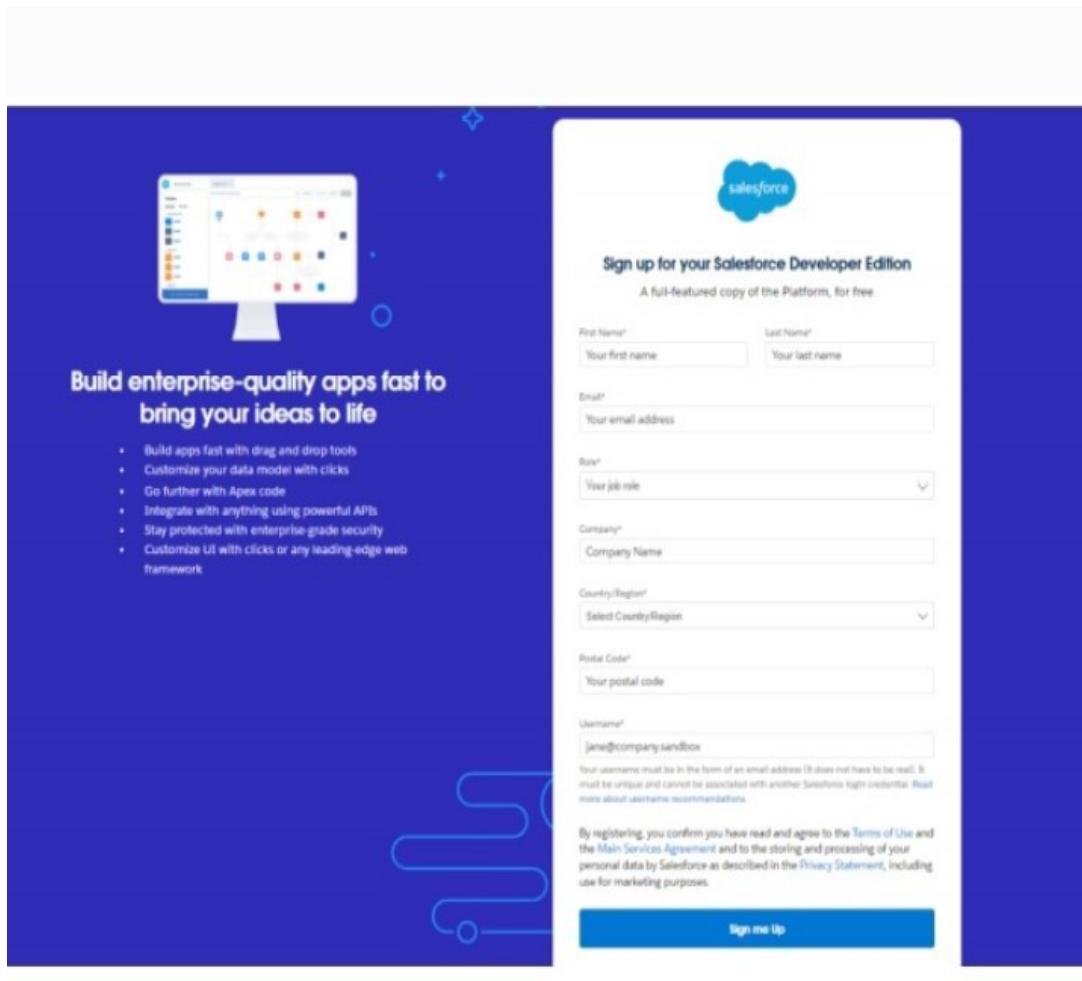
### 3.1 Data Model

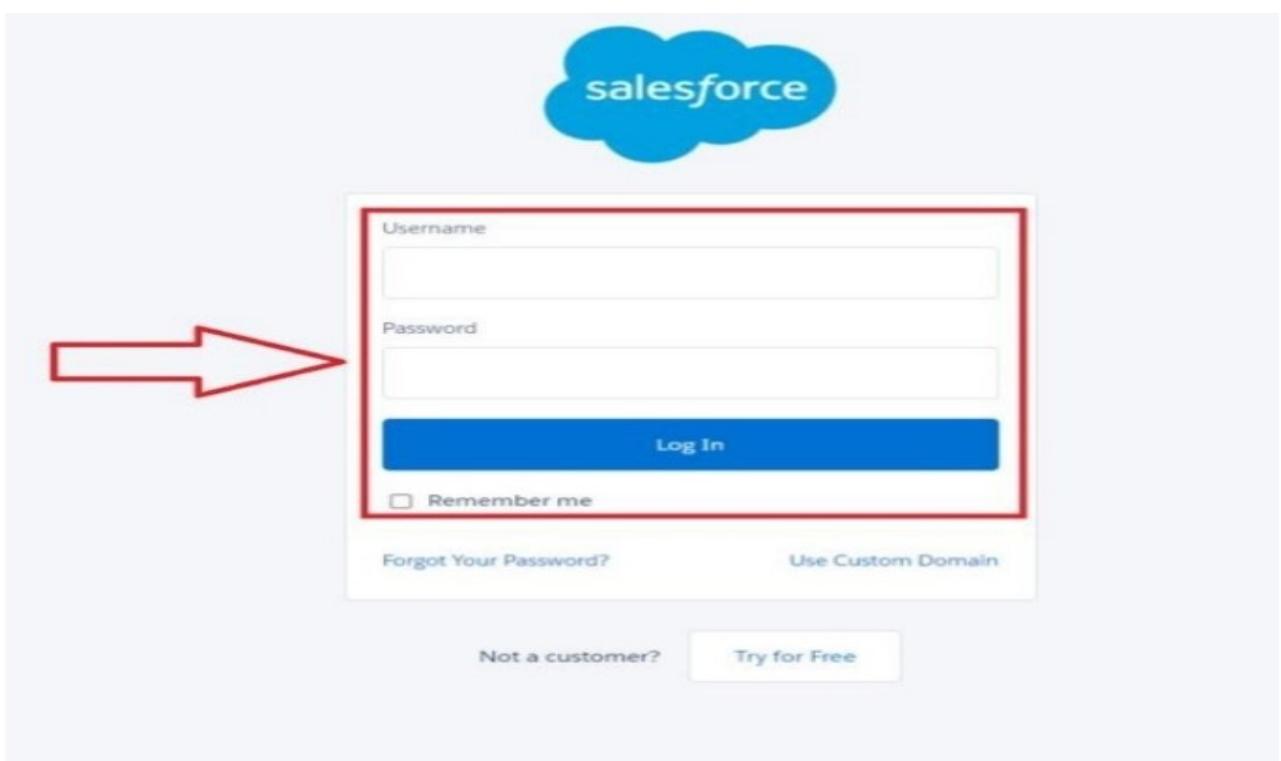
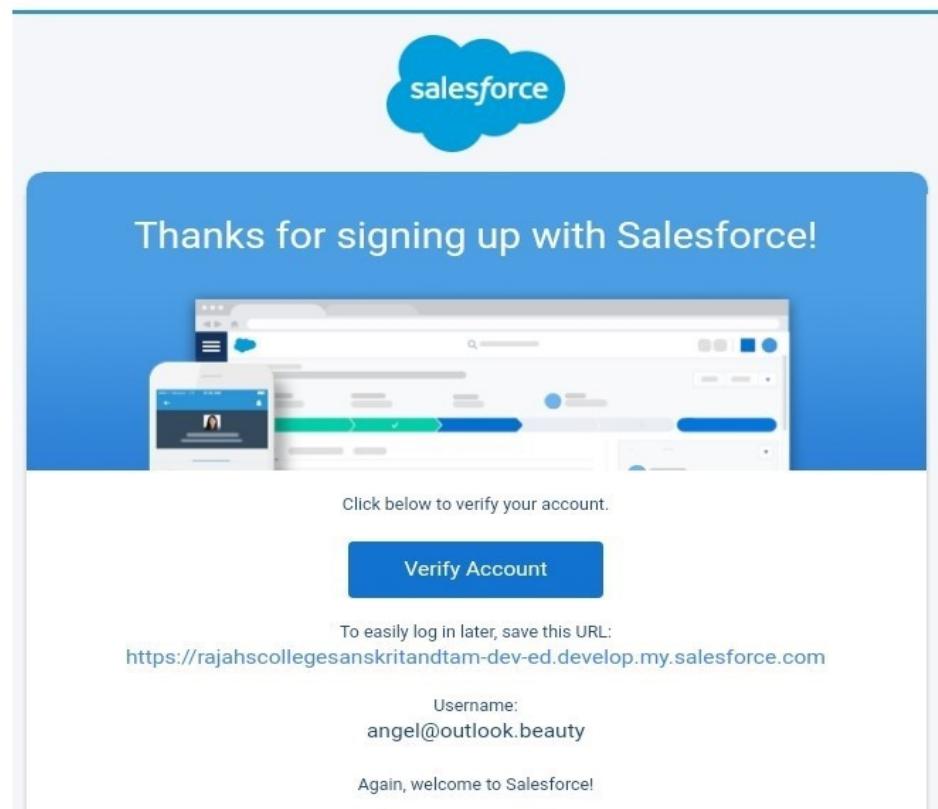
Object name	Fields in the Object	
Event	Field lable	Data type
	City	Text
	Start Date	Date/time
	End Date	Date/time
Attendee	Field lable	Data type
	Id	Auto number
	Phone	Phone
	Email	Email
	Tickets	Picklist
	Event Name	Master-detail Relationship
Speaker	Field lable	Data type
	Bio	Text Area
	e-mail	Email
	Event Name	Look-up Relationship
Vendor	Field lable	Data type
	e-mail	Email
	Phone	Phone
	Service Provider	Text
	Event Name	Look-up Relationship

## 3.2 Activity & screenshot

### Milestone 1

Creating a Salesforce Developer Org:







Cloud Search Setup Object Manager

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

- > Users
- > Data
- > Email

PLATFORM TOOLS

- > Subscription Management
- > Apps
- > Feature Settings
- > Slack
- > MuleSoft
- > Einstein
- > Objects and Fields
- > Events
- > Process Automation
- > User Interface
- > Custom Code
- > Development
- > Performance
- > Environments
- > User Engagement
- > Integrations
- > Notification Builder
- > Offline

SETTINGS

- > Company Settings
- > Data Classification
- > Privacy Center
- > Identity
- > Security

SETUP Home

Get Started with Einstein Bots

Launch an AI-powered bot to automate your digital connections.

Get Started

Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.

Learn More

Real-time Collaborative Docs

Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.

Get Started

Most Recently Used

10 items

NAME	TYPE	OBJECT
Attendee	Custom Object Definition	
Rahul Sharma	User	
Event permits	Permission Set	
Vendor permits	Permission Set	
Sanjay Gupta	User	
e-mail	Custom Field Definition	Vendor
Event Name	Custom Field Definition	Vendor
Service Provider	Custom Field Definition	Vendor
Phone	Custom Field Definition	Vendor
Vendor	Custom Object Definition	

## Description :

**Salesforce Developer** – salesforce developer platform is that allows developers to create, test, and deploy applications using the salesforce platform.

## Milestone 2 – Objects:

### Activity 1

#### Creation of object for Event Management:

SETUP New Custom Object

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label: Event Example: Account

Plural Label: Events Example: Accounts

starts with vowel sound:

The Object Name is used when referencing the object via the API.

Object Name: Event Example: Account

Description:

Context-Sensitive Help Setting

Content Name:

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: Event Name Example: Account Name

Date Type: Text

Optional Features

Allow Reports

Allow Activities

Track Field History

Allow in Chatter Groups

Enable Licensing

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. Learn more

Allow Sharing

Allow Bulk API Access

Allow Streaming API Access

Deployment Status

In Development

Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. Learn more

Allow Search

Object Creation Options (Available only when custom object is first created)

Add Notes and Attachments related list to default page layout

Launch New Custom Tab Wizard after saving this custom object

Save Save & New Cancel



Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

## Event

Details		Details	
Fields & Relationships	Description		
Page Layouts	API Name		
Lightning Record Pages	Event_c		
Buttons, Links, and Actions	Custom		
Compact Layouts	✓		
Field Sets	Singular Label		
Object Limits	Event		
Record Types	Plural Label		
Related Lookup Filters	Events		
Search Layouts	Enable Reports		
List View Button Layout	✓		
Restriction Rules	Track Activities		
Scoping Rules	Track Field History		
Triggers	Deployment Status		
Flow Triggers	Deployed		
Validation Rules	Help Settings		
	Standard salesforce.com Help Window		

## Activity 2 :

### creation of Attendees Object

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** The top navigation bar includes the Salesforce logo, a search bar labeled "Search Setup", and various setup icons.
- Page Title:** The main title is "New Custom Object" under the "Object Manager" tab.
- Custom Object Definition Edit:** This section contains the following fields:
  - Custom Object Information:** Singular label: "Attendee" (Example: Account), Plural label: "Attendees" (Example: Accounts), and a checkbox for "Starts with vowel sound".
  - API Name:** Object Name: "Attendee" (Example: Account).
  - Description:** A large text input field.
  - Help Settings:** Context-Sensitive Help Setting: "Open the standard Salesforce.com Help & Training window" (selected).
  - Content Name:** "None" (dropdown).
- Enter Record Name Label and Format:** Record Name: "Attendee Name" (Example: Account Name), Data Type: "Text".
- Optional Features:** Checkboxes for "Allow Reports", "Allow Activities", "Track Field History", "Allow in Chatter Groups", and "Enable Licensing".
- Object Classification:** Checkboxes for "Allow Sharing", "Allow Bulk API Access", and "Allow Streaming API Access".
- Deployment Status:** Deployment status is set to "Deployed".
- Search Status:** "Allow Search" is checked.
- Object Creation Options:** Available only when custom object is first created. Options: "Add Notes and Attachments related list to default page layout" and "Launch New Custom Tab Wizard after saving this custom object".
- Buttons:** "Save", "Save & New", and "Cancel" buttons at the bottom.



