



EVENT MANAGEMENT SYSTEM USING SALESFORCE



Beyond Knowledge

SALESFORCE NAAN MUDHALVAN PROJECT REPORT

Submitted By

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*in partial fulfilment for the award of the
degree of*

BACHELOR OF ENGINEERING
in

COMPUTER SCIENCE AND BUSINESS SYSTEMS

**KNOWLEDGE INSTITUTE OF
TECHNOLOGY,
SALEM-637504**

BONAFIDE CERTIFICATE

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ACKNOWLEDGEMENT

At the outset, we express our heartfelt gratitude to **GOD**, who has been our strength to bring this project to light.

At this pleasing moment of having successfully completed our project, we wish to convey our sincere thanks and gratitude to our beloved president **Mr. C. Balakrishnan**, who has provided all the facilities to us.

We would like to convey our sincere thanks to our beloved Principal **Dr. PSS. Srinivasan**, for forwarding us to do our project and offering adequate duration in completing our project.

We express our sincere thanks to our Head of the Department **Dr. M. Ramkumar**, Department of Computer Science and Business Systems for fostering the excellent academic climate in the Department.

We express our pronounced sense of thanks with deepest respect and gratitude to our Faculty Mentor **Mr. B. Venkata ramanen**, Department of Computer Science and Engineering for their valuable and precious guidance and for having amicable relation.

With deep sense of gratitude, we extend our earnest and sincere thanks to our SPOC **Mr. T. Karthikeyan**, Assistant Professor, Department of Computer Science and Engineering for his guidance and encouragement during this project.

We would also like express our thanks to all the faculty members of our Department, friends and students who helped us directly and indirectly in all aspects of the project work to get completed successfully.

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1.INTRODUCTION

Salesforce, a leading cloud-based Customer Relationship Management (CRM) platform, is a pivotal tool for organizations to manage customer data, optimize sales processes, and elevate customer interactions. Its multifaceted features include Sales Cloud, which enhances sales management through lead tracking, opportunity management, and seamless email integration. Service Cloud focuses on exceptional customer support, featuring case management, knowledge base development, and multi-channel support. Marketing Cloud empowers businesses with marketing automation, email campaigns, social media engagement, and in-depth analytics. Salesforce's hallmark is its customizability, allowing businesses to tailor the platform to meet specific requirements, while robust integration capabilities facilitate seamless connections with other business applications.

The platform equips businesses with powerful reporting and analytics tools, enabling data-driven decisions and insightful, customized reports and dashboards. Salesforce ensures mobile accessibility, enabling users to stay connected and productive while on the move. A paramount emphasis on data security and compliance guarantees data protection and privacy. Whether you're a small start-up or a large enterprise, Salesforce offers scalability to accommodate your evolving needs.

Through Salesforce, organizations foster improved customer relationships, increased sales efficiency, and superior customer support. It empowers businesses to make data-driven decisions, streamline operations, and create impactful, targeted marketing campaigns. This introduction encapsulates Salesforce's capabilities and benefits, offering a concise overview for your project document, allowing for a better understanding of how the platform can contribute to your specific project goals.

2.PROJECT SPECIFICATIONS

2.1 Project Goal

The goal of this project is to creating and maintaining an event. This process spans from the very beginning of planning all the way to post-event strategizing. At the start, an event manager makes planning decisions, such as the time, location, and theme of their event. During an event, event managers oversee the event live and make sure things run smoothly. After an event, event managers are tasked with reviewing event data, submitting KPI and ROI findings, and staying on the ball for any post-event offerings.

All different branches of planning go into event management, including various types of sourcing, designing, regulation checks, and on-site management. In event management, you could be in the process of creating a conference, a product launch, an internal sales kick-off, or even a wedding. Really, any event that requires considerable planning and execution is event management.

Project Scope

- **Occasion Management:**
 1. Create a custom object for "Occasions" to track event details.
 2. Capture event name, date, time, location, description, and associated event services.
 3. Implement record types for different types of events (e.g., conferences, seminars, workshops).
 4. Link occasions to attendees, speakers, and vendors.

- **Attendee Management:**

1. Create a custom object for "Attendees" to manage event participants.
2. Capture attendee details, contact information, and registration status.
3. Allow attendees to register for events and manage their registration status.

- **Speaker Management:**

1. Create a custom object for "Speakers" to manage event presenters.
2. Capture speaker details, bio, contact information, and their assigned events.
3. Enable speakers to submit presentation proposals and track their acceptance status.

- **Vendor Management:**

1. Create a custom object for "Vendors" to handle event service providers.
2. Capture vendor details, services offered, and contract information.
3. Associate vendors with specific events and manage vendor contracts.

- **Event Services:**

1. Create a custom object for "Event Services" to define services offered at events.
2. Include details on service type, cost, and availability.
3. Link services to occasions and vendors.

- **Profile Management:**

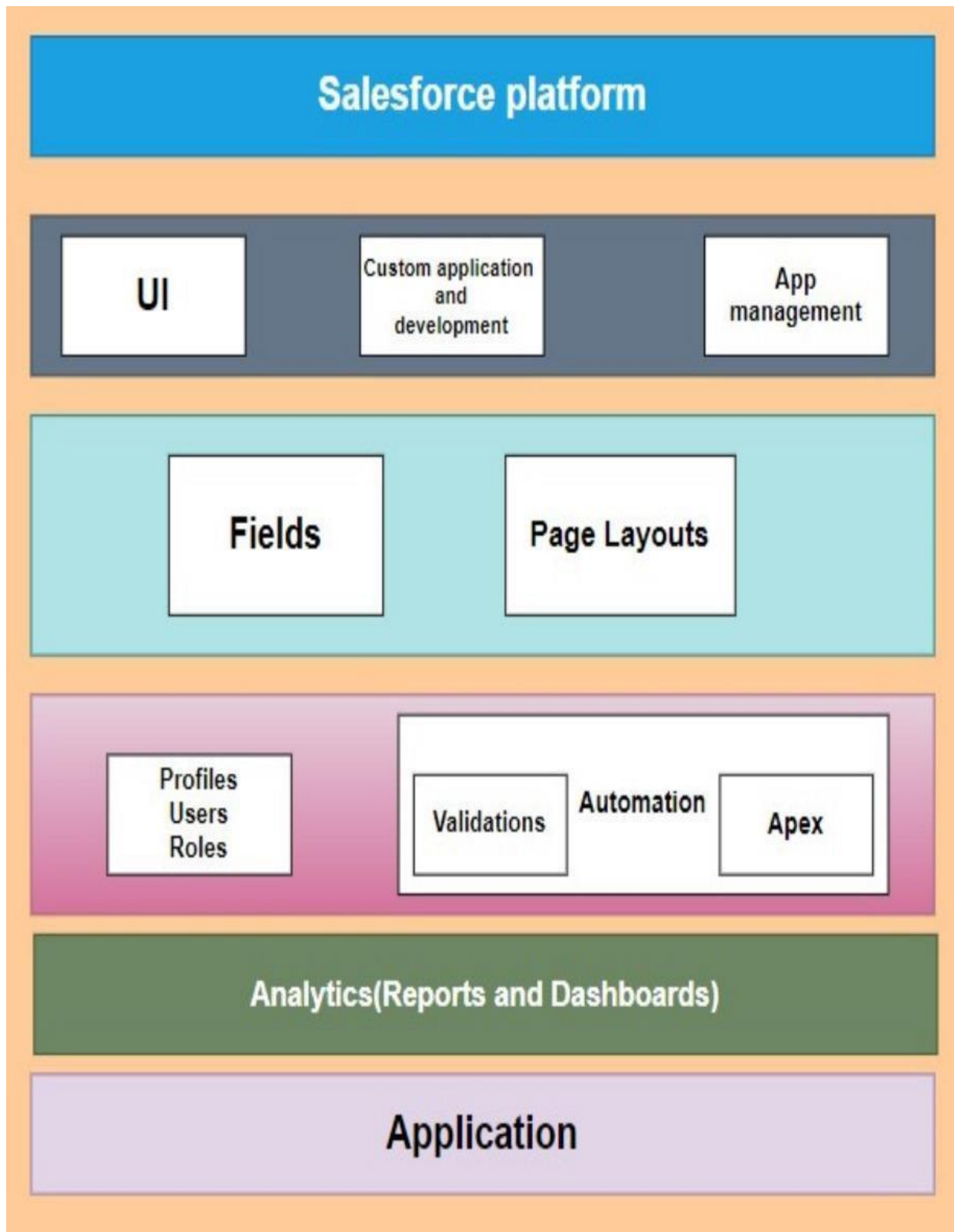
1. Use Salesforce's built-in User and Profile management to control access.
2. Define profiles for different user roles (admin, event manager, attendee, speaker, vendor).
3. Implement record sharing rules and role hierarchies to manage data access.

