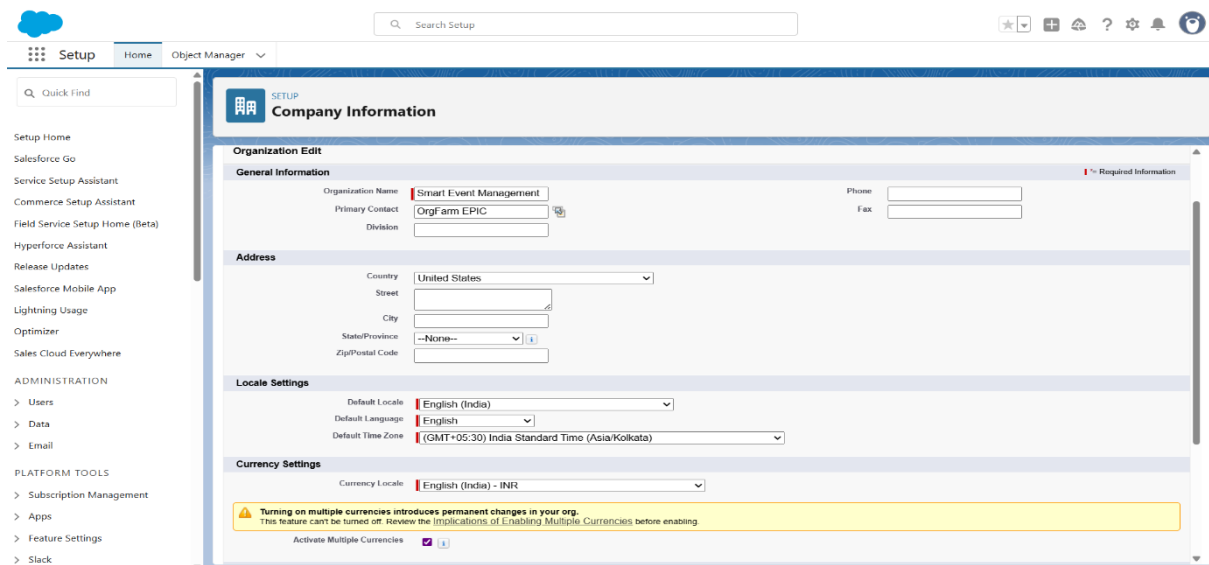


# PHASE 2 – ORG SETUP & CONFIGURATION (SMART EVENT MANAGEMENT SYSTEM)

## 1. Salesforce Org Setup

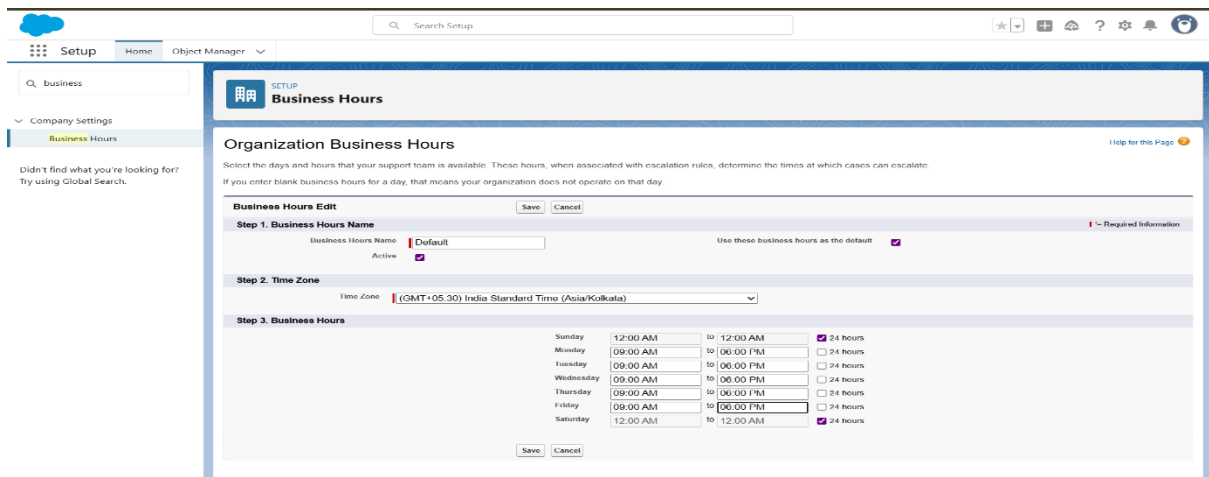
- Created a **Developer Org** (free edition) specifically for the project.
- Updated **Company Profile**:
  - Company name set to *Smart Event Management*.
  - Local time zone set to IST (India Standard Time).
  - Currency set to INR.