Search Setup

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Attendee

Details

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

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Details

Description

API Name

Attendee\_\_c

Custom

✓

Singular Label

Attendee

Plural Label

Attendees

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

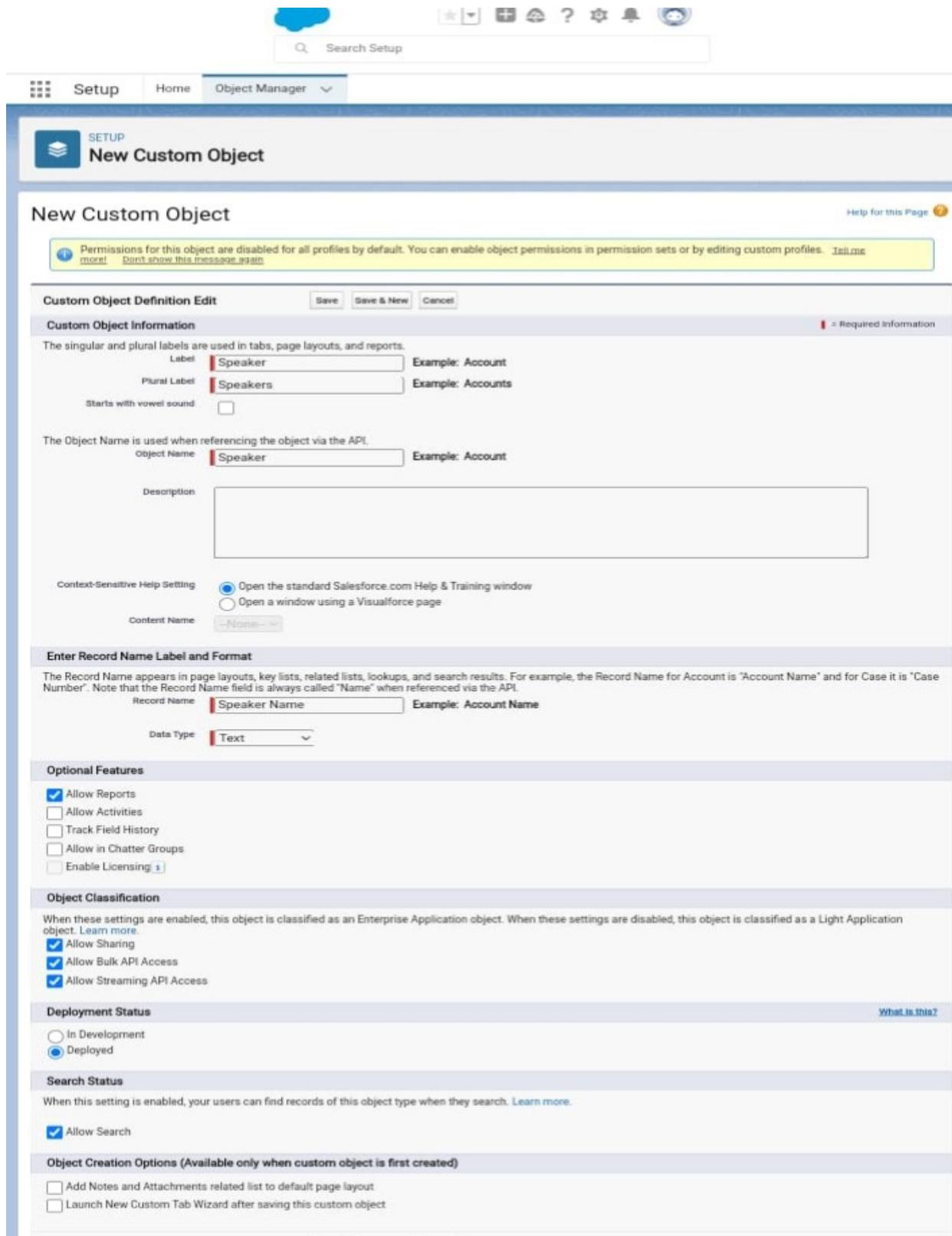
Standard salesforce.com Help Window

Edit

Delete

# Activity 3

## Creation of Speakers Object :



The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. The main title is 'New Custom Object'. The 'Custom Object Definition Edit' section is active. The 'Custom Object Information' section includes fields for 'Label' (Speaker) and 'Plural Label' (Speakers). The 'Object Name' field is also set to 'Speaker'. The 'Description' field is empty. Under 'Context-Sensitive Help Setting', the 'Open the standard Salesforce.com Help & Training window' radio button is selected. The 'Content Name' field is set to '-None-'.

**Enter Record Name Label and Format**  
The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: Speaker Name (Example: Account Name)  
Data Type: Text

**Optional Features**

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Chatter Groups
- Enable Licensing

**Object Classification**  
When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. Learn more.

- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

**Deployment Status**

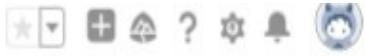
- In Development
- Deployed

**Search Status**  
When this setting is enabled, your users can find records of this object type when they search. Learn more.

- Allow Search

**Object Creation Options (Available only when custom object is first created)**

- Add Notes and Attachments related list to default page layout
- Launch New Custom Tab Wizard after saving this custom object



Search Setup

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Speaker

Details

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

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Details

Description

API Name

Speakers\_c

Enable Reports

Custom

Track Activities

Singular Label

Speaker

Track Field History

Plural Label

Speakers

Deployment Status

Deployed

Help Settings

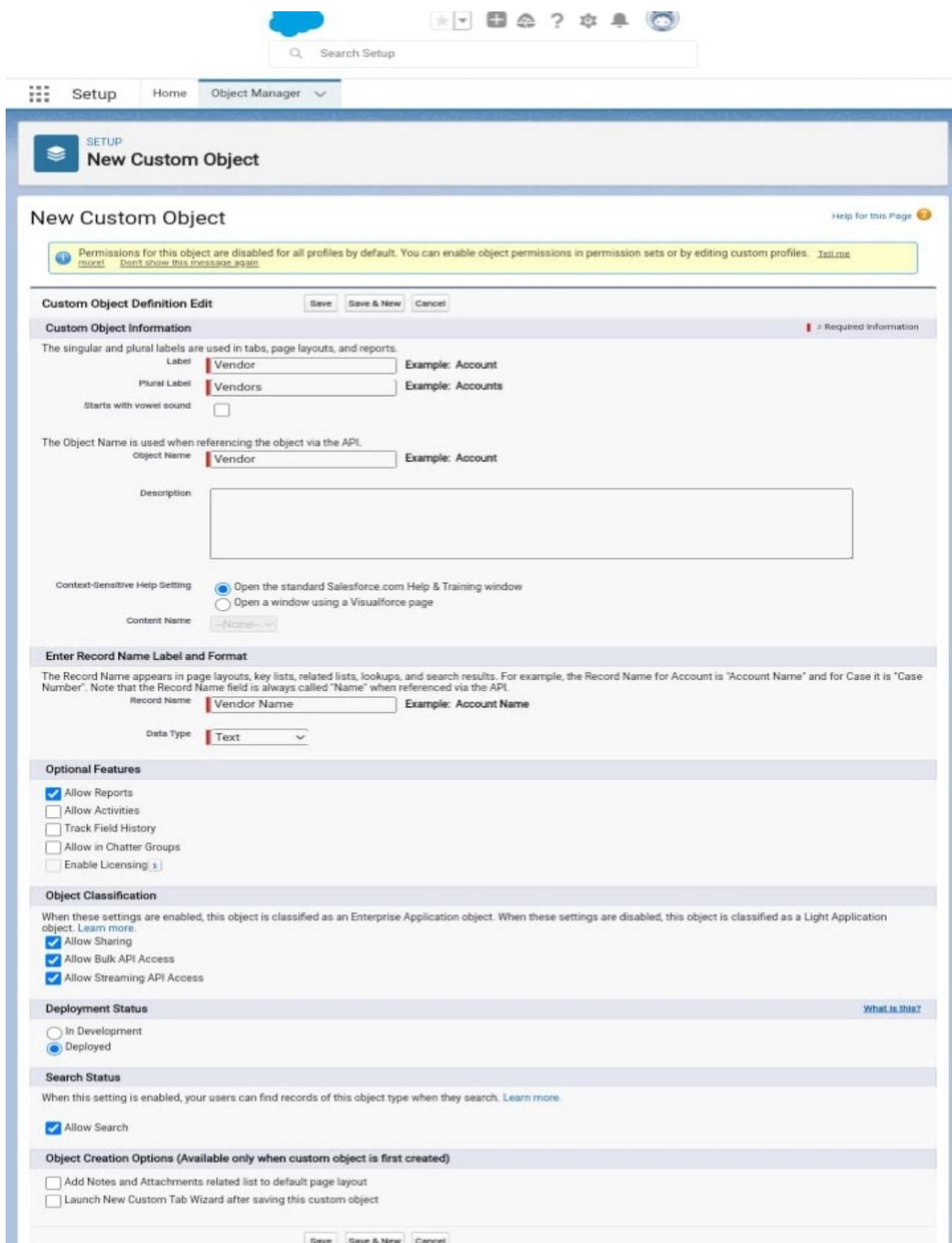
Standard salesforce.com Help Window

Edit

Delete

## Activity 4

creation of vendors object :



The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. The main page title is 'New Custom Object'. The 'Custom Object Definition Edit' section is active, showing the following fields:

- Custom Object Information:**
  - Label: Vendor (Example: Account)
  - Plural Label: Vendors (Example: Accounts)
  - Starts with vowel sound:
- Object Name:** Vendor (Example: Account)
- Description:** (Empty text area)
- Context-Sensitive Help Setting:**
  - Open the standard Salesforce.com Help & Training window
  - Open a window using a Visualforce page
- Content Name:**
- Enter Record Name Label and Format:**

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

  - Record Name: Vendor Name (Example: Account Name)
  - Data Type: Text
- Optional Features:**
  - Allow Reports
  - Allow Activities
  - Track Field History
  - Allow in Chatter Groups
  - Enable Licensing (1)
- Object Classification:**

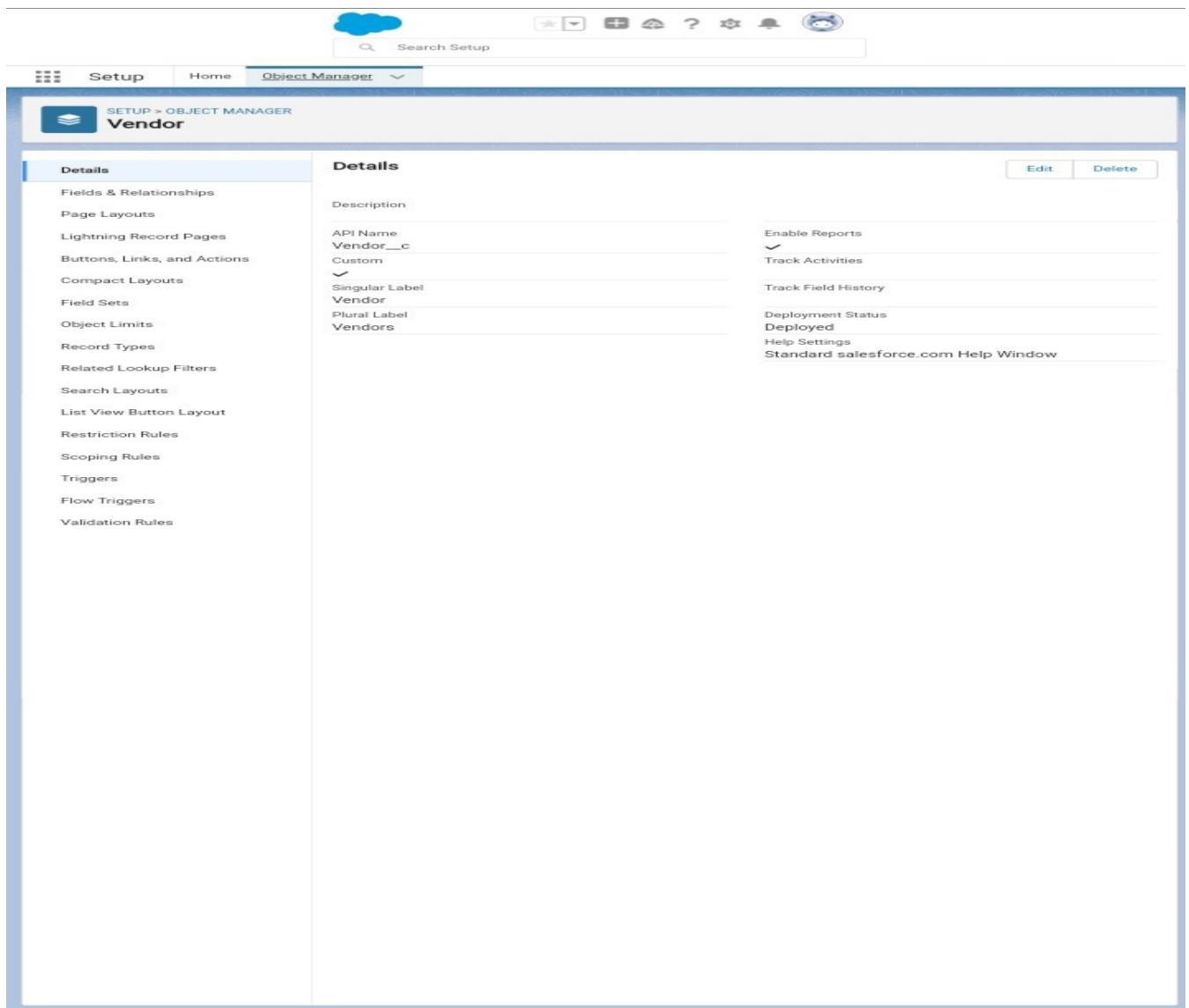
When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).

  - Allow Sharing
  - Allow Bulk API Access
  - Allow Streaming API Access
- Deployment Status:**
  - In Development
  - Deployed
- Search Status:**

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

  - Allow Search
- Object Creation Options (Available only when custom object is first created):**
  - Add Notes and Attachments related list to default page layout
  - Launch New Custom Tab Wizard after saving this custom object

At the bottom of the page are 'Save', 'Save & New', and 'Cancel' buttons.



The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'SETUP > OBJECT MANAGER Vendor'. The left sidebar under 'Details' 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, Scoping Rules, Triggers, Flow Triggers, and Validation Rules. The main content area is titled 'Details' and shows the following configuration for the 'Vendor' object:

Description	<input type="text" value=""/>
API Name	<input type="text" value="Vendor__c"/>
Custom	<input checked="" type="checkbox"/>
Singular Label	<input type="text" value="Vendor"/>
Plural Label	<input type="text" value="Vendors"/>
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	<input type="checkbox"/>
Track Field History	<input type="checkbox"/>
Deployment Status	<input type="text" value="Deployed"/>
Help Settings	<input type="text" value="Standard salesforce.com Help Window"/>

Buttons 'Edit' and 'Delete' are located in the top right corner of the main content area.

## Descreption :

**Object-** Salesforcs object are provides a complete set of tools to build, customise, and test applications in a sandbox environment.

## Milestone 3

Creation of Tab for Event Management:

# Activity 1

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with sections like Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION (with sub-options like Users, Data, Email, and Platform Tools), and PLATFROM TOOLS (with sub-options like Events, Process Automation, and User Interface). The main content area is titled 'SETUP Tabs' and shows a 'Custom Object Tab Events' detail page. The page displays a table with the following data:

Tab Label	Object	Tab Style
Events	Event	Splash Page Custom Link
Description	ANANTHI A ASOKAR K, 28/03/2023, 3:22 pm	Modified By
Created By	ANANTHI A ASOKAR K, 28/03/2023, 3:22 pm	ANANTHI A ASOKAR K, 28/03/2023, 3:22 pm

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

**ADMINISTRATION**

Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users

> Data

> Email

PLATFORM TOOLS

> Subscription Management

> Apps

> Feature Settings

> Slack

> MuleSoft

> Einstein

Objects and Fields

- Object Manager
- Picklist Value Sets
- Schema Builder

> Events

> Process Automation

User Interface

- Action Link Templates
- Actions & Recommendations
- App Menu
- Custom Labels
- Density Settings
- > Global Actions
- Lightning App Builder
- Lightning Extension
- Loaded Console Tab Limit
- Path Settings
- Quick Text Settings
- Record Page Settings
- Rename Tabs and Labels

SETUP Tabs

Custom Object Tab

Events

Below is the information for the custom tab. Click Edit to change the custom tab.

