

NAAN MUDHALVAN
SALESFORCE DEVELOPER PROJECT REPORT

PROJECT TITLE: EVENT MANAGEMENT SYSTEM
COLLEGE: PONJESLY COLLEGE OF ENGINEERING.

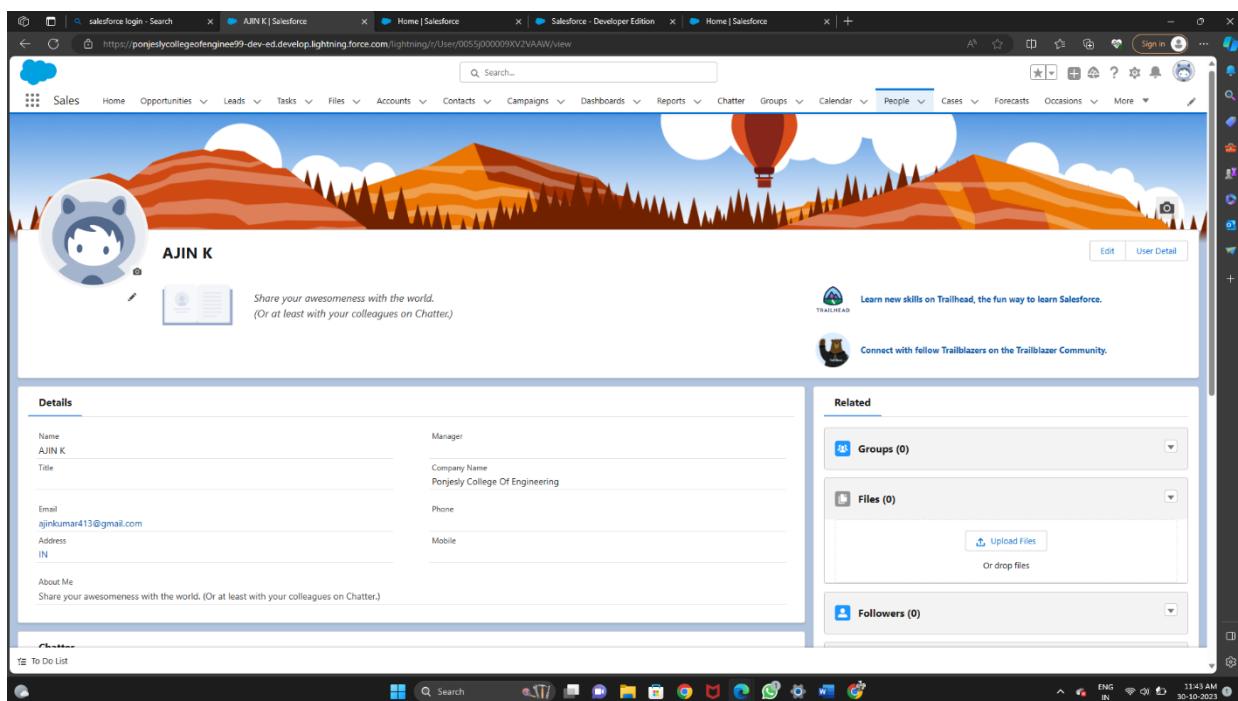
DONE BY :