- **Reports and Dashboards:**

1. Create custom reports to track event registration, attendance, and financials.

2. Build dashboards to provide at-a-glance insights into event performance.
3. Include graphical representations of key event metrics such as registration counts, revenue, and attendee demographics.

1.1 Technical Requirements



1.1 Functional Requirements

- **Event Creation:**

1. Create events using custom objects in Salesforce, capturing event details like name, date, location, and description.
2. Associate speakers, vendors, and event services with each event using lookup relationships.
3. Set event capacity and manage its status.

- **Attendee Management:**

1. Maintain attendee records as Contacts or a custom object, tracking their registration status for various events.
2. Use Salesforce Communities to enable self-service registration and profile management for attendees.

- **Speaker and Vendor Management:**

1. Manage speakers and vendors as custom objects with associated information.
2. Link speakers and vendors to events and track their availability.

- **Event Services:**

1. Create records for event services and associate them with specific events and vendors.

- **Security and Access Control:**

1. Define user profiles and permission sets to control access to different parts of the system.
2. Ensure data security and privacy compliance by setting up sharing rules and field-level security.

- **Reporting and Dashboards:**

1. Build reports and dashboards to gain insights into event performance, attendee registrations, speaker availability, and vendor services.

2.PREPARATION DATA MODELING

Objects:

Salesforce objects are database tables that permit you to store data that is specific to an organization. It consists of fields (columns) and records (rows).

Salesforce objects are of two types:

1. Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

2. 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 provide a structure for sharing data.

In This Application We Use 5 Custom Objects:

1. Occasion
2. Attendee
3. Speaker
4. Vendors
5. Event Service

1) Create A Custom Object for Enquiry:

1. To Navigate to Setup page

To create an object:

From the setup page? Click on Object Manager? Click on Create? Click on Custom Object.

2. On Custom object defining page:

Enter the label name (lead), plural label name?, Record name(Customer Name)

3. Click on Allow reports, Allow search?
4. Save

Setup Home | Service Setup Assistant | Commerce Setup Center | Multi-Factor Authentication Assistant | Hyperforce Assistant | Release Updates | Lightning Experience Transition Assistant | Salesforce Mobile App | Lightning Usage | Optimizer | ADMINISTRATION | > Users | > Data | > Email | PLATFORM TOOLS | > Subscription Management

Search Setup

Quick Find

Setup Tabs

Edit Custom Object Tab
Occasions

Fill in the fields below to define the custom tab.

Custom Tab Definition Edit

Custom Object Tab Information ! Required Information

Tab Label: Occasions
Object: Occasion
Tab Style: Jewel

(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

javascript:srcUp(%27%2F01r3j000000XOfs%2Fe%3FretURL%3D%252Fsetup%252Fui%252Fcustomtabs.jsp%253Fsetupid%253DCustomTabs%2526retURL%253D%252Fsetup%252FHome%2526applayout%253Dsetup%2526tour%...

Setup Home | Service Setup Assistant | Commerce Setup Center | Multi-Factor Authentication Assistant | Hyperforce Assistant | Release Updates | Lightning Experience Transition Assistant | Salesforce Mobile App | Lightning Usage | Optimizer | ADMINISTRATION | > Users | > Data | > Email | PLATFORM TOOLS | > Subscription Management | > Apps

Search Setup

Quick Find

Setup Tabs

New Custom Object Tab

Step 1. Enter the Details Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object now](#)
Object: Attendee
Tab Style: Diamond

(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:

Next Cancel

Search Setup

Setup

Home

Object Manager

tabs

User Interface

Rename Tabs and Labels

Tabs

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

SETUP

Tabs

New Custom Object Tab

Help for this Page

Step 1. Enter the Details

Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object now](#)

ObjectSpeaker

Tab StyleBalls

(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

NextCancel

Search Setup

Setup

Home

Object Manager

tabs

User Interface

Rename Tabs and Labels

Tabs

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

SETUP

Tabs

New Custom Object Tab

Help for this Page

Step 1. Enter the Details

Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object now](#)

ObjectVendor

Tab StyleApple

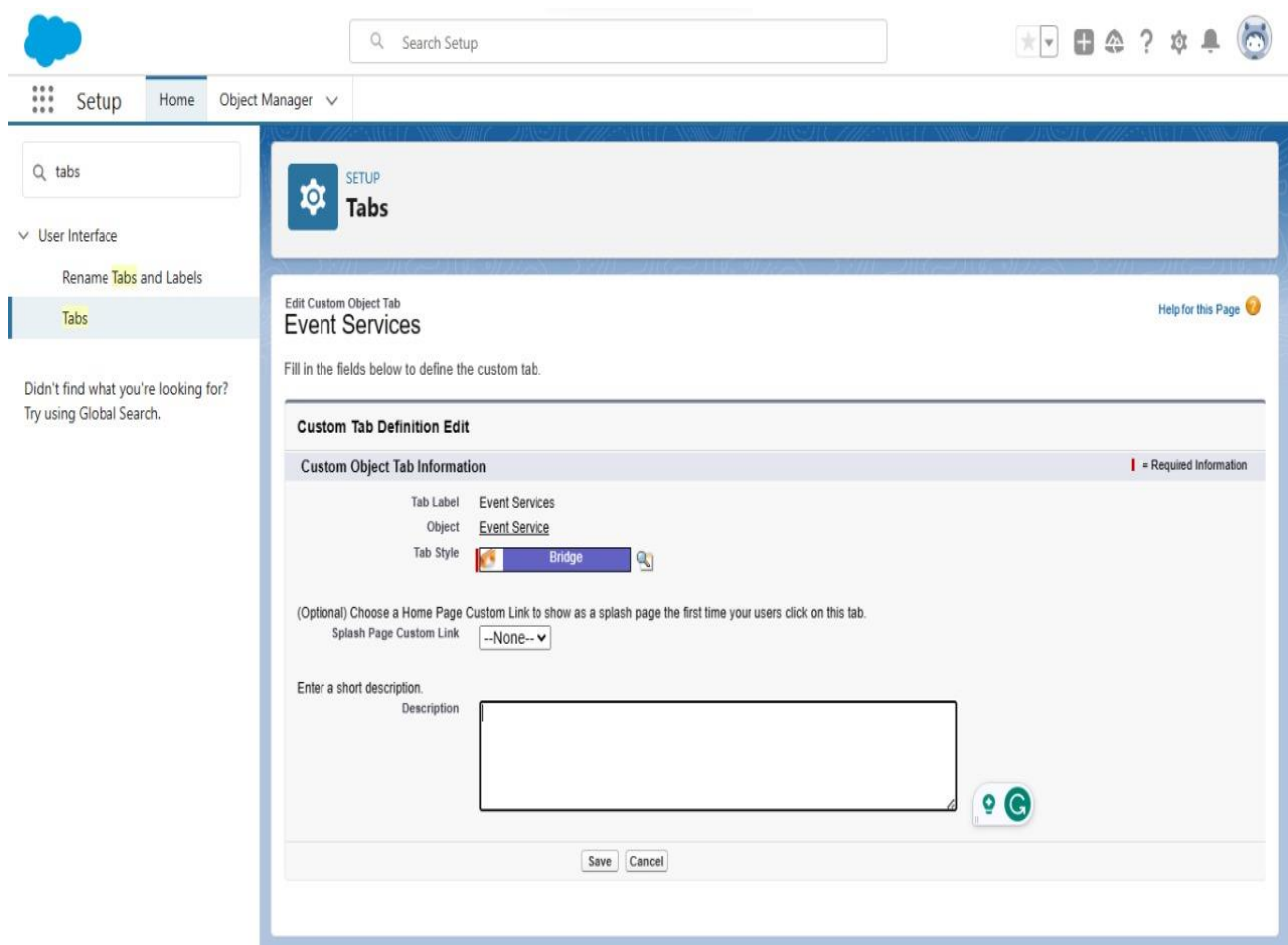
(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link--None--

Enter a short description.

