Phase 2 Report: Org Setup & Configuration

Project Title: Event Registration & Attendee Management – Salesforce Project
Phase: 2 – Org Setup & Configuration
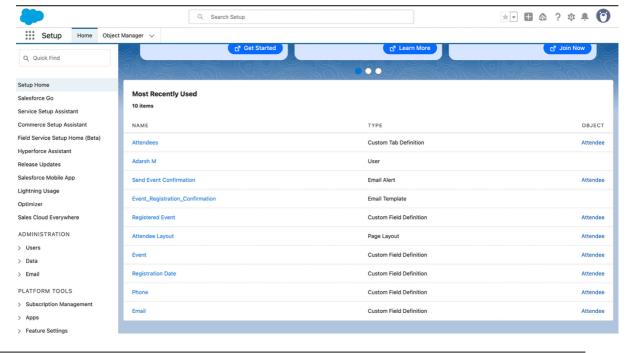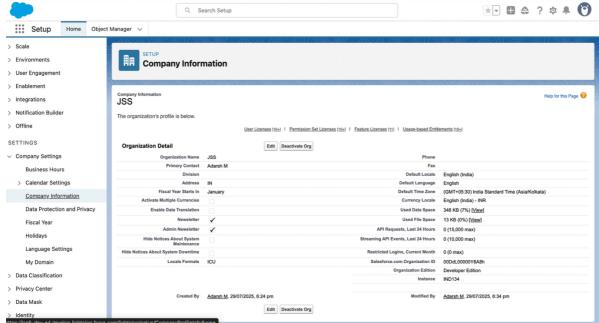**Course**: TCS Last Mile – Salesforce

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1. Introduction

This phase focuses on setting up the Salesforce Developer Org and configuring the basic environment to implement the Event Registration & Attendee Management system.
It ensures that all necessary objects, tabs, permissions, and apps are ready for further customization and automation.

2. Salesforce Org Setup

Steps performed in this phase:

1. Created a **Salesforce Developer Org**.
2. Enabled **Lightning Experience**.
3. Configured **Company Information** (Org Name, Default Locale, Timezone).
4. Enabled **Enhanced Email & Email Deliverability** for sending automated confirmation emails.
5. Enabled **Custom Objects** feature (if not already active).

3. App Configuration

- Created a new **Custom App** named `Event Management`.
- Added **Tabs** for:
  - `Event` (Custom Object)
  - `Attendee` (Custom Object)
- Assigned the app to the **System Administrator profile**.
- Configured **App Navigation & Branding**.

4. Object Permissions & Profiles

- Assigned **System Administrator Profile** full access to Event & Attendee objects.
- Created a **custom profile or permission set** (optional) for future event managers or attendees.
- Configured **Field-Level Security** for sensitive fields like Email or Contact Info.

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5. Lightning Experience & Navigation

- Configured **App Navigation** for easy access to Event & Attendee tabs.
- Enabled **Enhanced Related Lists** for showing attendees under each event.
- Ensured **mobile-friendly layouts** using Lightning App Builder.

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6. Conclusion

The Salesforce org is now fully configured with the necessary apps, tabs, and permissions. This setup forms the foundation for **data modeling, process automation, and dashboard creation**, which will be implemented in the next phases.