AJIN K

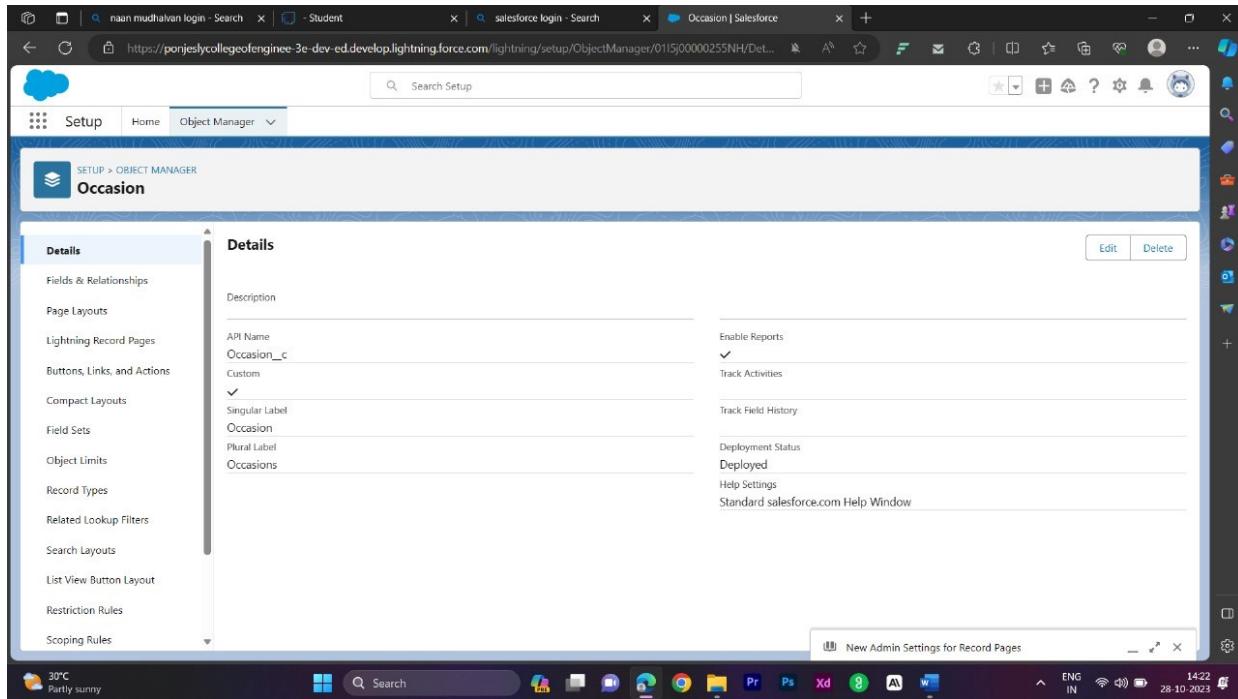
REG NO : 961820114010

NM ID : 100A18698B7B7B88D0B4DB6934BAF30E

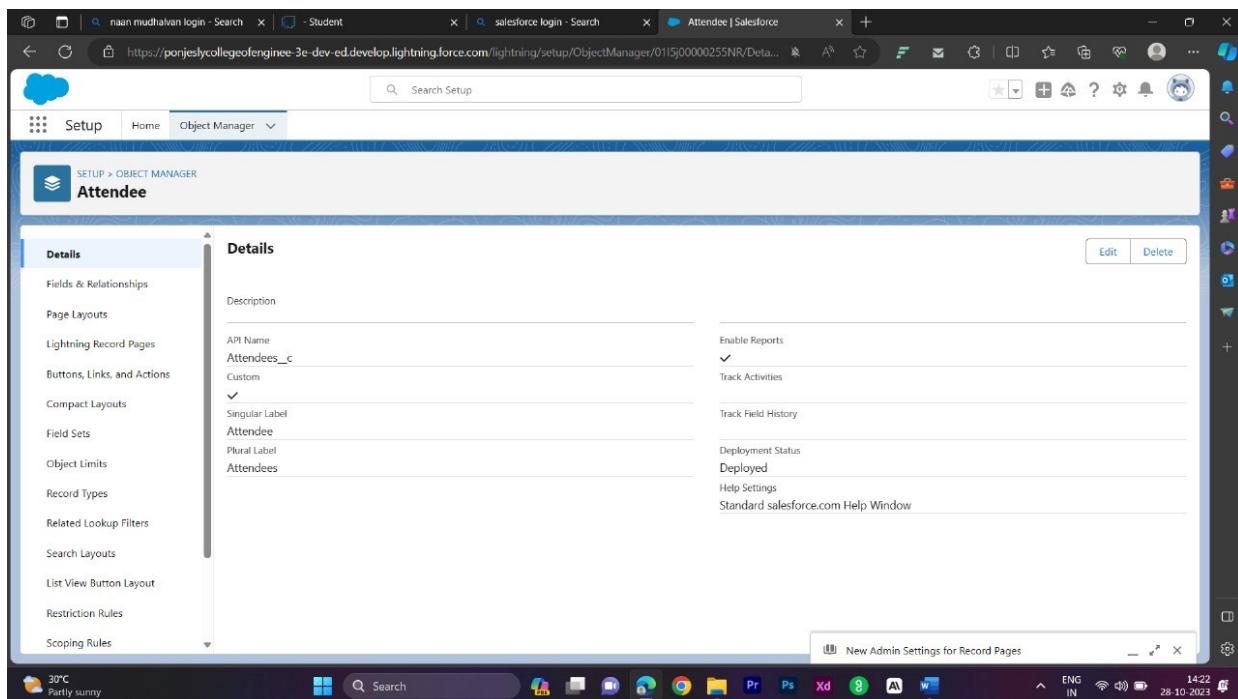
- Build An Event Management System Using Salesforce
- Salesforce
 - Creating A Salesforce Developer Org
 - Developer Edition Link