Help for this Page

Custom Tab Definition Detail

Tab Label	Events	Tab Style
Object	Event	Splash Page Custom Link
Description	Created By ANANTHI A ASOKAR K, 28/03/2023, 3:22 pm	Modified By ANANTHI A ASOKAR K, 28/03/2023, 3:22 pm

## Activity 2

### Creation of Attendees tab :

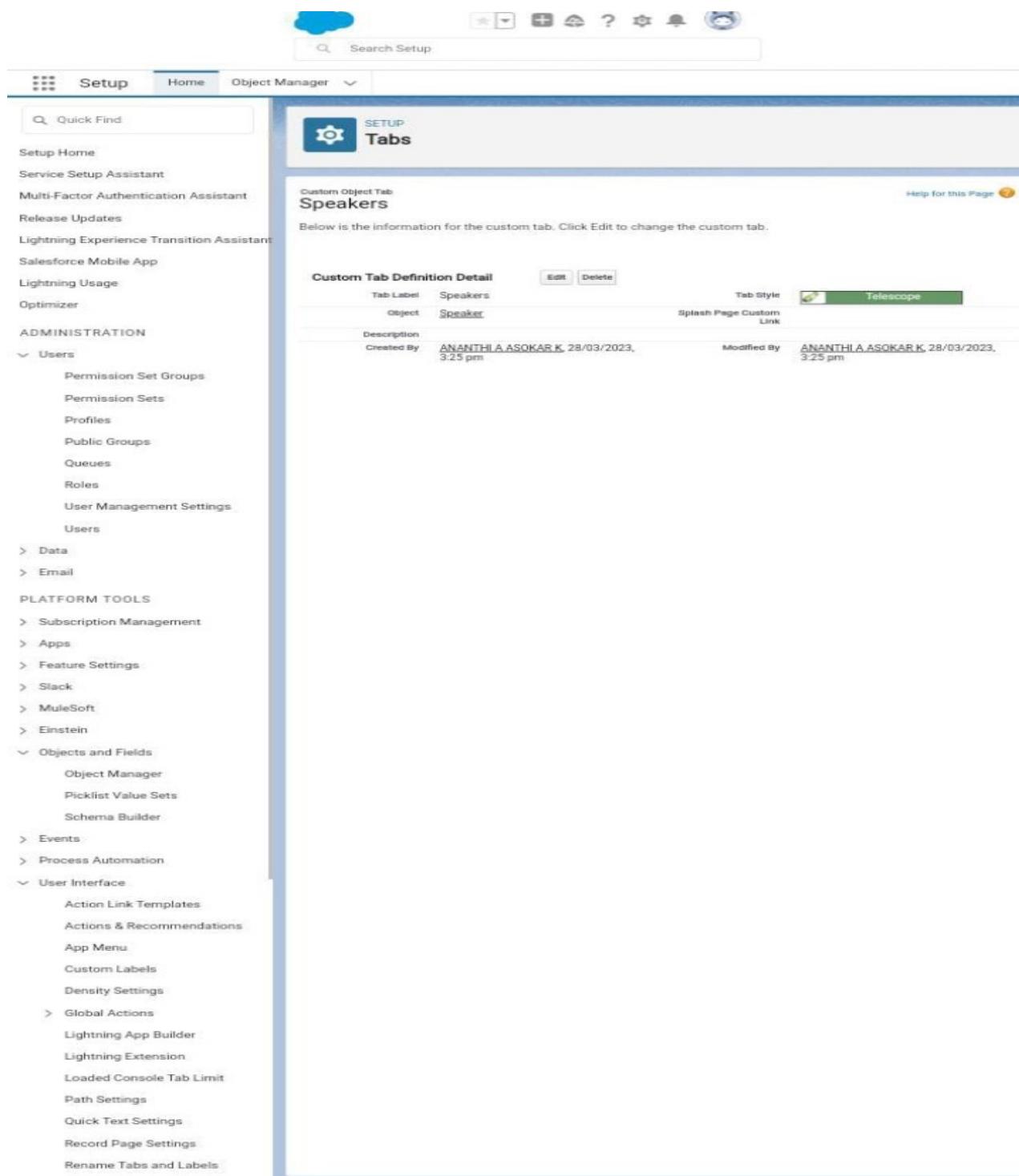
The screenshot shows the Salesforce Setup interface. The left sidebar lists various setup categories: Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION (with sub-options like Users, Data, Email, and Platform Tools), and PLATFROM TOOLS (with sub-options like Events, Process Automation, and User Interface).

The main content area is titled "Tabs" under "SETUP". It shows a "Custom Object Tab" named "Attendees". The "Custom Tab Definition Detail" table includes the following information:

Tab Label	Object	Tab Style
Attendees	Attendee	Ticket
Description		Splash Page Custom Link
Created By	ANANTHI A ASOKAR K 28/03/2023, 3:24 pm	Modified By
		ANANTHI A ASOKAR K 28/03/2023, 3:24 pm

## Activity 3

### Creation of Speakers tab :



The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled 'SETUP Tabs' and shows a 'Custom Object Tab' named 'Speakers'. The 'Custom Tab Definition Detail' table includes the following information:

Tab Label	Speakers	Tab Style
Object	Speaker	Splash Page Custom Link 
Description	ANANTHILA ASOKARK	Modified By 
Created By	ANANTHILA ASOKARK 28/03/2023, 3:25 pm	Modified By 

The 'Custom Tab Definition Detail' table includes the following information:

Tab Label	Speakers	Tab Style
Object	Speaker	Splash Page Custom Link 
Description	ANANTHILA ASOKARK	Modified By 
Created By	ANANTHILA ASOKARK 28/03/2023, 3:25 pm	Modified By 

## Activity 4

### Creation of Vendors tab :

The screenshot shows the Salesforce Setup interface. The left sidebar is titled 'Setup' and contains the following navigation items:

- Quick Find
- Setup Home
- Service Setup Assistant
- Multi-Factor Authentication Assistant
- Release Updates
- Lightning Experience Transition Assistant
- Salesforce Mobile App
- Lightning Usage
- Optimizer
- ADMINISTRATION**
  - Users
    - Permission Set Groups
    - Permission Sets
    - Profiles
    - Public Groups
    - Queues
    - Roles
    - User Management Settings
    - Users
  - Data
  - Email
- PLATFORM TOOLS
  - Subscription Management
  - Apps
  - Feature Settings
  - Slack
  - MuleSoft
  - Einstein
- Objects and Fields
  - Object Manager
  - Picklist Value Sets
  - Schema Builder
- Events
- Process Automation
- User Interface
  - Action Link Templates
  - Actions & Recommendations
  - App Menu
  - Custom Labels
  - Density Settings
- Global Actions
  - Lightning App Builder
  - Lightning Extension
  - Loaded Console Tab Limit
  - Path Settings
  - Quick Text Settings
  - Record Page Settings

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The left sidebar contains a navigation menu with sections like Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION (with sub-options like Users, Data, Email, and Platform Tools), and Objects and Fields. The main content area displays the 'Custom Object Tab Vendors' page, which shows a table with a single row for the 'Vendors' tab. The table includes columns for Tab Label (Vendors), Object (Vendor), Description (Created By ANANTHI A ASOKAR K, 28/03/2023, 3:27 pm), and Modified By (ANANTHI A ASOKAR K, 28/03/2023, 3:27 pm). The 'Tab Style' is set to 'Gears'.

Tab Label	Object	Description	Modified By
Vendors	Vendor	Created By ANANTHI A ASOKAR K, 28/03/2023, 3:27 pm	ANANTHI A ASOKAR K, 28/03/2023, 3:27 pm

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

**ADMINISTRATION**

Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users

Data

Email

**PLATFORM TOOLS**

Subscription Management

Apps

Feature Settings

Slack

MuleSoft

Einstein

Objects and Fields

- Object Manager
- Picklist Value Sets
- Schema Builder

Events

Process Automation

User Interface

- Action Link Templates
- Actions & Recommendations
- App Menu
- Custom Labels
- Density Settings
- Global Actions
- Lightning App Builder
- Lightning Extension
- Loaded Console Tab Limit
- Path Settings
- Quick Text Settings
- Record Page Settings
- Rename Tabs and Labels

SETUP Tabs

Edit Custom Object Tab  
**Vendors**

Fill in the fields below to define the custom tab.

**Custom Tab Definition Edit**

**Custom Object Tab Information**

Tab Label: **Vendors**

Object: **Vendor**

Tab Style: **Gears**

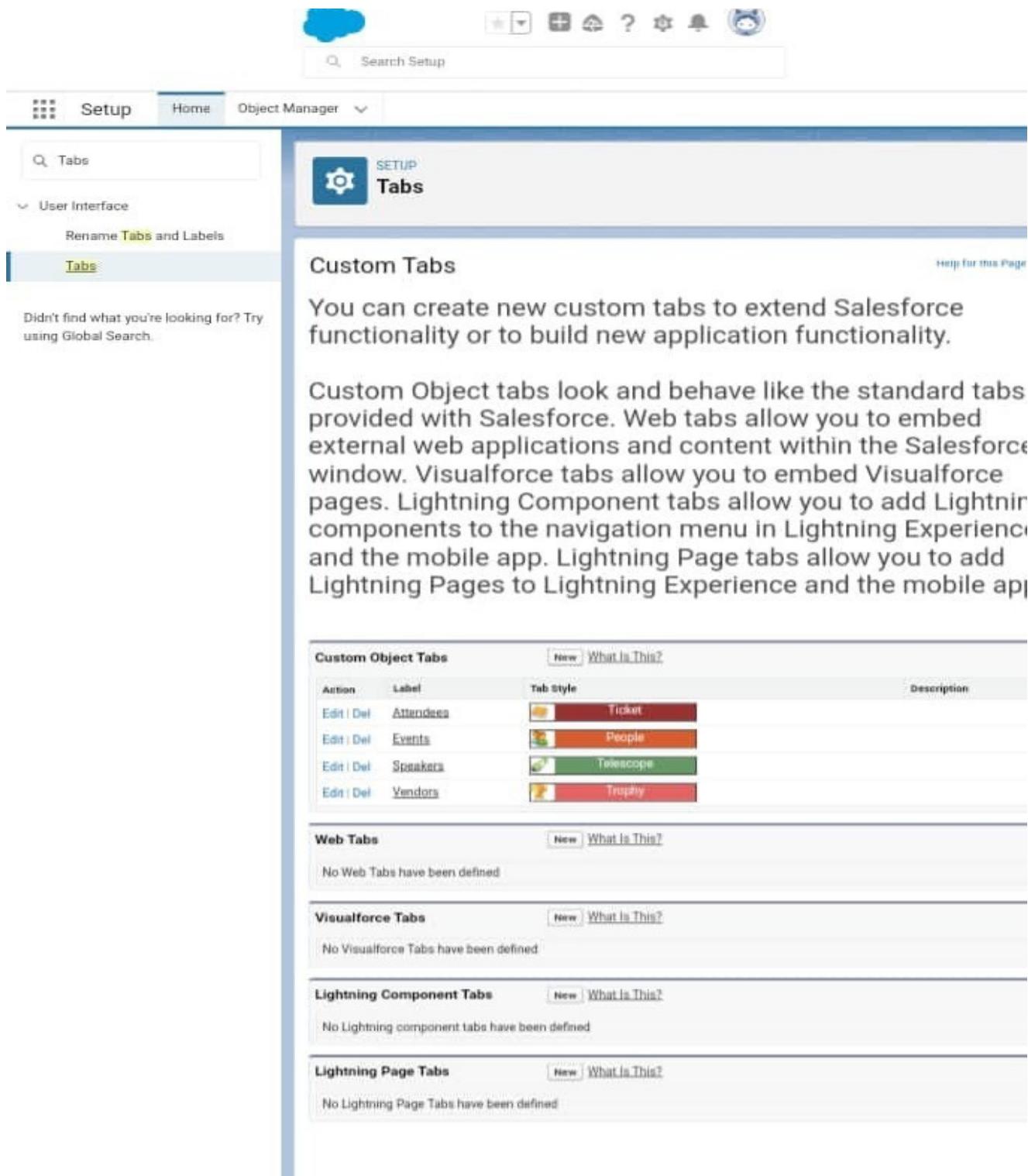
(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page: **—None—**

Enter a short description.

Description:

Save Cancel



The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar has a search bar and sections for 'User Interface' (with 'Rename Tabs and Labels' and 'Tabs' selected), 'Customize Home', 'Customize Pages', 'Customize Reports', and 'Customize Dashboards'. A message at the bottom of the sidebar says, 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'SETUP Tabs' and contains the 'Custom Tabs' section. It says, 'You can create new custom tabs to extend Salesforce functionality or to build new application functionality.' Below this, a table lists 'Custom Object Tabs' with four entries: 'Attendees' (Ticket), 'Events' (People), 'Speakers' (Telescope), and 'Vendors' (Trophy). Below the table are sections for 'Web Tabs' (No Web Tabs have been defined), 'Visualforce Tabs' (No Visualforce Tabs have been defined), 'Lightning Component Tabs' (No Lightning component tabs have been defined), and 'Lightning Page Tabs' (No Lightning Page Tabs have been defined). Each section has 'New' and 'What Is This?' buttons.

Action	Label	Tab Style	Description
Edit   Del	Attendees	Ticket	
Edit   Del	Events	People	
Edit   Del	Speakers	Telescope	
Edit   Del	Vendors	Trophy	

## Description:

**Tab-** Salesforce tab is a user interface to create records for an object and to view the records in objects.

## Milestone 4

Create the Event Management Construction App :

Event Management - Light...  

im-dev-ed.develop.lightning.force.com

Lightning App Builder App Settings App Details & Branding

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

App Details

\*App Name

\*Developer Name

Description

App Branding

Image 

Primary Color Hex Value

Clear

Org Theme Options  Use the app's image and color instead of the org's custom theme

App Launcher Preview





# Event Management - Light...

im-dev-ed.develop.lightning.force.com



## App Settings

### App Details & Branding

### App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

### App Options

#### Navigation and Form Factor 1

##### \* Navigation Style

- Standard navigation
- Console navigation

##### \* Supported Form Factors

- Desktop and phone
- Desktop
- Phone

#### Setup and Personalization 1

##### Setup Experience

- Setup (full set of Setup options)
- Service Setup

##### App Personalization Settings

- Disable end user personalization of nav items in this app
- Disable temporary tabs for items outside of this app



# Event Management - Light...

im-dev-ed.develop.lightning.force.com



← Lightning App Builder App Settings Pages Event Management Help

## App Settings

App Details & Branding  
App Options  
Utility Items (Desktop Only)  
Navigation Items  
**User Profiles**

## User Profiles

Choose the user profiles that can access this app.

### Available Profiles

<input type="text"/> Type to filter list...
Analytics Cloud Integration User
Analytics Cloud Security User
Authenticated Website
Authenticated Website
Contract Manager
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Customer Community Login User
Customer Community Plus Login User
Customer Community Plus User
Customer Community User
Customer Portal Manager Custom
Customer Portal Manager Standard
Event user profile
Event vendors profile
External Apps Login User
External Identity User
Force.com - App Subscription User
Gold Partner User
High Volume Customer Portal
High Volume Customer Portal User
Identity User
Marketing User
Minimum Access - Salesforce
Partner App Subscription User
Partner Community Login User
Partner Community User
Read Only
Salesforce API Only System Integrations
Silver Partner User
Solution Manager
Standard Platform User
Standard User

### Selected Profiles

System Administrator



← Lightning App Builder App Settings Pages Event Management ? Help

**App Settings**

App Details & Branding  
App Options  
Utility Items (Desktop Only)

**Navigation Items**

User Profiles

**Available Items**

Type to filter list...

