

BULID AN EVENT MANAGEMENT SYSTEM TUSING SALESFORCE-(DEVELOPER)

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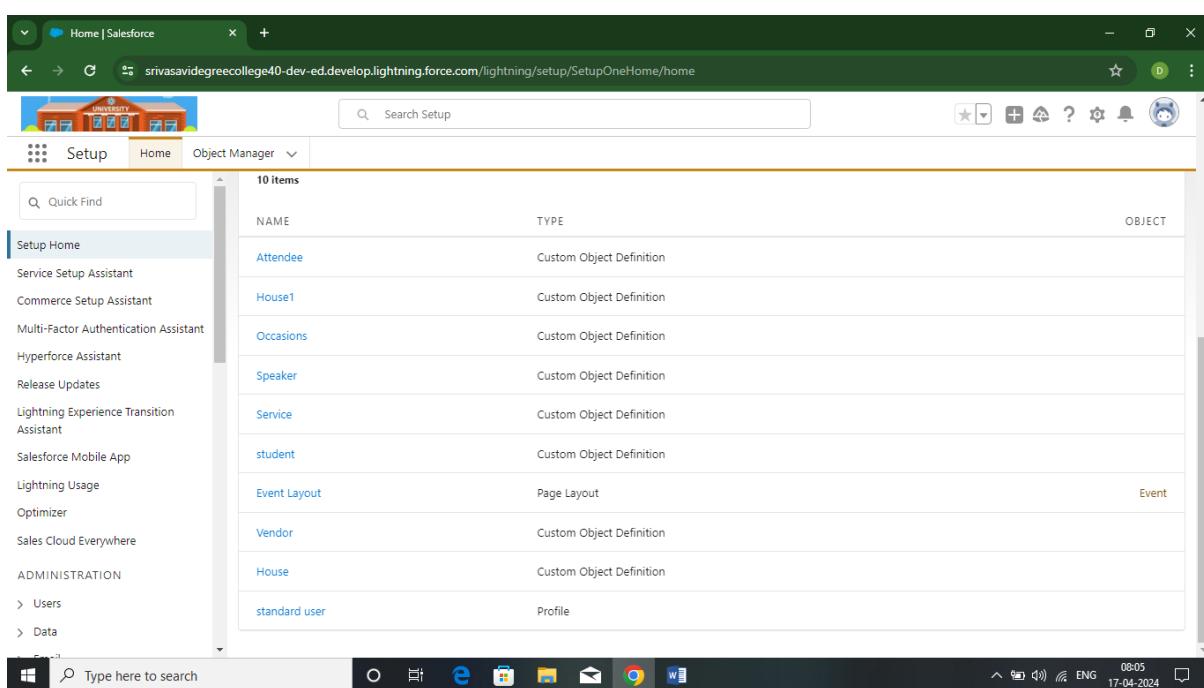
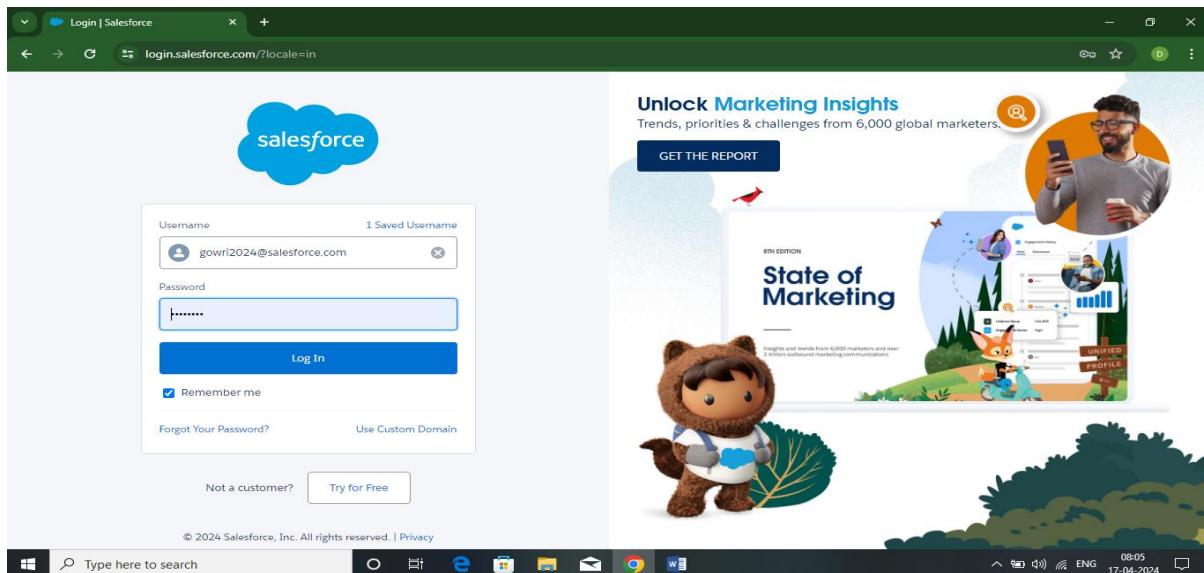


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SALESFORCE

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers. Salesforce allows you to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.



OBJECT

Salesforce objects are database tables that permit you to store data that is specific to an organization it consists if fields (columns) and records (rows) Salesforce objects are two types standard objects are provided by Salesforce.com such as users contracts, reports, dashboard,etc. custom objects custom objects are those objects that are created by users they supply information that is unique and essential to their organization they are the heart of any application and provided a structure for sharing data.

The screenshot shows the Salesforce Setup interface under the Object Manager. A modal window titled "Edit Custom Object Attendee" is open, showing the configuration for the "Attendee" object. The "Custom Object Information" section includes fields for "Label" (Attendee), "Plural Label" (Attendees), and "Object Name" (Attendee). The "Description" field is empty. On the left, a sidebar lists various object settings like Fields & Relationships, Page Layouts, and Lightning Record Pages. The top navigation bar shows "Event Manager | Salesforce" and "Attendee | Salesforce". The status bar at the bottom indicates the date as 17-04-2024 and the time as 08:23.

The screenshot shows the "Attendee" object details page. The "Details" tab is selected, displaying the API name (Attendee__c), which is checked as a custom object. Other details shown include "Enable Reports" (checked), "Track Activities" (checked), "Track Field History" (unchecked), "Deployment Status" (Deployed), and "Help Settings" (Standard salesforce.com Help Window). The left sidebar shows the same list of object settings as the previous screenshot. The top navigation bar and status bar are identical to the first screenshot.

