

# PROJECT REPORT

## BUILD AN EVENT MANAGEMENT SYSTEM USING SALESFORCE

### 1. INTRODUCTION

#### 1.1 Overview

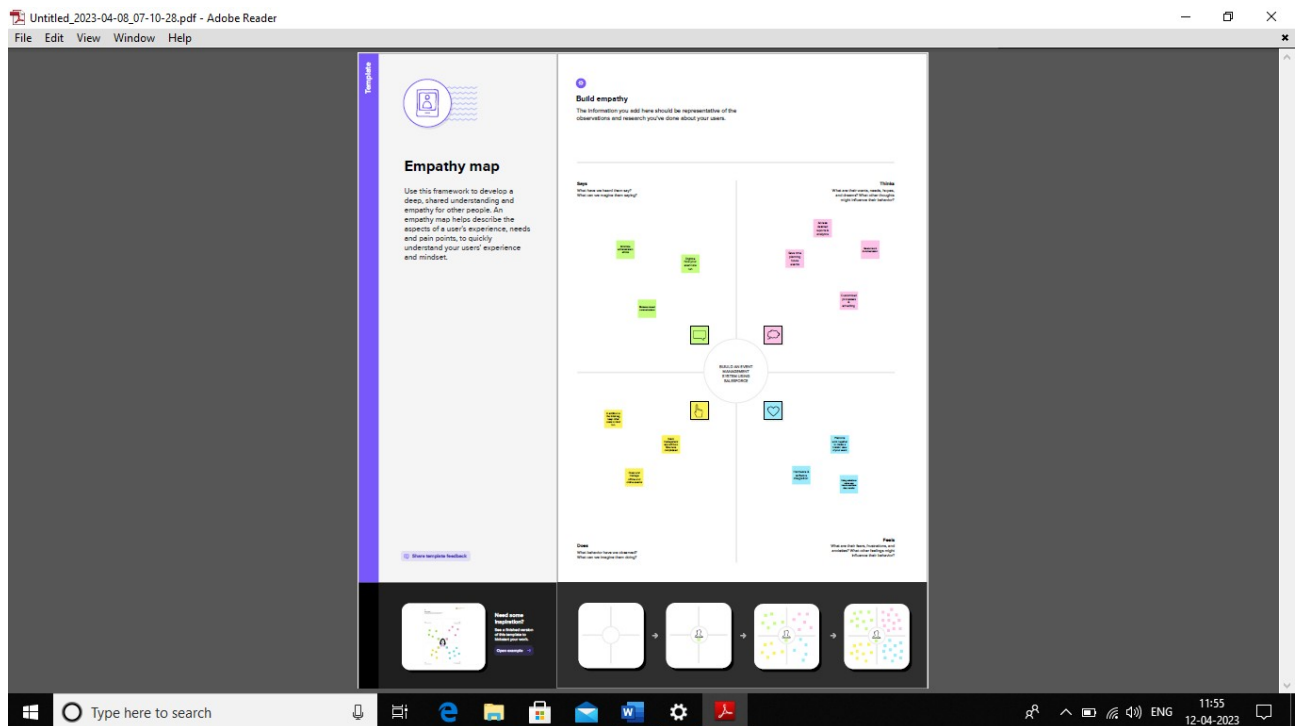
Event management is the process of creating and maintaining an event. This process spans from the very beginning of planning all the way to post event strategizing.

#### 1.2 Purpose

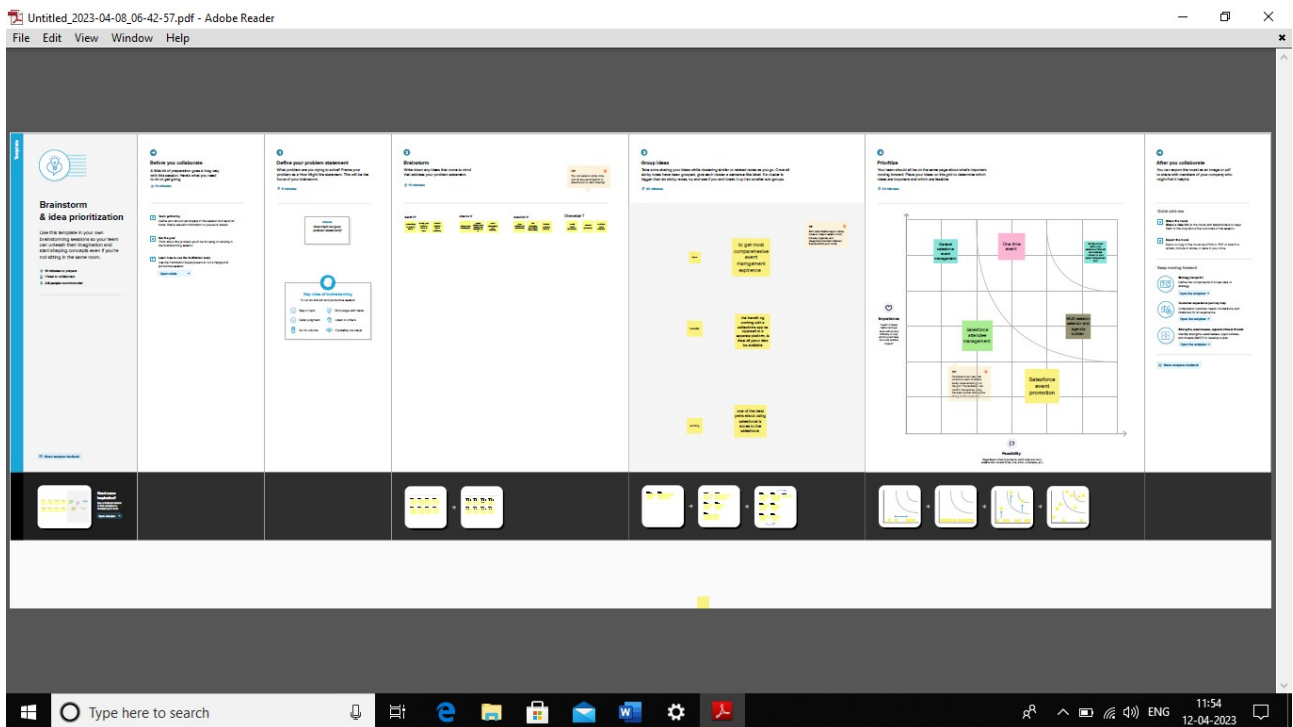
All different branches of planning go into event management, including various types of sourcing, designing, regulation **checks**, and on-site management.