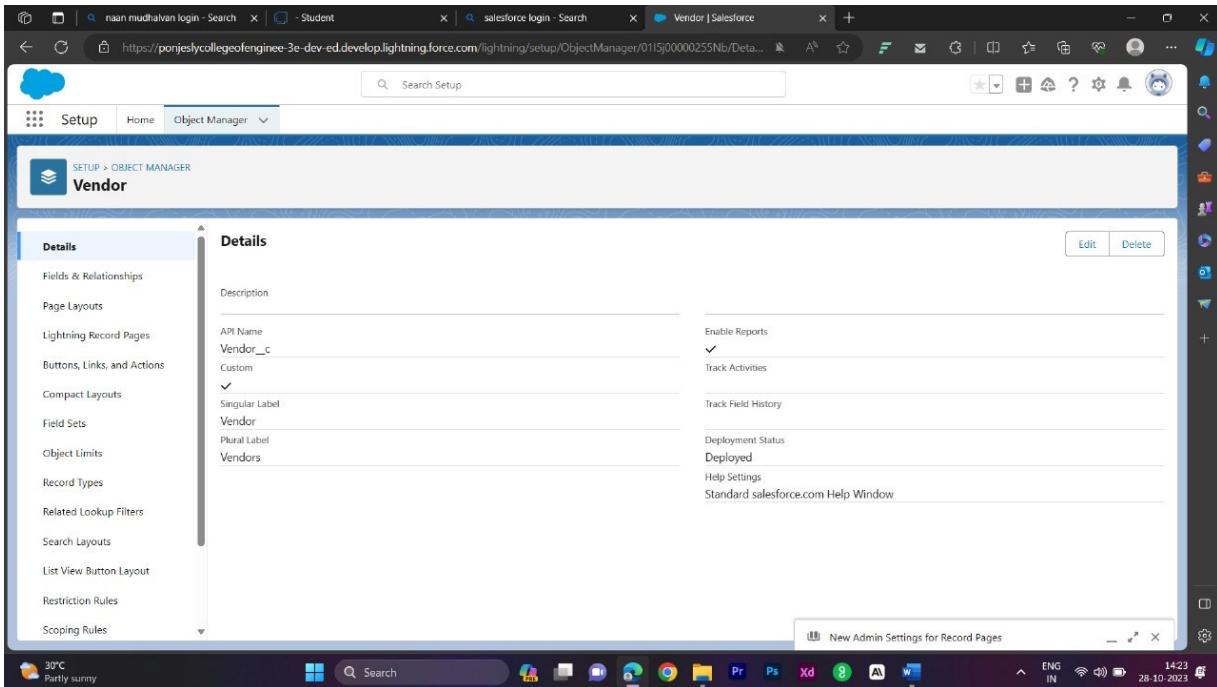
- o Object
 - Creation Of Objects for Event Management