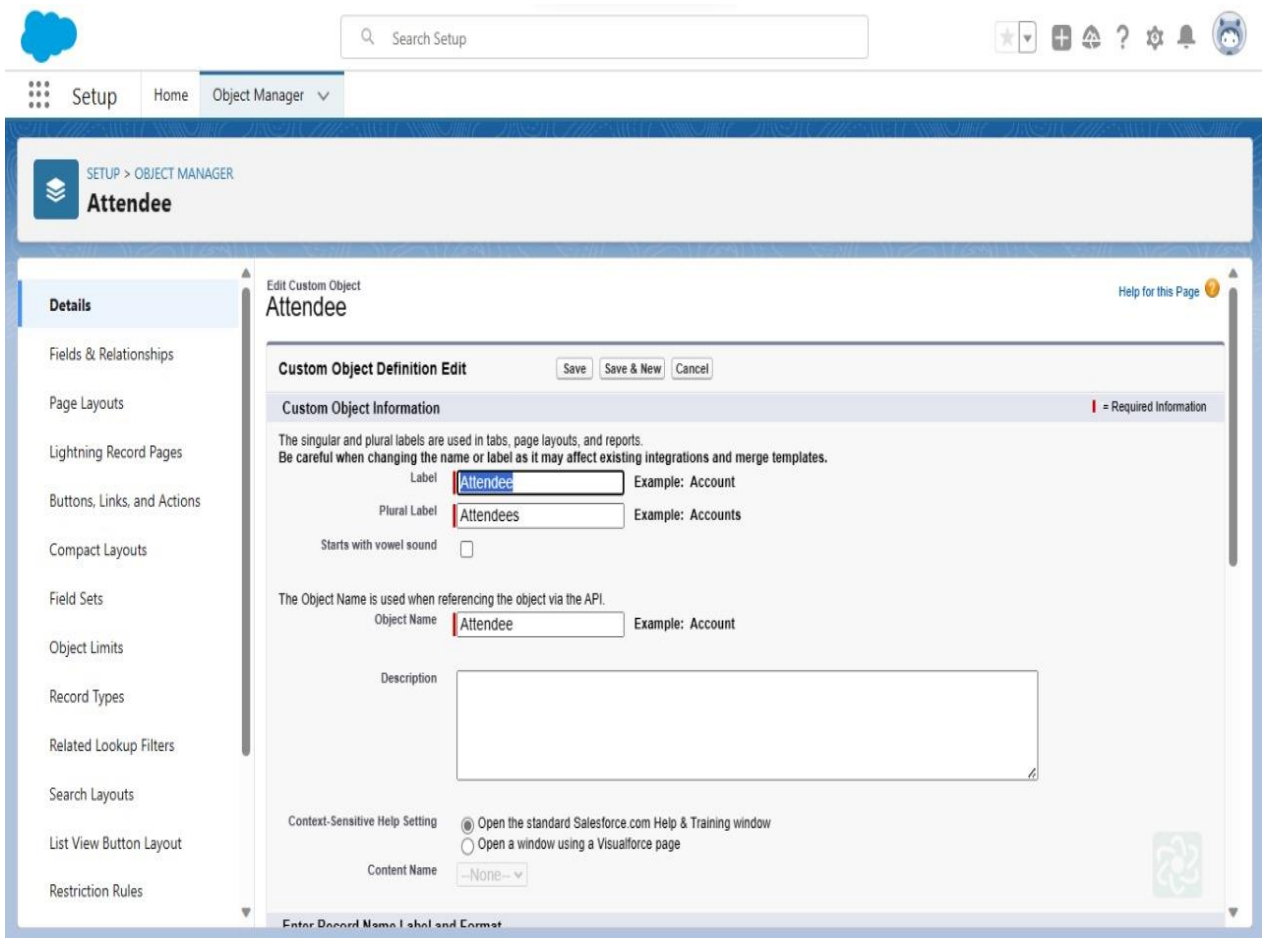
Description

NextCancel



2) Creation of Attendee Object

- 1) To create an object:
- 2) From the setup page ? Click on Object Manager ? Click on Create Custom Object.
- 3) Enter the label name? **Attendee**
- 4) Plural label name? **Attendee**
- 5) Record Name? Property Name
- 6) click on Allow reports,
- 7) Allow search ?
- 8) Save



3) Creation of Speaker Object

- 1) To create an object:
- 2) From the setup page ? Click on Object Manager ? Click on Create Custom Object.
- 3) Enter the label name? **Speaker**
- 4) Plural label name? **Speakers**
- 5) Record Name? Property Name
- 6) click on Allow reports,
- 7) Allow search ?
- 8) Save

Setup Home Object Manager

Search Setup

SETUP New Custom Object

Help for this Page

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information Required Information

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

Label Speaker Example: Account

Plural Label Speakers Example: Accounts

Starts with vowel sound ☐

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

Object Name Speaker Example: Account

Description

Context-Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window ☐ Open a window using a Visualforce page

Content Name --None--

4) Creation of Vendors Object

- 1) To create an object:
- 2) From the setup page ? Click on Object Manager ? Click on Create Custom Object.
- 3) Enter the label name? **Vendors**
- 4) Plural label name? **Vendors**
- 5) Record Name? Property Name
- 6) click on Allow reports,
- 7) Allow search ?
- 8) Save

Setup | Home | **Object Manager** | New Custom Object

New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)

Custom Object Definition Edit [Save] [Save & New] [Cancel]

Custom Object Information ⓘ = Required Information

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

Label: Example: Account

Plural Label: Example: Accounts

Starts with vowel sound: ☐

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

Object Name: Example: Account


Description:

Context-Sensitive Help Setting: ☒ Open the standard Salesforce.com Help & Training window ☐ Open a window using a Visualforce page







Content Name:

5) Creation of Event Service Object

- 1) To create an object:
- 2) From the setup page ? Click on Object Manager ? Click on Create Custom Object.
- 3) Enter the label name? **Event Service**
- 4) Plural label name? **Event Service**
- 5) Record Name? Property Name
- 6) click on Allow reports,
- 7) Allow search ?
- 8) Save



Search Setup



SetupHomeObject Manager

SETUP

New Custom Object

Custom Object Definition Edit

SaveSave & NewCancel

Custom Object Information

Required Information

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

Label

Event Service

Example: Account

Plural Label

Event Services

Example: Accounts

Starts with vowel sound

☐

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

Object Name

Event_Service

Example: Account

Description

Context-Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window

☐ Open a window using a Visualforce page

Content Name

--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

Event Services Name

Example: Account Name

- **Tabs:**

Tabs in Salesforce help users view the information at a glance. It displays the data of objects and other web content in the application.

There are mainly 4 types of tabs:

1. **Standard Object Tabs:** Standard object tabs display data related to standard objects.

2. **Custom Object Tabs:** Custom object tabs display data related to custom objects. These tabs look and function just like standard tabs.

3. **Web Tabs:** Web Tabs display any external Web-based application or Web page in a Salesforce tab.

4. **Visualforce Tabs:** Visualforce Tabs display data from a Visualforce Page.