- Accounts
- Alert Settings
- All Sites
- Alternative Payment Methods
- App Launcher
- Appointment Invitations
- Approval Requests
- Asset Action Sources
- Asset Actions
- Asset State Periods
- Assets
- Async Operation Logs
- Authorization Form
- Authorization Form Consent
- Authorization Form Data Use
- Authorization Form Text
- Awards
- Background Operations
- Business Brands
- Calendar
- Campaigns
- Card Payment Methods
- Cases
- Change Requests
- Chatter
- CMS Channels
- CMS Workspaces
- Communication Subscription Chan...
- Communication Subscription Cons...
- Communication Subscription Timin...
- Communication Subscriptions
- Consumption Schedules
- Contact Point Consent
- Contact Point Type Consent
- Contact Requests
- Contacts

**Selected Items**

- Events
- Attendees
- Speakers
- Vendors
- Reports
- Dashboards

◀ ▶ ▲ ▼



Cloud icon

Setup Home Object Manager

Search Setup

Q app

Salesforce Mobile App

▽ Data

Mass Transfer Approval Requests

▽ Apps

App Manager (selected)

AppExchange Marketplace

▽ Connected Apps

Connected Apps OAuth Usage

Manage Connected Apps

▽ Lightning Bolt

Flow Category

Lightning Bolt Solutions

▽ Mobile Apps

▽ Salesforce

Salesforce Branding

Salesforce Navigation

Salesforce Notifications

Salesforce Offline

Salesforce Settings

▽ Packaging

Installed Packages

Package Manager

Package Usage

▽ Feature Settings

▽ Analytics

▽ Apps

App Install History

Auto-Installed Apps

▽ Data.com

Field Mapping

▽ Process Automation

Approval Processes

▽ User Interface

App Menu

Lightning App Builder

▽ Custom Code

Canvas App Previewer

▽ User Engagement

In-App Guidance

Didn't find what you're looking for? Try using Global Search.

SETUP

## Lightning Experience App Manager

New Lightning App New Connected App

### Clone Apps(Beta)

Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the [Winter '23 release notes](#)

Enable App Cloning  Disabled

22 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

App Name
1 All Tabs
2 Analytics Studio
3 App Launcher
4 Bolt Solutions
5 Community
6 Content
7 Data Manager
8 Digital Experiences
9 Event Management
10 Lightning Usage App
11 Marketing
12 Platform
13 Queue Management
14 Sales
15 Sales
16 Sales Console
17 Salesforce Chatter
18 Salesforce Scheduler Setup
19 Service
20 Service Console
21 Site.com
22 Subscription Management

## **Descreption :**

**App** - App in salesforce is little more then a container for all of the objects, tabs and other functionality. It is a group of tabs that works as a unit to provide the applications functionality . It consists simple of a name, a logo, and an ordered set of tabs.

## **Milestone 5**

### **Fields creation :**

#### **Activity 1**

**Creation of fields for the Event objects.**

SETUP > OBJECT MANAGER  
Event

## Details

## Fields &amp; 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

Scoping Rules

Triggers

Flow Triggers

Validation Rules

## Edit Event Custom Field

## city

Help for this Page 

## Custom Field Definition Edit

Change Field Type

Save

Cancel

## Field Information

! = Required Information

Field Label  Data Type TextField Name Description Help Text Data Owner  Field Usage Data Sensitivity Level Compliance Categorization    

## General Options

Required  Always require a value in this field in order to save a recordUnique  Do not allow duplicate values Treat 'ABC' and 'abc' as duplicate values (case insensitive)  
 Treat 'ABC' and 'abc' as different values (case sensitive)External ID  Set this field as the unique record identifier from an external systemDefault Value 

Use [formula syntax](#). Enclose text and picklist value API names in double quotes : ("the\_text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type\_\_mdt.RecordAPIName.Field\_\_c

## Text Options

Length 

Change Field Type Save Cancel



Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Event

Details

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
- Scoping Rules
- Triggers
- Flow Triggers
- Validation Rules

Edit Event Custom Field Start Date

Custom Field Definition Edit Change Field Type Save Cancel

Field Information = Required Information

Field Label	Start Date	Data Type	Date/Time
Field Name	Start_Date		
Description			
Help Text			
Data Owner	User	[User Picker]	
Field Usage	-None-		
Data Sensitivity Level	-None-		
Compliance Categorization	0 selected	[Move Left]	0 selected

General Options

Required	<input checked="" type="checkbox"/> Always require a value in this field in order to save a record
Default Value	Show Formula Editor
Use <a href="#">formula syntax</a> : Enclose text and picklist value API names in double quotes : ("the_text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__mdt.RecordAPIName.Field__c	
Change Field Type Save Cancel	

Setup > Object Manager > Event

End Date

Custom Field Definition Edit

Field Label: End Date

Field Name: End\_Date

Description:

Help Text:

Data Owner: User

Field Usage: -None-

Data Sensitivity Level: -None-

Compliance Categorization: 0 selected

General Options

Required:  Always require a value in this field in order to save a record

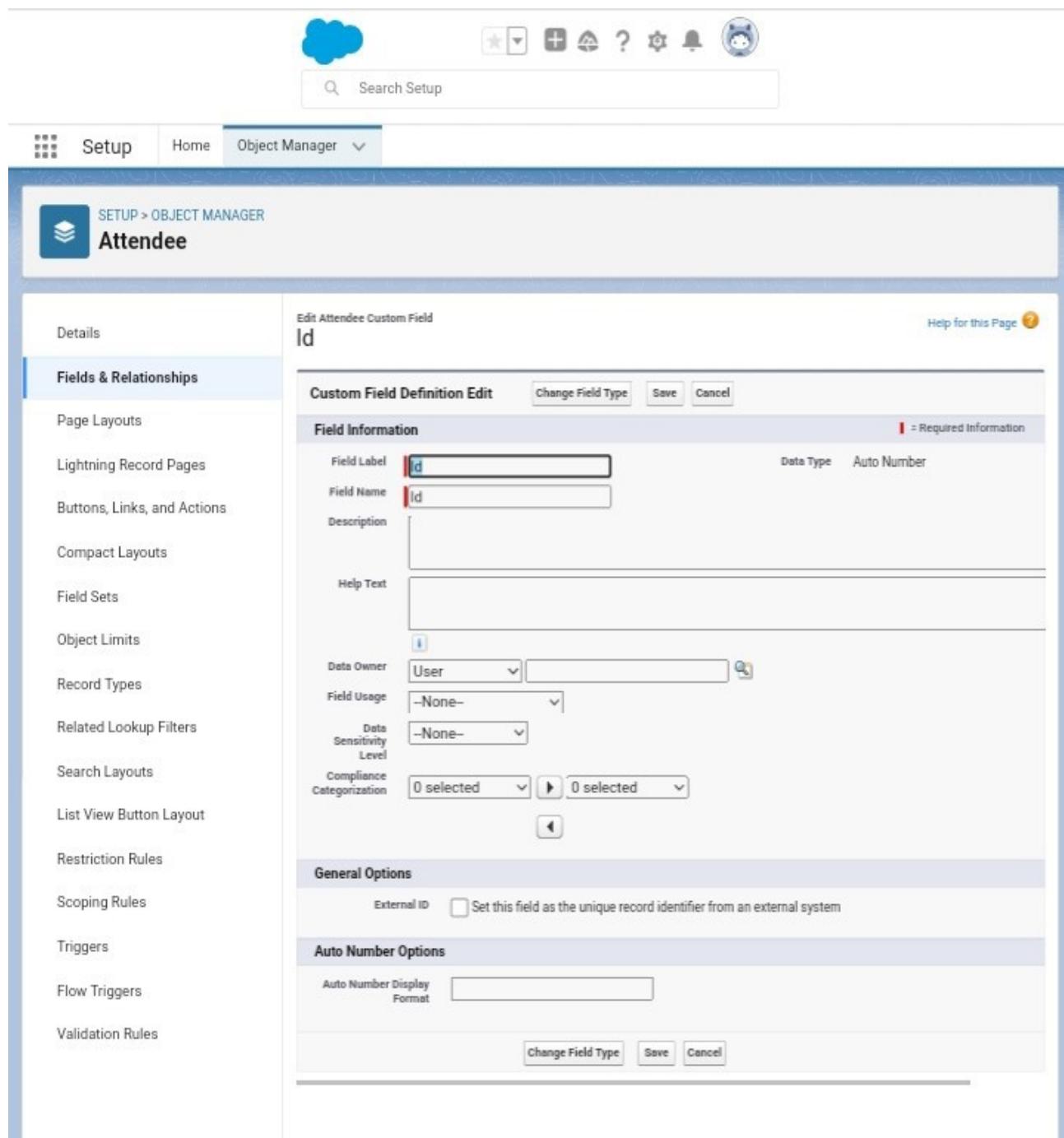
Default Value: Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes: ("the\_text"), include numbers without quotes: (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7), To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type\_\_mdt.RecordAPIName.Field\_\_c

Change Field Type Save Cancel

## Activity 2:

### Creation of fields for the Attendees objects:



The screenshot shows the Salesforce Setup interface for creating a custom field. The top navigation bar includes a blue cloud icon, a search bar with the placeholder "Search Setup", and various setup icons. The main menu bar shows "Setup" as the active tab, followed by "Home" and "Object Manager". The sub-menu under "Object Manager" is "Attendee". The page title is "SETUP > OBJECT MANAGER" and the specific object is "Attendee".

The left sidebar lists various configuration options under "Fields & Relationships": Details, 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, Scoping Rules, Triggers, Flow Triggers, and Validation Rules. The "Fields & Relationships" option is currently selected.

The main content area is titled "Edit Attendee Custom Field" and shows the "Id" field being edited. The "Custom Field Definition Edit" section includes buttons for "Change Field Type", "Save", and "Cancel".

**Field Information** (Required Information):

- Field Label:
- Field Name:
- Description: (empty text area)
- Help Text: (empty text area)
- Data Owner:
- Field Usage:
- Data Sensitivity Level:
- Compliance Categorization:  (with a double-headed arrow button)

**General Options**:

- External ID:  Set this field as the unique record identifier from an external system

**Auto Number Options**:

- Auto Number Display Format:

At the bottom of the edit screen are "Change Field Type", "Save", and "Cancel" buttons.



Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

## Attendee

Details

**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
- Scoping Rules
- Triggers
- Flow Triggers
- Validation Rules

Edit Attendee Custom Field  
**Phone**

Custom Field Definition Edit [Change Field Type](#) [Save](#) [Cancel](#)

**Field Information** Required Information

Field Label	Phone	Data Type	Phone	
Field Name	Phone			
Description				
Help Text				
Data Owner	User	<a href="#">Edit</a>		
Field Usage	-None-	<a href="#">Edit</a>		
Data Sensitivity Level	-None-	<a href="#">Edit</a>		
Compliance Categorization	0 selected	<a href="#">Edit</a>	0 selected	<a href="#">Edit</a>

**General Options**

Required	<input type="checkbox"/> Always require a value in this field in order to save a record
Default Value	<a href="#">Show Formula Editor</a>
<small>Use <a href="#">formula syntax</a>: Enclose text and picklist value API names in double quotes : ("the_text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__mdt.RecordAPIName.Field__c</small>	

[Change Field Type](#) [Save](#) [Cancel](#)

Setup > Object Manager > Attendee

Attendee

Details

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
- Scoping Rules
- Triggers
- Flow Triggers
- Validation Rules

Custom Field Definition Edit

Change Field Type Save Cancel

**Field Information**

Field Label: Email  
Field Name: Email  
Description:   
Help Text:   
Data Owner: User  
Field Usage: -None-  
Data Sensitivity Level: -None-  
Compliance Categorization: 0 selected

**General Options**

Required:  Always require a value in this field in order to save a record  
Unique:  Do not allow duplicate values  
External ID:  Set this field as the unique record identifier from an external system  
Default Value: Show Formula Editor  
Use formula syntax: Enclose text and picklist value API names in double quotes : ("the\_text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7), To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type\_\_mdt.RecordAPIName.Field\_\_

Change Field Type Save Cancel

Setup Home Object Manager

SETUP > OBJECT MANAGER Attendee

Edit Attendee Custom Field Tickets

Custom Field Definition Edit Change Field Type Promote to Global Value Set Save Cancel

**Field Information** = Required Information

Field Label	Tickets	Data Type	Picklist
Field Name	Tickets		
Description			
Help Text			
Data Owner	User		
Field Usage	-None-		
Data Sensitivity Level	-None-		
Compliance Categorization	0 selected	0 selected	

**General Options**

Required	<input type="checkbox"/> Always require a value in this field in order to save a record
Default Value	Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes : ("the\_text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7), To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type\_\_mdt.RecordAPIName.Field\_\_c

**Picklist Options**

<input checked="" type="checkbox"/> Restrict picklist to the values defined in the value set
--

Change Field Type Promote to Global Value Set Save Cancel


Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER
Attendee

Details
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
Scoping Rules
Triggers
Flow Triggers
Validation Rules

### Edit Attendee Custom Field Event Name

Have feedback on lookup filters? Comment on IdeaExchange!  Help for this Page 

**Custom Field Definition Edit** Change Field Type Save Cancel

**Field Information** ! = Required Information

Field Label	<input type="text" value="Event Name"/>	Data Type	Master-Detail
Field Name	<input type="text" value="Event_Name"/>		
Description	<input type="text"/>		
Help Text	<input type="text"/>		
Data Owner	<input type="text" value="User"/>		
Field Usage	<input type="text" value="--None--"/>		
Data Sensitivity Level	<input type="text" value="--None--"/>		
Compliance Categorization	<input type="text" value="0 selected"/>		<input type="text" value="0 selected"/>

**Master-Detail Options**

Related To	<input type="text" value="Event"/>	Child Relationship Name	<input type="text" value="Attendees"/>
Related List Label	<input type="text" value="Attendees"/>		
Sharing Setting	Select the minimum access level required on the Master record to create, edit, or delete related Detail records:		

Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.  
 Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

Allow reparenting  Child records can be reparented to other parent records after they are created