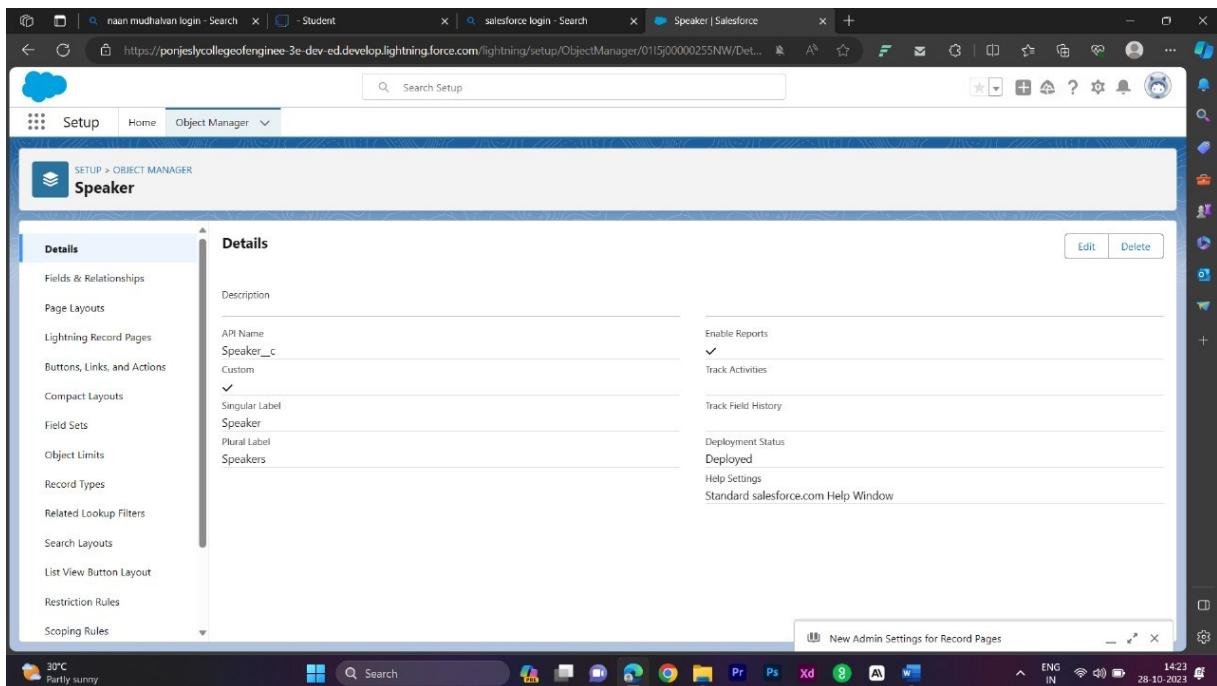
- Creation Of Attendees Object



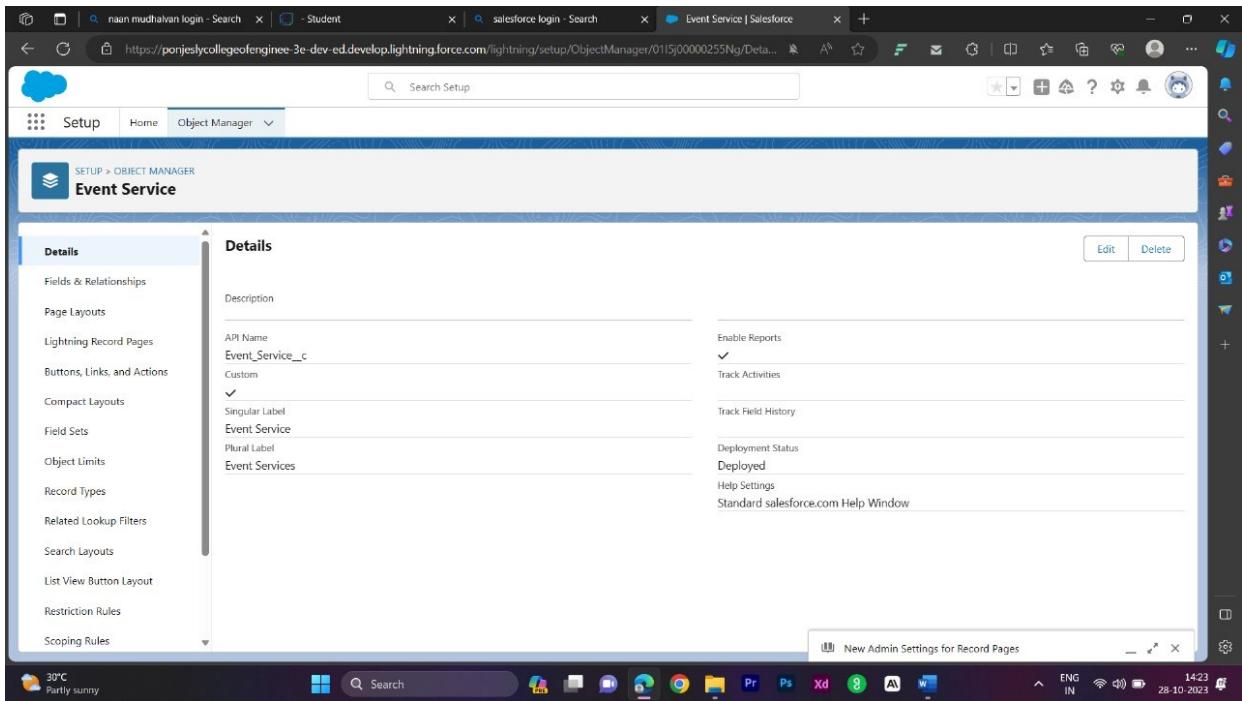
- Creation Of Speaker Object



- Creation Of Vendors Object



- Creation Of Event Service Object



- Tab
 - Creation Of Occasion Tab
 - Creation Of Attendee Tab
 - Creation Of Speakers Tab
 - Creation Of Vendor Tab
 - Creation Of Event Service Tab

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Action	Label	Tab Style	Description
Edit Del	Attendees	Alarm clock	
Edit Del	Event Services	Factory	
Edit Del	Occasions	Airplane	
Edit Del	Speakers	People	
Edit Del	Vendors	Bank	

Web Tabs

No Web Tabs have been defined.