### 2. Problem Definition & Design Thinking

#### 2.1 Empathy Map



## 2.2 Ideation & Brainstorming Map



## 3 RESULT

### 3.1 Data Model

Object name	Fields in the Object	
obj1	Field label	Data type
	City	Text
	Start Data	Data/time
obj2	Field label	Data type
	Id	Auto number
	Phone	phone

### 3.2 Activity & Screenshort

#### Milestone 1 – Salesforce?

Activity:

Creating a salesforce developer org:



## Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework



### Sign up for your Salesforce Developer Edition

A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name\*

Your first name

Last Name\*

Your last name

Email\*

Your email address

Role\*

Your job role

Company\*

Company Name

Country/Region\*

Select Country/Region

Postal Code\*

Your postal code

Username\*

jane@company.sandbox

Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. [Read more about username recommendations.](#)

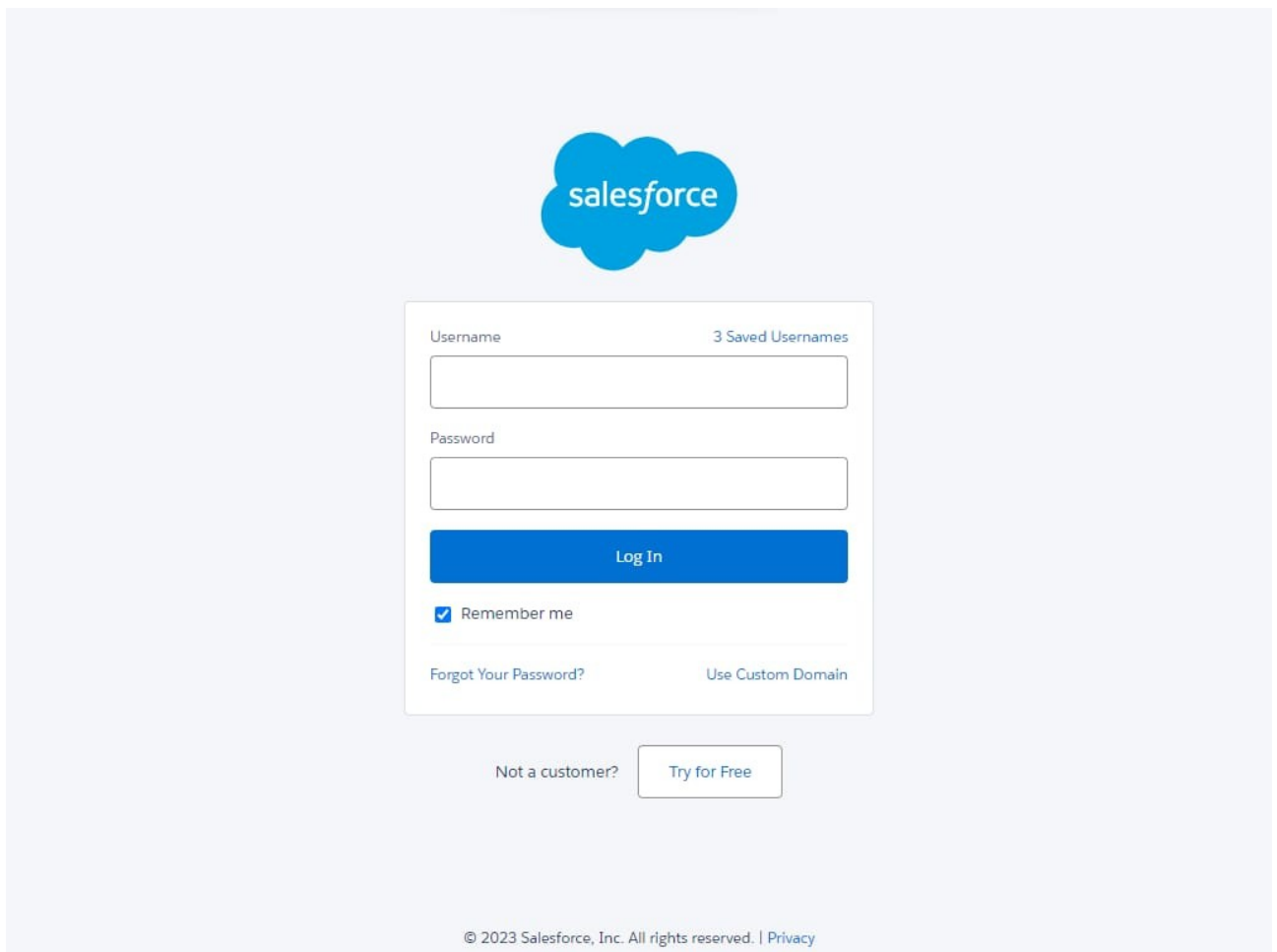
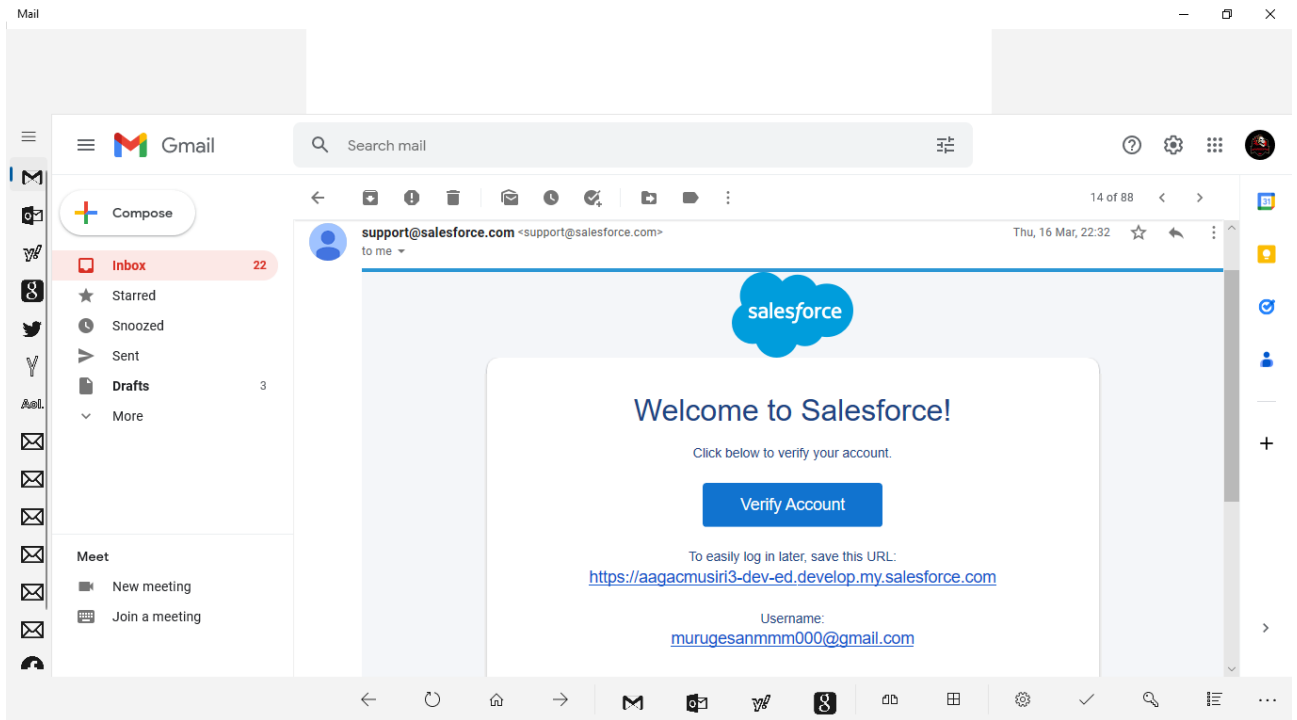
☐ I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement.

