

**UNIVERSITY COLLEGE OF ENGINEERING
NAGERCOIL**

NAAN MUDHALVAN PROJECT REPORT

DEPARTMENT OF MECHANICAL ENGINEERING

**TOPIC : BUILD AN EVENT MANAGEMENT SYSTEM
USING SALESFORCE**

Submitted by

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STEP 1: OBJECT

The screenshot displays the Salesforce Object Manager interface within a web browser. The browser's address bar shows the URL: `universitycollegeofengine21-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home`. The Salesforce header includes the 'Setup' menu, a search bar, and user information (Guest). The Object Manager header shows '51+ Items, Sorted by Label' and buttons for 'Quick Find', 'Schema Builder', and 'Create'. The main content area is a table listing standard objects.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Appointment Category	AppointmentCategory	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Asset	Asset	Standard Object			
Asset Action	AssetAction	Standard Object			
Asset Action Source	AssetActionSource	Standard Object			

The Windows taskbar at the bottom shows the search bar, task view button, and several application icons (Edge, File Explorer, Mail, Chrome). The system clock indicates 3:09 AM on 10/31/2023.

STEP2: TAB

The screenshot shows the Salesforce Setup interface for Custom Tabs. The browser address bar displays the URL: `universitycollegeofengine21-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home`. The user is logged in as 'Guest'. The left sidebar shows the navigation menu with 'Setup' selected, and the 'Custom Tabs' link is highlighted under the 'User Interface' section. The main content area is titled 'Custom Tabs' and includes a 'Help for this Page' link. Below the title, there is a brief explanation of custom tabs and their types. The 'Custom Object Tabs' section contains a table with five rows, each representing a different tab style: Bell, Computer, Box, Headset, and Apple. Each row includes an 'Action' column with 'Edit' and 'Del' links, a 'Label' column, a 'Tab Style' column with a corresponding icon and color, and a 'Description' column. The 'Web Tabs' section below it shows a message: 'No Web Tabs have been defined'.

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	Bell	
Edit Del	Event Services	Computer	
Edit Del	Occasions	Box	
Edit Del	Speakers	Headset	
Edit Del	Vendors	Apple	

Web Tabs

No Web Tabs have been defined

STEP 3: LIGHTNING APP

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name ⓘ
Name your app...

* Developer Name ⓘ
Enter a developer name...

Description ⓘ
Enter a description...

App Branding

Image ⓘ
Upload

Primary Color Hex
Value ⓘ
#0070D2

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

Next

10	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	25/09/2023, 1:45 pm	Lightning	✓
11	Marketing	Marketing	Best-in-class on-demand marketing automation	25/09/2023, 1:45 pm	Classic	✓

STEP 4 : FIELDS & RELATIONSHIPS

The screenshot shows the Salesforce Setup interface for the 'Occasion' object. The left sidebar contains a navigation menu with the following items: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Fields & Relationships' and displays a table of 10 fields, sorted by Field Label. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: City, Created By, Email, ID, Last Modified By, Occasion Name, Owner, and Phone. The 'Occasion Name' and 'Owner' fields are marked as indexed. The bottom of the screen shows the Windows taskbar with the search bar and various application icons.

Setup > OBJECT MANAGER
Occasion

Fields & Relationships
10 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Text(20)		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
ID	ID__c	Auto Number		
Last Modified By	LastModifiedById	Lookup(User)		
Occasion Name	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		

STEP 5: PROFILES

The screenshot shows the Salesforce Setup interface in a web browser. The browser tabs include 'Salesforce', 'Occasion | Salesforce', and 'Profiles | Salesforce'. The address bar shows the URL: `universitycollegeofengine21-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F_ui%2Fperms%2Fui%2Fprofile%2FProfileClone%2F...`. The user is logged in as 'Guest'.

The Setup menu is open, showing 'Setup', 'Home', and 'Object Manager'. The 'Profiles' link is highlighted in the left sidebar. A search bar in the sidebar contains the text 'profiles'. Below the sidebar, a message reads: 'Didn't find what you're looking for? Try using Global Search.'

The main content area displays the 'Clone Profile' dialog box. The title is 'Clone Profile' with a 'Help for this Page' link. The instruction says: 'Enter the name of the new profile.' Below this, a message states: 'You must select an existing profile to clone from.' with a 'Required Information' error indicator. A table lists the existing profile details:

Existing Profile	Standard User
User License	Salesforce
Profile Name	<input type="text"/>

At the bottom of the dialog box are 'Save' and 'Cancel' buttons. The Windows taskbar at the bottom shows the search bar with 'Type here to search', several application icons, and the system clock displaying '3:18 AM 10/31/2023'.