Event Manager | Salesforce Speaker | Salesforce

srivasavidegreecollege40-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01GB000002vkZr/Details/view

SETUP > OBJECT MANAGER Speaker

Details

Description

API Name: Speaker_c
Custom: ✓
Singular Label: Speaker
Plural Label: Speakers

Enable Reports: ✓
Track Activities
Track Field History
Deployment Status: Deployed
Help Settings: Standard salesforce.com Help Window

Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts

Edit Delete

Type here to search

08:37 17-04-2024

Event Manager | Salesforce Vendor | Salesforce

srivasavidegreecollege40-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01GB000002vkZw/edit?address=%2F01GB000002vkZw%2Fe%3FretURL%3D%...★

SETUP > OBJECT MANAGER Vendor

Edit Custom Object Vendor

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label: Vendor Example: Account
Plural Label: Vendors Example: Accounts
Starts with vowel sound:

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

Object Name: Vendor Example: Account

Description:

Context-Sensitive Help Setting: Open the standard Salesforce.com Help & Training window

Type here to search

08:41 17-04-2024

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

Header: Event Manager | Salesforce, Speaker | Salesforce, srivasavidegreecollege40-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01GB000002vkZr/Details/view

Breadcrumbs: SETUP > OBJECT MANAGER

Page Title: Speaker

Left Sidebar (Details tab):

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts

Right Panel (Details section):

Setting	Value
Description	
API Name	Speaker_c
Custom	✓
Singular Label	Speaker
Plural Label	Speakers
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons: Edit, Delete

System Navigation: Search Setup, Home, Object Manager

Taskbar: Type here to search, Start button, Taskbar icons (File Explorer, Edge, File Explorer, Mail, Google Chrome, File Explorer), Date and Time (08:37, 17-04-2024)

The screenshot shows the Salesforce Setup interface with the title 'Edit Custom Object Speaker'. The main area displays the 'Custom Object Definition Edit' form. Key fields include:

- Label:** Speaker
- Plural Label:** Speakers
- Object Name:** Speaker

The left sidebar lists various setup categories such as Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts.

C Type here to search 08:37 17-04-2024

The screenshot shows the 'Details' page for the Speaker custom object. The main area displays the following details:

Field	Value
Description	
API Name	Speaker_c
Custom	✓
Singular Label	Speaker
Plural Label	Speakers
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

The left sidebar lists the same setup categories as the previous screenshot.

Type here to search 08:37 17-04-2024

TAB

Tabs in Salesforce help users view the information at a glance. It displays the data of objects and other web content in the application ther are mainly 4 types of tabs standard object tabs standard object tabs display data related to standard object custom object tabs display data relate to custo object these tabs look and function just like standard tabs wed tabs display any external web based applications or web page in a Salesforce tab visualforce tabs display data form a visualforce page.

The top screenshot shows the 'Custom Tab Definition Edit' screen for a new custom tab named 'Attendees'. The 'Tab Label' is set to 'Attendees', 'Object' to 'Attendee', and 'Tab Style' to 'Computer'. An optional splash page link is set to '-None--'. The bottom screenshot shows the 'Custom Tabs' list screen, which includes sections for 'Custom Object Tabs' and 'Web Tabs'. Under 'Custom Object Tabs', there is a table with rows for 'Attendees', 'Event Services', 'Occurrences', 'Speakers', and 'Vendors', each with an 'Edit | Del' button. Under 'Web Tabs', there is a table with rows for 'Bridge', 'Castle', 'Diamond', and 'Bottle', each with an 'Edit | Del' button. Both screenshots show the standard Salesforce navigation bar at the top and a sidebar on the left.

Event Manager | Salesforce Tabs | Salesforce

srivasavidegreecollege40-dev-ed.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01rGB000000zuL0%2Fe%3Fr?url%3D%252Fsetup%252Fu%2...

Setup Home Service Setup Assistant Commerce Setup Assistant Multi-Factor Authentication Assistant Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer Sales Cloud Everywhere ADMINISTRATION > Users > Data

Type here to search

SETUP Tabs

LEVEL SERVICES

Fill in the fields below to define the custom tab.

Custom Tab Definition Edit

Custom Object Tab Information

Tab Label: Event Services
Object: Service
Tab Style: Bridge

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link: -None--

Enter a short description.
Description:

Save Cancel

javascriptrsrcUp%27%2F01rGB000000zuL0%2Fe%3Fr?url%3D%252Fcustomtabs.jsp%253Fsetupid%253DCustomTabs%2526retURL%253D%25252Fsetup%25252Fhome%2526appLayout%253Dsetup%2526tour%253D%2526sd...

09:01 17-04-2024

Event Manager | Salesforce Tabs | Salesforce

srivasavidegreecollege40-dev-ed.lightning.force.com/lightning/setup/CustomTabs/home

Setup Home Service Setup Assistant Commerce Setup Assistant Multi-Factor Authentication Assistant Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer Sales Cloud Everywhere ADMINISTRATION > Users > Data

Type here to search

SETUP Tabs

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.

Custom Object Tabs

Action	Label	Tab Style	Description
Edit Del	Attendees	Computer	
Edit Del	Event Services	Bridge	
Edit Del	Occasions	Castle	
Edit Del	Speakers	Diamond	
Edit Del	Vendors	Bottle	

Web Tabs

No Web Tabs have been defined.

New What Is This?

javascriptrsrcUp%27%2F01rGB000000zuL0%2Fe%3Fr?url%3D%252Fcustomtabs.jsp%253Fsetupid%253DCustomTabs%2526retURL%253D%25252Fsetup%25252Fhome%2526appLayout%253Dsetup%2526tour%253D%2526sd...

08:56 17-04-2024

Event Manager | Salesforce Tabs | Salesforce

srivasavidegreecollege40-dev-ed.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01rGB000000zuL0%2Fe%3Fr?url%3D%252Fsetup%252Fu%2...

Setup Themes and branding Translation Workbench User Interface Custom Code Development Scale Environments User Engagement Integrations Notification Builder Offline COMPANY SETTINGS Company Settings Data Classification Privacy Center Identity Security

Type here to search

SETUP Tabs

LEVEL OCCASIONS

Fill in the fields below to define the custom tab.