By registering, you confirm that you agree to the processing of your personal data by Salesforce as described in the [Privacy Statement](#).

Sign me up

Already have a Salesforce Developer Environment?

Log in



Search Setup

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

- > Users
- > Data
- > Email

PLATFORM TOOLS

- > Subscription Management
- > Apps
- > Feature Settings
- > Slack
- > MuleSoft

SETUP Home

Create

**Get Started with Einstein Bots**

Launch an AI-powered bot to automate your digital connections.

Get Started

**Mobile Publisher**

Use the Mobile Publisher to create your own branded mobile app.

Learn More

**Real-time Collaborative Docs**

Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.

Get Started

**Most Recently Used**


10 items

NAME	TYPE	OBJECT
<a href="#">Vendor Permits</a>	Permission Set	
<a href="#">Event permits</a>	Permission Set	
<a href="#">https://aagacmusiri59-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home</a>	Custom App	








## Milestone 2-object:

### Activity 1:

#### Creation of object for event management



Search Setup



Setup

Home

Object Manager

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

> Users

> Data

> Email

PLATFORM TOOLS

> Subscription Management

> Apps

> Feature Settings


> Slack

> MuleSoft

SETUP

Home


Create



**Get Started with Einstein Bots**

Launch an AI-powered bot to automate your digital connections.


Get Started



**Mobile Publisher**

Use the Mobile Publisher to create your own branded mobile app.