The screenshot shows the Salesforce Setup interface for the 'Company Information' section. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled 'Company Information' and includes sections for 'Organization Edit', 'Address', 'Locale Settings', and 'Currency Settings'. The 'Organization Edit' section shows the Organization Name as 'Smart Event Management', Primary Contact as 'OrgFarm EPIC', and Division as 'Smart Event Management'. The 'Address' section shows the Country as 'United States', City as 'New York', and State/Province as 'New York'. The 'Locale Settings' section shows the Default Locale as 'English (India)', Default Language as 'English', and Default Time Zone as '(GMT+05:30) India Standard Time (Asia/Kolkata)'. The 'Currency Settings' section shows the Currency Locale as 'English (India) - INR'. A warning message at the bottom states: 'Turning on multiple currencies introduces permanent changes in your org. This feature can't be turned off. Review the implications of Enabling Multiple Currencies before enabling.' The 'Activate Multiple Currencies' checkbox is checked.

## 2. Business Hours & Holidays

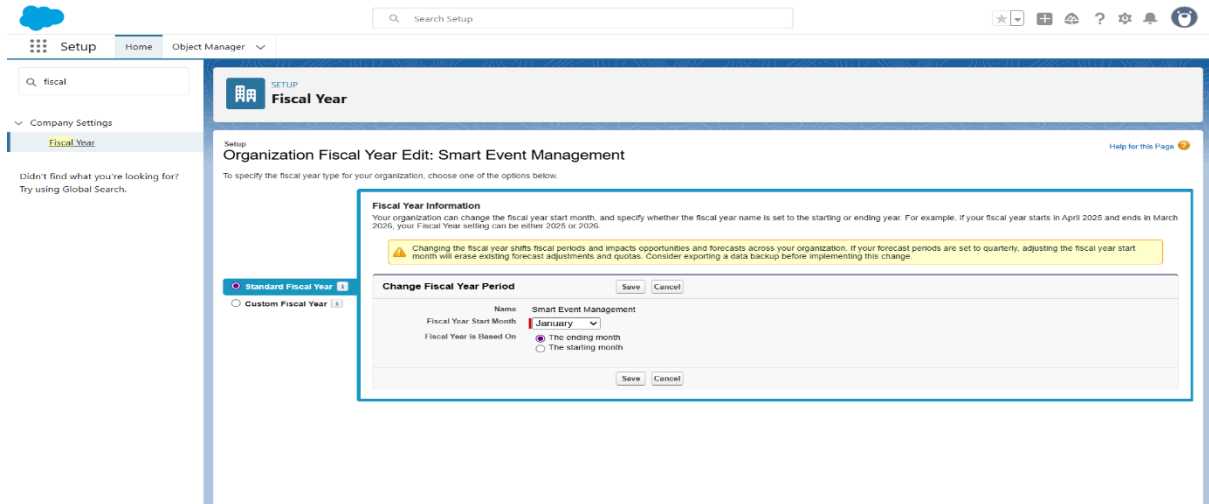
- Defined business hours as **9 AM – 6 PM, Monday to Friday**.
- Added common Indian public holidays (e.g., Independence Day, Republic Day) so approval flows will not run on these days.



The screenshot shows the Salesforce Setup interface for the 'Business Hours' section. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled 'Business Hours' and includes sections for 'Business Hours Edit', 'Step 1. Business Hours Name', 'Step 2. Time Zone', and 'Step 3. Business Hours'. The 'Business Hours Edit' section shows the Business Hours Name as 'Default' and the Time Zone as '(GMT+05:30) India Standard Time (Asia/Kolkata)'. The 'Step 3. Business Hours' section shows a table with columns for Day, Start Time, End Time, and 24 hours. The table is configured for Monday to Friday, 9:00 AM to 6:00 PM, with the '24 hours' checkbox checked for each day. The 'Saturday' row is also configured for 12:00 AM to 12:00 AM, with the '24 hours' checkbox checked. The 'Sunday' row is also configured for 12:00 AM to 12:00 AM, with the '24 hours' checkbox checked.

