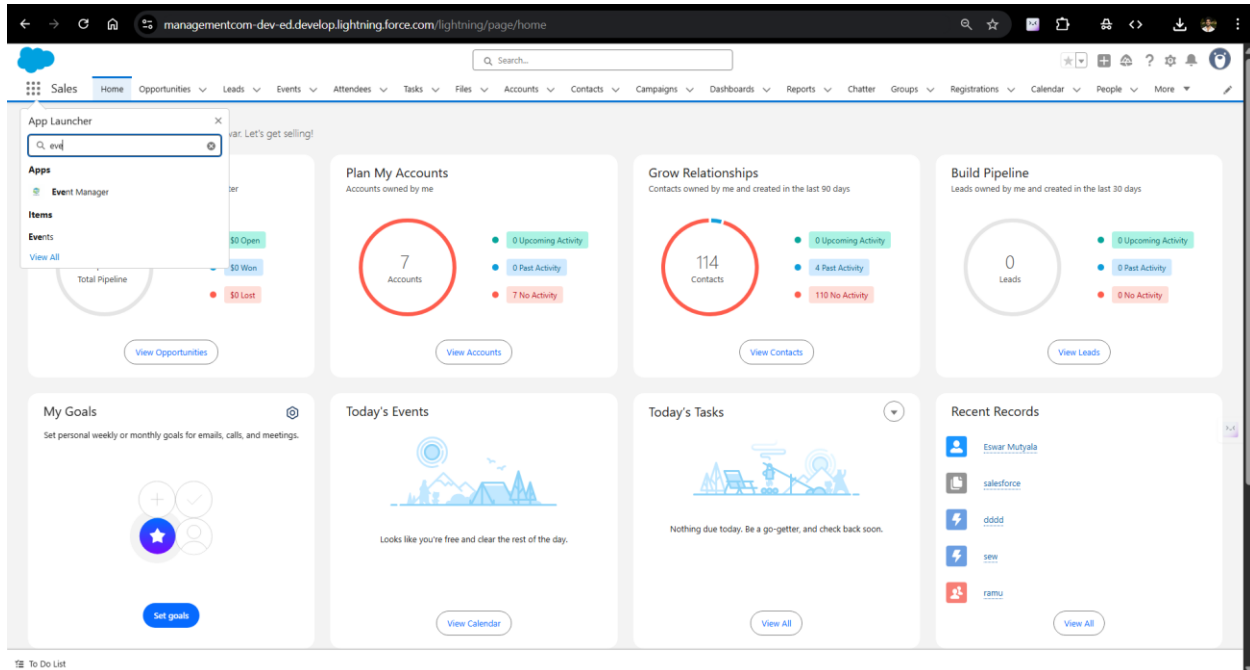


# Phase 2 – EVENT MANAGEMENT AND REGISTRATION

## 1. Salesforce Org Preparation

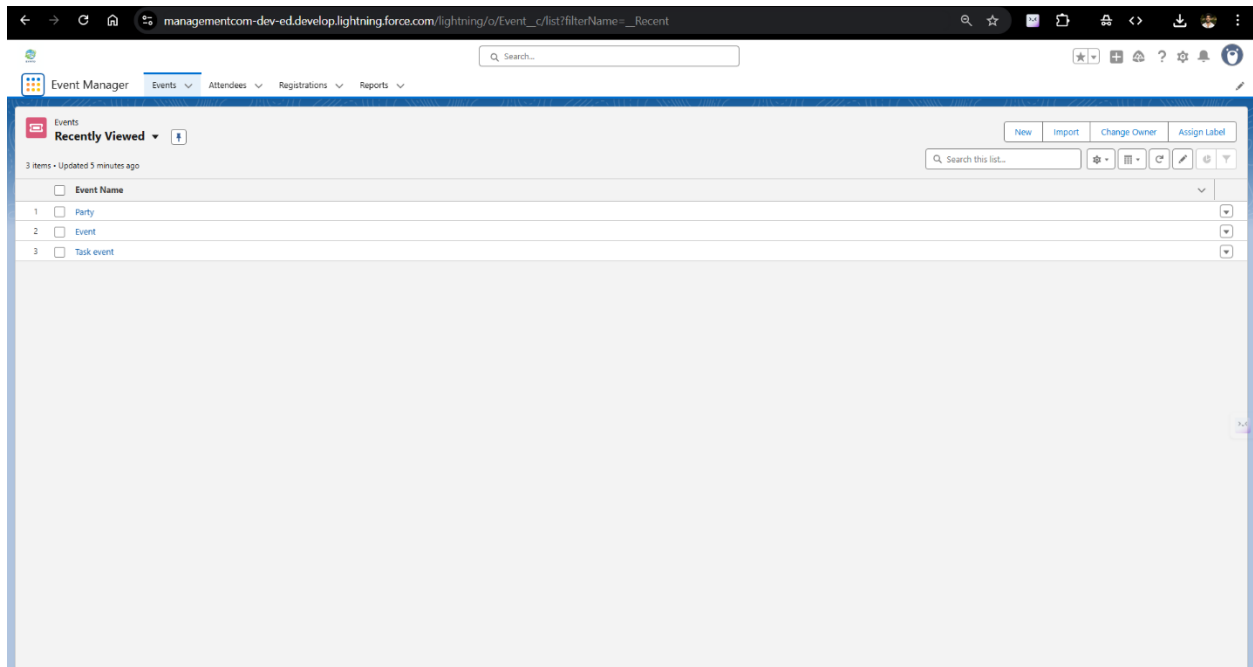
- Registered for a Salesforce Developer Edition org using [developer.salesforce.com].
- Switched user interface to Lightning Experience.
- Verified administrative access by confirming visibility of Setup, Profiles, Object Manager, App Manager, and required tabs.