Learn More



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<a href="#">https://aagacmusiri59-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home</a>	Custom App	

[Setup](#)[Home](#)[Object Manager](#) 

SETUP

## Object Manager

51+ Items, Sorted by Label

[Schema Builder](#)[Create](#)

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEP
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	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			

<https://aagacmusiri59-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home>

[Setup](#)
[Home](#)
[Object Manager](#)

**Event**

[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](#)
[Scoping Rules](#)
[Triggers](#)
[Flow Triggers](#)
[Validation Rules](#)

Edit Custom Object
Event
[Help for this Page](#)

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. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label  Example: Account

Plural Label  Example: Accounts

Sorts with respect to ☐

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

Description

Custom-Generated Help Setting ☒ Open the standard Salesforce.com help & training window  
☐ Open a custom setting or Visualforce page

Custom Name

Enter Record Name Label and Format

The Record Name appears in page layouts, key tabs, 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  Example: Account Name

Data Type

Optional Features

☒ Allow Reports  
☐ Allow Activities  
☐ Track Field History  
☐ Allow in-Channel Groups  
☐ Enable Lightning x

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#)

☒ Allow Sharing  
☒ Allow Sub-API Access  
☒ Allow Governing API Access

Deployment Status
[What is this?](#)

☐ In Development  
☒ Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#)

☒ Allow Search

Save Save & New Cancel

## Milestone 3-Tab:

### Activity 1:

### Creation of event tab:





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.



## Custom Tabs

[Help for this Page](#)

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

[New](#) [What Is This?](#)

Action	Label	Tab Style	Description
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Attendees</a>	Apple	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Events</a>	Guitar	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Speakers</a>	Cup	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">vendors</a>	Mail	

### Web Tabs

[New](#) [What Is This?](#)

No Web Tabs have been defined

### Visualforce Tabs

[New](#) [What Is This?](#)

No Visualforce Tabs have been defined

### Lightning Component Tabs


[New](#) [What Is This?](#)

No Lightning component tabs have been defined









### Lightning Page Tabs

[New](#) [What Is This?](#)

No Lightning Page Tabs have been defined



Search Setup



SetupHomeObject 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](#).

Object--None--

Tab Style

(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

## Milestone 3 – Application:

**Creat the event management construction app**

Q app man

▼ Apps

## App Manager

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

Enable App Cloning  Disabled

22 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

	App Name ↑	Developer Name	Description	Last Modified ...	Ap...	Vi...	
1	aagac	aagac		13/03/2023, 2:01 pm	Lightning	✓	▼
2	All Tabs	AllTabSet		10/03/2023, 2:19 pm	Classic		▼
3	Analytics Studio	Insights	Build CRM Analytics dashboards and a...	10/03/2023, 2:19 pm	Classic	✓	▼
4	App Launcher	AppLauncher	App Launcher tabs	10/03/2023, 2:19 pm	Classic	✓	▼
5	Bolt Solutions	LightningBolt	Discover and manage business solutio...	10/03/2023, 2:22 pm	Lightning	✓	▼
6	Community	Community	Salesforce CRM Communities	10/03/2023, 2:19 pm	Classic	✓	▼
7	Content	Content	Salesforce CRM Content	10/03/2023, 2:19 pm	Classic	✓	▼
8	Data Manager	DataManager	Use Data Manager to view limits, monit...	10/03/2023, 2:19 pm	Lightning	✓	▼
9	Digital Experiences	SalesforceCMS	Manage content and media for all of y...	10/03/2023, 2:19 pm	Lightning	✓	▼
10	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for L...	10/03/2023, 2:19 pm	Lightning	✓	▼
11	Marketing	Marketing	Best-in-class on-demand marketing su...	10/03/2023, 2:19 pm	Classic	✓	▼
12	Platform	Platform	The fundamental Lightning Platform	10/03/2023, 2:19 pm	Classic		▼
13	Queue Management	QueueManagement	Create and manage queues for your bu...	10/03/2023, 2:19 pm	Lightning	✓	▼
14	Sales	Sales	The world's most popular sales force a...	10/03/2023, 2:19 pm	Classic		▼
15	Sales	LightningSales	Manage your sales process with accou...	10/03/2023, 2:23 pm	Lightning	✓	▼
16	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps ...	10/03/2023, 2:19 pm	Lightning	✓	▼
17	Salesforce Chatter	Chatter	The Salesforce Chatter social network, i...	10/03/2023, 2:19 pm	Classic	✓	▼
18	Salesforce Scheduler Setup	LightningScheduler	Set up personalized appointment sche...	10/03/2023, 2:21 pm	Lightning	✓	▼
19	Service	Service	Manage customer service with account...	10/03/2023, 2:19 pm	Classic	✓	▼
20	Service Console	LightningService	(Lightning Experience) Lets support ag...	10/03/2023, 2:19 pm	Lightning	✓	▼
21	Site.com	Sites	Build pixel-perfect, data-rich websites ...	10/03/2023, 2:19 pm	Classic		▼

<https://aagacmusiri59-dev-ed.develop.lightning.force.com/one/one.app#/setup/NavigationMenus/home>

SetupHomeObject Manager

Search Setup

⌵⊕⚙️🔔👤

New Lightning App

App Details & Branding

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

App Details

\* App Name ⓘ  
Event management

\* Developer Name ⓘ  
Event\_management

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

App Launcher Preview

Em

Event management

Next

12	Platform	Platform	The fundamental Lightning Platform	10/03/2023, 2:19 pm	Classic	⌵
13	Queue Management	QueueManagement	Create and manage queues for your bu...	10/03/2023, 2:19 pm	Lightning	✓ ⌵
14	Sales	Sales	The world's most popular sales force a...	10/03/2023, 2:19 pm	Classic	⌵
15	Sales	LightningSales	Manage your sales process with accou...	10/03/2023, 2:23 pm	Lightning	✓ ⌵

12	Platform	Platform	The fundamental Lightning Platform	10/03/2023, 2:19 pm	Classic	⌵
13	Queue Management	QueueManagement	Create and manage queues for your bu...	10/03/2023, 2:19 pm	Lightning	✓ ⌵
14	Sales	Sales	The world's most popular sales force a...	10/03/2023, 2:19 pm	Classic	⌵
15	Sales	LightningSales	Manage your sales process with accou...	10/03/2023, 2:23 pm	Lightning	✓ ⌵

SetupHomeObject Manager

Search Setup

⌵⊕⚙️🔔👤

New Lightning App

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.

