

BUILD AN EVENT MANAGEMENT SYSTEM USING SALESFORCE

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BUILD AN EVENT MANAGEMENT SYSTEM USING SALESFORCE

1. INTRODUCTION

1.1 Overview

Description:

The project aim is to provide real-time knowledge for all the students who have basic knowledge of Salesforce and Looking for a real-time project. This project will also help to those professionals who are in cross-technology and wanted to switch to Salesforce with the help of this project they will gain knowledge and can include into their resume as well.

1.2 Purpose

Salesforce is customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

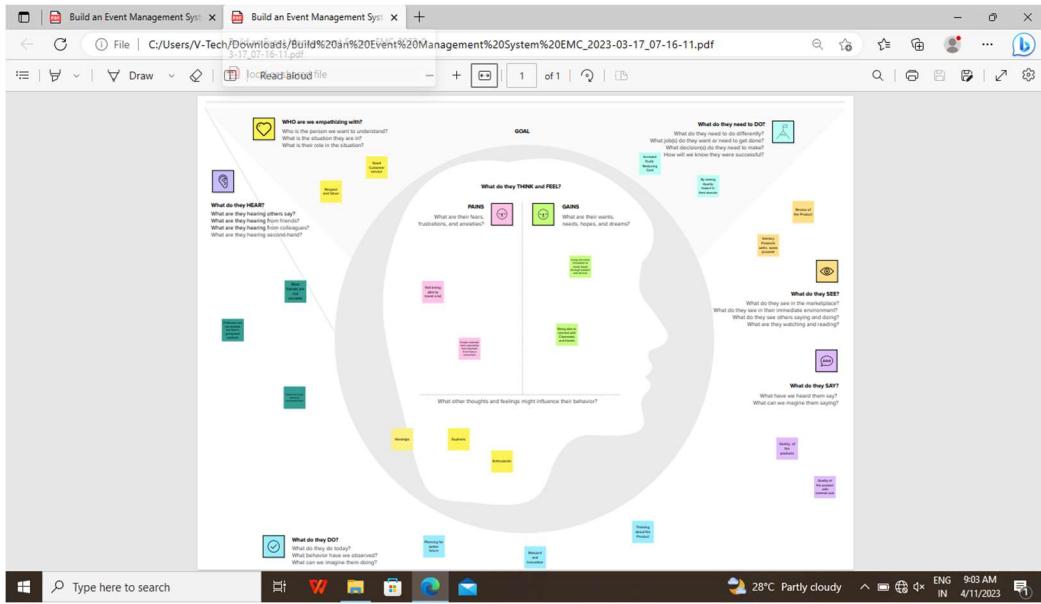
Event management is the process of creating and maintaining an event. This process spans from the very beginning of planning all the way to post-event strategizing.

We will learn

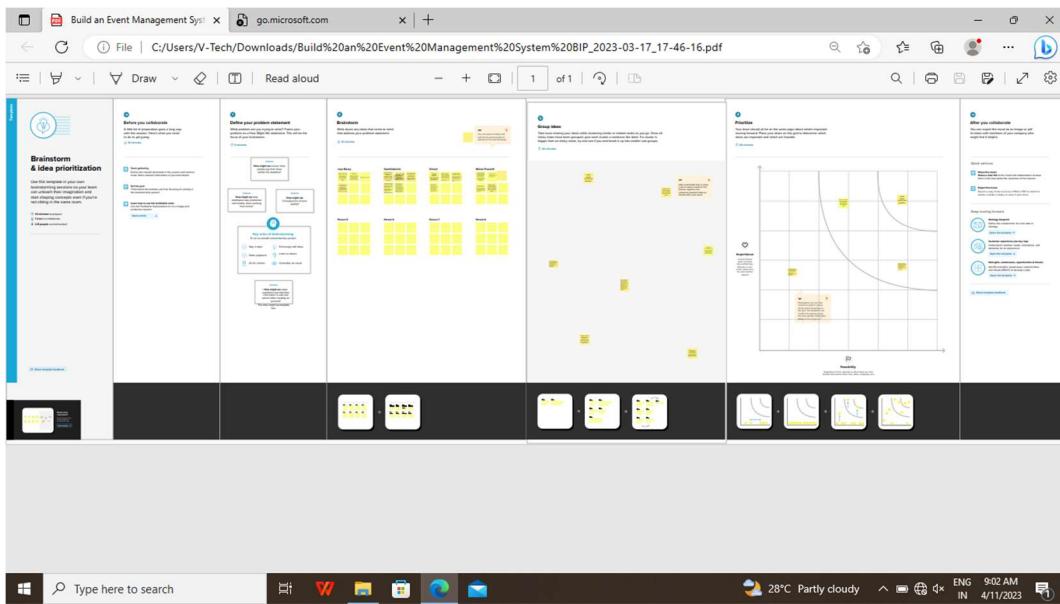
1. Real Time Salesforce Project
2. Object & Relationship in Salesforce
3. Create Salesforce Org

