

# Phase 3: Deployment & Testing – EventEase Salesforce Project

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## 3.1 Phase Overview

Phase 3 focuses on deploying the **EventEase – AI Powered Event Registration System** into Salesforce and validating its functionalities through structured testing. This phase ensures that all **custom objects, fields, relationships, layouts, and record types** are properly deployed, integrated, and ready for production use.

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## 3.2 Deployment Strategy

### 3.2.1 Target Environments

- **Development Org (Scratch Org)** – Used for initial configuration and testing.
- **Sandbox Org** – Staging environment for complete system validation.
- **Production Org** – Final deployment after successful testing.

### 3.2.2 Tools & Approach

- **Salesforce CLI (sf)** used for deployments.
- Metadata stored in Salesforce DX project structure (force-app/main/default).
- Deployments tested in sandbox before moving to production.

### 3.2.3 Deployment Steps

1. Authenticate target org:
2. `sf login org --target-org <org-alias>`
3. Deploy entire metadata:
4. `sf project deploy start --target-org <org-alias> --source-dir force-app/main/default`
5. Resolve metadata errors (e.g., restrictedPicklist issues, required lookups, required fields on layouts).
6. Validate deployment logs for successful creation/update of metadata.

## 3.3 EventEase Salesforce Objects & Metadata

### 3.3.1 Custom Object: Event\_\_c

**Purpose:** Stores event details (in-person & virtual).

SETUP > OBJECT MANAGER

**Event**

Details

**Fields & Relationships**  
11 Items, Sorted by Field Label

Q Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Capacity	Capacity__c	Number(8, 0)		
Created By	CreatedById	Lookup(User)		
Event Date	Event_Date__c	Date/Time		
Event Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Meeting Link	Meeting_Link__c	URL(255)		
Mode	Mode__c	Picklist		

Field Sets

Object Limits

Record Types

Related Lookup Filters

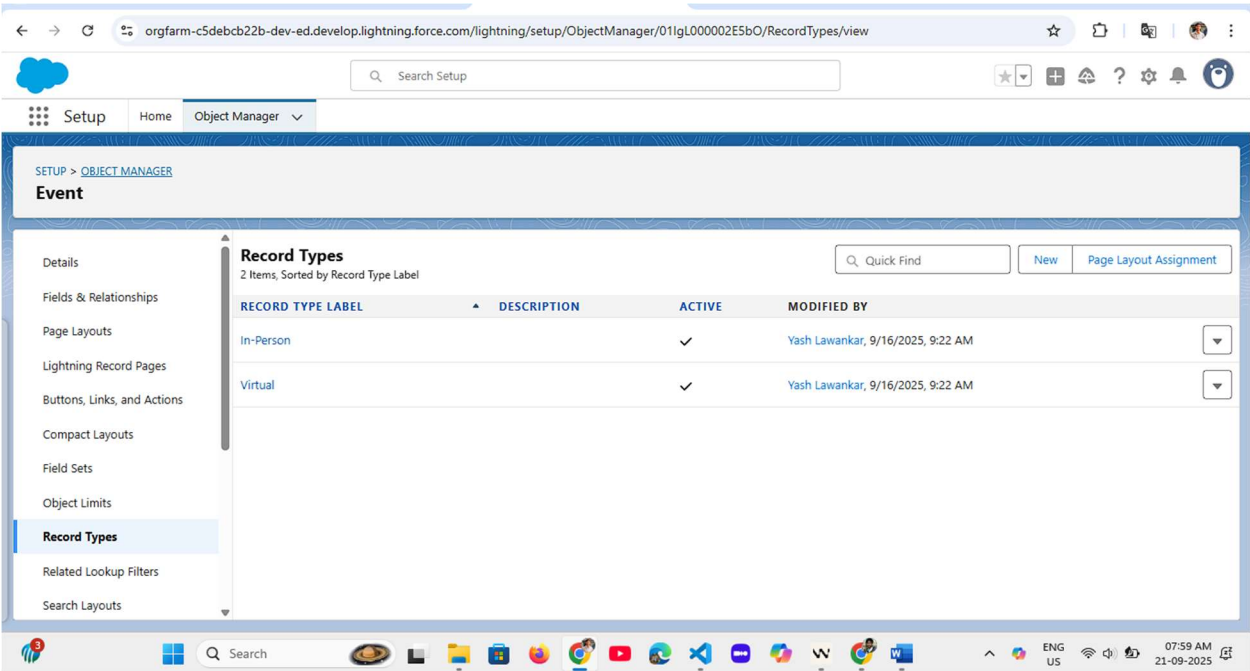
Search Layouts

Owner	OwnerId	Lookup(User,Group)	✓
Record Type	RecordTypeId	Record Type	✓
Venue	Venue__c	Text(255)	
Venue Address	Venue_Address__c	Text Area(255)	