Available Items

Type to filter list...

Accounts

Alert Settings

All Sites

Alternative Payment Methods

App Launcher

Appointment Invitations

Approval Requests

Asset Action Sources

Asset Actions

Asset State Derivatives

Create

▶

◀

Selected Items

Events

Attendees

Speakers

vendors

Reports

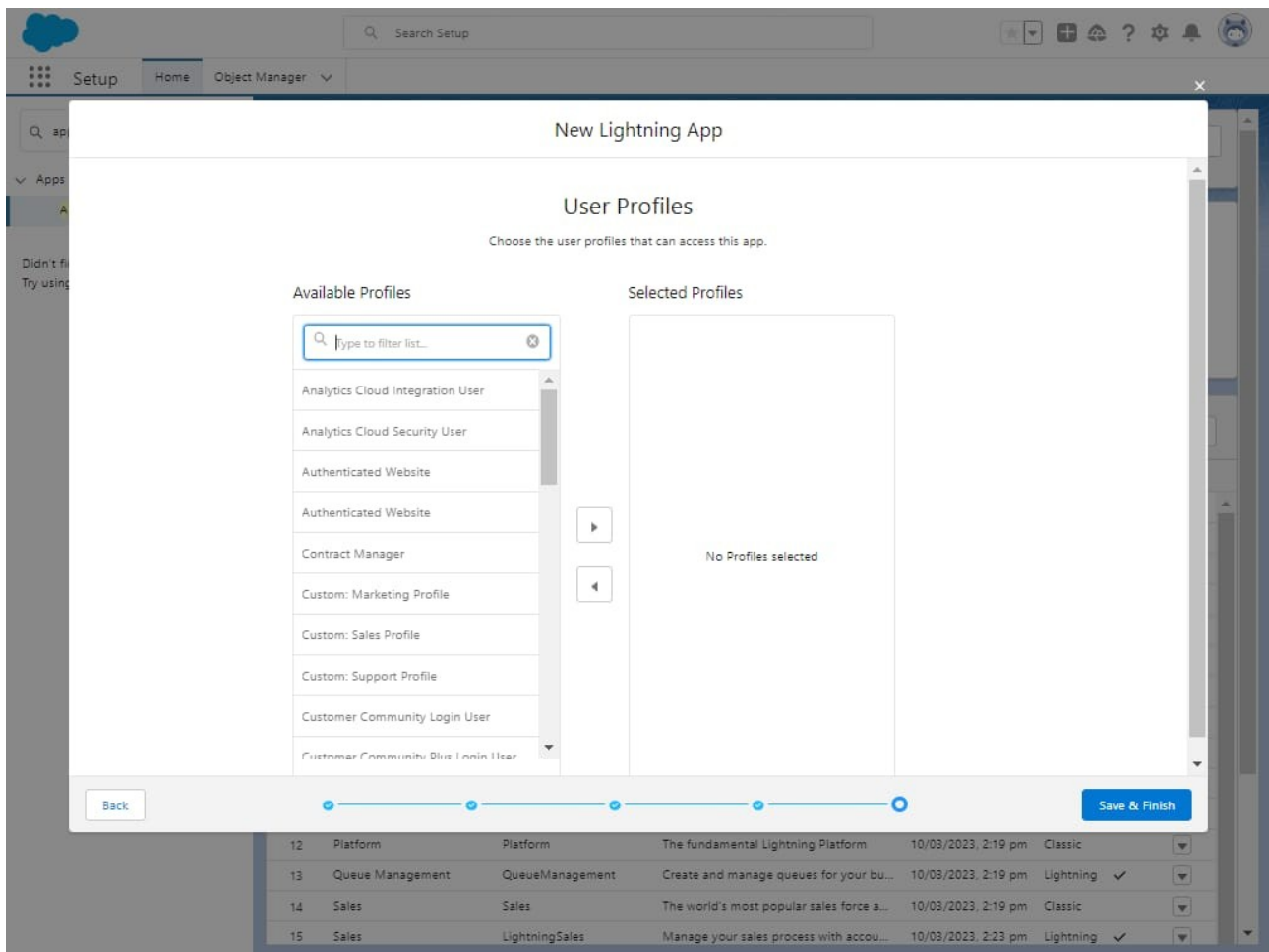
⬆

⬇

Back

Next

12	Platform	Platform	The fundamental Lightning Platform	10/03/2023, 2:19 pm	Classic	⌵
13	Queue Management	QueueManagement	Create and manage queues for your bu...	10/03/2023, 2:19 pm	Lightning	✓⌵
14	Sales	Sales	The world's most popular sales force a...	10/03/2023, 2:19 pm	Classic	⌵
15	Sales	LightningSales	Manage your sales process with accou...	10/03/2023, 2:23 pm	Lightning	✓⌵



## Milestone 4 – Fields:

### Activity 1:

Creation of fields for the event object;



SETUP

## Object Manager

51+ Items, Sorted by Label

[Schema Builder](#)[Create](#)