2 PROBLEM DEFINITION & DESIGN THINKING

2.1 Empathy Map



2.2 Ideation & Brainstorming Map



3 RESULT

3.1 Data Model:

Object name	Fields in the Object									
Event	<table border="1"><tr><td data-bbox="709 840 1036 897">Field label</td><td data-bbox="1036 840 1330 897">Data type</td></tr><tr><td data-bbox="709 897 1036 954">Label</td><td data-bbox="1036 897 1330 954">Text</td></tr><tr><td data-bbox="709 954 1036 1011">Plural Label</td><td data-bbox="1036 954 1330 1011">Text</td></tr><tr><td data-bbox="709 1011 1036 1068">Record Name</td><td data-bbox="1036 1011 1330 1068">Text</td></tr></table>		Field label	Data type	Label	Text	Plural Label	Text	Record Name	Text
Field label	Data type									
Label	Text									
Plural Label	Text									
Record Name	Text									
Attendees	<table border="1"><tr><td data-bbox="709 1235 1036 1292">Field label</td><td data-bbox="1036 1235 1330 1292">Data type</td></tr><tr><td data-bbox="709 1292 1036 1349">Label</td><td data-bbox="1036 1292 1330 1349">Text</td></tr><tr><td data-bbox="709 1349 1036 1406">Plural Label</td><td data-bbox="1036 1349 1330 1406">Text</td></tr><tr><td data-bbox="709 1406 1036 1463">Record Name</td><td data-bbox="1036 1406 1330 1463">Text</td></tr></table>		Field label	Data type	Label	Text	Plural Label	Text	Record Name	Text
Field label	Data type									
Label	Text									
Plural Label	Text									
Record Name	Text									
speaker	<table border="1"><tr><td data-bbox="709 1588 1036 1645">Field label</td><td data-bbox="1036 1588 1330 1645">Data type</td></tr><tr><td data-bbox="709 1645 1036 1702">Label</td><td data-bbox="1036 1645 1330 1702">Text</td></tr><tr><td data-bbox="709 1702 1036 1759">Plural Label</td><td data-bbox="1036 1702 1330 1759">Text</td></tr><tr><td data-bbox="709 1759 1036 1814">Record Name</td><td data-bbox="1036 1759 1330 1814">Text</td></tr></table>		Field label	Data type	Label	Text	Plural Label	Text	Record Name	Text
Field label	Data type									
Label	Text									
Plural Label	Text									
Record Name	Text									

