

Phase 2 Report: Org Setup & Configuration

Project Title: Event Registration & Attendee Management – Salesforce Project

Phase: 2 – Org Setup & Configuration

Course: TCS Last Mile – Salesforce

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).

The image shows two screenshots of the Salesforce Setup interface. The top screenshot displays the 'Most Recently Used' section with a table of 10 items. The bottom screenshot shows the 'Company Information' page for the organization 'JSS'.

NAME	TYPE	OBJECT
Attendees	Custom Tab Definition	Attendee
Adarsh M	User	
Send Event Confirmation	Email Alert	Attendee
Event_Registration_Confirmation	Email Template	
Registered Event	Custom Field Definition	Attendee
Attendee Layout	Page Layout	Attendee
Event	Custom Field Definition	Attendee
Registration Date	Custom Field Definition	Attendee
Phone	Custom Field Definition	Attendee
Email	Custom Field Definition	Attendee

Company Information

Company Information
JSS

The organization's profile is below.

User Licenses (10) | Permission Set Licenses (10) | Feature Licenses (11) | Usage-based Entitlements (10)

Organization Detail [Edit] [Deactivate Org]

Organization Name	JSS	Phone	
Primary Contact	Adarsh M	Fax	
Division		Default Locale	English (India)
Address	IN	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	348 KB (7%) View
Newsletter	<input checked="" type="checkbox"/>	Used File Space	13 KB (0%) View
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	000dL00000Y6A8h
		Organization Edition	Developer Edition
		Instance	IND134

Created By [Adarsh M](#), 29/07/2025, 6:24 pm [Edit] [Deactivate Org]

Modified By [Adarsh M](#), 29/07/2025, 6:34 pm

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.