Custom Tab Definition Edit

Custom Object Tab Information

Tab Label: Occasions
Object: Occasions
Tab Style: Castle

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link: -None--

Enter a short description.
Description:

Save Cancel

javascriptrsrcUp%27%2F01rGB000000zuL0%2Fe%3Fr?url%3D%252Fcustomtabs.jsp%253Fsetupid%253DCustomTabs%2526retURL%253D%25252Fsetup%25252Fhome%2526appLayout%253Dsetup%2526tour%253D%2526sd...

09:04 17-04-2024

The screenshot shows the Salesforce Setup interface with the title "Event Manager | Salesforce" and "Tabs | Salesforce". The left sidebar includes links like Setup Home, Service Setup Assistant, Commerce Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Sales Cloud Everywhere, and ADMINISTRATION. The main content area is titled "Custom Tabs" and contains a table for "Custom Object Tabs" and a section for "Web Tabs". The "Custom Object Tabs" table has columns for Action, Label, Tab Style, and Description. The "Label" column lists "Attendees", "Event Services", "Occurrences", "Speakers", and "Vendors". The "Tab Style" column shows icons for Computer, Bridge, Castle, Diamond, and Bottle. A note at the top states: "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." A "Help for this Page" link is in the top right.

The screenshot shows the Salesforce Setup interface with the title "Event Manager | Salesforce" and "Tabs | Salesforce". The left sidebar includes links for Themes and branding, Translation Workbench, User Interface, Custom Code, Development, Scale, Environments, User Engagement, Integrations, Notification Builder, Offline, SETTINGS, Company Settings, Data Classification, Privacy Center, Identity, and Security. The main content area is titled "Edit Custom Object Tab" and "Speakers". It contains a "Custom Tab Definition Edit" form with fields for Tab Label (Speakers), Object (Speaker), Tab Style (Diamond), and Splash Page Custom Link (None). A note says: "Fill in the fields below to define the custom tab." A "Help for this Page" link is in the top right.

The screenshot shows the Salesforce Setup interface with the title "Event Manager | Salesforce" and "Tabs | Salesforce". The left sidebar is identical to the previous screenshots. The main content area is titled "Custom Tabs" and contains the same "Custom Object Tabs" table and "Web Tabs" section as the first screenshot. A note at the top states: "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." A "Help for this Page" link is in the top right.

The screenshot shows the Salesforce Setup interface with the 'Custom Tabs' page open. The left sidebar includes links for Setup Home, Service Setup Assistant, Commerce Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Sales Cloud Everywhere, and ADMINISTRATION. The main content area displays information about Custom Object Tabs and Web Tabs, with a table showing existing tabs like Attendees, Event Services, Occasions, Speakers, and Vendors, each with an edit or delete link and a tab style icon.

The screenshot shows the 'Edit Custom Object Tab' page for the 'Speakers' tab. The left sidebar lists various setup categories. The main content area shows the 'Custom Tab Definition Edit' section with fields for Tab Label (Speakers), Object (Speaker), Tab Style (Diamond), and Splash Page Custom Link (set to None). A note says '(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.' Below is a 'Description' field with a placeholder 'A short description'.

The screenshot shows the 'Custom Tabs' page again, similar to the first one but with a different URL. The left sidebar and main content area are identical to the first screenshot, displaying the list of custom tabs and their details.

LIGHTNING APP

Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simpler app usually has just two tabs. There are 2 types of Salesforce applications: standard apps (these apps come with every occurrence of Salesforce as default) and custom apps (these apps are created according to the needs of a company). They can be made by putting custom and standard tabs together. Logos for custom apps can be changed.

The screenshot shows the "Lightning Experience App Manager" page within the Salesforce Setup interface. The page displays a list of 23 items, sorted by App Name, filtered by All appmenuitems - TabSet Type. The columns include App Name, Developer Name, Description, Last Modified, App Set Type, and View. The list includes standard apps like Commerce, Community, Content, Data Manager, Digital Experiences, Event Management, Lightning Usage App, Marketing CRM Class..., Platform, Queue Management, and Sales, along with custom apps like Event_Mangement and Event_Usage.

The screenshot shows the "Event Management - Lightning" app builder interface. The "App Details & Branding" section is active, allowing users to give the app a name and description, upload an image, and choose a highlight color for its navigation bar. The "App Details" section shows the current values: App Name (Event Management), Developer Name (Event_Mangement), and Description (Enter a description...). The "App Branding" section includes fields for Primary Color Hex Value (#0070D2) and Org Theme Options (checkbox for using the app's image and color instead of the org's custom theme). The "App Launcher Preview" shows a preview of the app icon and label.

FIELDS AND RELATIONSHIP

Fields in Salesforce represents what the columns represent in relational databases in relational databases. It can store data values which are required for a particular objects In a record there are 2 types fields and Salesforce standard fields there are four standard fields in every custom object that are created by, last modified by, owner, and the field created at the time of the creation of an object these fields cannot be deleted or edited and they are always required for standard objects, the fields which are present by default in them and cannot be deleted from standard objects are standard fields.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The main panel displays the 'Field Information' for the 'Email' field of the 'Occurrences' object. The 'Field Label' is set to 'Email', 'Data Type' is 'Email', and 'Data Owner' is 'User'. Other settings include 'Field Usage' (None), 'Data Sensitivity Level' (None), and 'Compliance Categorization' (Available: PII, HIPAA, GDPR, PCI; Chosen: None). The 'General Options' section includes checkboxes for 'Required' and 'Unique'.

The screenshot shows the 'Fields & Relationships' list for the 'Occurrences' object. The table lists 9 items, sorted by Field Label. The columns include FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The listed fields are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City_c	Text(20)		
Created By	CreatedBy	Lookup(User)		
Email	Email_c	Email		
Event Name	Name	Text(80)		
Id	id_c	Auto Number		✓
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone_c	Phone		

Screenshot 1: Salesforce Object Manager - Edit Occasions Custom Field City

The screenshot shows the 'Edit Occasions Custom Field City' page. The 'Field Information' section contains the following details:

- Field Label:** City
- Field Name:** City_c
- Description:** (empty)
- Help Text:** (empty)
- Data Owner:** User
- Field Usage:** None
- Data Sensitivity Level:** None
- Compliance Categorization:** Available (PII, HIPAA, GDPR) Chosen

The 'Fields & Relationships' sidebar lists various setup options like Page Layouts, Lightning Record Pages, etc.