Visualforce Tabs

No Visualforce Tabs have been defined.

- o **Lightning App**
 - Create The Event Management App

Event Management

Occurrences Recently Viewed

0 items • Updated a few seconds ago

Occasion Name

You haven't viewed any Occasions recently.
Try switching list views.

- Fields And Relationships
 - Creation Of Fields For The Occasion Objects

The screenshot shows the Salesforce Object Manager interface for the 'Occasion' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main area displays the 'Fields & Relationships' section with 7 items. The table shows the following fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Text(20)		
Created By	CreatedById	Lookup(User)		
End Date	End_Date__c	Date/Time		
Last Modified By	LastModifiedById	Lookup(User)		
Occasion Name	Name	Text(80)		✓
Owner	OwnerId	Lookup(User/Group)		✓
Start Date	Start_Date__c	Date/Time		

- Creation Of Fields For The Attendees Objects

The screenshot shows the Salesforce Object Manager interface for the 'Attendee' object. The left sidebar lists various setup options. The main area displays the 'Fields & Relationships' section with 8 items. The table shows the following fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Attendee Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Id	Id__c	Auto Number		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓
Phone	Phone__c	Phone		
Tickets	Tickets__c	Picklist		

▪ Creation Of Master-Detail Relationship

The screenshot shows the Salesforce Setup interface for the 'Attendee' object. The 'Fields & Relationships' section is displayed, listing various fields and their properties. One field, 'Event Name', is highlighted as having a 'Master-Detail(Occasion)' data type. The 'Controlling Field' column for this field is set to 'Event_Name__c'. Other fields listed include 'Attendee Name', 'Created By', 'Email', 'Id', 'Last Modified By', 'Phone', and 'Tickets'.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Attendee Name	Name	Text(80)		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Event Name	Event_Name__c	Master-Detail(Occasion)	Event_Name__c	
Id	Id__c	Auto Number		
Last Modified By	LastModifiedById	Lookup(User)		
Phone	Phone__c	Phone		
Tickets	Tickets__c	Picklist		

▪ Creation Of Fields For The Speakers Objects

The screenshot shows the Salesforce Setup interface for the 'Speaker' object. The 'Fields & Relationships' section is displayed, listing various fields and their properties. One field, 'Event Name', is highlighted as having a 'Lookup(Occasion)' data type. The 'Controlling Field' column for this field is set to 'Event_Name__c'. Other fields listed include 'Bio', 'Created By', 'Email', 'Owner', 'Phone', and 'Speaker Name'.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Bio	Bio__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Event Name	Event_Name__c	Lookup(Occasion)	Event_Name__c	
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		
Phone	Phone__c	Phone		
Speaker Name	Name	Text(80)		

- Creation Of Fields For The Vendors Objects

Fields & Relationships
8 items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Event Name	Event_Name__c	Lookup(Occasion)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		
Phone	Phone__c	Phone		
Service	Service__c	Text(30)		
Vendor Name	Name	Text(80)		

- Creation Relationship On Event Service Objects

Fields & Relationships
5 items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Event Name	Event_Name__c	Master-Detail(Occasion)		
Event Service Name	Name	Text(80)		
Last Modified By	LastModifiedById	Lookup(User)		
Vendor Name	Vendor_Name__c	Master-Detail(Vendor)		

- o Profile
 - Creation On Profile

Profile Detail

Name	enter Event user profile	Custom Profile	✓
User License	Salesforce		
Description			
Created By	AJULIN DANISH, 27/10/2023, 2:09 pm	Modified By	AJULIN DANISH, 27/10/2023, 2:10 pm