## 2. Lightning App Creation

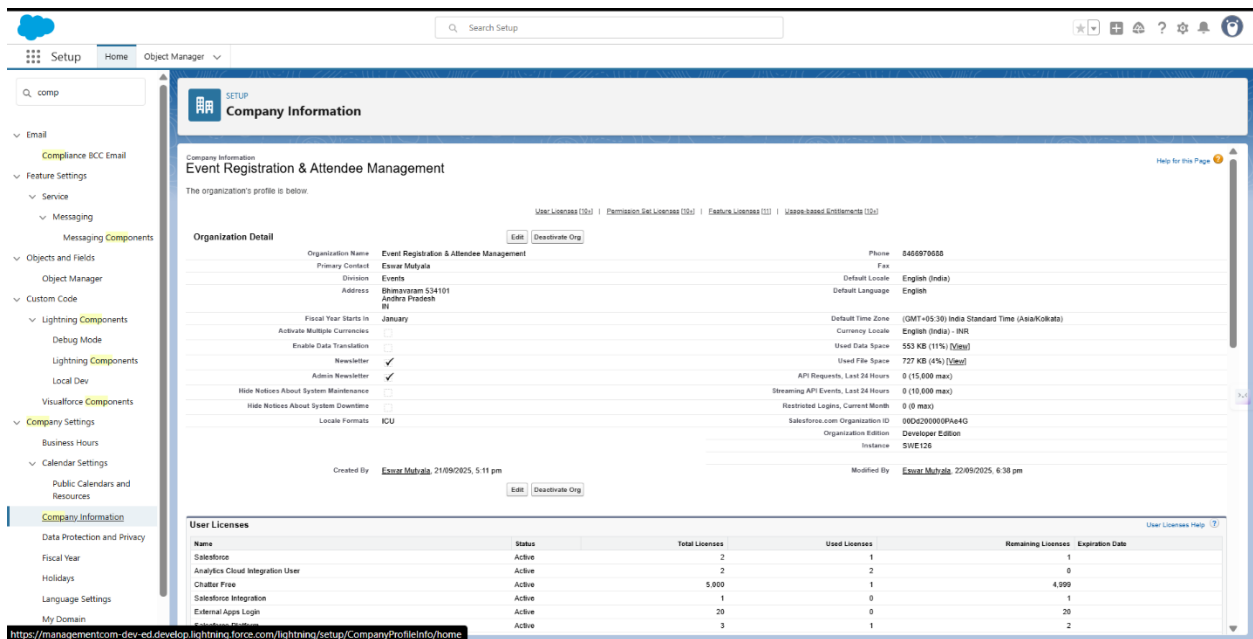
- Opened Setup > App Manager.
- Clicked New Lightning App.
- Provided the following information:
  - App Name: Event Management
  - Primary Color/Icon: [Custom or Default]
- Added the following navigation items (which will correspond to custom object tabs):
  - Events
  - Registrations
  - Attendees
- Made the app visible to target profiles (e.g., System Administrator, Event Admin, Organizer).