1) Creation of Occasion Tab

1) Go to setup page? type Tabs in Quick Find bar? click on tabs? New (under custom object tab)

2) Select Object(Property)? Select the tab style? Next (Add to profiles page) keep it as default? Next (Add to Custom App) keep it as default? Save

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links like 'Setup Home', 'Service Setup Assistant', 'Commerce Setup Center', 'Multi-Factor Authentication Assistant', 'Hyperforce Assistant', 'Release Updates', 'Lightning Experience Transition Assistant', 'Salesforce Mobile App', 'Lightning Usage', 'Optimizer', 'ADMINISTRATION' (with sub-links for Users, Data, Email), and 'PLATFORM TOOLS' (with a link for Subscription Management). The main content area is titled 'SETUP Tabs' and 'Edit Custom Object Tab Occasions'. It includes a 'Quick Find' bar and a 'Help for this Page' link. The 'Custom Tab Definition Edit' section contains a 'Custom Object Tab Information' table with fields for Tab Label (Occasions), Object (Occasion), and Tab Style (Jewel). Below this is a section for 'Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.' with a 'Splash Page Custom Link' dropdown set to '--None--'. There is also a 'Description' field with a text area. At the bottom are 'Save' and 'Cancel' buttons. A URL bar at the very bottom shows a complex Salesforce URL.

2) Creation of Attendee Tab

1) Go to setup page? type Tabs in Quick Find bar click on tabs? New (under custom object tab)

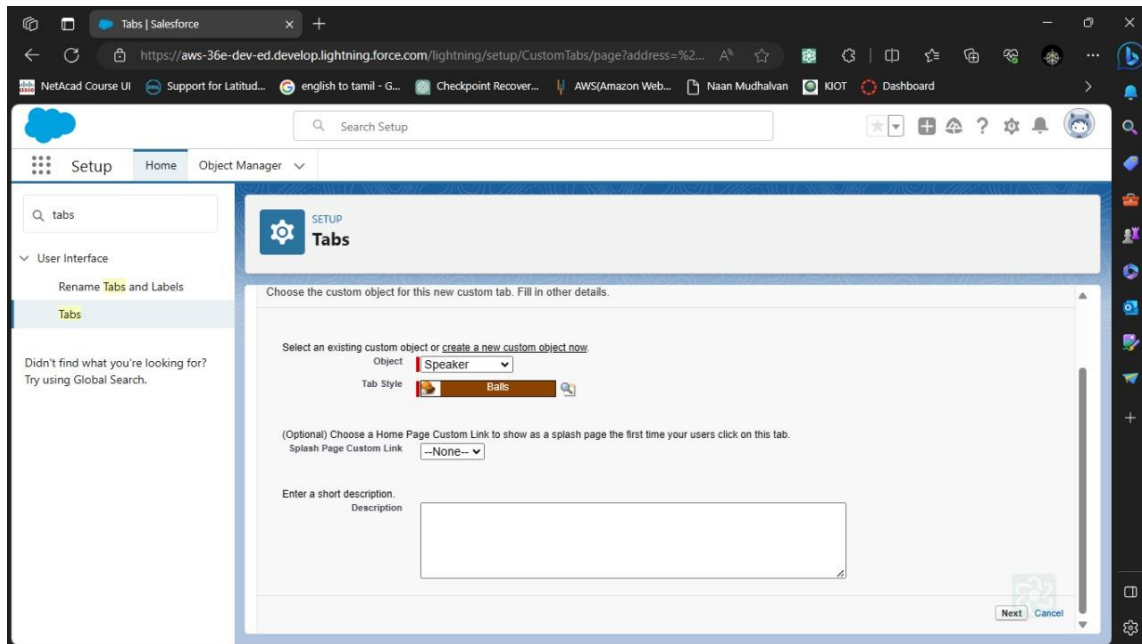
2) Select Object(Buy)? Select the tab style? Next (Add to profiles page) keep it as default? Next (Add to Custom App) keep it as default? Save

The screenshot shows the Salesforce Setup interface. On the left is a navigation menu with categories like Setup Home, Service Setup Assistant, Commerce Setup Center, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION (Users, Data, Email), and PLATFORM TOOLS (Subscription Management, Apps). The main content area is titled 'New Custom Object Tab' and is part of the 'Tabs' setup section. It shows 'Step 1 of 3: Enter the Details'. The instructions say 'Choose the custom object for this new custom tab. Fill in other details.' There are two options: 'Select an existing custom object' (with a dropdown menu showing 'Attendee') and 'create a new custom object now'. Below this, there's a 'Tab Style' dropdown showing 'Diamond' with a magnifying glass icon. An optional section asks to 'Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab', with a dropdown menu showing '--None--'. At the bottom, there's a text area for 'Enter a short description.' and 'Description'. 'Next' and 'Cancel' buttons are at the bottom right.

3) Creation of Speaker Tab

1) Go to setup page? type Tabs in Quick find bar? click on tabs? New (under custom object tab)

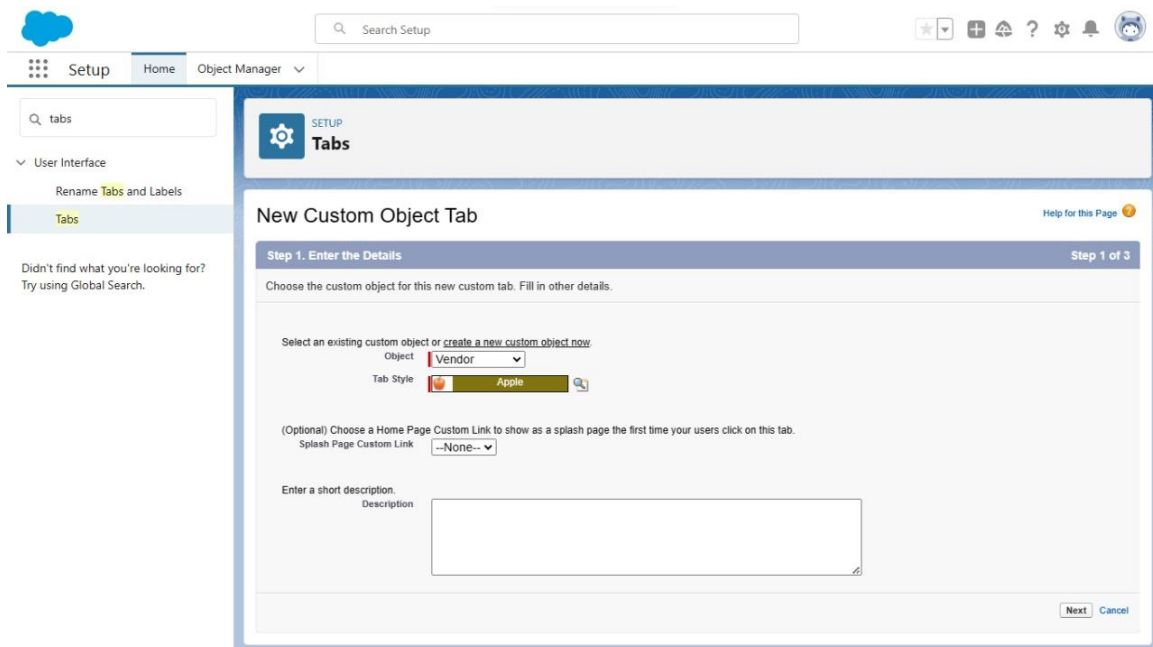
2) Select Object? Select the tab style? Next (Add to profiles page) keep it as default? Next (Add to Custom App) keep it as default? Save.