**Fields:**

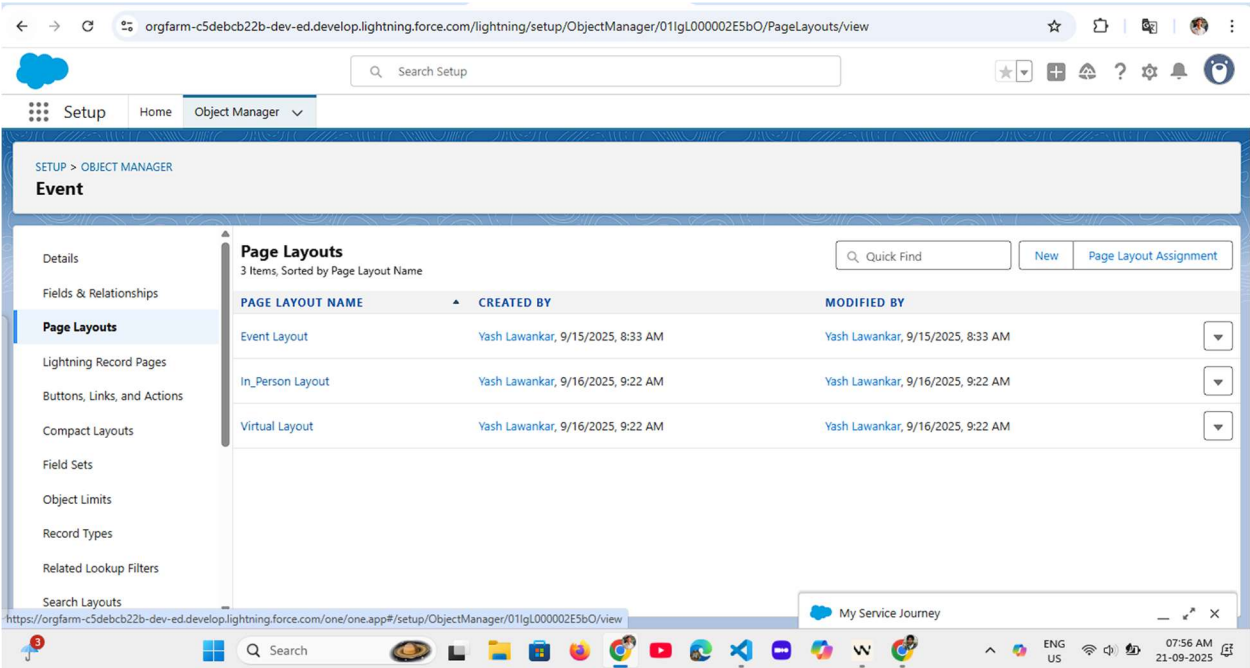
Field API Name	Type	Required	Description
Name	Text	Yes	Event unique identifier
Capacity__c	Number	No	Max number of attendees
Event_Date__c	DateTime	Yes	Scheduled date of event
Meeting_Link__c	URL	No	Virtual event link
Mode__c	Picklist	Yes	In-Person / Virtual
Venue__c	Text	No	Venue name (In-person only)
Venue_Address__c	TextArea	No	Venue address (In-person only)

Record Types:



- In\_Person
- Virtual

Layouts:



- Event\_\_c-In\_Person Layout

- Event\_\_c-Virtual Layout

### 3.3.2 Custom Object: Attendee\_\_c

**Purpose:** Stores information about attendees.

**Fields:**

Field API Name	Type	Required	Description
Name	Text	Yes	Attendee's name

### 3.3.3 Custom Object: Registration\_\_c

**Purpose:** Manages attendee registrations for events.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Attendee	Attendee__c	Lookup(Attendee)		✓
Created By	CreatedById	Lookup(User)		
Event	Event__c	Master-Detail(Event)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Registration Date	Registration_Date__c	Date/Time		
Registration Number	Name	Auto Number		✓
Status	Status__c	Picklist		

