Phase 2: Org Setup & Configuration

This phase covers the Salesforce Developer Org setup and configuration for the Event Registration & Attendee Management project.

1. Salesforce Developer Org Setup

- Signed up for a Salesforce Developer Edition to build and test the event registration application.

- Org Name: Event Registration & Attendee Management

2. Company Profile Configuration

- Entered basic organization information in Setup > Company Information.

- Set the project name and provided a contact email for administrative tasks.

3. Profiles Creation

- Created two custom profiles by cloning Standard User:

- Event Organizer Profile: Full access to event and attendee management functions.

- Event Attendee Profile: Limited access, can only view and manage their own registrations.

4. Role Hierarchy Setup

- Configured a three-level role hierarchy:

- Event Manager: Top-level, access to all data.

- Organizer: Can access events they organize and the associated attendees.

- Attendee: Can view only their own event registrations.

5. User Accounts (Sample/Test)

- Added sample users per role to validate permissions and feature access:

- One Event Manager, one Organizer, one Attendee.

- Used test email addresses for demonstration.

6. Permission Sets (Optional Use)

- Created permission sets to grant additional access if required (e.g., dashboard viewing for Organizers).

7. Org-Wide Defaults & Sharing Rules

- Set Org-Wide Defaults:

- Event Object: Private, only owners and those above in the role hierarchy can access.

- Attendee Object: Controlled by parent (Event), ensuring attendee records are protected and only accessible as required.

- Configured sharing rules for Event Managers and Organizers for collaborative event management.

8. Login Access Policies

- Default settings used; no restrictions or IP range limitations applied in this phase, keeping testing open for project members.

Summary of Phase 2 Steps

Step	Action Taken
Developer Org Setup	Created Salesforce Developer Org, named for the project
Company Profile	Updated organization info and project name
Profiles	Created Event Organizer & Attendee profiles
Roles	Set up Event Manager, Organizer, and Attendee roles
Sample Users	Added one user per role for permissions testing
Permission Sets	Created if needed for specialized access
Org-Wide Defaults	Event: Private, Attendee: Controlled by Parent; custom sharing rules for collaborative access
Login Access Policies	Kept default settings for development and testing