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEP
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	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			

https://aagacmusiri59-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home



Search Setup



Setup

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Object Manager



SETUP > OBJECT MANAGER

Student

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

Scoping Rules

Triggers

Flow Triggers

Validation Rules

## Fields & Relationships

13 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Bio	Bio__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
e-mail	e_mail__c	Email		
e-mail	e__c	Email		
e-mail	Em__c	Email		
Event Name	Ev__c	Lookup(Event)		✓
Event Name	Event__c	Lookup(Event)		✓
Event name	Event_name__c	Master-Detail(Event)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Phone	Phone__c	Phone		
Service provider	Service_provider__c	Text(3)		
Student Name	Name	Text(80)		✓
Tickets	Tickets__c	Picklist		



Setup Home Object Manager

Search Setup

Setup > OBJECT MANAGER  
**Student**

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

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Edit Student Custom Field  
**City**

Help for this Page

Custom Field Definition Edit

Change Field Type Save Cancel

**Field Information**

Field Label City Data Type Text

Field Name City

Description

Help Text

Data Owner User

Field Usage --None--

Data Sensitivity Level --None--

Compliance Categorization

Available PII HIPAA GDPR PCI

Chosen

**General Options**

Required ☐ Always require a value in this field in order to save a record

Unique ☐ Do not allow duplicate values

☒ Treat "ABC" and "abc" as duplicate values (case insensitive)

☐ Treat "ABC" and "abc" as different values (case sensitive)

External ID ☐ Set this field as the unique record identifier from an external system

Default Value Show Formula Editor

Use formula syntax. Enclose text and picklist value API names in double quotes. ("The text"). Include numbers without quotes. (25). Show percentages as decimals. (0.10), and express date calculations in the standard format. (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type\_\_c.RecordAPINameField\_\_c

**Text Options**

Length 4

Change Field Type Save Cancel

**Milestone 5 – profile:**

**Activity 1;**

**Creation on profile:**



Search Setup



Setup

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Object Manager

pro

Users

Profiles

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Mass Transfer Approval Requests

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Data.com

Prospector Preferences

Prospector Users

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Product Schedules

Settings

Product Settings

Sales Processes

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler

Settings

Scheduling Policies

Skills

Service

Entitlement Management

Entitlement Processes

Support Processes

## SETUP Profiles

### Profiles

Help for this Page

All Profiles Edit Delete Create New View

New Profile


A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Profile Name	User License	Custom
Edit   Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
Edit   Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
Edit   Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
Edit   Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
Edit   Clone	Chatter External User	Chatter External	<input type="checkbox"/>
Edit   Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
Edit   Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
Edit   Clone	Contract Manager	Salesforce	<input type="checkbox"/>
Edit   Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
Edit   Del   ...	Custom: Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
Edit   Del   ...	Custom: Sales Profile	Salesforce	<input checked="" type="checkbox"/>
Edit   Del   ...	Custom: Support Profile	Salesforce	<input checked="" type="checkbox"/>
Edit   Clone	Customer Community Login User	Customer Community Login	<input type="checkbox"/>
Edit   Clone	Customer Community Plus Login User	Customer Community Plus Login	<input type="checkbox"/>
Edit   Clone	Customer Community Plus User	Customer Community Plus	<input type="checkbox"/>
Edit   Clone	Customer Community User	Customer Community	<input type="checkbox"/>
Edit   Clone	Customer Portal Manager Custom	Customer Portal Manager Custom	<input type="checkbox"/>
Edit   Clone	Customer Portal Manager Standard	Customer Portal Manager Standard	<input type="checkbox"/>
Edit   Del   ...	Event users profile	Salesforce	<input checked="" type="checkbox"/>
Edit   Del   ...	Event vendors profile	Salesforce	<input checked="" type="checkbox"/>
Edit   Clone	External Apps Login User	External Apps Login	<input type="checkbox"/>
Edit   Clone	External Identity User	External Identity	<input type="checkbox"/>
Edit   Clone	Force.com - App Subscription User	Force.com - App Subscription	<input type="checkbox"/>
Edit   Clone	Force.com - Free User	Force.com - Free	<input type="checkbox"/>
Edit   Clone	Gold Partner User	Gold Partner	<input type="checkbox"/>









1-25 of 41 0 Selected

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Page 1 of 2



Search Setup



SetupHomeObject Manager

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Assignment Policies

Salesforce Scheduler Settings

Scheduling Policies


Skills

Service

Entitlement Management

Entitlement Processes

Support Processes

SETUP

Profiles

Clone Profile

Help for this Page

Enter the name of the new profile.

You must select an existing profile to clone from.

Required Information

Existing Profile	Standard User
User License	Salesforce
Profile Name	Event user profile

SaveCancel

Setup

Home

Object Manager

Search Setup

Setup

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Object Manager

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pro

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Product Schedules

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Product Settings

Sales Processes

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler Settings

Scheduling Policies

Skills

Service

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Entitlement Processes

Support Processes

SETUP

Profiles

Profile

Event users profile

Help for this Page

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges

Enabled Apex Class Access

Enabled Visualforce Page Access

Enabled External Data Source Access

Enabled Named Credential Access

Enabled Custom Metadata Type Access

Enabled Custom Setting Definitions Access

Enabled Flow Access

Enabled Service Presence Status Access

Enabled Custom Permissions

Profile Detail

Edit

Clone

Delete

View Users

Name	Event users profile		
User License	Salesforce	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	aarthi o aarthi	29/03/2023, 1:48 pm	Modified By aarthi o aarthi 11/04/2023, 12:55 pm