Page Layouts

Standard Object Layouts	Global	Object Milestone
Email Application	Not Assigned [View Assignment]	Operating Hours Operating Hours Layout [View Assignment]
Home Page Layout	DE Default [View Assignment]	Opportunity Opportunity Layout [View Assignment]
Account	Account Layout [View Assignment]	Opportunity Product Opportunity Product Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Order Order Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Order Product Order Product Layout [View Assignment]
Asset	Asset Layout [View Assignment]	Payment Payment Layout [View Assignment]
Asset Action	Asset Action Layout [View Assignment]	Payment Authorization Payment Authorization Layout [View Assignment]
Asset Action Source	Asset Action Source Layout [View Assignment]	Payment Authorization Adjustment Payment Authorization Adjustment Layout [View Assignment]
Asset Relationship	Asset Relationship Layout [View Assignment]	Payment Gateway Payment Gateway Layout [View Assignment]

- Create A Profile with The Profile Name As “Event Vendors Profile”

Profile Detail

Name	enter Event vendors profile	Custom Profile	✓
User License	Salesforce		
Description			
Created By	AJULIN DANISH, 27/10/2023, 2:12 pm	Modified By	AJULIN DANISH, 27/10/2023, 2:12 pm

Page Layouts

Standard Object Layouts	Global	Object Milestone
Email Application	Not Assigned [View Assignment]	Operating Hours Operating Hours Layout [View Assignment]
Home Page Layout	DE Default [View Assignment]	Opportunity Opportunity Layout [View Assignment]
Account	Account Layout [View Assignment]	Opportunity Product Opportunity Product Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Order Order Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Order Product Order Product Layout [View Assignment]
Asset	Asset Layout [View Assignment]	Payment Payment Layout [View Assignment]
Asset Action	Asset Action Layout [View Assignment]	Payment Authorization Payment Authorization Layout [View Assignment]
Asset Action Source	Asset Action Source Layout [View Assignment]	Payment Authorization Adjustment Payment Authorization Adjustment Layout [View Assignment]
Asset Relationship	Asset Relationship Layout [View Assignment]	Payment Gateway Payment Gateway Layout [View Assignment]

- o User
 - Creating A User

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. A new user record is being created for 'Sanjay Gupta'. The 'User Detail' section includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, and various checkboxes for permissions and settings. The 'Role' field is set to 'Salesforce Standard User'. The 'User License' field is set to 'Salesforce Standard User'. The 'Profile' field is set to 'Standard User Profile'. The 'Active' checkbox is checked. Other checkboxes like 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', 'WDC User', 'Mobile Push Registrations', 'Data.com User Type', 'Accessibility Mode (Classic Only)', 'Debug Mode', 'High-Contrast Palette on Charts', 'Load Lightning Pages While Scrolling', 'Salesforce CRM Content User', 'Receive Salesforce CRM Content Email Alerts', 'Receive Salesforce CRM Content Alerts as Daily Digest', and 'Make Setup My Default Landing Page' are also present. The 'Temporary Verification Code' field shows 'Temporary Verification Code (Expires in 1 to 24 Hours) [Generate]'. The browser status bar at the bottom indicates it's 05:15 PM on 28-10-2023.

- Creating A Another User

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. A new user record is being created for 'Rahul Sharma'. The 'User Detail' section includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, and various checkboxes for permissions and settings. The 'Role' field is set to 'Salesforce Platform Standard Platform User'. The 'User License' field is set to 'Salesforce Platform Standard Platform User'. The 'Profile' field is set to 'Standard Platform User Profile'. The 'Active' checkbox is checked. Other checkboxes like 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', 'WDC User', 'Mobile Push Registrations', 'Data.com User Type', 'Accessibility Mode (Classic Only)', 'Debug Mode', 'High-Contrast Palette on Charts', 'Load Lightning Pages While Scrolling', 'Salesforce CRM Content User', 'Receive Salesforce CRM Content Email Alerts', 'Receive Salesforce CRM Content Alerts as Daily Digest', and 'Allow Forecasting' are also present. The 'Temporary Verification Code' field shows 'Temporary Verification Code (Expires in 1 to 24 Hours) [Generate]'. The browser status bar at the bottom indicates it's 05:16 PM on 28-10-2023.

- o Permission Sets
 - Creating A Permission Set

The screenshot shows the Salesforce Setup interface under the 'Permission Sets' tab. A new permission set named 'Event Permits' has been created. The 'Permission Set Overview' section displays the API name 'Event_Permits', created by 'AJILIN DANISH' on 27/10/2023, 2:58 pm, and last modified by 'AJILIN DANISH' on 27/10/2023, 2:58 pm. The 'Description' field is empty. The 'Apps' section lists various app permissions, all of which are currently empty.