- Saved and launched the app.



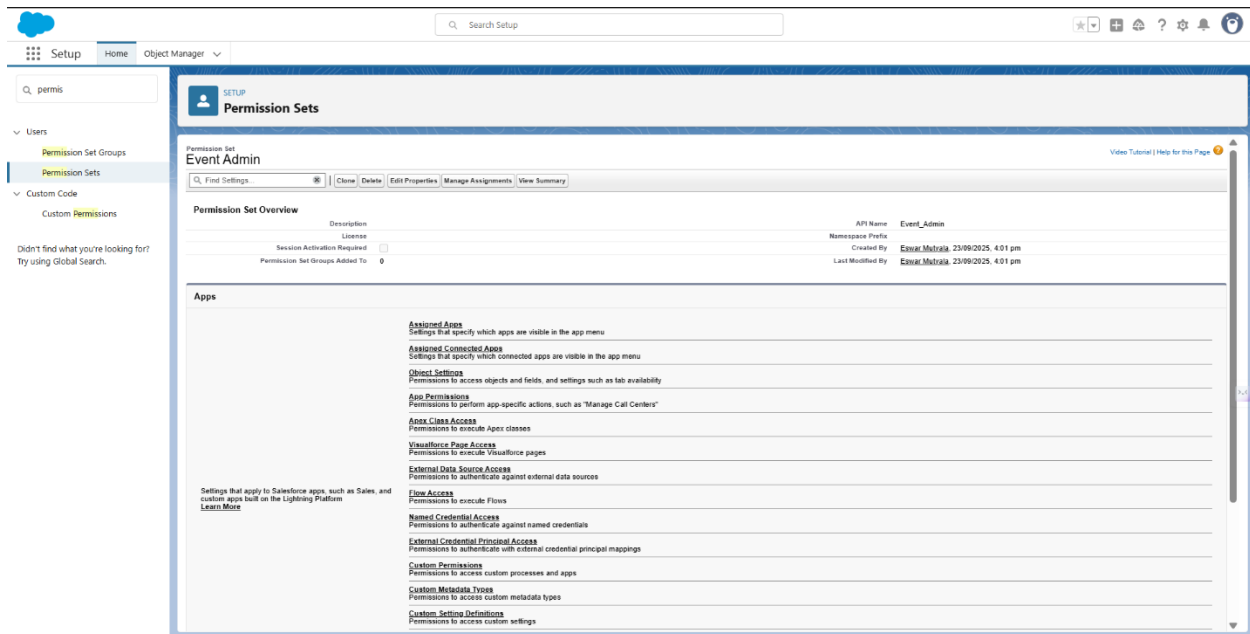
### 3. Organization Information

- Navigated to Setup > Company Information.
- Updated the following:
  - Organization Name: Event Registration & Attendee Management
  - Address: [Institution address]
  - Default Locale: English (United States)
  - Default Timezone: Set to the correct region
- Checked availability of Salesforce licenses for test and production users.