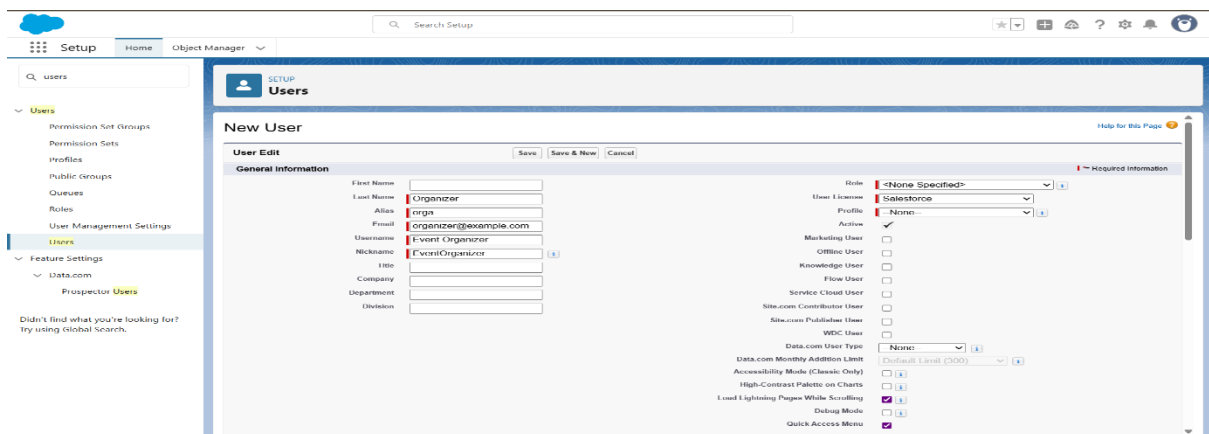
### 3. Fiscal Year Setup

- Used the **Standard Fiscal Year (Jan–Dec)** to align with event planning and financial reporting.



### 4. User Setup

- Created separate users for key roles:
  - Event Manager** → Full access to event records, approvals, and reporting.
  - Event Coordinator** → Can create/update event and booking records.
  - Participant** → Registers to participate.



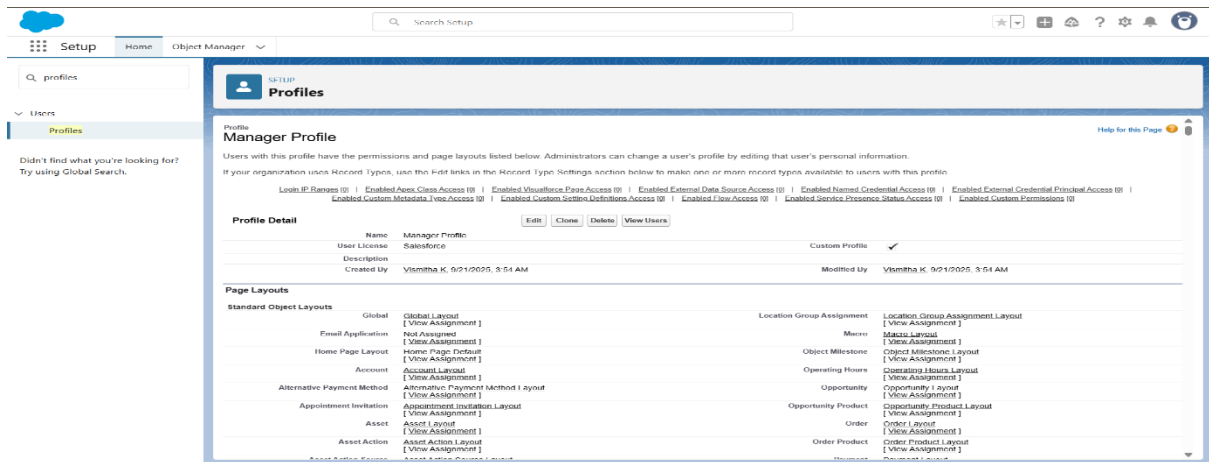
### 5. Profiles & Permissions

- Event Coordinator Profile:**
  - Can create and edit Event and Booking records.
  - Cannot modify system-wide sharing settings.