Screenshot 2: Salesforce Object Manager - Fields & Relationships

The screenshot shows the 'Fields & Relationships' list for the Occasions object. It displays one item: 'city' (Field Label: city, Field Name: City_c, Data Type: Text(20), Controlling Field: None, Indexed: Yes).

Screenshot 3: Salesforce Object Manager - Edit Occasions Custom Field Tickets

A modal dialog box is displayed, showing a warning message: "...grecocolege40-dev-ed.develop.my.salesforce.com says Be careful when changing the label as it may affect existing merge templates." A green 'OK' button is visible at the bottom right of the dialog.

The 'Custom Field Definition Edit' page for the 'Tickets' field has the following details:

- Field Label:** Ticket
- Field Name:** Tickets
- Description:** (empty)
- Help Text:** (empty)
- Data Owner:** User
- Field Usage:** None
- Data Sensitivity Level:** None
- Compliance Categorization:** Available (PII, HIPAA, GDPR) Chosen

The 'Fields & Relationships' sidebar lists various setup options like Page Layouts, Lightning Record Pages, etc.

Screenshot 4: Salesforce Object Manager - Fields & Relationships

The screenshot shows the 'Fields & Relationships' list for the Occasions object. It displays one item: 'Phone' (Field Label: Phone, Field Name: Phone_c, Data Type: phone9, Controlling Field: None, Indexed: Yes).

PROFILE

A PROFILE is a group/collection of settings and permission that define what a user can do in Salesforce a profile controls object permissions field permissions user permissions tab settings app settings apex class access visualforce page access page layouts record types login hours login ip ranges a profile can be assigned to many users but user can be assigned single profile at a time.

Custom App Settings					
	Visible	Default	Visible	Default	
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>	Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales Console (standard__LightningConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Commerce (standard__Commerce)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="radio"/>
Community (standard__Community)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>	<input type="radio"/>
Content (standard__Content)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sample Console (standard__ServiceConsole)	<input type="checkbox"/>	<input type="radio"/>
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>	<input type="radio"/>	Service (standard__Service)	<input checked="" type="checkbox"/>	<input type="radio"/>
Digital Experiences (standard__SalesforceCMS)	<input checked="" type="checkbox"/>	<input type="radio"/>	Service Console (standard__LightningService)	<input checked="" type="checkbox"/>	<input type="radio"/>
Event Management (Event_Management)	<input type="checkbox"/>	<input type="radio"/>	Site.com (standard__Sites)	<input checked="" type="checkbox"/>	<input type="radio"/>

	Basic Access					Data Administration						
	Read	Create	Edit	Delete	View All <small>[A]</small>	Modify All <small>[A]</small>	Read	Create	Edit	Delete	View All <small>[A]</small>	Modify All <small>[A]</small>
Accounts	<input checked="" type="checkbox"/>	<input type="checkbox"/>										
Addresses	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
AI Record Insights	<input type="checkbox"/>	<input type="checkbox"/>										
Alternative Payment Methods	<input type="checkbox"/>	<input type="checkbox"/>										
API Anomaly Event Stores	<input type="checkbox"/>	<input type="checkbox"/>										
App Analytics Query Requests	<input type="checkbox"/>	<input type="checkbox"/>										
Application Usage Assignments	<input type="checkbox"/>	<input type="checkbox"/>										
Appointment Categories	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
Appointment Invitations	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
Appointment Schedule Aggregates	<input type="checkbox"/>	<input type="checkbox"/>										
Appointment Schedule Logs	<input type="checkbox"/>	<input type="checkbox"/>										
Location Group Assignments	<input type="checkbox"/>	<input type="checkbox"/>										
Macros	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
Messaging Sessions	<input type="checkbox"/>	<input type="checkbox"/>										
Operating Hours	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
Opportunities	<input checked="" type="checkbox"/>	<input type="checkbox"/>										
Orders	<input checked="" type="checkbox"/>	<input type="checkbox"/>										
Party Consents	<input checked="" type="checkbox"/>	<input type="checkbox"/>										
Payments	<input type="checkbox"/>	<input type="checkbox"/>										
Payment Authorizations	<input type="checkbox"/>	<input type="checkbox"/>										
Payment Authorization Adjustments	<input type="checkbox"/>	<input type="checkbox"/>										
Payment Gateways	<input type="checkbox"/>	<input type="checkbox"/>										

Screenshot of the Salesforce Setup interface showing the Profiles page under the Administer section.

The page title is "Profiles".

Section: "Administrative Permissions".

Permission	Status
Access Conversation Entries	<input checked="" type="checkbox"/>
Access Experience Management	<input type="checkbox"/>
Access Libraries	<input checked="" type="checkbox"/>
Add People to Direct Messages	<input checked="" type="checkbox"/>
Allow blockchain data upload	<input type="checkbox"/>
Allow Inclusion of Code Snippets from UI	<input type="checkbox"/>
Allows users to modify Named Credentials and External Credentials	<input type="checkbox"/>
Allow user to modify Private Connections	<input type="checkbox"/>
Apex REST Services	<input checked="" type="checkbox"/>
API Enabled	<input checked="" type="checkbox"/>
Api Only User	<input type="checkbox"/>
Assign Permission Sets	<input type="checkbox"/>
Author Apex	<input type="checkbox"/>
Bulk API Hard Delete	<input type="checkbox"/>
Manage Macros Users Can't Undo	<input checked="" type="checkbox"/>
Manage Mobile Configurations	<input type="checkbox"/>
Manage Next Best Action Recommendations	<input type="checkbox"/>
Manage Next Best Action Strategies	<input type="checkbox"/>
Manage Orchestration Runs	<input type="checkbox"/>
Manage Orchestration Runs and Work Items	<input type="checkbox"/>
Manage Package Licenses	<input type="checkbox"/>
Manage Password Policies	<input type="checkbox"/>
Manage Profiles and Permission Sets	<input type="checkbox"/>
Manage Promoted Search Terms	<input type="checkbox"/>
Manage Public Classic Email Templates	<input type="checkbox"/>
Manage Public Documents	<input type="checkbox"/>
Manage Public List Views	<input type="checkbox"/>
Manage Release Updates	<input type="checkbox"/>

System bar at the bottom:

- Type here to search
- Windows icon
- File, Home, Insert, etc. icons
- 11:23 17-04-2024

Screenshot of the Salesforce Setup interface showing the Profiles page under the Administer section.