4) Creation of Vendors Tab

3) Go to setup page? type Tabs in Quick find bar? click on tabs? New (under custom object tab)

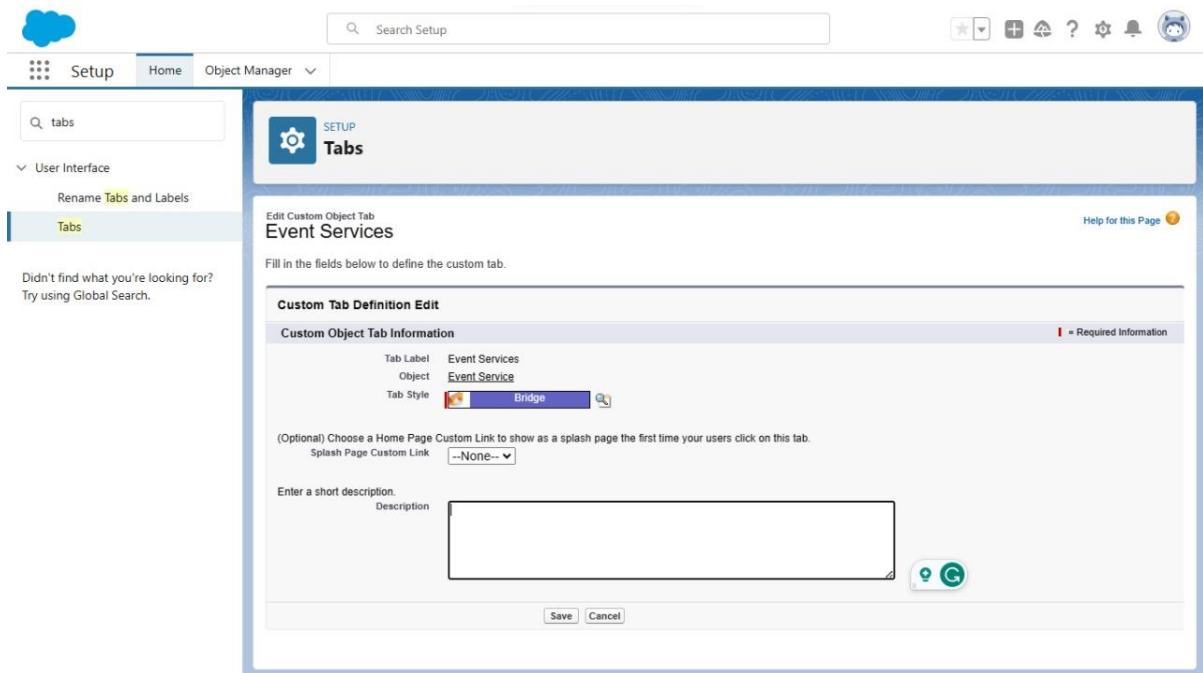
4) Select Object? Select the tab style? Next (Add to profiles page) keep it as default? Next (Add to Custom App) keep it as default? Save.



5) Creation of Event Service Tab

Go to setup page? type Tabs in Quick find bar? click on tabs? New (under custom object tab)

Select Object? Select the tab style? Next (Add to profiles page) keep it as default? Next (Add to Custom App) keep it as default? Save.



The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is open, and 'Tabs' is selected under 'User Interface'. The main content area is titled 'Edit Custom Object Tab' for 'Event Services'. It includes a 'Custom Tab Definition Edit' section with fields for 'Tab Label' (Event Services), 'Object' (Event Service), and 'Tab Style' (Bridge). There is also a 'Splash Page Custom Link' dropdown set to '--None--' and a 'Description' text area. At the bottom, there are 'Save' and 'Cancel' buttons.

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 simplest 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. Community, Call Centre, Content, Sales, Marketing, Salesforce Chatter, Site.com, and App Launcher are included in these apps. The description, logo, and label of a standard app cannot be altered.

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.

1. Click New Lightning App. Event Management as the App Name, then click Next

The screenshot shows the 'App Details & Branding' configuration screen in the Lightning App Builder. The left sidebar lists 'App Settings' with sub-items: 'App Details & Branding' (selected), 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles'. The main content area is titled 'App Details & Branding' and includes instructions: 'Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.' It contains two sections: 'App Details' and 'App Branding'. 'App Details' has fields for 'App Name' (filled with 'Property Management'), 'Developer Name' (filled with 'Property_Management'), and 'Description' (with a placeholder 'Enter a description...'). 'App Branding' has an 'Image' upload button, a 'Primary Color Hex Value' dropdown (set to '#0070C2'), and 'Org Theme Options' with a checkbox 'Use the app's image and color instead of the org's custom theme' (unchecked). At the bottom, an 'App Launcher Preview' shows a blue square with 'PM' and the text 'Property Management'.

2. Under App Options, leave the default selections and click Next.

3. Under Utility Items, leave as is and click Next.

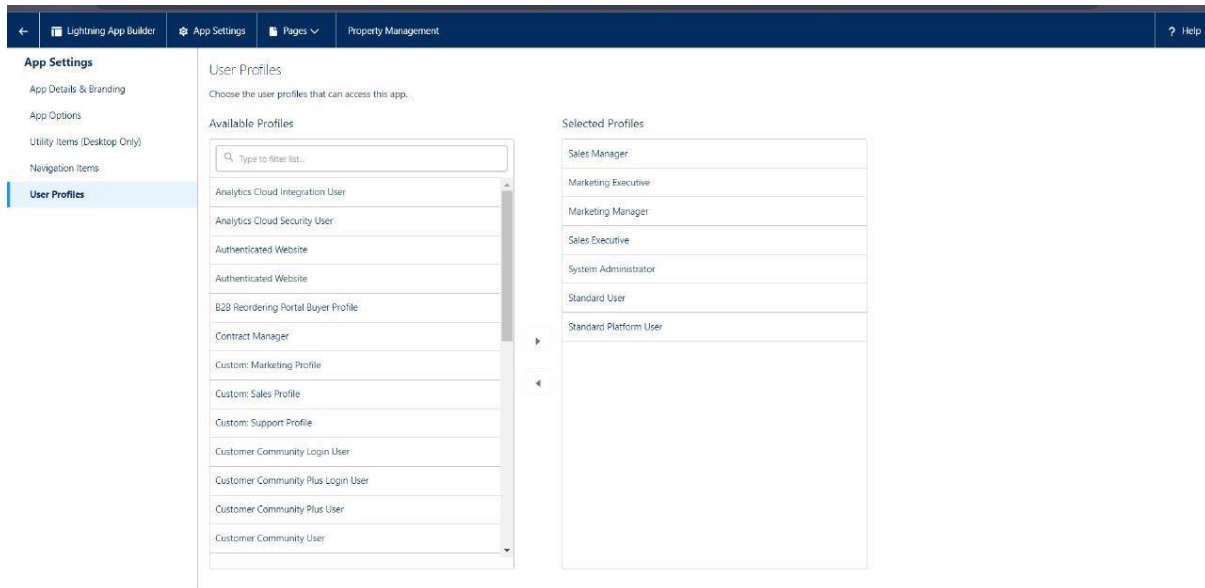
To Add Navigation Items:

Occasion, Pr, Loan, Report, Dashboard) Select the items from the search bar and move it using the arrow button ? Next.

The screenshot shows the 'Navigation Items' configuration screen in the Lightning App Builder. The left sidebar lists 'App Settings' with sub-items: 'App Details & Branding', 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items' (selected), and 'User Profiles'. The main content area is titled 'Navigation Items' and includes instructions: 'Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.' It contains two sections: 'Available Items' and 'Selected Items'. 'Available Items' has a search bar and a list of items including 'Accounts', 'Alert Settings', 'All Sites', 'Alternative Payment Methods', 'Analytics', 'App Launcher', 'Appointment Categories', 'Appointment Invitations', 'Approval Requests', 'Asset Action Sources', 'Asset Actions', 'Asset State Periods', and 'Assets'. 'Selected Items' has a list of items including 'Properties', 'Loans', 'Reports', 'Dashboards', and 'Enquiries'. Arrows between the two lists allow for moving items.

5. To Add User Profiles:

(System Administrator, Salesforce platform user, Standard User) Search profiles in search bar ? click on the arrow button ? save & finish.