The screenshot shows the 'Assignment Summary' section of the 'Event Permits' permission set. It displays one successful assignment made to 'Sanjay Gupta'. The assignment details are: Full Name - Sanjay Gupta, User License - Salesforce, Expires On - Not specified, Time Zone - Not specified, and Status - Success. A green success message at the top indicates '1 assignments were successful.'

▪ Creating A Another Permission Set

The screenshot shows the Salesforce Setup interface under the 'Permission Sets' section. The 'Vendor Permits' permission set is selected. The 'Permission Set Overview' section displays the API Name as 'Vendor_Permits', created by 'AJILIN DANISH' on 27/10/2023, 3:01 pm, and last modified by 'AJILIN DANISH' on 27/10/2023, 3:01 pm. The 'Description' field is empty, and the 'License' field shows 'Session Activation Required'. The 'Assigned Apps' section lists various app permissions such as 'Assigned Connected Apps', 'Object Settings', 'App Permissions', 'Apex Class Access', 'Visualforce Page Access', 'External Data Source Access', 'Flow Access', 'Named Credential Access', and 'External Credential Principal Access'. A note at the bottom states: 'Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform'.

The screenshot shows the 'Assignment Summary' page for the 'Vendor Permits' permission set. A green success message at the top right indicates '1 assignments were successful.' The table below shows one assignment made to 'Rahul Sharma' with a 'User License' of 'Salesforce Platform'. The status of the assignment is 'Success'. The table has columns: Full Name, User License, Expires On, Time Zone, and Status.

Full Name	User License	Expires On	Time Zone	Status
Rahul Sharma	Salesforce Platform			Success

- User Adoption
 - Create A Record (Occasion)

The screenshot shows the Salesforce Lightning interface. The top navigation bar includes tabs for 'Student', 'Recently Viewed | Occasions | S...', 'Permission Sets | Salesforce', and a '+' button. Below the navigation is a header with the 'Event Management' logo and links for 'Reports', 'Dashboards', 'Occurrences', 'Attendees', 'Speakers', 'Vendors', and 'Event Services'. The main content area displays a list titled 'Occasions Recently Viewed'. It shows one item: 'Anniversary' (Event Name). The interface features a search bar, a toolbar with buttons for 'New' and 'Import', and a list of other items like 'Event Name' and 'Anniversary'. The bottom of the screen shows a taskbar with various application icons and system status indicators.

- View A Record(Occasion)

The screenshot shows the Salesforce Lightning interface displaying the details of an 'Occasion' record. The title bar shows the URL 'eventmanagementsystemcom-dev-ed.develop.lightning.force.com/lightning/r/Occasion_c/a005i00000FYVX3AAP/view'. The page header includes the 'Event Management' logo and navigation links for 'Occurrences', 'Attendees', 'Speakers', 'Vendors', 'Event Services', 'Reports', and 'Dashboards'. The main content area is titled 'Occasion Anniversary'. It shows the following details:

Related	Details
Occasion Name	Anniversary
City	Guntur
Start Date	17/05/2023, 10:00 am
End Date	17/05/2023, 5:00 pm
Created By	PremSagar Bommanaboina, 17/05/2023, 7:13 pm
Last Modified By	PremSagar Bommanaboina, 17/05/2023, 7:13 pm

The bottom of the screen shows a taskbar with various application icons and system status indicators.

- Delete A Record(Occasion)

The screenshot shows a browser window with multiple tabs open. The active tab is titled "Recently Viewed | Occasions | Sales..." and displays the "Event Management" interface. A green success message at the top right says "Occasion 'Anniversary' was deleted. Undo X". On the left, there's a sidebar with "Occasions" and "Recently Viewed". The main content area shows a table with one row, "Occasion Name", and a note below it: "You haven't viewed any Occasions recently. Try switching list views." The browser's address bar shows the URL: "eventmanagementsystem.com-dev-ed.develop.lightning.force.com/lightning/o/Occasion_c/list?filterName=Recent".