The page title is "Profiles".

Section: "Profiles".

Table of profiles:

Action	Profile Name	User License	Custom
<input type="checkbox"/>	Work.com Only User	Work.com Only	<input type="checkbox"/>
<input type="checkbox"/>	System Administrator	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Standard User	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	standard user	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/>	standard	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/>	Salesforce API Only System Interactions	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/>	Read Only	Salesforce	<input checked="" type="checkbox"/>

System bar at the bottom:

- Type here to search
- Windows icon
- File, Home, Insert, etc. icons
- 11:24 17-04-2024

User

A user is anyone who logs in to Salesforce users are employees at your company ,such as sales reps , managers , and IT specialist ,who need access to the company's records every user in Salesforce has a user account the user account identifies the users, and the user account settings determine what features and records the user can access.

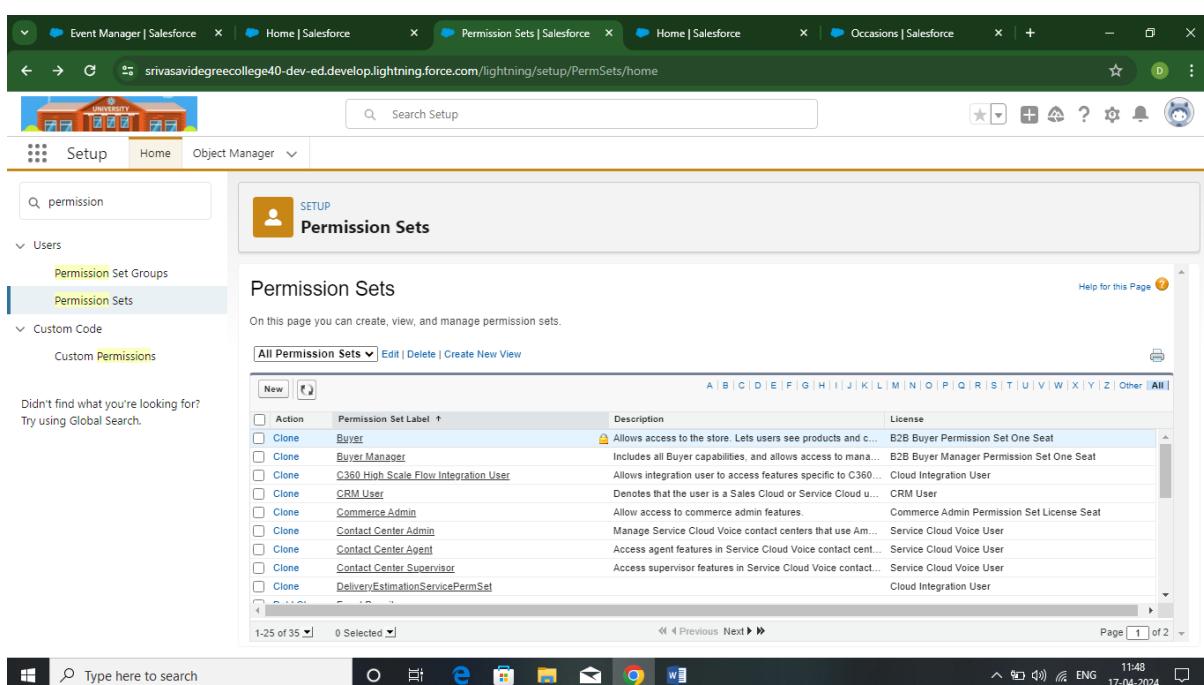
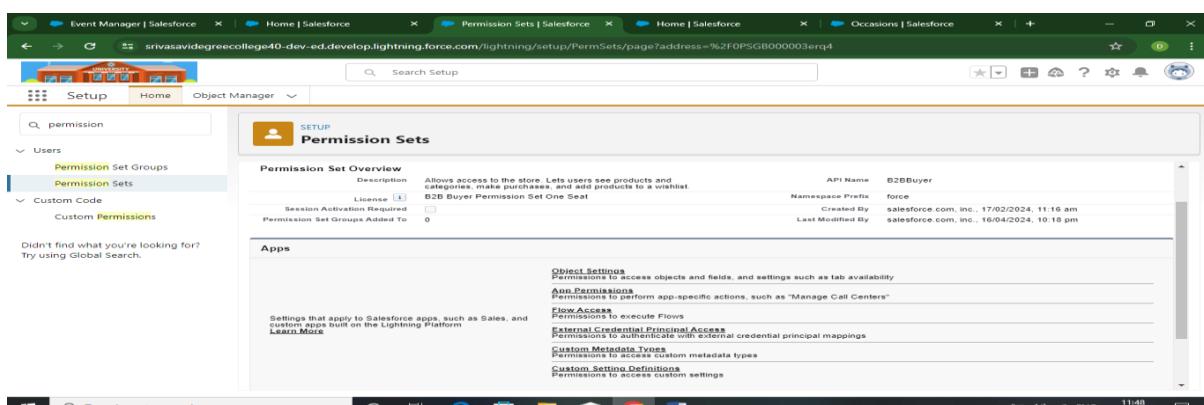
The screenshot shows the Salesforce Setup interface. The left sidebar is titled 'Users' and includes 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Users'. Under 'Users', there is a sub-section for 'Feature Settings' which includes 'Data.com' and 'Prospector Users'. The main content area is titled 'User Edit' for 'Sanjay Gupta'. It contains a 'General Information' section with fields for First Name (Sanjay), Last Name (Gupta), Alias (sgupt), Email (srinulachipathula16@gmail.com), Username (srinulachipathula16@gmail.com), and Nickname (srinu). There are also sections for Role (None Specified), User License (Salesforce), Profile (Event User Profile), and Active status (checked). Other tabs like Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, and WDC User are shown with checkboxes. A 'Save' button is at the top right.

The screenshot shows the Salesforce Setup interface. The left sidebar is identical to the previous one. The main content area is titled 'All Users'. It displays a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several users including Chatter, Gupta_sanjay, krupaani_jachchabuthala, Sharma_Rahul, User_Integration, and User_Security. Each user row has an edit link. A 'New User' button is at the bottom left of the table.