- **Event Manager Profile:**
  - Full CRUD (Create, Read, Update, Delete) access on custom objects.
  - Report and dashboard access.

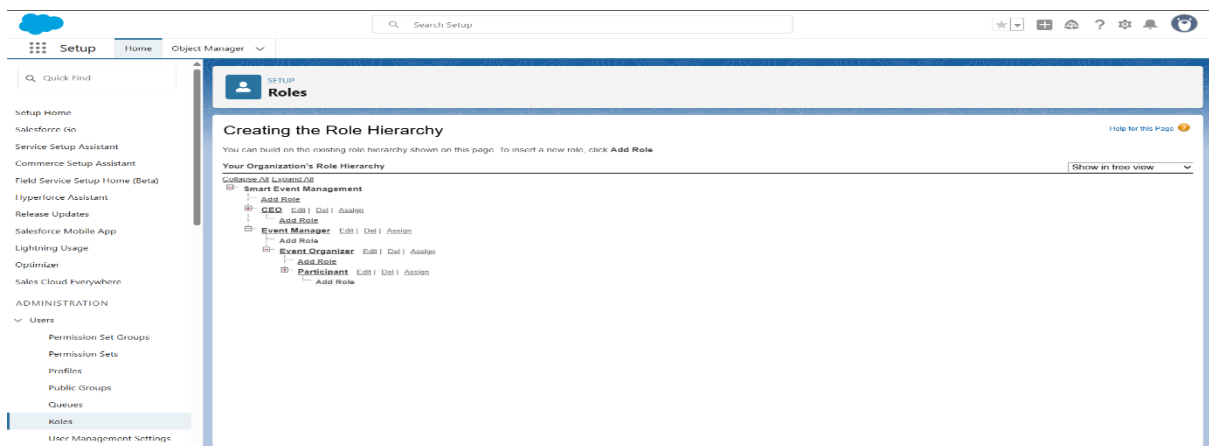
Created **Permission Sets** instead of changing Profiles directly, for extra flexibility:

- *Report Viewer* → extra access to analytics.
- *Notification Manager* → access to notification settings.



## 6. Roles & Hierarchy

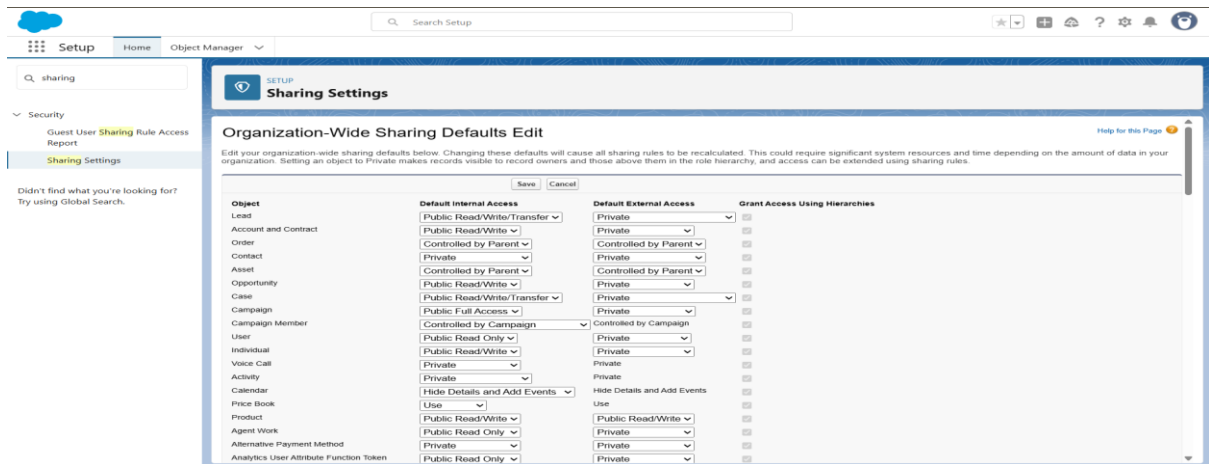
- **Event Manager** at top of hierarchy.
- **Event Coordinators** report to Event Manager.
- **Participant** under Coordinators (so visibility flows upward).



## 7. Org-Wide Defaults (OWD) and Sharing Rules

- **Event Object:** Public Read Only → everyone can see events but only owners can edit.
- **Booking Object:** Private → only the owner and their manager can see/edit.