6. To verify your changes, click the App Launcher, type Property Management and select the Property Management app.

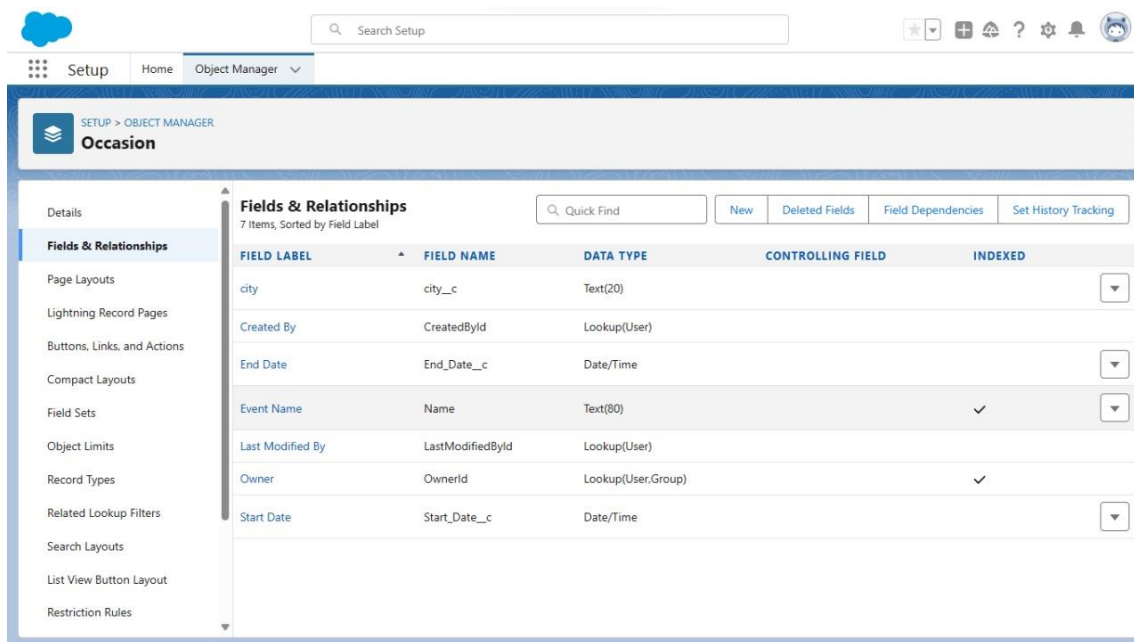
Fields and Relationship:

Fields in Salesforce represent what the columns represent in relational databases. It can store data values which are required for a particular object in a record.

There are 2 types of fields in 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.

Custom fields: The Custom fields which are added by the administrator / developer to meet the business requirements of any organization. They may or may not be required.



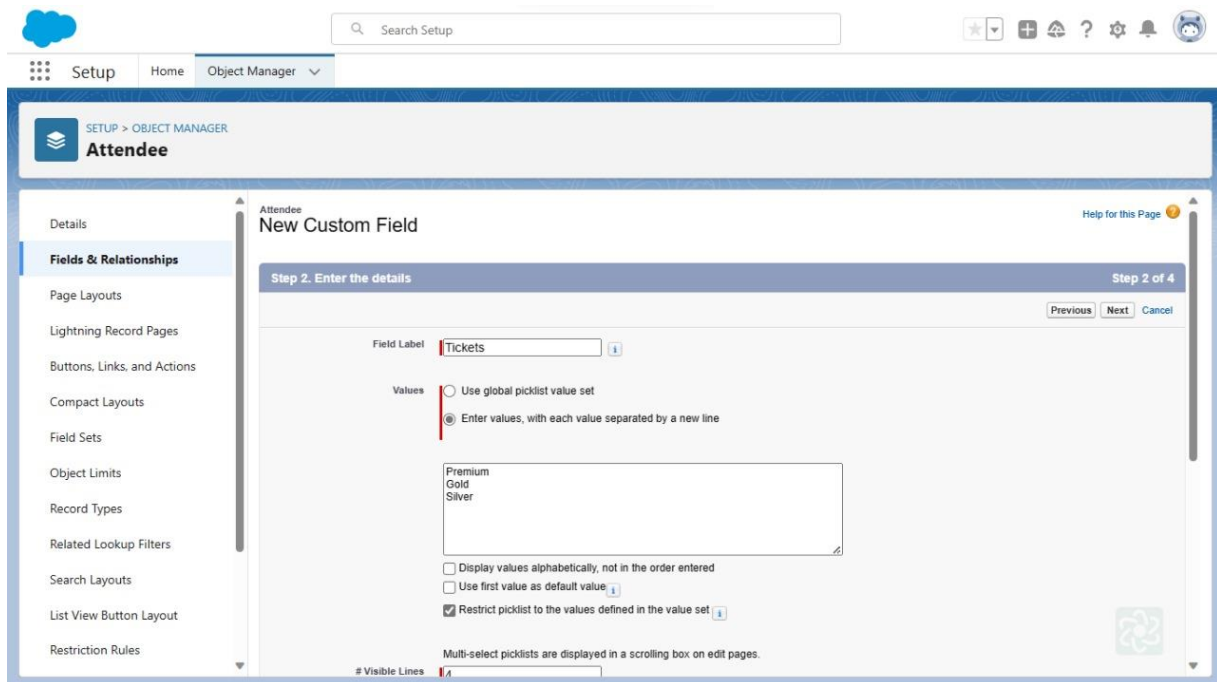
4. USERS & DATA SECURITY

Profile

A profile is a group/collection of settings and permissions 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.

1) Create A Custom Profile

1. From setup, enter profiles in Quick Find box
2. Select profiles (Attendee).
3. Click clone.
4. For Profile, enter Buyer.
5. Click save.



2) Create A Custom Profile-2

1. Create a profile with the profile name as “Attendee”.
2. From setup, enter profiles in Quick Find box
3. Select profiles (Standard user).
4. Click clone.

Setup

Home

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

Attendee

New Relationship

Help for this Page

Step 6. Add custom related lists

Step 6 of 6

Field Label

Event Name

Data Type

Master-Detail

Field Name

Event_Name

Description

Specify the title that the related list will have in all of the layouts associated with the parent.

Related List Label

Attendees

These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.

Add Related List

Page Layout Name

☒ Occasion Layout

☒ Append related list to users' existing personal customizations

Previous

Save & New

Save

Cancel

Setup

Home

Object Manager

Users

Profiles

Didn't find what you're looking for?

Try using Global Search.

Profiles

Basic Access

Data Administration

	Read	Create	Edit	Delete	View All	Modify All
Attendees	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Brokers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Childs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Event Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Occasions	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Basic Access

Data Administration

	Read	Create	Edit	Delete	View All	Modify All
Parents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Properties	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Speakers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Vendors	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input 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

Must include alpha and numeric characters

javascript:srcUp(%27%2F_ui%2Fperms%2Fu%2Fprofile%2FProfileClone%2Fe%3Fid%3D00e5j000004ftL%26setupid%3DEnhancedProfiles%26retURL%3D%252F00e%253Ffc%253D0085j000000WjDD7%2526rolodexIndex%253D18%252...

USER

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

1)To Create A User

1. Go to setup? type users in quick find box? select users? click New user.

2.Click New User.

First Name: Sanjay

Last Name: Gupta

Alias: Sanjeev

Email: provide your personal email id for future reference

Username: sanjaygupta@thesmartbridge.com

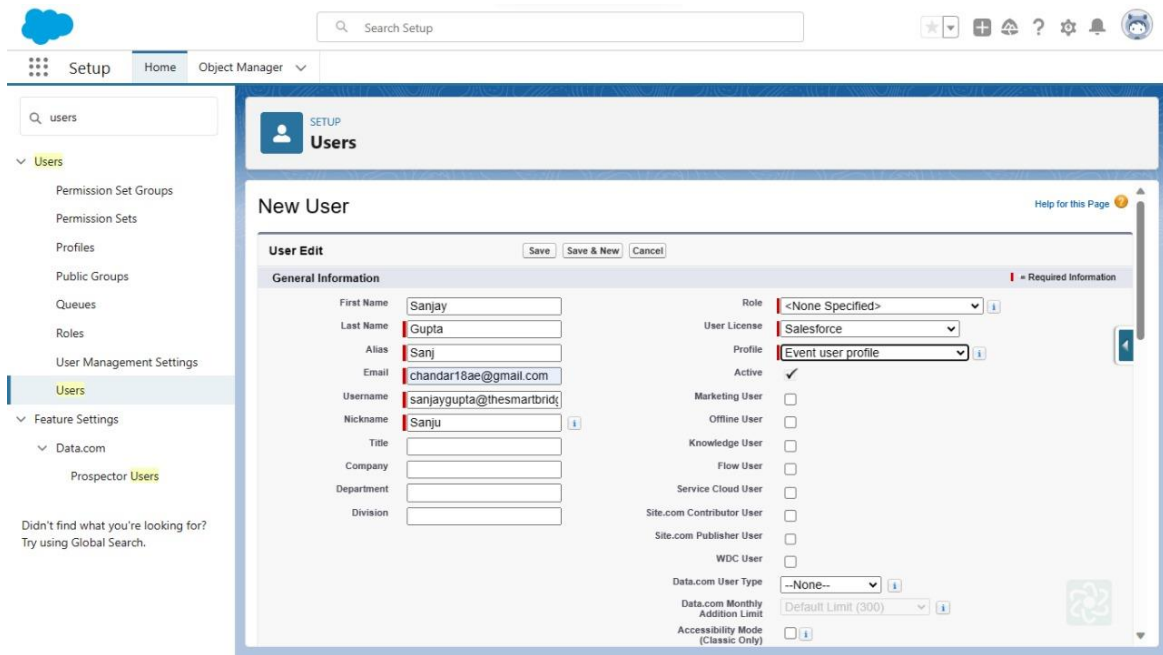
Nickname: Sanjay

Role: leave it as default

User License: Salesforce

Profile: Attendee and Click Save Button.