The screenshot shows the Salesforce Setup interface. The left sidebar is identical to the previous ones. The main content area is titled 'User Edit' for 'Rahul Sharma'. It contains a 'General Information' section with fields for First Name (Rahul), Last Name (Sharma), Alias (Rahus), Email (govrilachipathula16@gmail.com), Username (govrilachipathula16@gmail.com), and Nickname (govrili). There are also sections for Role (None Specified), User License (Salesforce Platform), Profile (Standard Platform User), and Active status (checked). Other tabs like Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, and WDC User are shown with checkboxes. A 'Save' button is at the top right.

Permission sets

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles. Create permission sets to grant access among logical groupings of users regardless of their primary job function. For example, let's say you have several users who must delete and transfer leads; you can create a permission set based on the tasks that these users must perform and include the permission set within permission set groups based on job functions.



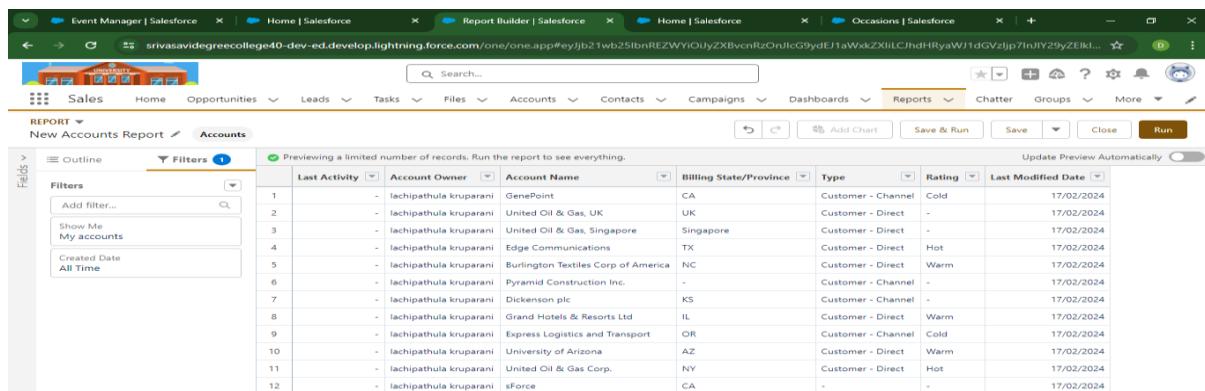
USER ADOPTION

The screenshot shows the Salesforce Setup Home page. The left sidebar contains links for Setup Home, Service Setup Assistant, Commerce Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Sales Cloud Everywhere, and Administration (Users, Permission Set Groups). The main content area features three cards: "Get Started with Einstein Bots" (Launch an AI-powered bot to automate your digital connections), "Mobile Publisher" (Use the Mobile Publisher to create your own branded mobile app), and "Real-time Collaborative Docs" (Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce). Below these cards is a section titled "Most Recently Used" showing 10 items. The bottom navigation bar includes a search bar, a ribbon with various icons, and system status information (11:59, ENG, 17-04-2024).

The screenshot shows the Salesforce Occasions Recently Viewed page. The top navigation bar includes links for Event Manager, Home, Recently Viewed, Home, and Occasions. The main content area displays a list of recently viewed occasions. A message at the top states "0 items • Updated a few seconds ago". Below this, there is a search bar and a table header with columns for "Event Name" and other details. A message at the bottom says "You haven't viewed any Occasions recently. Try switching list views." The bottom navigation bar includes a search bar, a ribbon with various icons, and system status information (11:58, ENG, 17-04-2024).

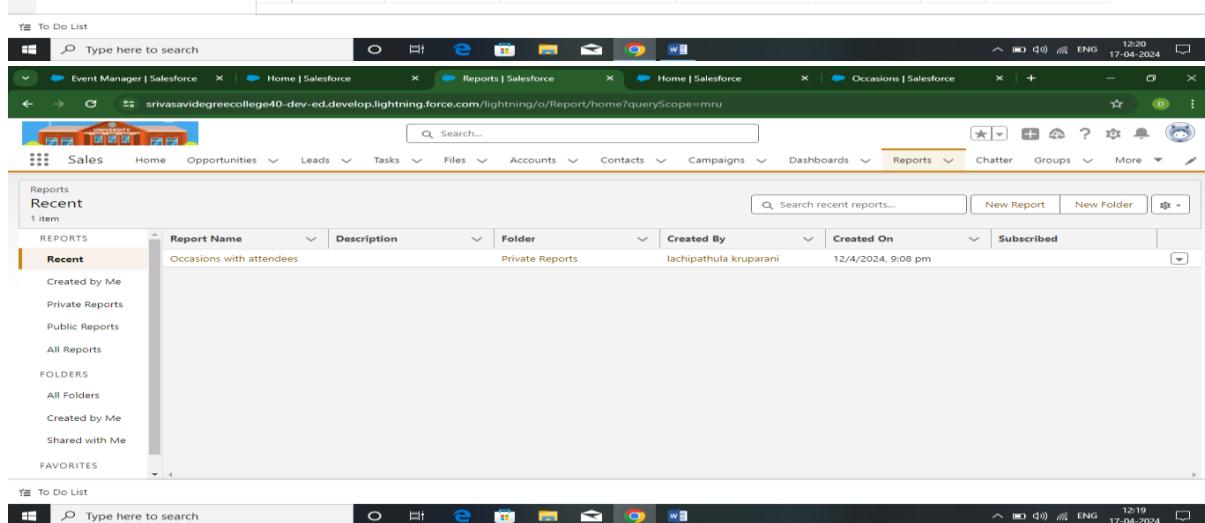
REPORT

Reports in Salesforce is a list of records that meet a particular criterion which gives an answer to a particular question these records are displayed as a table that can be filtered or grouped based on any field there are 4 types of report formats in Salesforce this is the most basic report format it just displays the row of records in a table with a grand total while easy to set up they cant be used to create groups of data or charts and also cannot be mainly used to generate a simple list or a list with a grand total it is almost commonly used type of report it allows grouping of rows of data view subtotal and create charts it is the most complex report format matrix reports summarize information in a grid format it allows records to be grouped by both columns and rows it can also be used to generate dashboards charts can be added to this type of reports.