Vendor	
Field label	Data type
Label	Text
Plural Label	Text
Record Name	Text

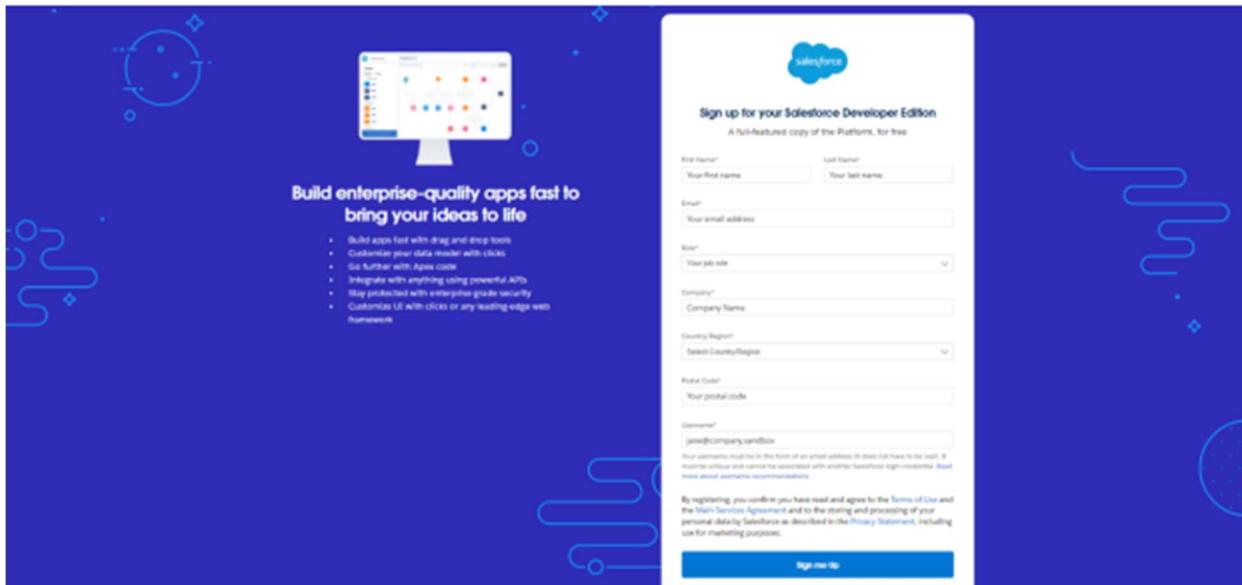
3.2 Activity & Screenshot

Milestone 1- SALESFORCE

Activity-1

Creating a Salesforce Developer Org:

A Developer org has all the features and licenses you need to get started with Salesforce.



4/11/23, 10:17 AM

Gmail - Welcome to Salesforce: Verify your account



20MAEM59 Joys Blessy <joysblessy14@gmail.com>

Welcome to Salesforce: Verify your account

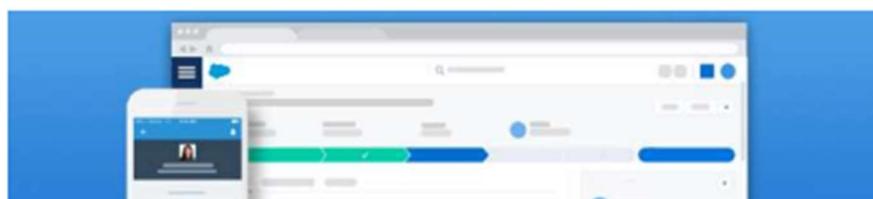
1 message

developer@salesforce.com <developer@salesforce.com>
To: joysblessy14@gmail.com

9 March 2023 at 19:19



Thanks for signing up with Salesforce!



Click below to verify your account.

Verify Account

To easily log in later, save this URL:

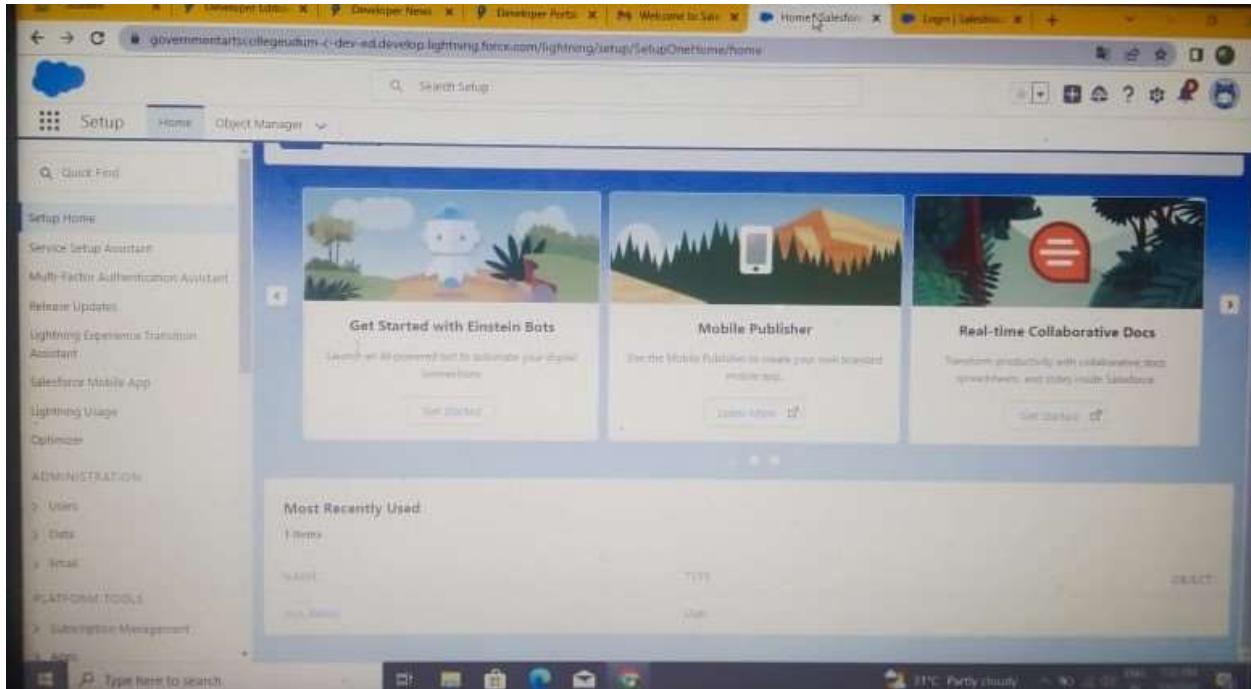
<https://governmentartscollegeudum-c-dev-ed.develop.my.salesforce.com>

Username:

joysblessy14@gmail.com

Again, welcome to Salesforce!

The image shows two screenshots. The left screenshot is the Salesforce login page, featuring a blue cloud logo at the top, a red box highlighting the 'Log In' button, and a red arrow pointing towards it. The right screenshot is the 'Net Zero Marketplace' landing page, which has a green background with white clouds and a large tree icon. It features a 'Explore the Marketplace' button and several project cards.



Milestone 2- OBJECTS

Salesforce objects are database tables that permit you to store data that is specific to an organization. It consists of fields (columns) and records (rows).

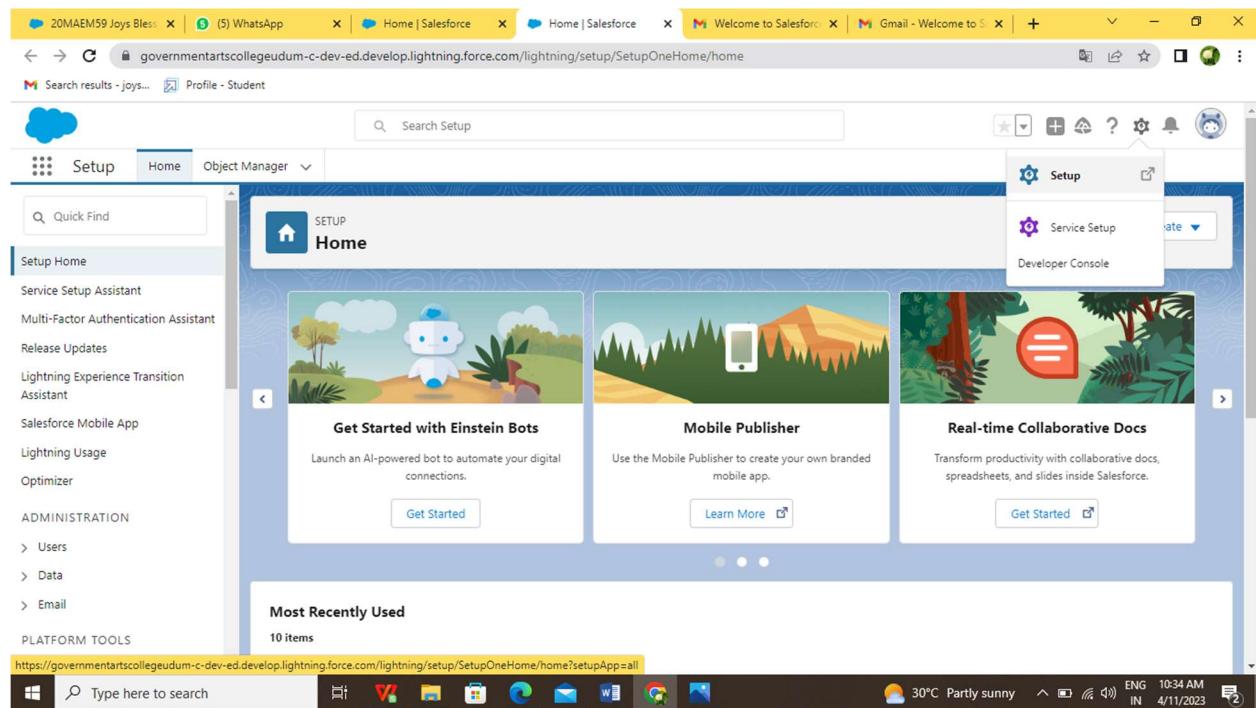
Salesforce objects are of two types:

- Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
- Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

Activity-1

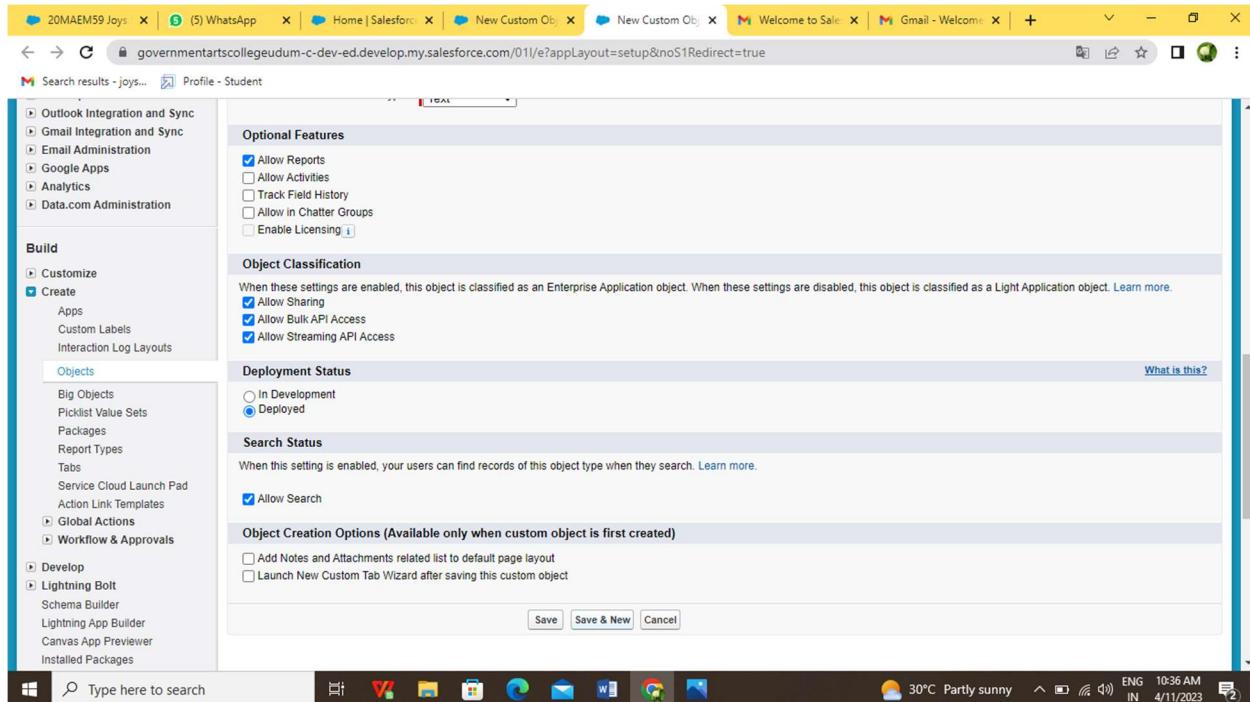
Creation of Objects for Event Management:

For this Event management we need to create 4 objects i.e Events, Attendees, Speakers and vendors. The below steps will assist you in creating those objects.