## 4 . Profiles & Permission Sets

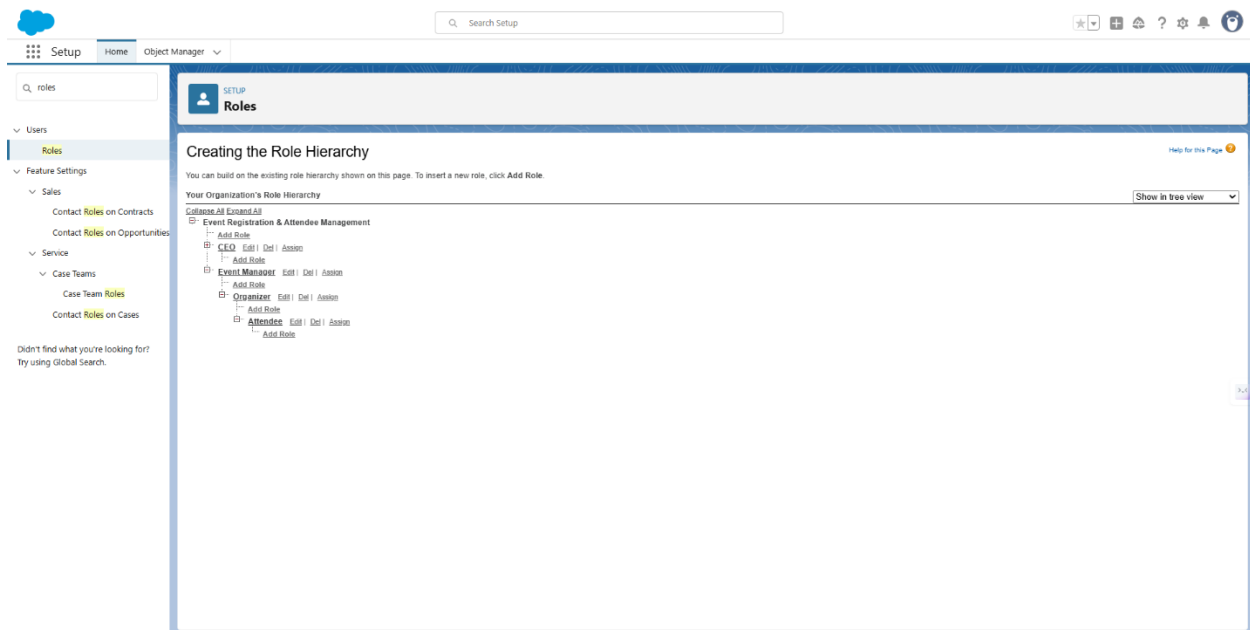
- Cloned the “Standard User” profile to create:
  - Event Admin (full CRUD for project objects)
  - Organizer (manage own events/registrations)
  - Attendee (read-limited or registration-only, if applicable)
- Created a permission set (“Event Admin”) for fast assignment of object permissions (to be used after custom objects/tabs created).
- Set default tab visibility for all new project tabs to “Default On” for relevant profiles.



The screenshot shows the Salesforce Setup interface for the 'Event Admin' permission set. The left sidebar contains navigation links for 'Users', 'Permission Set Groups', 'Permission Sets', 'Custom Code', and 'Custom Permissions'. The main content area is titled 'Permission Sets' and shows the 'Event Admin' permission set. It includes a 'Permission Set Overview' section with fields for Name, API Name, Namespace Prefix, Created By, and Last Modified By. Below this is a table of 'Apps' with columns for App Name, App Class Access, Visualforce Page Access, External Data Source Access, Flow Access, Named Credential Access, External Credential Principal Access, Custom Permissions, Custom Metadata Types, and Custom Settings Definitions. The 'Apps' table is currently empty.