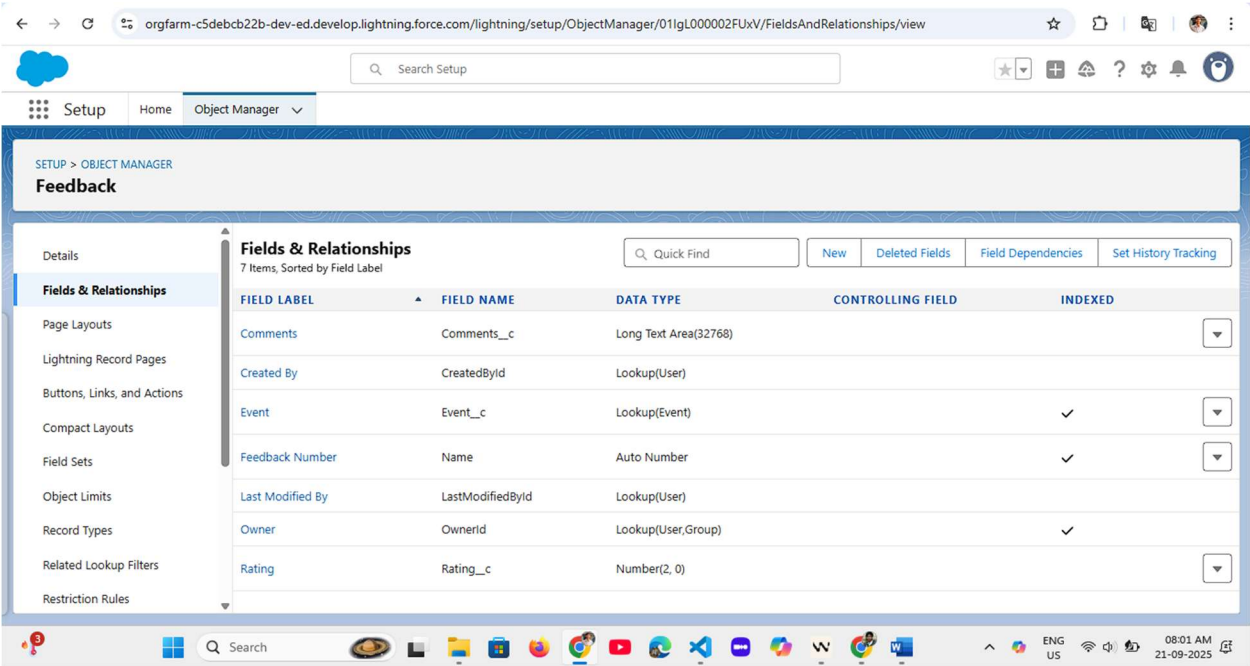
**Fields:**

Field API Name	Type	Required	Description
Event__c	Lookup	Yes	Links registration to Event__c
Attendee__c	Lookup	Yes	Links registration to Attendee__c
Registration_Date__c	DateTime	Yes	Date of registration
Status__c	Picklist	Yes	Values: Registered, Cancelled, Attended

3.3.4 Custom Object: Feedback\_\_c

Purpose: Captures event feedback from attendees.

Fields:



Field API Name	Type	Required	Description
Event__c	Lookup	Yes	Feedback linked to Event__c

Field API Name	Type	Required	Description
Rating__c	Number(1-5)	Yes	Event rating from attendee
Comments__c	Long Text	No	Additional feedback/comments

## 3.4 Relationships

Parent Object	Child Object	Relationship	Delete Behavior
Event__c	Registration__c	Lookup	Restrict
Attendee__c	Registration__c	Lookup	Restrict
Event__c	Feedback__c	Lookup	Restrict

## 3.5 Testing Strategy

### 3.5.1 Types of Testing

1. **Unit Testing** – Verify each object and field works as expected.
2. **Integration Testing** – Validate lookups and relationships between Event, Registration, Attendee, and Feedback.
3. **User Acceptance Testing (UAT)** – End-users test with real scenarios.
4. **UI & Layout Testing** – Ensure layouts display correct required fields.

### 3.5.2 Sample Test Cases

ID	Module	Scenario	Expected Result
TC1	Event__c	Create In-Person Event	Event saved with Venue fields visible
TC2	Event__c	Create Virtual Event	Event saved with Meeting Link visible
TC3	Registration__c	Register Attendee	Registration linked to Event & Attendee
TC4	Feedback__c	Submit Feedback	Feedback saved and linked to Event
TC5	Layout	Leave Name field blank	Error shown: Name required
TC6	Relationship	Delete Event with Registrations	Deletion blocked (Restrict Delete enforced)

## 3.6 Post-Deployment Activities

- **Data Migration** – Import existing attendees/events via Data Loader.
  - **User Training** – Provide guide for event organizers and admins.
  - **Support** – Monitor logs, validate functionality, and resolve issues.
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## 3.7 Key Deliverables

- Deployed metadata: Objects, Fields, Record Types, Layouts.
- Executed Unit, Integration, and UAT test cases.
- Deployment logs confirming success.
- User training documentation prepared.