- Reports
 - Creating A Report

The screenshot shows a browser window with multiple tabs open. The active tab is titled "Report: Occasions with Attendees | Sales..." and displays the "Event Management" interface. The title bar says "Report: Occasions with Attendees". The main content area shows a table titled "Report: Occasions with Attendees" with 8 total records. The table has columns: Occasion: Occasion Name, Attendee: Attendee Name, City, Start Date, and End Date. The data is grouped by occasion, with subtotals for each group. At the bottom, there are buttons for "Row Counts", "Detail Rows", "Subtotals", and "Grand Total". The browser's address bar shows the URL: "eventmanagementsystem.com-dev-ed.develop.lightning.force.com/lightning/r/Report/00O5i000008ushEEAQ/view".

Occasion: Occasion Name	Attendee: Attendee Name	City	Start Date	End Date
Christmas (4)	Harika	Sattenapalli	25/12/2022, 9:30 am	25/12/2022, 11:45 am
	Rajeev	Sattenapalli	25/12/2022, 9:30 am	25/12/2022, 11:45 am
	Padma	Sattenapalli	25/12/2022, 9:30 am	25/12/2022, 11:45 am
	BalaRishi	Sattenapalli	25/12/2022, 9:30 am	25/12/2022, 11:45 am
Subtotal				
Graduation Day (4)	Revanth Kumar	Guntur	20/04/2023, 10:00 am	24/04/2023, 3:30 pm
	Hemanth Kumar	Guntur	20/04/2023, 10:00 am	24/04/2023, 3:30 pm
	Sarith Chandra	Guntur	20/04/2023, 10:00 am	24/04/2023, 3:30 pm
	Prem Sagar	Guntur	20/04/2023, 10:00 am	24/04/2023, 3:30 pm
Subtotal				
Total (8)				

Report: Occasions with Attendees

Total Records: 8

Record Count:

Occasion	Count
Christmas	4
Graduation Day	4

Occasion	Occasion Name	Attendee	Attendee Name	City	Start Date	End Date
Christmas (4)		Hariika	Sattenapalli	Guntur	25/12/2022, 8:39 am	25/12/2022, 11:45 am
		Rajeev	Sattenapalli	Guntur	25/12/2022, 8:39 am	25/12/2022, 11:45 am
		Padma	Sattenapalli	Guntur	25/12/2022, 8:39 am	25/12/2022, 11:45 am
		Balakrishna	Sattenapalli	Guntur	25/12/2022, 8:39 am	25/12/2022, 11:45 am
Graduation Day (2)		Neeravini Kumar	Guntur	Guntur	20/04/2023, 10:00 am	20/04/2023, 3:30 pm
		Harineeth Kumar	Guntur	Guntur	20/04/2023, 10:00 am	20/04/2023, 3:30 pm
		Saranya Chandra	Guntur	Guntur	20/04/2023, 10:00 am	20/04/2023, 3:30 pm
		Praveen Segar	Guntur	Guntur	20/04/2023, 10:00 am	20/04/2023, 3:30 pm
Subtotal						
Total (8)						

Row Counts: Detail Rows Subtotals Grand Total

o Dashboard

- Create A Dashboard

Occasions with Attendees

Record Count:

Occasion	Count
Christmas	4
Graduation Day	4

View Report (Occurrences with Attendees)

+ Component + Filter Save Done

- o View Reports And Dashboards
 - View Report

Report: Occasions with Attendees
Occurrences with Attendees

Total Records 8				
Occasion: Occasion Name	Attendee: Attendee Name	City	Start Date	End Date
Christmas (4)	Harika	Sattenapalli	25/12/2022, 9:30 am	25/12/2022, 11:45 am
	Rajeev	Sattenapalli	25/12/2022, 9:30 am	25/12/2022, 11:45 am
	Padma	Sattenapalli	25/12/2022, 9:30 am	25/12/2022, 11:45 am
	BalaRishi	Sattenapalli	25/12/2022, 9:30 am	25/12/2022, 11:45 am
Subtotal				
Graduation Day (4)	Reventh Kumar	Guntur	20/04/2023, 10:00 am	24/04/2023, 3:30 pm
	Hemanth Kumar	Guntur	20/04/2023, 10:00 am	24/04/2023, 3:30 pm
	Sarith Chandra	Guntur	20/04/2023, 10:00 am	24/04/2023, 3:30 pm
	Prem Sagar	Guntur	20/04/2023, 10:00 am	24/04/2023, 3:30 pm
Subtotal				
Total (8)				

Row Counts Detail Rows Subtotals Grand Total

- View Dashboard

Occurrences with Attendees

Occurrences with Attendees

Record Count

Occasion: Occasion Name

View Report (Occurrences with Attendees)

+ Component + Filter Save Done

7:45 PM 5/17/2023