The screenshot shows the Salesforce Report Builder interface. The top navigation bar includes tabs for Event Manager, Home, Report Builder, and Occasions. The main area is titled "New Accounts Report" under the "Accounts" section. On the left, a sidebar shows filters for Last Activity, Account Owner, Account Name, Billing State/Province, Type, Rating, and Last Modified Date. A message indicates "Previewing a limited number of records. Run the report to see everything." Below the filters is a table listing 12 accounts, each with a minus sign icon. The table columns are: Last Activity, Account Owner, Account Name, Billing State/Province, Type, Rating, and Last Modified Date. The data is as follows:

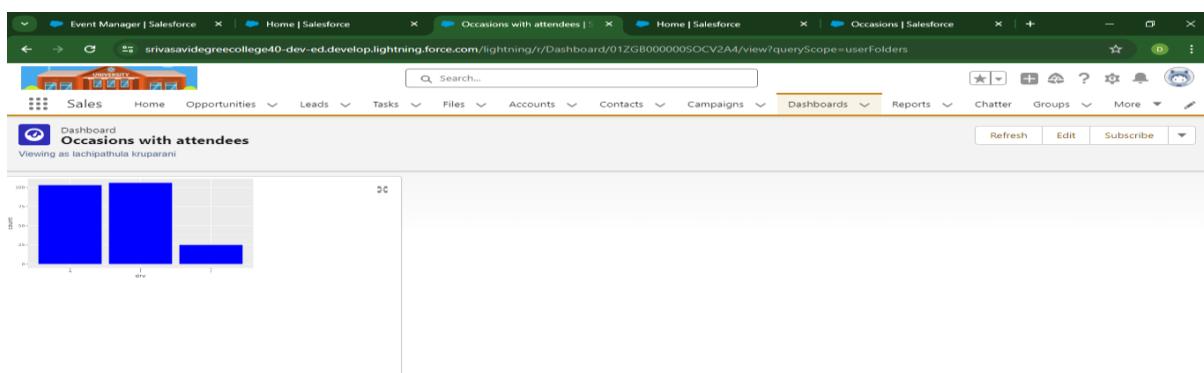
Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	- lachipathula kruparani	GenePoint	CA	Customer - Channel	Cold	17/02/2024
2	- lachipathula kruparani	United Oil & Gas, UK	UK	Customer - Direct	-	17/02/2024
3	- lachipathula kruparani	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	17/02/2024
4	- lachipathula kruparani	Edge Communications	TX	Customer - Direct	Hot	17/02/2024
5	- lachipathula kruparani	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	17/02/2024
6	- lachipathula kruparani	Pyramid Construction Inc.	-	Customer - Channel	-	17/02/2024
7	- lachipathula kruparani	Dickenson plc	KS	Customer - Channel	-	17/02/2024
8	- lachipathula kruparani	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	17/02/2024
9	- lachipathula kruparani	Express Logistics and Transport	OR	Customer - Channel	Cold	17/02/2024
10	- lachipathula kruparani	University of Arizona	AZ	Customer - Direct	Warm	17/02/2024
11	- lachipathula kruparani	United Oil & Gas Corp.	NY	Customer - Direct	Hot	17/02/2024
12	- lachipathula kruparani	sForce	CA	Customer - Direct	-	17/02/2024



The screenshot shows the Salesforce Reports page. The top navigation bar includes tabs for Event Manager, Home, Reports, and Occasions. The main area is titled "Recent" under the "Reports" section. On the left, a sidebar shows categories: Created by Me (Private Reports, Public Reports, All Reports), FOLDERS (All Folders), and FAVORITES. A table lists recent reports, with one entry visible: "Occasions with attendees" created by "lachipathula kruparani" on "12/04/2024, 9:08 pm". The table columns are: Report Name, Description, Folder, Created By, Created On, and Subscribed.

DASHBOARD

Dashboard provide more insights than reports as they combine the data from many reports and show a summarized result looking at many reports at a time gives the flexibility of combining the results from them quickly also summaries in dashboards help us decide on action plans quicker the dashboard can contain charts graphs and tabular data



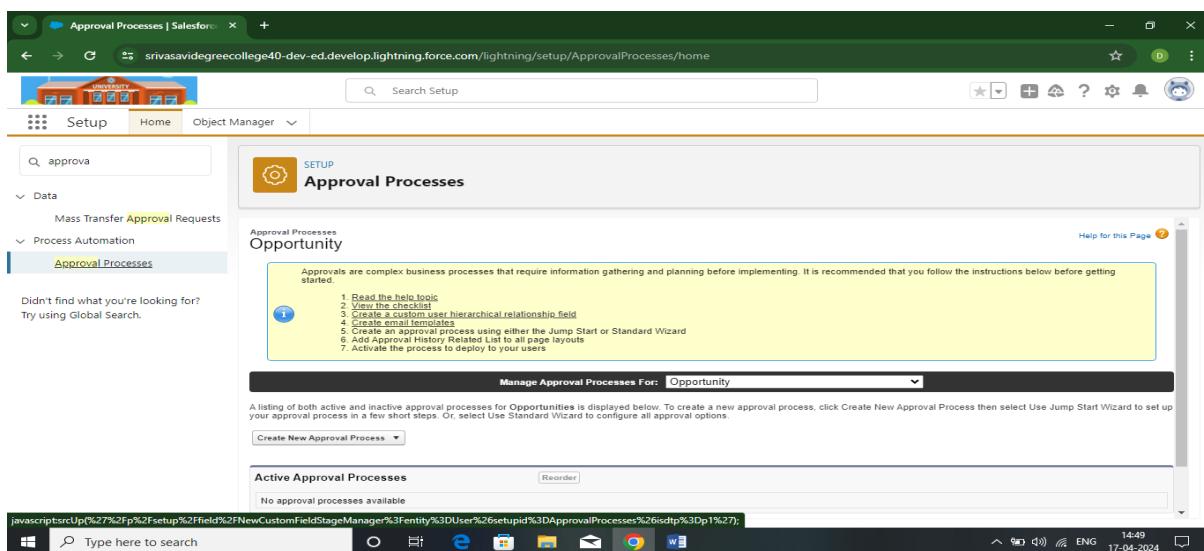
The screenshot shows the Salesforce Dashboards page. The top navigation bar includes Event Manager, Home, Dashboards, Home, and Occasions. The main content area displays a table of recent dashboards:

DASHBOARD	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Occurrences with attendees		attendees	lachipathula kraparani	12/4/2024, 9:12 pm	

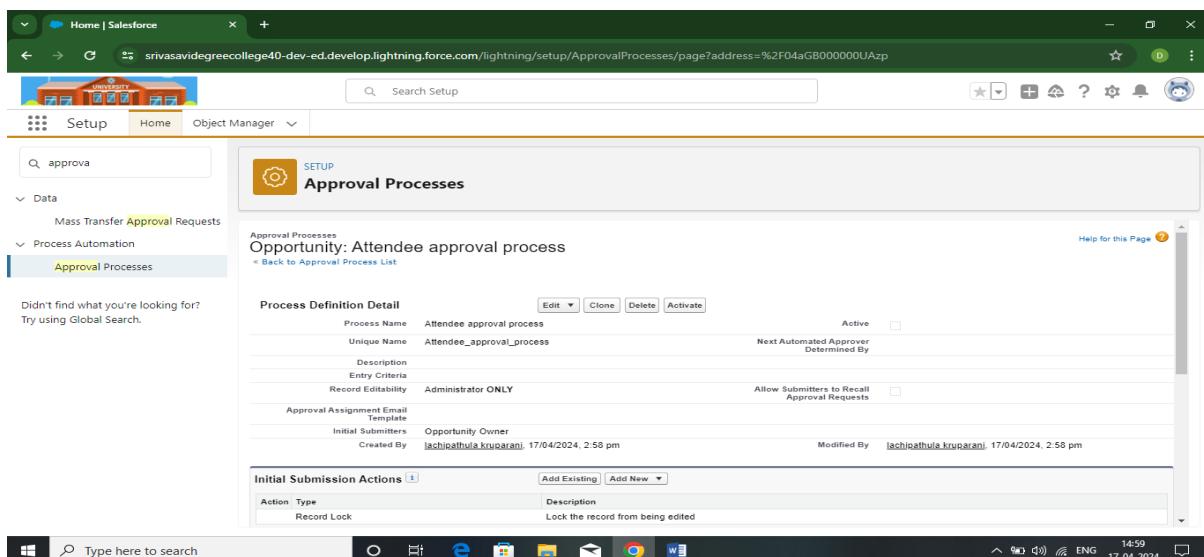
Below the table, there are sections for "Created by Me", "Private Dashboards", "All Dashboards", "Folders", "All Folders", "Created by Me", "Shared with Me", and "Favorites".

APPROVAL PROCESS

The approval process in Salesforce is a powerful tool that allows you to automate and streamline the approval of records such as opportunity leads cases and custom object it is a workflow process that is triggered when a record meets certain criteria and requires approval from one or more approvers before it can be moved forward in the sale process.



This screenshot shows the 'Approval Processes' page for the 'Opportunity' object in Salesforce. The page title is 'Approval Processes' under the 'SETUP' tab. A sidebar on the left includes sections for 'Data' (Mass Transfer Approval Requests, Process Automation, Approval Processes), 'Process Automation' (Approval Processes), and a search bar. The main content area displays a help section titled 'Approvals are complex business processes...' with steps 1 through 7. Below this is a section titled 'Manage Approval Processes For: Opportunity' with a button 'Create New Approval Process'. A table titled 'Active Approval Processes' shows no results. The status bar at the bottom indicates the URL as 'srivasavidegreecollege40-dev-ed.lightning.force.com/lightning/setup/ApprovalProcesses/home' and the date/time as '17-04-2024 14:49'.



This screenshot shows a specific approval process named 'Attendee_approval_process' for the 'Opportunity' object. The page title is 'Opportunity: Attendee approval process' under the 'SETUP' tab. The 'Process Definition Detail' section shows details like Unique Name ('Attendee_approval_process'), Record Editability ('Administrator ONLY'), and Initial Submitters ('Opportunity Owner'). The 'Initial Submission Actions' section includes an action 'Record Lock' with a description 'Lock the record from being edited'. The status bar at the bottom indicates the URL as 'srivasavidegreecollege40-dev-ed.lightning.force.com/lightning/setup/ApprovalProcesses/page?address=%2F04aGB000000UAzp' and the date/time as '17-04-2024 14:59'.

Email Alerts | Salesforce

srivasavidegreecollege40-dev-ed.develop.lightning.force.com/lightning/setup/WorkflowEmails/page?address=%2F01WGB000000UY3v%2Fe%3Fr?url%3D%252F04aGB0000...

Setup Home Service Setup Assistant Commerce Setup Assistant Multi-Factor Authentication Assistant Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer Sales Cloud Everywhere ADMINISTRATION > Users > Data

Quick Find Search Setup Object Manager

SETUP Email Alerts

Edit Email Alert Confrimed Cancel

Create an email alert to associate with one or more workflow rules, approval processes, or entitlement processes. When changing an email alert, any modifications will apply to all rules, approvals, or entitlement processes associated with it.

Help for this Page

Email Alert Edit Save Save & New Cancel

Edit Email Alert

Description: Confrimed_Cancel

Unique Name: Confrimed_Cancel

Object: Opportunity

Email Template: Appointment for Unauthenticated

Protected Component:

Recipient Type: User

Recipients:

Available Recipients: User: Integration User, User: Rahul Sharma, User: lachipathula kruparani, User: sanjay Gupta

Selected Recipients: User: Integration User, User: Rahul Sharma, User: lachipathula kruparani, User: sanjay Gupta

Type here to search

15:01 ENG 17-04-2024

Approval Processes | Salesforce

srivasavidegreecollege40-dev-ed.develop.lightning.force.com/lightning/setup/ApprovalProcesses/page?address=%2Fp%2Fprocess%2FProcessDefinitionEntityLock%3Fptid%3...

Setup Home Object Manager

Workflow Rules > User Interface > Custom Code > Development > Scale > Environments > User Engagement > Integrations > Notification Builder > Offline

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

Attendee approval process Final Approval Record Lock

Help for this Page

Choose Final Approval Record Locking Behavior

Lock the record from being edited

Unlock the record for editing

Save Cancel

https://srivasavidegreecollege40-dev-ed.develop.my.salesforce.com/one/one.app#/alohaRedirect/p/process/ProcessDefinitionEntityLock?ptid=04cG8000001QRrM&retURL=%2F04aGB000000UAzp&sctp=p

Type here to search

15:02 ENG 17-04-2024