**Lookup Filter**

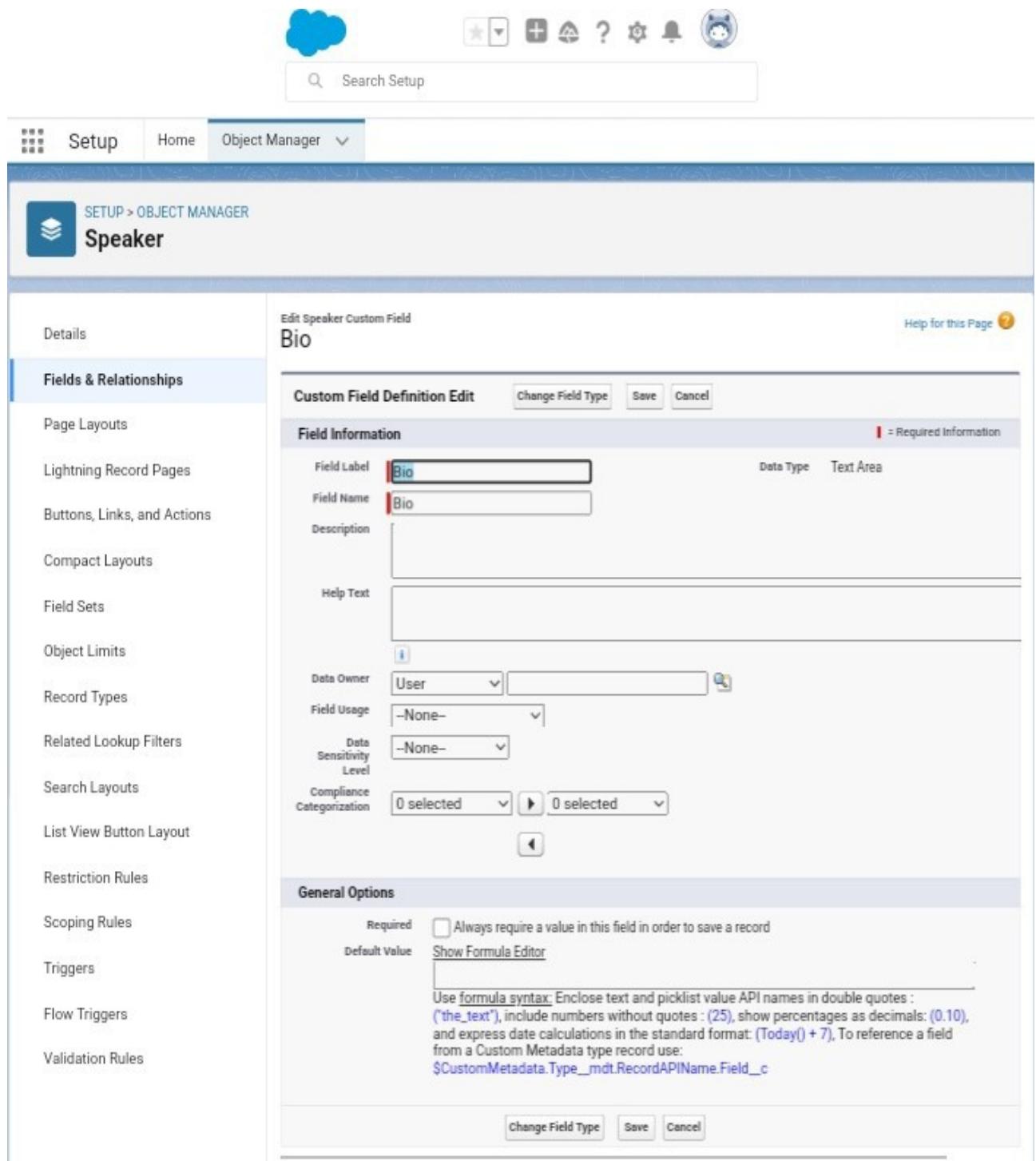
Optionally, create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

[Show Filter Settings](#)

Change Field Type Save Cancel

## Activity 3

### Creation of fields for the Speakers objects:



The screenshot shows the Salesforce Object Manager interface for creating a custom field named 'Bio' on the 'Speaker' object.

**Header:** The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The 'Object Manager' tab is active, showing 'SETUP > OBJECT MANAGER' and the 'Speaker' object.

**Left Sidebar:** The sidebar lists various configuration options: Details, Fields & Relationships (selected), 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, Scoping Rules, Triggers, Flow Triggers, and Validation Rules.

**Custom Field Definition Edit:** The main content area is titled 'Edit Speaker Custom Field Bio'. It contains the following fields:

- Field Information:** Field Label: Bio, Field Name: Bio, Description: (empty), Help Text: (empty), Data Type: Text Area.
- Field Settings:** Data Owner: User, Field Usage: -None-, Data Sensitivity Level: -None-, Compliance Categorization: 0 selected.
- General Options:** Required:  Always require a value in this field in order to save a record, Default Value: Show Formula Editor. A note explains formula syntax: Enclose text and picklist value API names in double quotes: ("the\_text"), include numbers without quotes: (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \${CustomMetadata.Type\_\_mdt.RecordAPIName.Field\_\_c}

**Buttons:** Change Field Type, Save, Cancel.



Setup Home Object Manager ▾

SETUP > OBJECT MANAGER Speaker

Details

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
- Scoping Rules
- Triggers
- Flow Triggers
- Validation Rules

Edit Speaker Custom Field e-mail

Custom Field Definition Edit [Change Field Type](#) [Save](#) [Cancel](#)

Field Information Required Information

Field Label	e-mail	Data Type	Email	
Field Name	e_email			
Description				
Help Text				
Data Owner	User	<a href="#">Edit</a>		
Field Usage	-None-	<a href="#">Edit</a>		
Data Sensitivity Level	-None-	<a href="#">Edit</a>		
Compliance Categorization	0 selected	<a href="#">Edit</a>	0 selected	<a href="#">Edit</a>

General Options

Required	<input type="checkbox"/> Always require a value in this field in order to save a record
Unique	<input type="checkbox"/> Do not allow duplicate values
External ID	<input type="checkbox"/> Set this field as the unique record identifier from an external system
Default Value	<a href="#">Show Formula Editor</a>

Use [formula syntax](#): Enclose text and picklist value API names in double quotes : ("the\_text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7), To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type\_\_mdt.RecordAPIName.Field\_\_c

[Change Field Type](#) [Save](#) [Cancel](#)



Setup Home Object Manager ▾

SETUP > OBJECT MANAGER Speaker

Details

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
- Scoping Rules
- Triggers
- Flow Triggers
- Validation Rules

Edit Speaker Custom Field  
**Event Name**

Have feedback on lookup filters? Comment on IdeaExchange! [Help for this Page](#)

Custom Field Definition Edit [Change Field Type](#) [Save](#) [Cancel](#)

**Field Information** Required Information

Field Label	Event Name	Data Type	Lookup	
Field Name	Event_Name			
Description				
Help Text				
Data Owner	User	<a href="#">Edit</a>		
Field Usage	-None-	<a href="#">Edit</a>		
Data Sensitivity Level	-None-	<a href="#">Edit</a>		
Compliance Categorization	0 selected	<a href="#">Edit</a>	0 selected	<a href="#">Edit</a>

**Lookup Options**

Related To	Event	child Relationship Name	Speakers
Related List Label	Speakers		
Required	<input type="checkbox"/> Always require a value in this field in order to save a record		
What to do if the lookup record is deleted?	<input checked="" type="radio"/> Clear the value of this field. You can't choose this option if you make this field required. <input type="radio"/> Don't allow deletion of the lookup record that's part of a lookup relationship.		

**Lookup Filter**

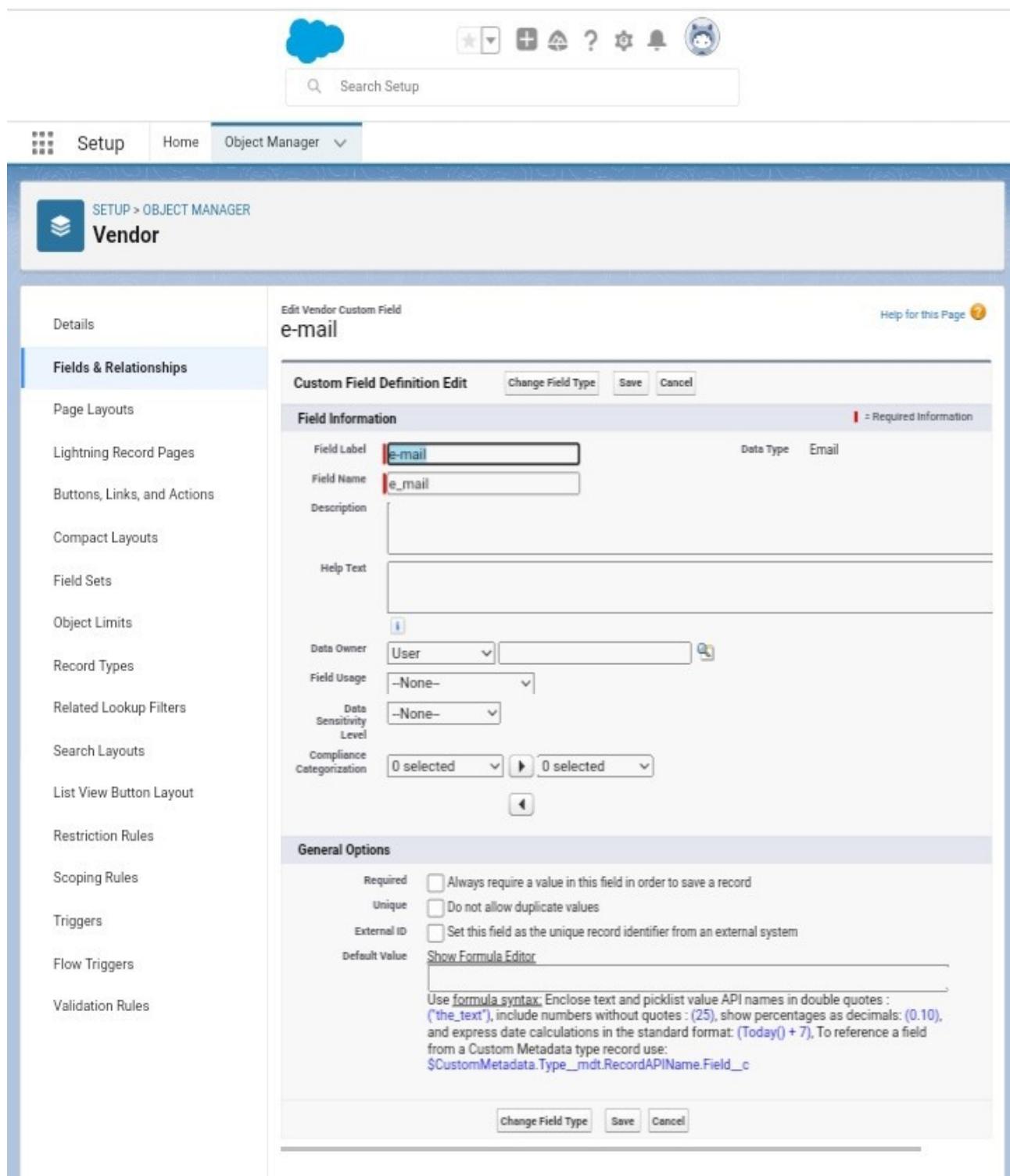
Optionally, create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

[Show Filter Settings](#)

[Change Field Type](#) [Save](#) [Cancel](#)

## Activit 4 :

### Creation of fields for the vendors object :



The screenshot shows the Salesforce Setup interface with the following details:

**Header:** The top navigation bar includes the Salesforce logo, a search bar with the placeholder "Search Setup", and various setup icons (star, down arrow, plus, question mark, gear, bell, user).

**Page Header:** The page title is "SETUP > OBJECT MANAGER" and the specific object is "Vendor".

**Left Sidebar:** The sidebar lists various setup categories: Details, Fields & Relationships (selected), 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, Scoping Rules, Triggers, Flow Triggers, and Validation Rules.

**Central Content:** The main area is titled "Edit Vendor Custom Field" and "e-mail". It shows the "Custom Field Definition Edit" screen with the following details:

- Field Information:** Field Label: "e-mail", Field Name: "e\_email", Data Type: Email.
- Help Text:** A large empty text area for help text.
- Field Settings:** Data Owner: "User", Field Usage: "-None-", Data Sensitivity Level: "-None-", Compliance Categorization: "0 selected" (with a "0 selected" button).
- General Options:** Required:  Always require a value in this field in order to save a record, Unique:  Do not allow duplicate values, External ID:  Set this field as the unique record identifier from an external system, Default Value: "Show Formula Editor".
- Formula Editor Note:** A note explains formula syntax: "Use formula syntax: Enclose text and picklist value API names in double quotes: ('the\_text'), include numbers without quotes: (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type\_\_mdt.RecordAPIName.Field\_\_c".

**Buttons:** The bottom of the screen includes "Change Field Type", "Save", and "Cancel" buttons.

[Setup Icons]  
  
Setup Home Object Manager  
  

### SETUP > OBJECT MANAGER

## Vendor

- Details
- 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
- Scoping Rules
- Triggers
- Flow Triggers
- Validation Rules

### Edit Vendor Custom Field

#### Phone

Help for this Page

Custom Field Definition Edit Change Field Type Save Cancel

**Field Information** = Required Information

Field Label	<input type="text" value="Phone"/>	Data Type	Phone
Field Name	<input type="text" value="Phone"/>		
Description	<input type="text"/>		
Help Text	<input type="text"/>		
Data Owner	User	<input type="text"/>	
Field Usage	--None--		
Data Sensitivity Level	--None--		
Compliance Categorization	<input type="button" value="0 selected"/>		<input type="button" value="0 selected"/>
			
Required	<input type="checkbox"/> Always require a value in this field in order to save a record		
Default Value	<a href="#">Show Formula Editor</a>		
<p>Use formula syntax: Enclose text and picklist value API names in double quotes : <code>('the_text')</code>, include numbers without quotes : <code>(25)</code>, show percentages as decimals: <code>(0.10)</code>, and express date calculations in the standard format: <code>(Today() + 7)</code>. To reference a field from a Custom Metadata type record use: <code>\$CustomMetadata.Type__mdt.RecordAPIName.Field__c</code></p>			

Setup > Object Manager > Vendor

Service Provider

Custom Field Definition Edit

Change Field Type Save Cancel

Field Information

Field Label: Service Provider

Field Name: Service\_Provider

Description:

Help Text:

Data Owner: User

Field Usage: -None-

Data Sensitivity Level: -None-

Compliance Categorization: 0 selected

General Options

Required:  Always require a value in this field in order to save a record

Unique:  Do not allow duplicate values

Treat 'ABC' and 'abc' as duplicate values (case insensitive)

Treat 'ABC' and 'abc' as different values (case sensitive)

External ID:  Set this field as the unique record identifier from an external system

Default Value: Show Formula Editor

Use formula syntax. Enclose text and picklist value API names in double quotes : ("the\_text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type\_\_mdt.RecordAPIName.Field\_\_c

Text Options

Length: 30

Change Field Type Save Cancel

Details

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
- Scoping Rules
- Triggers
- Flow Triggers
- Validation Rules

SETUP > OBJECT MANAGER

**Vendor**

Details

**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

Scoping Rules

Triggers

Flow Triggers

Validation Rules

**Edit Vendor Custom Field**  
**Event Name**

Have feedback on lookup filters? Comment on IdeaExchange! [Help for this Page](#)

**Custom Field Definition Edit** [Change Field Type](#) [Save](#) [Cancel](#)

**Field Information** ! = Required Information

Field Label: **Event Name** Data Type: **Lookup**

Field Name: **Event\_Name**

Description:

Help Text:

Data Owner: **User**

Field Usage: **-None-**

Data Sensitivity Level: **-None-**

Compliance Categorization: **0 selected** **0 selected**

**Lookup Options**

Related To: **Event** Child Relationship Name: **Vendors**

Related List Label: **Vendors**

Required:  Always require a value in this field in order to save a record  Clear the value of this field. You can't choose this option if you make this field required.  Don't allow deletion of the lookup record that's part of a lookup relationship.