STEP 6: USER

Setup Home Object Manager

Search Setup

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Service

Embedded Service

Messaging for In-App and Web User

New User

User Edit Save Save & New Cancel

General Information

First Name

Last Name

Alias

Email

Username

Nickname

Title

Company

Department

Division

Role

User License

Profile

Active

Marketing User

Offline User

Knowledge User

Flow User

Service Cloud User

Site.com Contributor User

Site.com Publisher User

WDC User

Help for this Page

3:19 AM 10/31/2023

STEP 7: PERMISSION SETS

The screenshot shows the Salesforce Setup interface for creating a new Permission Set. The browser tabs at the top include 'Salesforce', 'Occasion | Salesforce', 'Profiles | Salesforce', 'Users | Salesforce', and 'Permission Sets | Salesforce'. The address bar shows the URL: `universitycollegeofengine21-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp`. The user is logged in as 'Guest'.

On the left sidebar, the 'Setup' menu is open, showing 'Home' and 'Object Manager'. The 'permission' search filter is applied, and the 'Permission Sets' link is highlighted under the 'Users' section. Below the sidebar, a message states: 'Didn't find what you're looking for? Try using Global Search.'

The main content area is titled 'Permission Sets' with a 'Create' button. It contains a form for 'Enter permission set information' with fields for 'Label', 'API Name', and 'Description'. The 'Session Activation Required' checkbox is unchecked. Below the form, there is a section titled 'Select the type of users who will use this permission set' with instructions on choosing licenses and a link to 'Learn more here'.

The Windows taskbar at the bottom shows the search bar, task view button, and several open applications including Edge, File Explorer, and Chrome. The system clock indicates 3:20 AM on 10/31/2023.

STEP 8: DASHBOARD

The screenshot displays the Salesforce Dashboards interface. The browser address bar shows the URL: `universitycollegeofengine21-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru`. The Salesforce navigation bar includes the 'Event Management' menu and a search bar. The 'Dashboards' tab is selected, showing a 'Recent' section with one item: 'dashboard Occasions with Attendees'. The dashboard is located in the 'Private Dashboards' folder, created by 'Rathna prabhu M' on '21/10/2023, 8:48 pm'. The left sidebar lists navigation options: DASHBOARDS, FOLDERS, and FAVORITES. The Windows taskbar at the bottom shows the system clock as 3:22 AM on 10/31/2023.

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	dashboard Occasions with Attendees		Private Dashboards	Rathna prabhu M	21/10/2023, 8:48 pm	

STEP 9: VIEW REPORT AND DASHBOARD

The screenshot displays the Salesforce Reports interface within a web browser. The browser's address bar shows the URL: `universitycollegeofengine21-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mr`. The Salesforce navigation bar at the top includes the 'Event Management' app and various sub-tabs like 'Occasions', 'Attendees', 'Speakers', 'Vendors', 'Event Services', 'Reports', and 'Dashboards'. The 'Reports' tab is currently selected.

Below the navigation bar, the 'Reports' section is titled 'Recent' and shows '1 item'. A search bar for 'Search recent reports...' is present, along with buttons for 'New Report' and 'New Folder'. A table lists the recent reports:

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Occasions Report		Private Reports	Rathna prabhu M	21/10/2023, 8:45 pm	

On the left side of the report list, there is a sidebar with categories: 'Created by Me' (containing 'Private Reports' and 'Public Reports'), 'All Reports', 'FOLDERS' (containing 'All Folders', 'Created by Me', and 'Shared with Me'), and 'FAVORITES' (containing 'All Favorites').

The bottom of the image shows the Windows taskbar with the search bar and several open applications, including Chrome and the Windows Store.

STEP 10: APPROVAL PROCESS

The screenshot shows the Salesforce Setup interface for the 'Approval Processes' section. The browser address bar indicates the URL: `universitycollegeofengine21-dev-ed.develop.lightning.force.com/lightning/setup/ApprovalProcesses/home`. The page title is 'Approval Processes' under the 'Setup' menu. A search bar on the left contains 'approval p'. The main content area is titled 'Approval Processes Shift' and includes a 'Manage Approval Processes For:' dropdown set to 'Shift'. Below this, a 'Create New Approval Process' button is visible. A section titled 'Active Approval Processes' contains a table with one entry: 'Attendee approval process'. The table has columns for 'Action', 'Process Order', 'Approval Process Name', and 'Description'. The 'Action' column for the 'Attendee approval process' entry shows 'Edit | Deactivate'.

Setup

Home Object Manager

Search Setup

approval p

Process Automation

Approval Processes

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

Approval Processes

Shift

Approvals are complex business processes that require information gathering and planning before implementing. It is recommended that you follow the instructions below before getting started.

1. [Read the help topic](#)
2. [View the checklist](#)
3. [Create a custom user hierarchical relationship field](#)
4. [Create email templates](#)
5. [Create an approval process using either the Jump Start or Standard Wizard](#)
6. [Add Approval History Related List to all page layouts](#)
7. [Activate the process to deploy to your users](#)

Manage Approval Processes For: Shift

A listing of both active and inactive approval processes for Shifts is displayed below. To create a new approval process, click Create New Approval Process then select Use Jump Start Wizard to set up your approval process in a few short steps. Or, select Use Standard Wizard to configure all approval options.

Create New Approval Process

Active Approval Processes

Reorder

Action	Process Order	Approval Process Name	Description
Edit Deactivate	1	Attendee approval process	

THANK YOU