8.Click save



8. Click save

Permission Set

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. Users can have only one profile but, depending on the Salesforce edition, they can have multiple permission sets.

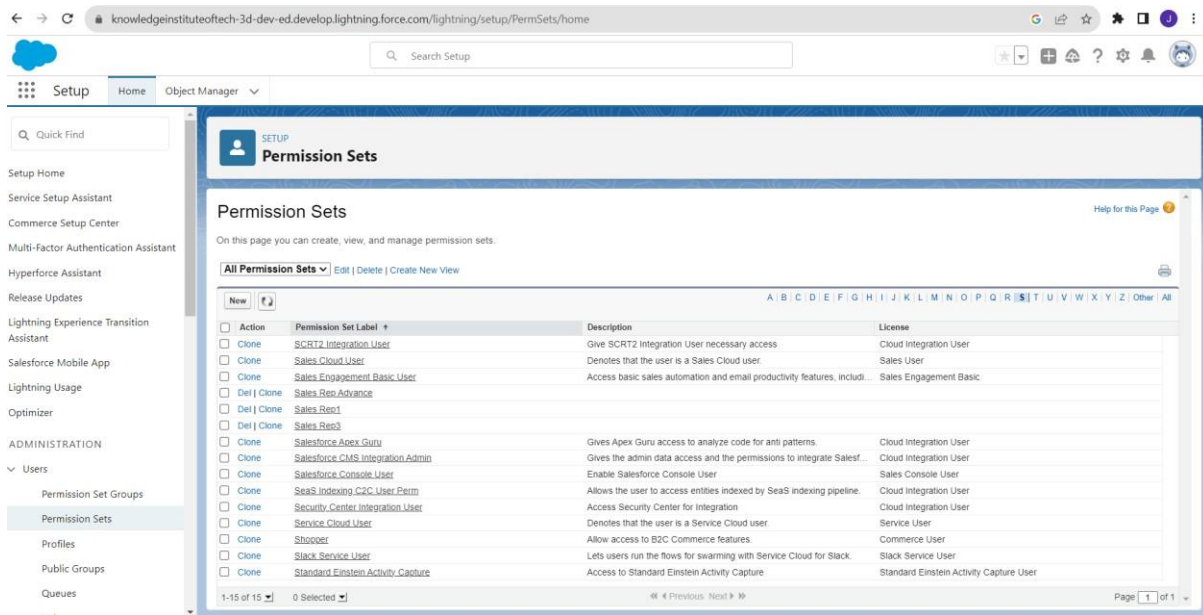
1. Go to setup ? type “permission sets” in quick search ? select permission sets ? New
2. Enter the label name (Sales Rep Advance)? save
3. Select Object settings
4. Search object property and select property object. and click Edit button
5. In Object Permission we give View all permission. And click save button

Repeat 4th and 5th steps for Enquiry and Loan objects.

After saving the permission click on the Manage assignment

6. Now click on the Add Assignment

7. Now select the user (sunny) and click on next & assign.



USER ADOPTION

User adoption is the process of enabling users to use the full capabilities of the Salesforce CRM. Here are some strategies to increase Salesforce user adoption:

- Offer adequate training: Provide online training resources, remote support, and integrate the platform with other tools.
- Create a Salesforce training folder: Create strategies around onboarding, training, and continued development.
- Define adoption metrics: Plan which metrics you want to track and how you'll track them.

Some important metrics include:

- Premium
- Gold
- Silver
- Confirm
- Not Confirmed
- Pending

5.REPORTS & DASHBOARD

Reports

A report is a list of records that meet the criteria you define. It's displayed in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

1)Create A Report

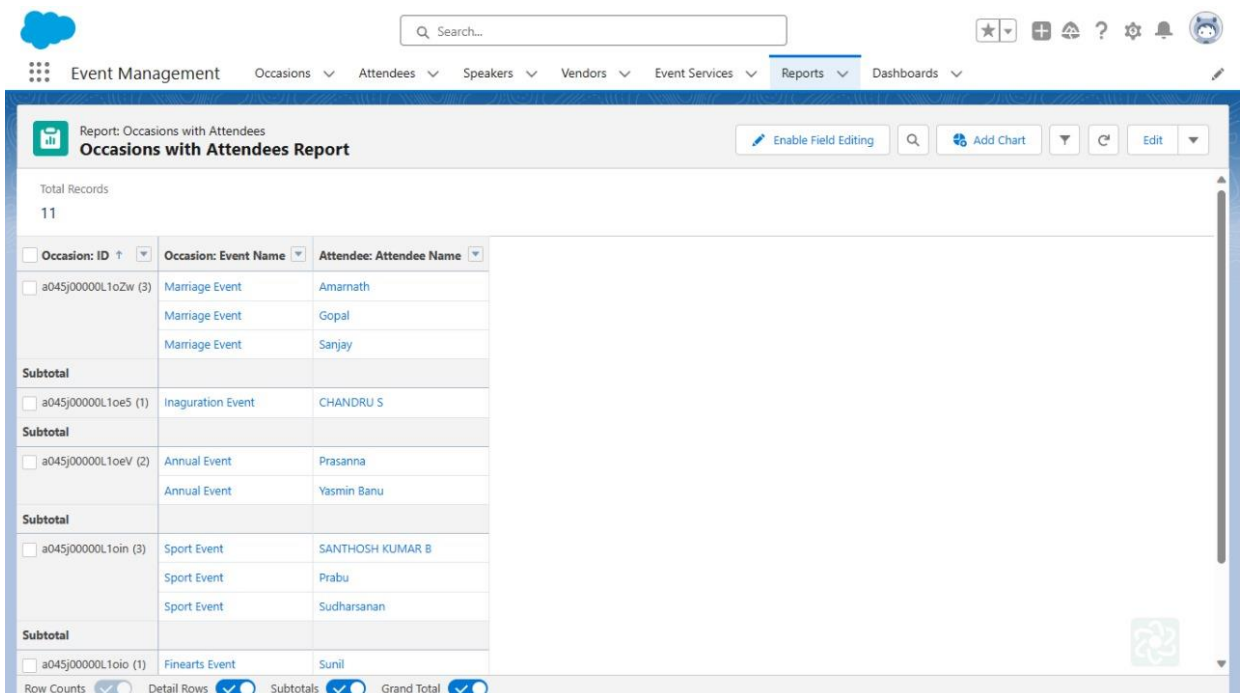
1)Go to the app ? click on the reports tab

2)Click New Report

3)Select report type from category or from report type panel or from search panel (properties with customer name)? click on start report.