**Lookup Filter**

Optionally, create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

[Show Filter Settings](#)

[Change Field Type](#) [Save](#) [Cancel](#)

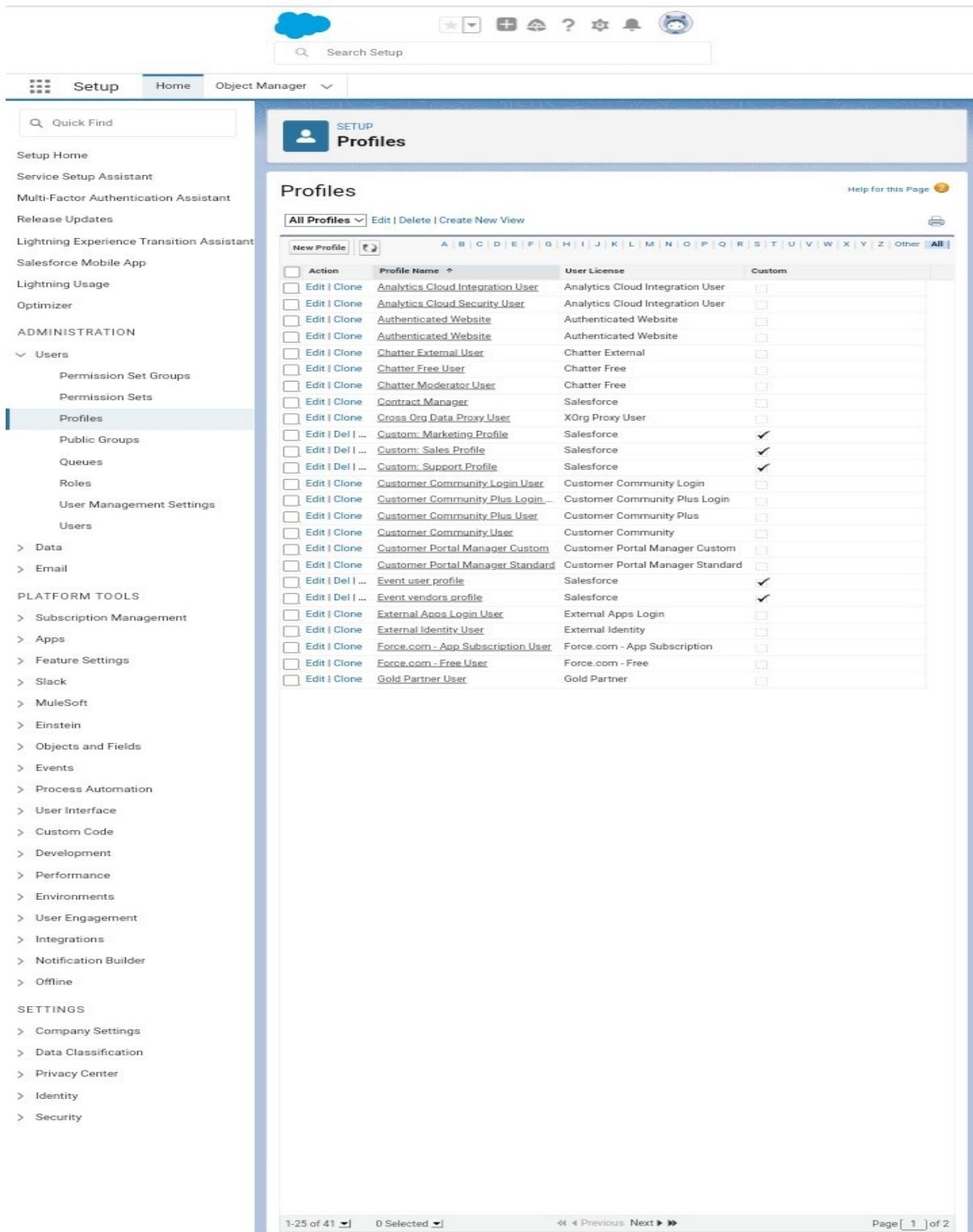
## Description:

**Fields** – Fields represents a columns in salesforce. Here you can create the field in different type of data type. Ex.you can create the field in name data type and number data type, E.mail,phone, date then so manage type of data. Which is available in salesforce. And you can make the field as a mandatory when you creating the fields.

## Milestone 6 – Profile :

### Activity 1 :

#### Creation on Event user profile :



The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The left sidebar contains a navigation menu with various categories like Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, and many more. The 'Profiles' section under ADMINISTRATION is currently active. The main content area displays a table of profiles, each with an 'Action' column (containing 'Edit' and 'Clone' buttons), a 'Profile Name' column, a 'User License' column, and a 'Custom' column. The table lists numerous profiles, including 'Analytics Cloud Integration User', 'Authenticated Website', 'Chatter External User', 'Chatter Free User', 'Chatter Moderator User', 'Contract Manager', 'Cross Org Data Proxy User', 'Custom Marketing Profile', 'Custom Sales Profile', 'Custom Support Profile', 'Customer Community Login User', 'Customer Community Plus Login', 'Customer Community Plus User', 'Customer Community User', 'Customer Portal Manager Custom', 'Customer Portal Manager Standard', 'Event user profile', 'Event vendors profile', 'External Apps Login User', 'External Identity User', 'Force.com - App Subscription User', 'Force.com - Free User', and 'Gold Partner User'. The 'Event user profile' and 'Event vendors profile' rows have checked boxes in the 'Custom' column, indicating they are custom profiles.

Action	Profile Name	User License	Custom
<input type="button" value="Edit"/> <input type="button" value="Clone"/>	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="button" value="Edit"/> <input type="button" value="Clone"/>	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="button" value="Edit"/> <input type="button" value="Clone"/>	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="button" value="Edit"/> <input type="button" value="Clone"/>	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="button" value="Edit"/> <input type="button" value="Clone"/>	Chatter External User	Chatter External	<input type="checkbox"/>
<input type="button" value="Edit"/> <input type="button" value="Clone"/>	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="button" value="Edit"/> <input type="button" value="Clone"/>	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<input type="button" value="Edit"/> <input type="button" value="Clone"/>	Contract Manager	Salesforce	<input type="checkbox"/>
<input type="button" value="Edit"/> <input type="button" value="Clone"/>	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<input type="button" value="Edit"/> <input type="button" value="Clone"/>	Custom Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="button" value="Edit"/> <input type="button" value="Clone"/>	Custom Sales Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="button" value="Edit"/> <input type="button" value="Clone"/>	Custom Support Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="button" value="Edit"/> <input type="button" value="Clone"/>	Customer Community Login User	Customer Community Login	<input type="checkbox"/>
<input type="button" value="Edit"/> <input type="button" value="Clone"/>	Customer Community Plus Login	Customer Community Plus Login	<input type="checkbox"/>
<input type="button" value="Edit"/> <input type="button" value="Clone"/>	Customer Community Plus User	Customer Community Plus	<input type="checkbox"/>
<input type="button" value="Edit"/> <input type="button" value="Clone"/>	Customer Community User	Customer Community	<input type="checkbox"/>
<input type="button" value="Edit"/> <input type="button" value="Clone"/>	Customer Portal Manager Custom	Customer Portal Manager Custom	<input type="checkbox"/>
<input type="button" value="Edit"/> <input type="button" value="Clone"/>	Customer Portal Manager Standard	Customer Portal Manager Standard	<input type="checkbox"/>
<input type="button" value="Edit"/> <input type="button" value="Clone"/>	Event user profile	Salesforce	<input checked="" type="checkbox"/>
<input type="button" value="Edit"/> <input type="button" value="Clone"/>	Event vendors profile	Salesforce	<input checked="" type="checkbox"/>
<input type="button" value="Edit"/> <input type="button" value="Clone"/>	External Apps Login User	External Apps Login	<input type="checkbox"/>
<input type="button" value="Edit"/> <input type="button" value="Clone"/>	External Identity User	External Identity	<input type="checkbox"/>
<input type="button" value="Edit"/> <input type="button" value="Clone"/>	Force.com - App Subscription User	Force.com - App Subscription	<input type="checkbox"/>
<input type="button" value="Edit"/> <input type="button" value="Clone"/>	Force.com - Free User	Force.com - Free	<input type="checkbox"/>
<input type="button" value="Edit"/> <input type="button" value="Clone"/>	Gold Partner User	Gold Partner	<input type="checkbox"/>

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

> Data

> Email

PLATFORM TOOLS

> Subscription Management

> Apps

> Feature Settings

> Slack

> MuleSoft

> Einstein

> Objects and Fields

> Events

> Process Automation

> User Interface

> Custom Code

> Development

> Performance

> Environments

> User Engagement

> Integrations

> Notification Builder

> Offline

SETTINGS

> Company Settings

> Data Classification

> Privacy Center

> Identity

> Security

SETUP

Home

Object Manager

SETUP

Profiles

Event user profile

Help for this Page

Profile Edit

Name: Event user profile

User License: Salesforce

Description: Custom Profile

Custom App Settings

All Tabs (standard\_\_AllTabSet)

Analytics Studio (standard\_\_Insights)

App Launcher (standard\_\_AppLauncher)

Bolt Solutions (standard\_\_LightningBolt)

Community (standard\_\_Community)

Content (standard\_\_Content)

Data Manager (standard\_\_DataManager)

Digital Experiences (standard\_\_SalesforceCMS)

Event Management (Event\_Management)

Lightning Usage App (standard\_\_LightningInstrumentation)

Marketing (standard\_\_Marketing)

Queue Management (standard\_\_QueueManagement)

Sales (standard\_\_LightningSales)

Sales (standard\_\_Sales)

Sales Console (standard\_\_LightningSalesConsole)

Salesforce Chatter (standard\_\_Chatter)

Salesforce Scheduler Setup (standard\_\_LightningScheduler)

Sample Console (standard\_\_ServiceConsole)

Service (standard\_\_Service)

Service Console (standard\_\_LightningService)

Site.com (standard\_\_Sites)

Subscription Management (standard\_\_RevenueCloudConsole)

WDC (standard\_\_Work)

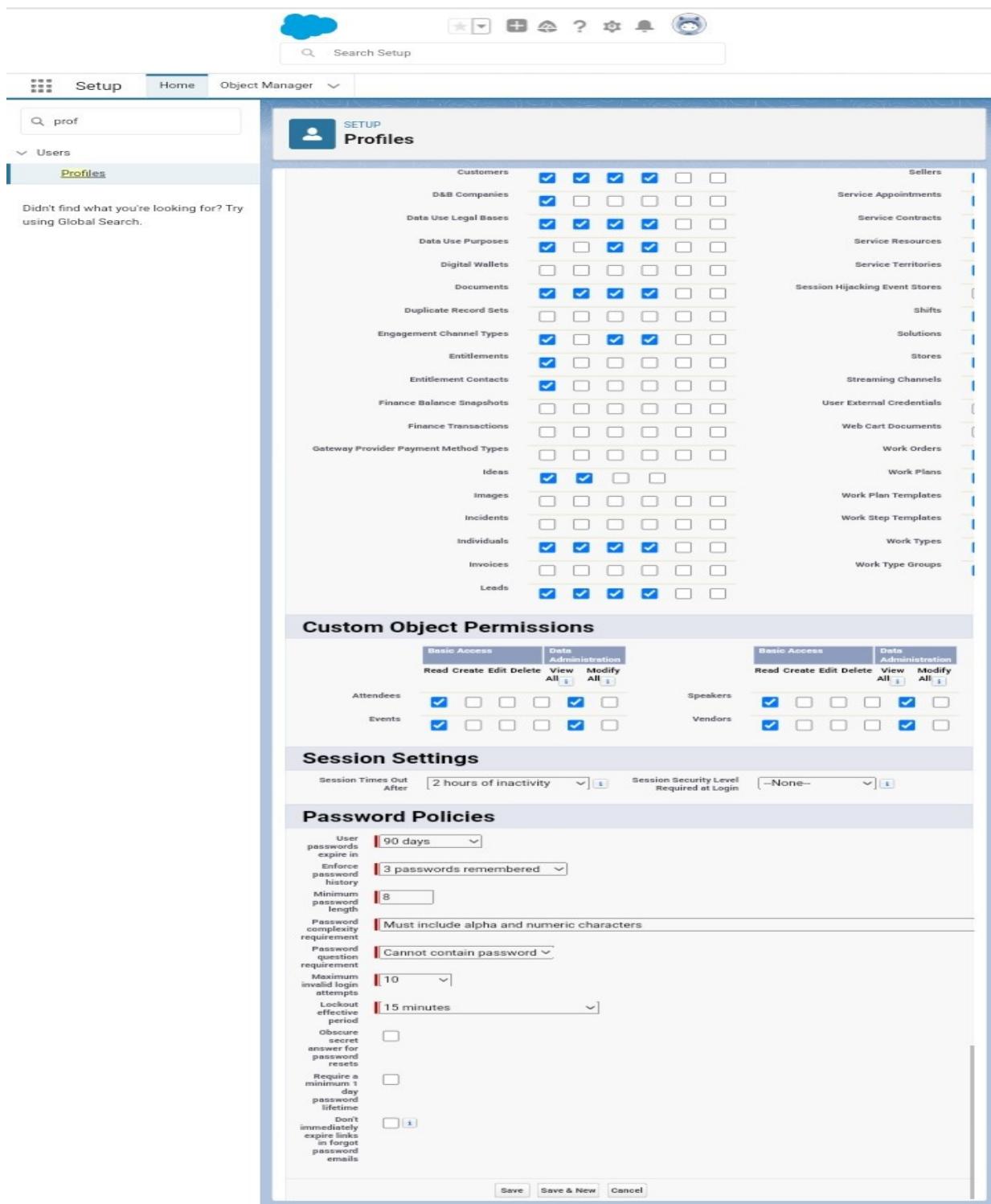
Service Provider Access

Tab Settings

Overwrite users' personal tab customizations

Standard Tab Settings

Tab	Setting
Accounts	Default On
Alert Settings	Default On
All Sites	Tab Hidden
Alternative Payment Methods	Default Off
Analytics	Default On
App Launcher	Default On
Appointment Invitations	Default Off
Approval Requests	Default On
Asset Actions	Default Off
Asset Action Sources	Default Off
Assets	Default Off
Asset State Periods	Default Off
Async Operation Logs	Default On
Authorization Form	Default On
Authorization Form Consent	Default On
Authorization Form Data Use	Default On
Authorization Form Text	Default On
Awards	Default On
Background Operations	Default On
Business Brands	Default On
Calendar	Default On
Campaigns	Default On
Invoices	Default On
Leads	Default On
Learning	Default On
Legal Entities	Default Off
Libraries	Default On
Lightning Bolt Solutions	Default On
Lightning Usage	Default On
List Emails	Default On
Location Groups	Default On
Locations	Default On
Macros	Default Off
Messaging Sessions	Default On
Messaging Users	Default On
Mobile Home	Default On
Omnichannel Inventory	Default On
Operating Hours	Default On
Opportunities	Default On
Orchestration Runs	Default On
Orchestration Work Items	Default On
Orders	Default On
Org Metrics	Default On
Party Consent	Default On
Paused Flows	Default On



The image shows the Salesforce Setup Home page. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar is at the top right. The main content area is titled 'Profiles' and shows a grid of checkboxes for various object permissions. The objects listed are: Customers, D&B Companies, Data Use Legal Bases, Data Use Purposes, Digital Wallets, Documents, Duplicate Record Sets, Engagement Channel Types, Entitlements, Entitlement Contacts, Finance Balance Snapshots, Finance Transactions, Gateway Provider Payment Method Types, Ideas, Images, Incidents, Individuals, Invoices, Leads, Sellers, Service Appointments, Service Contracts, Service Resources, Service Territories, Session Hijacking Event Stores, Shifts, Solutions, Stores, Streaming Channels, User External Credentials, Web Cart Documents, Work Orders, Work Plans, Work Plan Templates, Work Step Templates, Work Types, and Work Type Groups. Below this is a 'Custom Object Permissions' section for 'Attendees' and 'Events', and a 'Session Settings' section for 'Session Times Out' and 'Session Security Level'. The bottom section is 'Password Policies' with various configuration options for password expiration, complexity, and lockout.