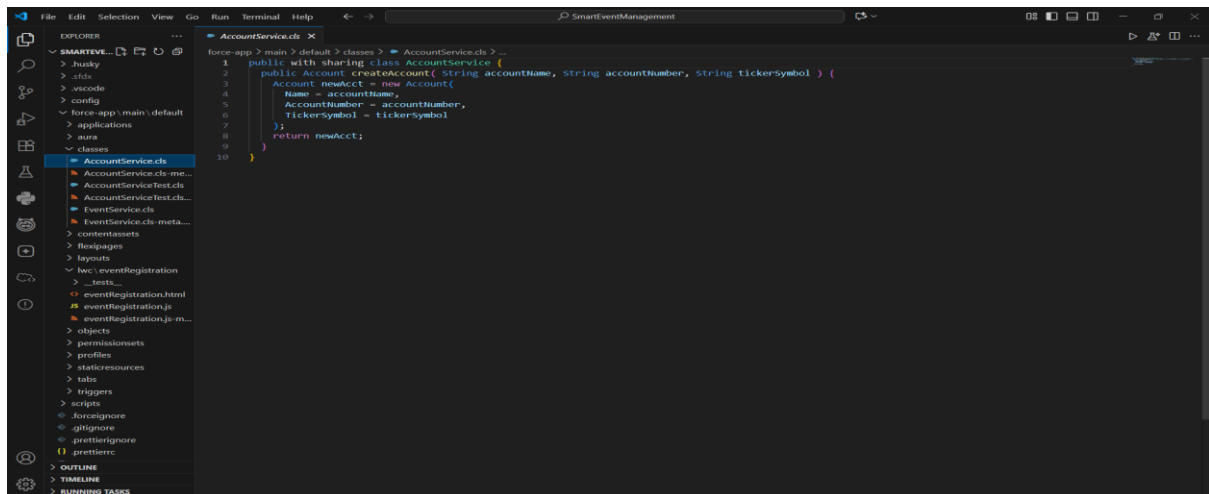
- Created sharing rules so that:
  - Event Coordinators can see other coordinators' events.
  - Event Managers can access all booking data.



## 8. VS Code & Org Connection

- Installed Salesforce CLI (sf).
- Connected VS Code to Salesforce Org using:
 

```
//sf org login web --set-default --alias myOrg
```
- Verified successful authorization with org ID.



## Outcome of Phase 2:

- The Salesforce Org is now fully set up with roles, profiles, permissions, and security.
- Development environment (VS Code + Salesforce Org) is connected and ready for Phase 3 (Data Modeling & Relationships).

# PHASE 2 REPORT

## 1. Feasibility Study

### a) Technical Feasibility

The Smart Event Management System will be developed on the Salesforce platform, leveraging its low-code/no-code capabilities and extensibility through Apex, Lightning Components, and Flows.

- **Tools & Technologies:** Salesforce CRM, Apex (for custom logic), SOQL, Flows, VS Code with Salesforce Extensions, GitHub for version control.
- **Hardware/Software Requirements:** Since Salesforce is cloud-based, no complex hardware is needed beyond standard developer machines and stable internet.
- **Scalability:** Salesforce's multi-tenant architecture ensures that the system can scale seamlessly as the number of events and participants grows.
- **Integration Possibility:** External services (like Google Calendar or Email APIs) can be integrated if needed using Salesforce APIs.

**Conclusion:** Technically feasible, since all required tools and features are already supported by Salesforce.

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### b) Operational Feasibility

- **Ease of Use:** The system will provide intuitive Lightning pages for event creation and participant registration.
- **User Adoption:** Organizers and participants will require minimal training because Salesforce UI is user-friendly.
- **Support & Maintenance:** Salesforce provides continuous updates, ensuring long-term system stability.

**Conclusion:** Operational feasibility is high, as the system aligns with user expectations and requires minimal additional effort.

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### c) Economic Feasibility

- **Development Cost:** Since Salesforce provides a free Developer Edition and SmartBridge already provides access, no major costs are incurred.
- **Operational Cost:** Cloud hosting and maintenance are handled by Salesforce; minimal expenses for development and deployment.
- **Benefit vs. Cost:** Automating event management saves manual effort, reduces errors, and improves efficiency.

**Conclusion:** High economic feasibility, as benefits far outweigh minimal costs.