4)Customize your report, add fields like event name, attendee name. Click on save& run (Properties with Customer Name Report)

5)Create Report for following Condition



The screenshot displays the 'Event Management' application interface. At the top, there is a navigation bar with tabs for 'Event Management', 'Occasions', 'Attendees', 'Speakers', 'Vendors', 'Event Services', 'Reports', and 'Dashboards'. The 'Reports' tab is selected. Below the navigation bar, a search bar and several utility icons are visible. The main content area shows a report titled 'Report: Occasions with Attendees' and 'Occasions with Attendees Report'. It indicates 'Total Records: 11'. The report is presented as a table with columns for 'Occasion: ID', 'Occasion: Event Name', and 'Attendee: Attendee Name'. The table contains several rows, including subtotals for different event types like 'Marriage Event', 'Inaguration Event', 'Annual Event', 'Sport Event', and 'Finearts Event'. At the bottom, there are checkboxes for 'Row Counts', 'Detail Rows', 'Subtotals', and 'Grand Total', all of which are checked.

Occasion: ID	Occasion: Event Name	Attendee: Attendee Name
a045j00000L1oZw (3)	Marriage Event	Amarnath
	Marriage Event	Gopal
	Marriage Event	Sanjay
Subtotal		
a045j00000L1oe5 (1)	Inaguration Event	CHANDRU S
Subtotal		
a045j00000L1oeV (2)	Annual Event	Prasanna
	Annual Event	Yasmin Banu
Subtotal		
a045j00000L1oin (3)	Sport Event	SANTHOSH KUMAR B
	Sport Event	Prabu
	Sport Event	Sudharsanan
Subtotal		
a045j00000L1oio (1)	Finearts Event	Sunil

Event Management
Occasions
Attendees
Speakers
Vendors
Event Services
Reports
Dashboards

Occasions
Recently Viewed
0 items • Updated a few seconds ago

Occasion "Marriage Event" was deleted. [Undo](#)

New Import Change Owner

☐ Event Name

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

Event Management
Occasions
Attendees
Speakers
Vendors
Event Services
Reports
Dashboards

Report: Occasions with Attendees
New Occasions with Attendees Report

[Enable Field Editing](#)

[Add Chart](#)
[Edit](#)

Total Records
2

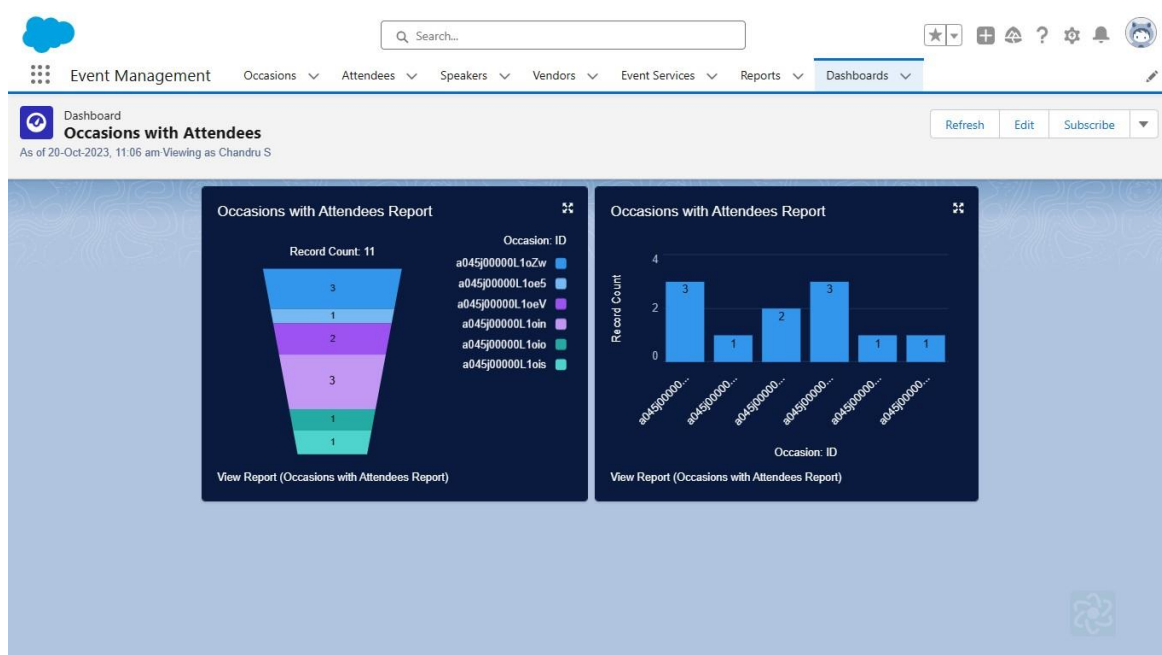
	Occasion: Event Name	Attendee: Attendee Name
1	Inaguration Event	CHANDRU S
2	Marriage Event	Amarnath

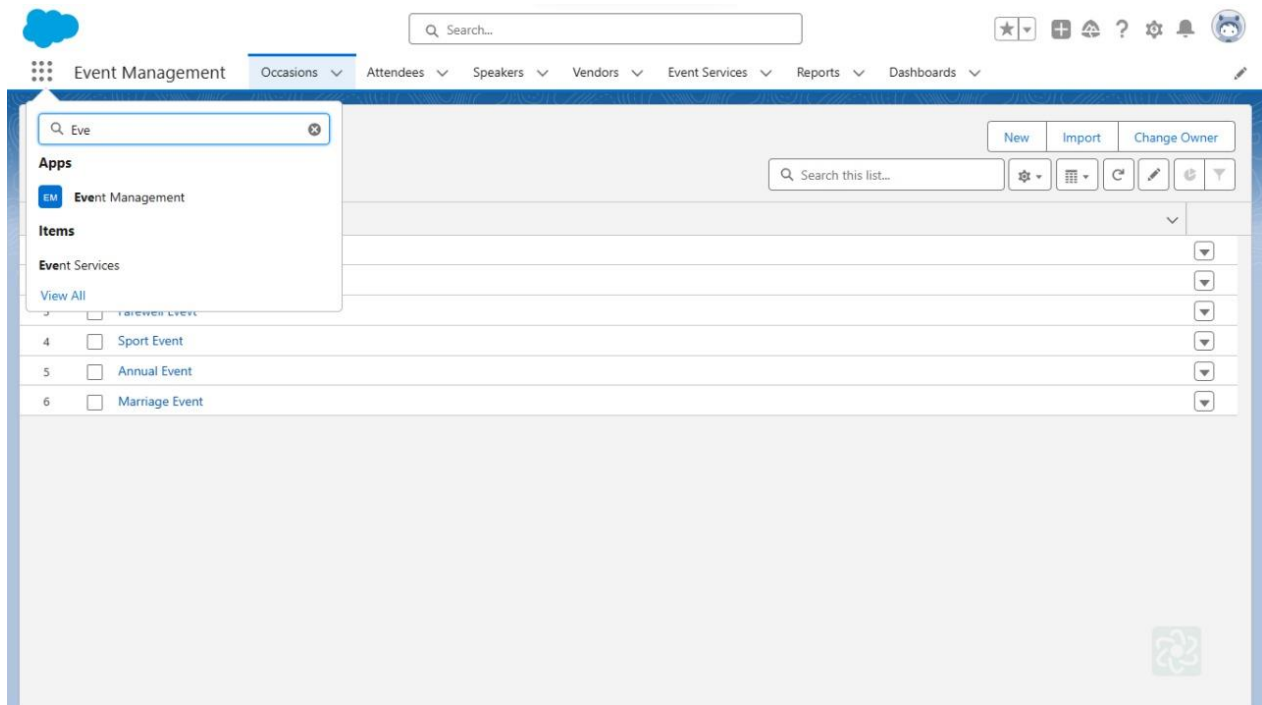
DASHBOARD

Dashboards 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 dashboards can contain charts, graphs and Tabular data.

1) Create A Dashboard

1. Click the Dashboards tab.
2. Click New Dashboard.
3. Name the Properties with Customer Name Report and click Create.
4. Click +Component.
5. Select the Properties with Customer Name Report and click Select
6. Select the Vertical Bar Chart component (select in which format you want display chart and click Add.
7. Click Save and then Done.





GitHub & Project Video Demo Link

1.GitHub Link- <https://github.com/Logesh-developer/Nan-mudhalvan-Project.git>

2.Video Demo -

https://drive.google.com/drive/folders/1kc4jf_V_N1A9zxDFYVb2_nG_VL07QYlx?usp=sharing