## Activity 2 :

### Create a Event vendors profile :

The screenshot shows the Salesforce Setup interface with the following details:

- Setup Tab:** The user is in the "Profiles" section under the "Users" category.
- Profile Edit:** The profile is named "Event vendors profile".
  - User License:** Salesforce
  - Custom Profile:** Checked
- Custom App Settings:** A grid of app settings with checkboxes for "Visible Default".

App	Visible Default	Visible Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>	<input type="radio"/>
Community (standard__Community)	<input checked="" type="checkbox"/>	<input type="radio"/>
Content (standard__Content)	<input checked="" type="checkbox"/>	<input type="radio"/>
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>	<input type="radio"/>
Digital Experiences (standard__SalesforceCMS)	<input checked="" type="checkbox"/>	<input type="radio"/>
Event Management (Event_Management)	<input type="checkbox"/>	<input checked="" type="radio"/>
Lightning Usage App (standard__LightningInstrumentation)	<input checked="" type="checkbox"/>	<input type="radio"/>
Marketing (standard__Marketing)	<input checked="" type="checkbox"/>	<input type="radio"/>
Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="radio"/>
Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="radio"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>	<input type="radio"/>
Sample Console (standard__ServiceConsole)	<input type="checkbox"/>	<input type="radio"/>
Service (standard__Service)	<input checked="" type="checkbox"/>	<input type="radio"/>
Service Console (standard__LightningService)	<input checked="" type="checkbox"/>	<input type="radio"/>
Site.com (standard__Sites)	<input checked="" type="checkbox"/>	<input type="radio"/>
Subscription Management (standard__RevenueCloudConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
WDC (standard__Work)	<input checked="" type="checkbox"/>	<input type="radio"/>
- Service Provider Access:** Tab Settings
  - Overwrite users' personal tab customizations
- Standard Tab Settings:** A grid of tab settings with dropdown menus for "Default On/Off".

Tab	Default On/Off	Default On/Off
Accounts	Default On	Default On
Alert Settings	Default On	Default On
All Sites	Tab Hidden	Tab Hidden
Alternative Payment Methods	Default Off	Default Off
Analytics	Default On	Default On
App Launcher	Default On	Default On
Appointment Invitations	Default Off	Default Off
Approval Requests	Default On	Default On
Asset Actions	Default Off	Default Off
Asset Action Sources	Default Off	Default Off
Assets	Default Off	Default Off
Asset State Periods	Default Off	Default Off
Async Operation Logs	Default On	Default On
Authorization Form	Default On	Default On
Authorization Form Consent	Default On	Default On
Authorization Form Data Use	Default On	Default On
Authorization Form Text	Default On	Default On
Awards	Default On	Default On
Background Operations	Default On	Default On
Business Brands	Default On	Default On
Calendar	Default On	Default On
Campaigns	Default On	Default On
Card Payment Methods	Default Off	Default Off
Invoices	Default On	Default On
Leads	Default On	Default On
Learning	Default On	Default On
Legal Entities	Default Off	Default Off
Libraries	Default On	Default On
Lightning Bolt Solutions	Default On	Default On
Lightning Usage	Default On	Default On
List Emails	Default On	Default On
Location Groups	Default On	Default On
Locations	Default On	Default On
Macros	Default Off	Default Off
Messaging Sessions	Default On	Default On
Messaging Users	Default On	Default On
Mobile Home	Default On	Default On
Omnichannel Inventory	Default On	Default On
Operating Hours	Default On	Default On
Opportunities	Default On	Default On
Orchestration Runs	Default On	Default On
Orchestration Work Items	Default On	Default On
Orders	Default On	Default On
Org Metrics	Default On	Default On
Party Consent	Default On	Default On
Paused Flows	Default On	Default On
Payment Authorization Adjustments	Default Off	Default Off

Setup Home Object Manager

Search Setup

Users Profiles

Didn't find what you're looking for? Try using Global Search.

**SETUP Profiles**

	Customers	Sellers
D&B Companies	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Data Use Legal Bases	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Data Use Purposes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Digital Wallets	<input type="checkbox"/>	<input type="checkbox"/>
Documents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Duplicate Record Sets	<input type="checkbox"/>	<input type="checkbox"/>
Engagement Channel Types	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Entitlements	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Entitlement Contacts	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Finance Balance Snapshots	<input type="checkbox"/>	<input type="checkbox"/>
Finance Transactions	<input type="checkbox"/>	<input type="checkbox"/>
Gateway Provider Payment Method Types	<input type="checkbox"/>	<input type="checkbox"/>
Ideas	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Images	<input type="checkbox"/>	<input type="checkbox"/>
Incidents	<input type="checkbox"/>	<input type="checkbox"/>
Individuals	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Invoices	<input type="checkbox"/>	<input type="checkbox"/>
Leads	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Service Appointments		
Service Contracts		
Service Resources		
Service Territories		
Session Hijacking Event Stores		
Shifts		
Solutions		
Stores		
Streaming Channels		
User External Credentials		
Web Cart Documents		
Work Orders		
Work Plans		
Work Plan Templates		
Work Step Templates		
Work Types		
Work Type Groups		

**Custom Object Permissions**

	Basic Access	Data Administration	Basic Access	Data Administration
	Read Create Edit Delete	View All	Read Create Edit Delete	View All
Attendees	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Events	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Speakers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Vendors	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Session Settings**

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

**Password Policies**

User passwords expire in	90 days
Enforce password history	3 passwords remembered
Minimum password length	8
Password complexity requirement	Must include alpha and numeric characters
Password question requirement	Cannot contain password
Maximum invalid login attempts	10
Lockout effective period	15 minutes
Obfuscate secret answers for password resets	<input type="checkbox"/>
Require a minimum 1 day password lifetime	<input type="checkbox"/>
Don't immediately expire links in forgot password emails	<input type="checkbox"/>

Save Save & New Cancel

## Description:

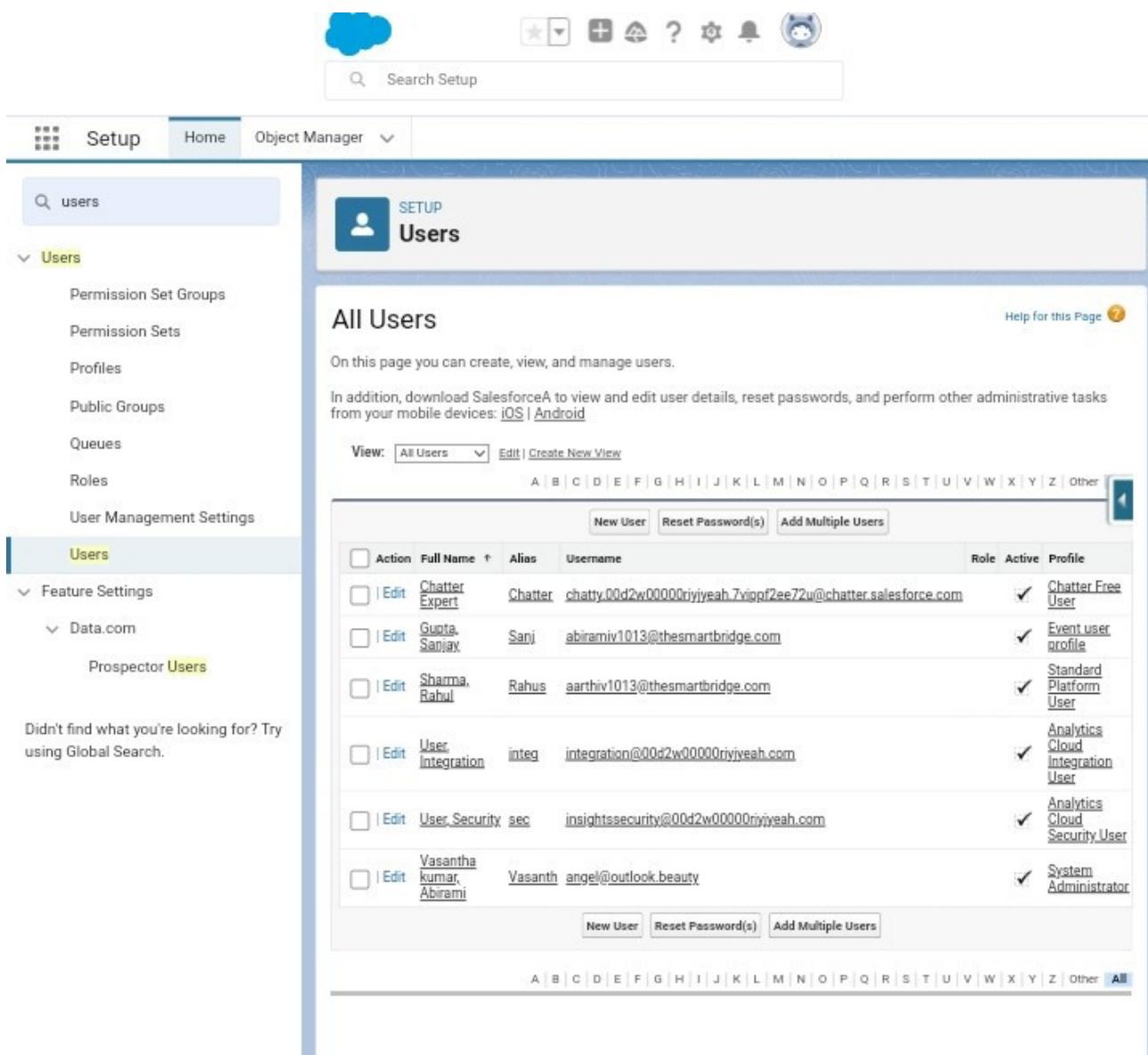
**Profile** – Salesforce profile is a set of setting and permission provided to specific salesforce users that define the extent of their actions on the platform.

## Milestone 7

Creation on users :

### Activity 1

#### Creating a user



The screenshot shows the Salesforce Setup interface with the 'Users' page selected. The 'All Users' section is displayed, showing a list of users with their details and profile status. A 'New User' button is available to create a new account.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>   Edit	Chatter Expert	Chatter	chatty.00d2w00000riyiyeah.7viggf2ee72u@chatter.salesforce.com	<input checked="" type="checkbox"/>	Chatter Free User	
<input type="checkbox"/>   Edit	Gupta, Sanjay	Sanji	abiramiv1013@thesmartbridge.com	<input checked="" type="checkbox"/>	Event user profile	
<input type="checkbox"/>   Edit	Sharma, Rahul	Rahus	aarthiv1013@thesmartbridge.com	<input checked="" type="checkbox"/>	Standard Platform User	
<input type="checkbox"/>   Edit	User Integration	integ	integration@00d2w00000riyiyeah.com	<input checked="" type="checkbox"/>	Analytics Cloud Integration User	
<input type="checkbox"/>   Edit	User_Security sec		insightssecurity@00d2w00000riyiyeah.com	<input checked="" type="checkbox"/>	Analytics Cloud Security User	
<input type="checkbox"/>   Edit	Vasantha kumar, Abirami	Vasantha	angel@outlook.beauty	<input checked="" type="checkbox"/>	System Administrator	

The screenshot shows the Salesforce Setup interface with the following details:

**Header:** Search Setup, Home, Object Manager

**Left Sidebar:**

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users** (selected)
- Feature Settings
- Data.com
- Prospector Users

**Message:** Didn't find what you're looking for? Try using Global Search.

**Current Page:** SETUP Users

**User Edit Screen:** Sanjay Gupta

**General Information:**

First Name	Sanjay	Role	<None Specified>
Last Name	Gupta	User License	Salesforce
Alias	Sanj	Profile	Event user profile
Email	abiramiv1013@gmail.com	Active	<input checked="" type="checkbox"/>
Username	abiramiv1013@thesmartbridge	Marketing User	<input type="checkbox"/>
Nickname	Sanju	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	<None>
		Data.com Monthly Addition Limit	300
		Accessibility Mode (Classic Only)	<input type="checkbox"/>
		High-Contrast Palette on Charts	<input type="checkbox"/>
		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
		Debug Mode	<input type="checkbox"/>
		Make Setup My Default Landing Page	<input type="checkbox"/>
		Salesforce CRM Content User	<input checked="" type="checkbox"/>
		Receive Salesforce CRM Content Email Alerts	<input checked="" type="checkbox"/>
		Receive Salesforce CRM Content Alerts as Daily Digest	<input checked="" type="checkbox"/>
		Allow Forecasting	<input type="checkbox"/>
		Call Center	<input type="checkbox"/>
		Phone	
		Extension	
		Fax	
		Mobile	
		Email Encoding	Unicode (UTF-8)
		Employee Number	
		Individual	

**Mailing Address:**

Street	
City	
Zip/Postal Code	
State/Province	
Country	

**Single Sign On Information:**

## Activity 2 :

### Create a new user :

The screenshot shows the Salesforce Setup interface with the following details:

**Setup** tab is selected in the top navigation bar.

The left sidebar shows the following navigation paths under **Users**:

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users** (selected)
- Feature Settings
- Data.com
- Prospector Users

The main content area displays the **Users** setup page for editing a user named **ahul Sharma**.