Page Layouts

Standard Object Layouts

Global	Global Layout [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
Home Page Layout	DE Default [View Assignment]	Opportunity	Opportunity Layout [View Assignment]
Account	Account Layout [View Assignment]	Opportunity Product	Opportunity Product Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Order	Order Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Order Product	Order Product Layout [View Assignment]
Asset	Asset Layout [View Assignment]	Payment	Payment Layout [View Assignment]
Asset Action	Asset Action Layout [View Assignment]	Payment Authorization	Payment Authorization Layout [View Assignment]
Asset Action Source	Asset Action Source Layout [View Assignment]	Payment Authorization Adjustment	Payment Authorization Adjustment Layout [View Assignment]
Asset Relationship	Asset Relationship Layout [View Assignment]	Payment Gateway	Payment Gateway Layout [View Assignment]
Asset State Period	Asset State Period Layout [View Assignment]	Payment Gateway Log	Payment Gateway Log Layout [View Assignment]
Assigned Resource	Assigned Resource Layout [View Assignment]	Payment Group	Payment Group Layout [View Assignment]
Authorization Form	Authorization Form Layout [View Assignment]	Payment Line Invoice	Payment Line Invoice Layout [View Assignment]
Authorization Form Consent	Authorization Form Consent Layout [View Assignment]	Price Book	Price Book Layout [View Assignment]

Setup Home Object Manager

Search Setup

pro

Users

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Salesforce Scheduler

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Salesforce Scheduler Settings

Scheduling Policies

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SETUP Profiles

Object	Read	Create	Edit	Delete	View All	Modify All
ideas	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Images	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Incidents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Individuals	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Invoices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Leads	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Object	Read	Create	Edit	Delete	View All	Modify All
Work Plans	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Plan Templates	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Work Step Templates	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Work Types	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Type Groups	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Custom Object Permissions

Object	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Attendees	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Events	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Speakers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Object	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Students	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vendors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input 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 requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password resets: ☐

Require a minimum 1 day password lifetime: ☐

Don't immediately expire links in forgot password email: ☐

Save Save & New Cancel

## Milestone 6 – User:

### Activity 1:

### Creating a User:

Setup

Home

Object Manager

Search Setup

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector

Users

Didn't find what you're looking for?

Try using Global Search.

SETUP

Users

All Users

Help for this Page

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: All Users

Edit

Create New View

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

New User

Reset Password(s)

Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	aarthi_aarthiq	aaart	green@aaqac.com		✓	System Administrator
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chaty.00d2w0000rjvread.d4rtdqkv22h@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	P.Aarthi	Aaru	aarthigreen2002@gmail.com		✓	Event users profile
<input type="checkbox"/> Edit	Sharma, Rahul	Rahus	rahulsharma@salsforce.com		✓	Standard Platform User
<input type="checkbox"/> Edit	User, Integration	integ	integration@00d2w00000rjvread.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User, Security	sec	insightssecurity@00d2w00000rjvread.com		✓	Analytics Cloud Security User

New User

Reset Password(s)

Add Multiple Users

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

**Setup** Home Object Manager

Search Setup

users

**Users**

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users**
- Feature Settings
  - Data.com
  - Prospector **Users**

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

**Users**

User Edit: Aarthi P

Save Save & New Cancel

**General Information**

First Name: Aarthi  
 Last Name: P  
 Alias: Aaru  
 Email: aarthigreen2002@mail.com  
 Username: aarthigreen2002@mail.com  
 Nickname: Aaru  
 Title:  
 Company:  
 Department:  
 Division:

Role: <None Specified>  
 User License: Salesforce  
 Profile: Event users profile  
 Active: ☒  
 Marketing User: ☐  
 Offline User: ☐  
 Knowledge User: ☐  
 Flow User: ☐  
 Service Cloud User: ☐  
 Site.com Contributor User: ☐  
 Site.com Publisher User: ☐  
 WDC User: ☐  
 Data.com User Type: --None--  
 Data.com Monthly Addition Limit: 300  
 Accessibility Mode (Classic Only): ☐  
 High-Contrast Palette on Charts: ☐  
 Load Lightning Pages While Scrolling: ☒  
 Debug Mode: ☐  
 Make Setup My Default Landing Page: ☐  
 Salesforce CRM Content User: ☒  
 Receive Salesforce CRM Content Email Alerts: ☒  
 Receive Salesforce CRM Content Alerts as Daily Digest: ☒  
 Allow Forecasting: ☐  
 Call Center:   
 Phone:

Milestone 7 – Permission sets:

Activity 1:

Creating a permission set:

Setup

Home

Object Manager

Search Setup

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

SETUP

Permission Sets

Permission Sets

On this page you can create, view, and manage permission sets.  
In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All Permission Sets