## 5. Roles & User Assignment

- Setup > Roles:
  - Built a simple hierarchy:
    - Event Manager (top; oversees all events)
    - Organizer (child; creates and manages assigned events)



The screenshot shows the Salesforce Setup interface for the 'Roles' page. The left sidebar contains navigation links for 'Users', 'Roles', 'Feature Settings', 'Sales', 'Service', 'Case Teams', and 'Contact Roles on Cases'. The main content area is titled 'Roles' and shows the 'Creating the Role Hierarchy' section. It includes a 'Your Organization's Role Hierarchy' section with a tree view showing the hierarchy of roles. The hierarchy starts with 'Event Manager' at the top, followed by 'Organizer' and 'Attendee' as children. The 'Attendee' role is currently selected.

- Setup > Users:
    - Added test users for each project role.
    - Assigned correct profile and role on each user's record.
6. Org-Wide Defaults (OWD) & Sharing
- Setup > Sharing Settings:
    - Planned to set Org-Wide Defaults to Private for all project objects ("Event", "Attendee", "Registration") after creation.
    - Noted sharing rules will be added after object availability.
    - No custom login IP restrictions or password policies for initial development.

The screenshot shows the Salesforce Setup interface for "Organization-Wide Email Addresses". The left sidebar contains the Setup menu with "Email" expanded and "Organization-Wide Addresses" selected. The main content area is titled "Edit Organization-Wide Email Addresses" and includes a description: "An org-wide email address allows each user in a user profile to send email using this address. All messages use the same display name and email address. You can also designate an org-wide email address for unmonitored mailboxes that require a verified address." Below this is a form with the following fields:

- Display Name:** Event Manager
- Email Address:** eswar.m.10.03.2004@gmail.com
- Purpose:** User Selection
- Permissions:**
  - ☒ Allow All Profiles to Use this From Address
  - ☐ Allow Only Selected Profiles to Use the From Address
- Profiles:** A list of profiles including System Administrator, Analytics Cloud Integration User, Analytics Cloud Security User, Minimum Access - API Only Integrations, B2B Reordering Portal Buyer Profile, External Apps Login User, Minimum Access - Salesforce, Salesforce API Only System Integrations, Standard Platform User, and Customer Community Login User.
- Permission Sets:** No Permission Sets configured

Buttons for "Save", "Save and New", and "Cancel" are located at the top and bottom of the form.

## 7. Custom Tabs Prep (Planned)

- Documented the plan to create tabs for:
  - Events
  - Attendees
  - Registrations

The screenshot shows the Salesforce Setup interface for Custom Tabs. The browser address bar displays the URL: `managementcom-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home`. The left sidebar contains the 'Setup' menu with 'Home' and 'Object Manager' options. Below this, a search bar for 'tabs' is visible, along with a 'User Interface' section containing 'Rename Tabs and Labels' and 'Tabs'. A message states: 'Didn't find what you're looking for? Try using Global Search.'

The main content area is titled 'Custom Tabs' and includes a 'Help for this Page' link. It explains that custom tabs can be created to extend Salesforce functionality or build new application functionality. It also notes that Custom Object tabs look and behave like standard tabs, while Web tabs, Visualforce tabs, Lightning Component tabs, and Lightning Page tabs allow for embedding external content or Lightning components.

The 'Custom Object Tabs' section is active, showing a table with the following data:

Action	Label	Tab Style	Description
<a href="#">Edit</a>   <a href="#">Del</a>	Albums	CONFIRMED	
<a href="#">Edit</a>   <a href="#">Del</a>	Artists	CONFIRMED	
<a href="#">Edit</a>   <a href="#">Del</a>	Attendees	CONFIRMED	
<a href="#">Edit</a>   <a href="#">Del</a>	Events	CONFIRMED	
<a href="#">Edit</a>   <a href="#">Del</a>	Registrations	CONFIRMED	
<a href="#">Edit</a>   <a href="#">Del</a>	S2020	CONFIRMED	

Below the table, there are sections for 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs', each with a 'New' button and a 'What is This?' link. Each section currently displays the message: 'No [Tab Type] Tabs have been defined.'