**User Edit** section:

- General Information** (Required):
  - First Name: **Rahul**
  - Last Name: **Sharma**
  - Alias: **Rahus**
  - Email: **aarthiv1013@gmail.com**
  - Username: **aarthiv1013@thesmartbridge.c**
  - Nickname: **Rahu**
  - Title: (empty)
  - Company: (empty)
  - Department: (empty)
  - Division: (empty)
- Role**: **<None Specified>** (dropdown)
- User License**: **Salesforce Platform** (dropdown)
- Profile**: **Standard Platform User** (dropdown)
- Active**:
- Marketing User**:
- Offline User**:
- Knowledge User**:
- Flow User**:
- Service Cloud User**:
- Site.com Contributor User**:
- Site.com Publisher User**:
- WDC User**:
- Data.com User Type**: **-None-** (dropdown)
- Data.com Monthly Addition Limit**: **300** (dropdown)
- Accessibility Mode (Classic Only)**:
- High-Contrast Palette on Charts**:
- Load Lightning Pages While Scrolling**:
- Debug Mode**:
- Make Setup My Default Landing Page**:
- Salesforce CRM Content User**:
- Receive Salesforce CRM Content Email Alerts**:
- Receive Salesforce CRM Content Alerts as Daily Digest**:
- Allow Forecasting**:
- Call Center**: (dropdown)
- Phone**: (text input)
- Extension**: (text input)
- Fax**: (text input)
- Mobile**: (text input)
- Email Encoding**: **Unicode (UTF-8)** (dropdown)
- Employee Number**: (text input)
- Individual**: (text input)

**Mailing Address** section:

- Street: (text input)
- City: (text input)
- Zip/Postal Code: (text input)
- State/Province: (text input)
- Country: (text input)

**Single Sign On Information** section (partially visible at the bottom):

## Description :

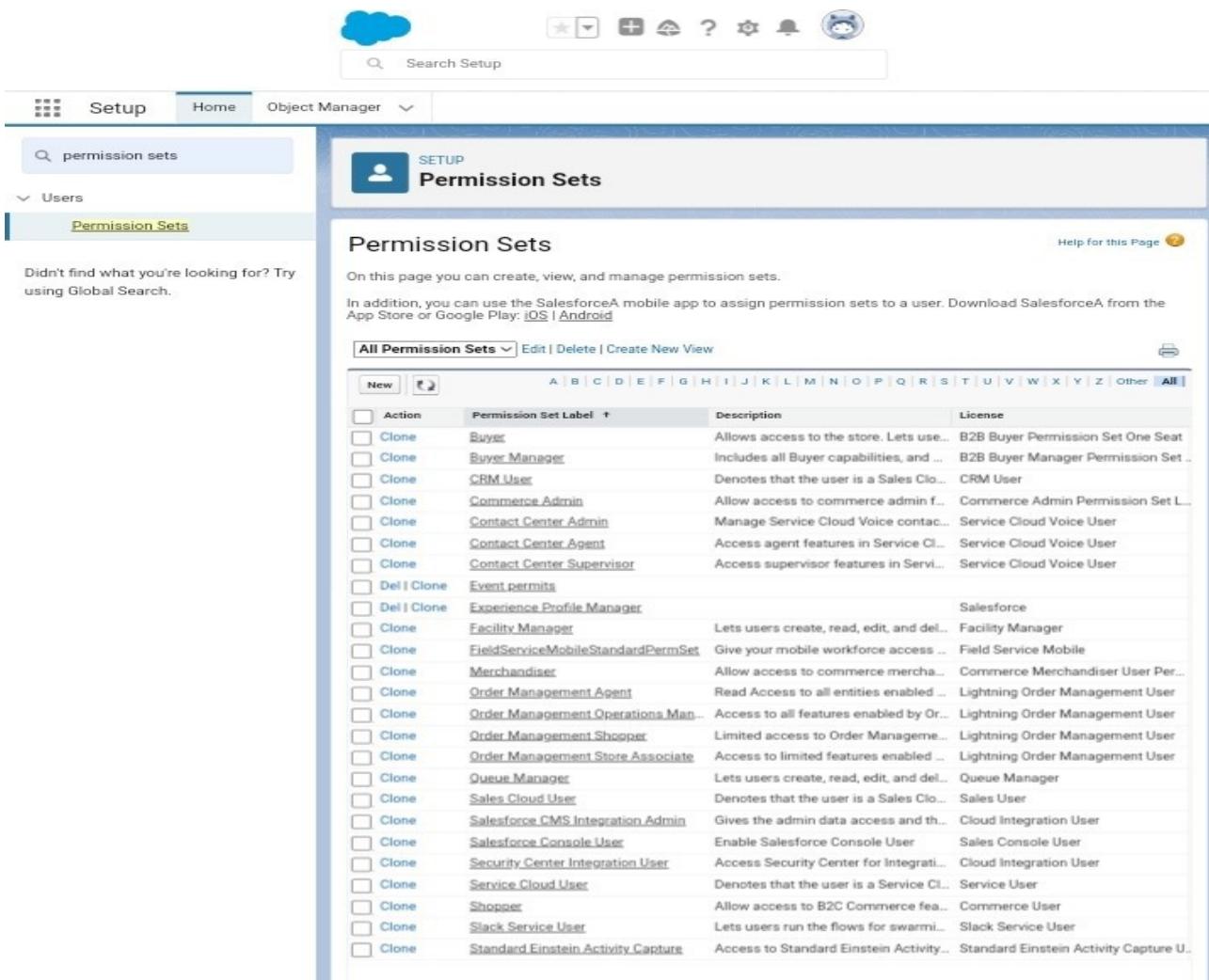
**User** – In salesforce, each user is uniquely identified with a username, password and profile. Every user in salesforce has a user account.

## Milestone 8 :

### Permission sets :

### Activity 1 :

#### Creating a Event permits:



The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Includes the Salesforce logo, a search bar labeled "Search Setup", and various navigation icons.
- Left Sidebar:** Shows "Setup" as the active tab, "Home", and "Object Manager". Under "Users", "Permission Sets" is highlighted.
- Page Title:** "Permission Sets" with a "Help for this Page" link.
- Section Header:** "Permission Sets".
- Text:** "On this page you can create, view, and manage permission sets." and "In addition, you can use the Salesforce mobile app to assign permission sets to a user. Download Salesforce from the App Store or Google Play: [iOS](#) | [Android](#)".
- Table:** "All Permission Sets" table with columns: Action, Permission Set Label, Description, and License. The table lists various permission sets including "Event permits", "Buyer", "Buyer Manager", "CRM User", "Commerce Admin", "Contact Center Admin", "Contact Center Agent", "Contact Center Supervisor", "Experiance Profile Manager", "Facility Manager", "FieldServiceMobileStandardPermSet", "Merchandiser", "Order Management Agent", "Order Management Operations Manager", "Order Management Shopper", "Order Management Store Associate", "Queue Manager", "Sales Cloud User", "Salesforce CMS Integration Admin", "Salesforce Console User", "Security Center Integration User", "Service Cloud User", "Shopper", "Slack Service User", and "Standard Einstein Activity Capture".

The screenshot shows the Salesforce Setup interface with the following details:

**Header:** Includes the Salesforce logo, a search bar labeled "Search Setup", and various navigation icons.

**Top Navigation:** Shows "Setup" as the active tab, along with "Home" and "Object Manager".

**Left Sidebar:** Contains a search bar for "permission sets", a "Users" section, and a "Permission Sets" section which is currently selected. A note says " Didn't find what you're looking for? Try using Global Search.".

**Central Content:** The main area is titled "Permission Sets" and shows a "Permission Set Overview" for "Event permits". The table includes columns for "Description", "License", "Session Activation Required", "API Name", "Namespace Prefix", "Created By", and "Last Modified By".

**Section: Apps**

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform. [Learn More](#)

**Assigned Apps**  
Settings that specify which apps are visible in the app menu

**Assigned Connected Apps**  
Settings that specify which connected apps are visible in the app menu

**Object Settings**  
Permissions to access objects and fields, and settings such as tab availability

**App Permissions**  
Permissions to perform app-specific actions, such as "Manage Call Centers"

**Apex Class Access**  
Permissions to execute Apex classes

**Visualforce Page Access**  
Permissions to execute Visualforce pages

**External Data Source Access**  
Permissions to authenticate against external data sources

**Flow Access**  
Permissions to execute Flows

**Named Credential Access**  
Permissions to authenticate against named credentials

**Custom Permissions**  
Permissions to access custom processes and apps

**Custom Metadata Types**  
Permissions to access custom metadata types

**Custom Setting Definitions**  
Permissions to access custom settings

**Section: System**

Settings that apply across all apps, such as record and user

**System Permissions**  
Permissions to perform actions that apply across apps, such as "Modify All Data"

## Activity 2 :

### Creating a Vendor permits :

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar has 'permission sets' selected under 'Users'. The main content area is titled 'Permission Sets' and shows a 'Permission Set Overview' for 'Vendor permits'. The overview table includes columns for 'Description', 'License', 'Session Activation Required', 'API Name', 'Namespace Prefix', 'Created By', and 'Last Modified By'. The 'API Name' is 'Vendor\_permits', 'Namespace Prefix' is 'Abirami\_Vasantha\_kumar', and it was created by 'Abirami Vasantha kumar' on '06/04/2023, 3:29 pm'. Below the overview is a 'Apps' section listing various app-related permissions, and a 'System' section listing system permissions.

**Permission Set Overview**

Description	License	Session Activation Required	API Name	Namespace Prefix	Created By	Last Modified By
		<input type="checkbox"/>	Vendor_permits	Abirami_Vasantha_kumar	06/04/2023, 3:29 pm	Abirami Vasantha kumar, 06/04/2023, 3:29 pm

**Apps**

- Assigned Apps**  
Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**  
Settings that specify which connected apps are visible in the app menu
- Object Settings**  
Permissions to access objects and fields, and settings such as tab availability
- App Permissions**  
Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**  
Permissions to execute Apex classes
- Visualforce Page Access**  
Permissions to execute Visualforce pages
- External Data Source Access**  
Permissions to authenticate against external data sources
- Flow Access**  
Permissions to execute Flows
- Named Credential Access**  
Permissions to authenticate against named credentials
- Custom Permissions**  
Permissions to access custom processes and apps
- Custom Metadata Types**  
Permissions to access custom metadata types
- Custom Setting Definitions**  
Permissions to access custom settings

**System**

- System Permissions**  
Permissions to perform actions that apply across apps, such as "Modify All Data"

## Description :

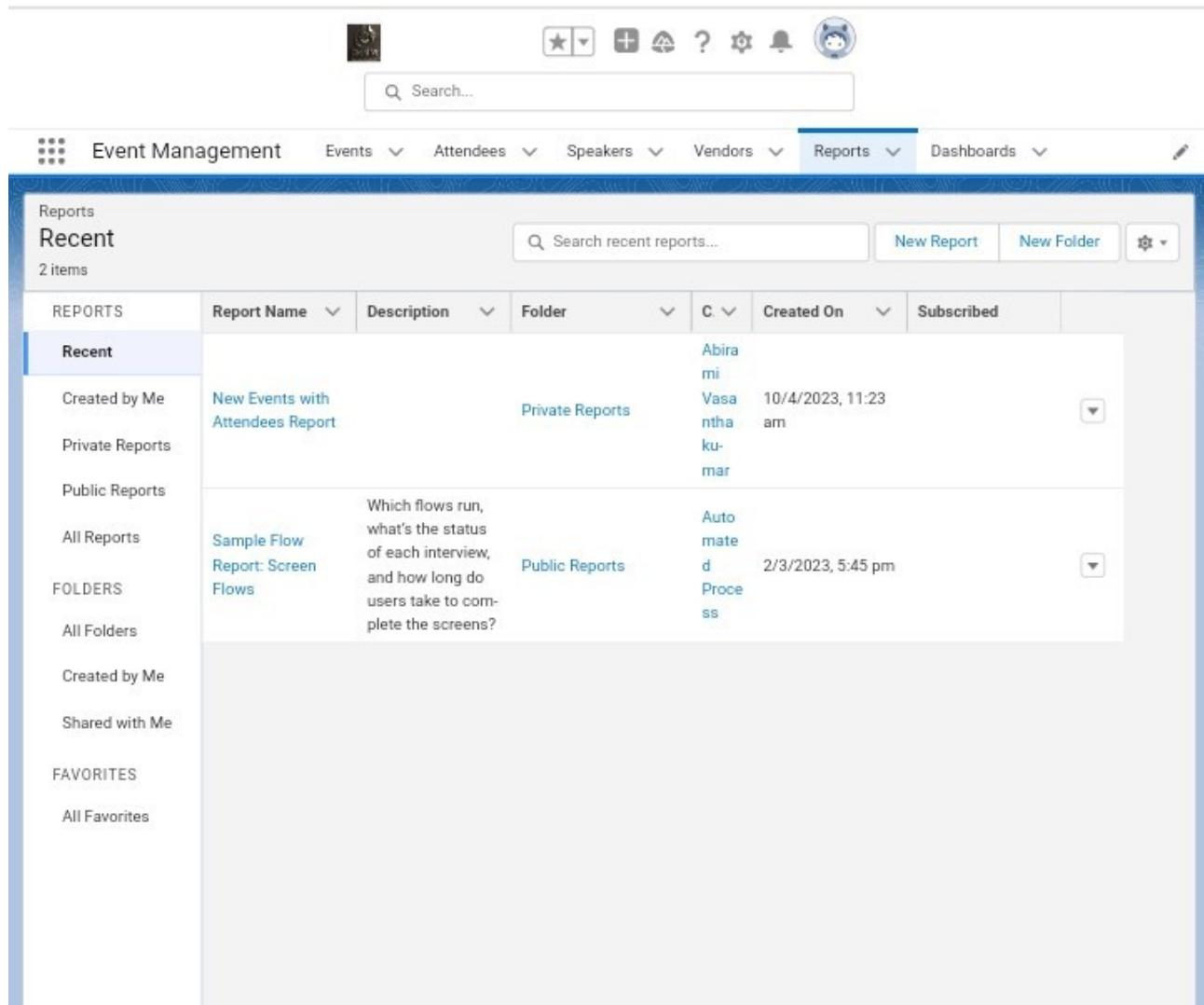
**Permission sets** – Permission sets in salesforce extends users functional access without changing their profile. It is a collection of settings and permissions.

Permission set could be considered add-once for profile.

## Milestone 9 :

### Activity

#### Creating a report :



The screenshot shows the Salesforce Event Management interface. The top navigation bar includes links for Event Management, Events, Attendees, Speakers, Vendors, Reports, Dashboards, and a search bar. The Reports section is active. The left sidebar lists categories: Reports (Recent, Created by Me, Private Reports, Public Reports, All Reports), Folders (All Folders), and Favorites (All Favorites). The main content area displays two recent reports in a table:

REPORTS	Report Name	Description	Folder	C.	Created On	Subscribed
Recent	New Events with Attendees Report	Private Reports	Abira mi Vasa ntha ku-mar	10/4/2023, 11:23 am		
	Sample Flow Report: Screen Flows	Public Reports	Auto mate d Proce ss	2/3/2023, 5:45 pm		

## **Description :**

**Report** – A Report is a list of meet the criteria you define. It's displayed in salesforce in rows and colomns and can be filtered, grouped or displayed in a graphical chart. Every report is stored in a folder.

## **4 Trailhead Profile Public URL**

**Team lead** - <https://trailblazer.me/id/avasanthakumar1>

**Team Member 1** - <https://trailblazer.me/id/yerrokfp>

**Team Member 2** - <https://trailblazer.me/id/aasokark>

**Team Member 3** - <https://trailblazer.me/id/rravishankar11>

## **5 ADVANTAGES & DISADVANTAGE**

### **Advantages:**

- **Collaboretion is key.**
- **Remain stress free.**
- **Ability to work on different events.**
- **Collaborative work environment.**
- **High projections for job growth.**

### **DisadvantageS:**

- **Uncoventional work hours.**

- **Time away from family and friends.**
- **Multiple events at the same time.**
- **High level of responsibility.**
- **Not a permanent job.**

## 6 APPLICATIONS

**This includes overall event design, brandbuilding, marketing and communication strategy, audio-visual production, script writing, logistics, budgeting, negotiation and client service.**

## 7 CONCLUSIONS

**Event Management System is an e-commerce web application seeks to provide all the services and products that customers need mainly in occasions. In addition to facilitating the process of product management and booking appointments to clients and increase the market share for them through the recommendation system and provide all the needs of customers.**

## **8 FUTURE SCOPE**

**The main Odjective of the Event Management System is to manage the details of Event, Employee, Booking, Venue, Package. It manages all the information about Event, Enquiry, Package, Event. The project is totally built at administrative end and thus only the administrator is guaranteed the access.**

**The scope of the event was to define the programme of activitice, invite the attendees, source and prepare materials for the day, book the catering and the venue, manage the stakeholders and manage the event on the day. Agreeing what you WON'T do is just as important as agreeing what you WILL do**