Edit

Delete

Create New View

New

↻

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Action	Permission Set Label	Description	License
<input type="checkbox"/> Clone	Buyer	Allows access to the store. Lets users see products and c...	B2B Buyer Permission Set One Seat
<input type="checkbox"/> Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to mana...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/> Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud u...	CRM User
<input type="checkbox"/> Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seats
<input type="checkbox"/> Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that use Am...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Agent	Access agent features in Service Cloud Voice contact cen...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contac...	Service Cloud Voice User
<input type="checkbox"/> Del   Clone	Event permits		
<input type="checkbox"/> Del   Clone	Experience Profile Manager		Salesforce
<input type="checkbox"/> Clone	Facility Manager	Lets users create, read, edit, and delete locations, subloc...	Facility Manager
<input type="checkbox"/> Clone	FieldServiceMobileStandardPermSet	Give your mobile workforce access to the Field Service m...	Field Service Mobile
<input type="checkbox"/> Clone	Merchandiser	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License S...
<input type="checkbox"/> Clone	Order Management Agent	Read Access to all entities enabled by Order Management	Lightning Order Management User
<input type="checkbox"/> Clone	Order Management Operations Manager	Access to all features enabled by Order Management	Lightning Order Management User
<input type="checkbox"/> Clone	Order Management Shopper	Limited access to Order Management features for Self Se...	Lightning Order Management User
<input type="checkbox"/> Clone	Order Management Store Associate	Access to limited features enabled by Order Management	Lightning Order Management User
<input type="checkbox"/> Clone	Queue Manager	Lets users create, read, edit, and delete queued parties a...	Queue Manager
<input type="checkbox"/> Clone	Sales Cloud User	Denotes that the user is a Sales Cloud user.	Sales User
<input type="checkbox"/> Clone	Salesforce CMS Integration Admin	Gives the admin data access and the permissions to integ...	Cloud Integration User
<input type="checkbox"/> Clone	Salesforce Console User	Enable Salesforce Console User	Sales Console User
<input type="checkbox"/> Clone	Security Center Integration User	Access Security Center for Integration	Cloud Integration User
<input type="checkbox"/> Clone	Service Cloud User	Denotes that the user is a Service Cloud user.	Service User
<input type="checkbox"/> Clone	Shopper	Allow access to B2C Commerce features.	Commerce User
<input type="checkbox"/> Clone	Slack Service User	Lets users run the flows for swarming with Service Cloud f...	Slack Service User
<input type="checkbox"/> Clone	Standard Einstein Activity Capture	Access to Standard Einstein Activity Capture	Standard Einstein Activity Capture User

1-25 of 27 0 Selected Previous Next Page 1 of 2



The screenshot displays the Salesforce Setup interface. On the left, a navigation sidebar shows the 'Users' section expanded, with 'Permission Sets' selected. The main content area is titled 'Permission Sets' and shows the configuration for a permission set named 'Event permits'. The 'API Name' is 'Event\_permits'. The 'Created By' is 'aarthip aarthip' on 29/03/2023 at 2:44 pm. The 'Last Modified By' is also 'aarthip aarthip' on the same date and time. The 'Session Activation Required' checkbox is unchecked. Below the overview, there is a section for 'Apps' with a list of permissions: 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings', 'App Permissions', 'Apex Class Access', 'Visualforce Page Access', 'External Data Source Access', 'Flow Access', 'Named Credential Access', 'Custom Permissions', 'Custom Metadata Types', and 'Custom Setting Definitions'. Each item has a brief description of the permissions it grants.

**Permission Set Overview**

Field	Value
API Name	Event_permits
Namespace Prefix	
Created By	aarthip aarthip, 29/03/2023, 2:44 pm
Last Modified By	aarthip aarthip, 29/03/2023, 2:44 pm

**Apps**

- Assigned Apps**  
Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**  
Settings that specify which connected apps are visible in the app menu
- Object Settings**  
Permissions to access objects and fields, and settings such as tab availability
- App Permissions**  
Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**  
Permissions to execute Apex classes
- Visualforce Page Access**  
Permissions to execute Visualforce pages
- External Data Source Access**  
Permissions to authenticate against external data sources
- Flow Access**  
Permissions to execute Flows
- Named Credential Access**  
Permissions to authenticate against named credentials
- Custom Permissions**  
Permissions to access custom processes and apps
- Custom Metadata Types**  
Permissions to access custom metadata types
- Custom Setting Definitions**  
Permissions to access custom settings

## Milestone 8 – Reports

### Activity

### Creating a Report:

Sales
Home
Opportunities
Leads
Tasks
Files
Accounts
Contacts
Campaigns
Dashboards
Reports
Chatter
Groups
More

Reports
Recent
3 Items

New Report
New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Attendees Report		Private Reports	aarthip.aarathi	30/3/2023, 1:25 pm	
Created by Me	Attendees with events		Private Reports	aarthip.aarathi	30/3/2023, 12:03 pm	
Private Reports	New Attendees Report		Private Reports	aarthip.aarathi	30/3/2023, 1:19 pm	
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

To Do List

#### 4 Trailhead Profile Public URL

**Team Lead-<https://trailblazer.me/id/aaarthi10>**

**Team Member 1-**<https://trailblazer.me/id/avabarna>

**Team Member 2-**<https://trailblazer.me/id/aravv14>

**Team Member 3-**<https://trailblazer.me/id/dhbal1>

## **5. ADVANTAGES AND DISADVANTAGES**

### **Advantages**

1. Opportunities for creativity
2. Ability to work on different events
3. Chance to work with diverse clients
4. Collaborative work environment
5. High projections for job growth
6. Few educational requirements

### **Disadvantage**

1. Unconventional work hours
2. Time away from family and friends
3. Experience requirements
4. Job instability
5. Multiple events at the same time
6. High level of responsibility

## **6. APPLICATIONS**

1. Start with the right salesforce event management app
2. segment your salesforce data
3. Set pricing levels for your salesforce event
4. Management event logistic using your salesforce app
5. Compile event reports and get ready for next event

## **7. CONCLUSION**

Event Management System is user friendly and cost effective system, it is customized with activities related to event management life-cycle. It provides a new edge to management industry. Solution Dot always keep your objectives and goals on top priority while developing any plan of work.

## **8. FUTURE SCOPE**

The scope of event management as a career in India is vast. It's a thriving industry and is home to a million people. So, if you have a knack for creativity and want to redesign the perceptions of society, the event management industry is all for you