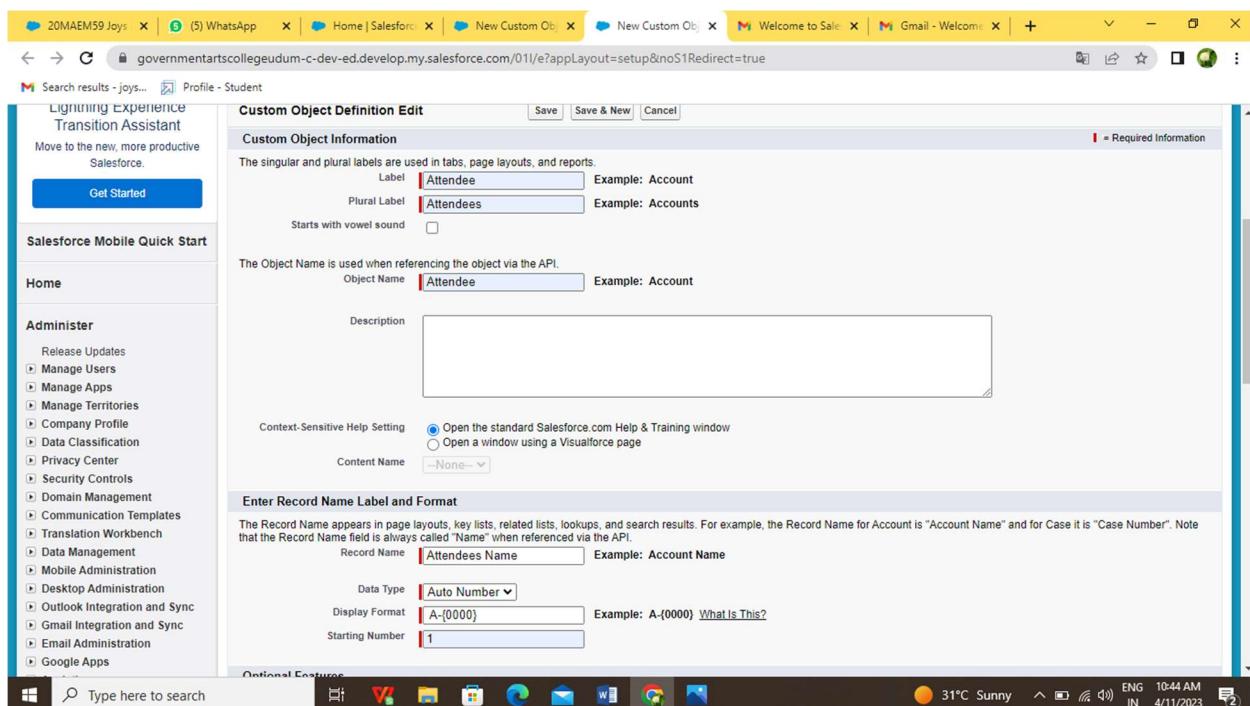
The screenshot shows the Salesforce Object Manager page. At the top, there are tabs for Setup, Home, and Object Manager. The main area displays a table of standard objects with columns for Label, API Name, Type, Description, and Last Modified. A context menu is open over the 'Asset Action' row, with options like 'Custom Object' and 'Custom Object from Spreadsheet'. The URL in the address bar is <https://governmentartscollegeudum-c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home>.

The screenshot shows the 'Custom Object Definition Edit' page. On the left, there's a sidebar with 'Lightning Experience Transition Assistant' and 'Salesforce Mobile Quick Start' sections. The main form is titled 'Custom Object Information' and includes fields for Label (Event), Plural Label (Events), and a checkbox for 'Starts with vowel sound'. Below this is a section for 'Object Name' with a field for 'Event' and an example of 'Account'. There's also a 'Description' text area and a 'Context-Sensitive Help Setting' section with radio buttons for 'Open the standard Salesforce.com Help & Training window' (selected) and 'Open a window using a Visualforce page'. The 'Content Name' dropdown is set to 'None'. The 'Enter Record Name Label and Format' section at the bottom includes a note about record names appearing in various contexts, a 'Record Name' field with 'Event Name' and example 'Account Name', a 'Data Type' dropdown set to 'Text', and an 'Optional Features' section with a checked 'Allow Reports' checkbox. The URL in the address bar is <https://governmentartscollegeudum-c-dev-ed.develop.my.salesforce.com/01/e?appLayout=setup&noS1Redirect=true>.



Activity 2:

Creation of Attendees object

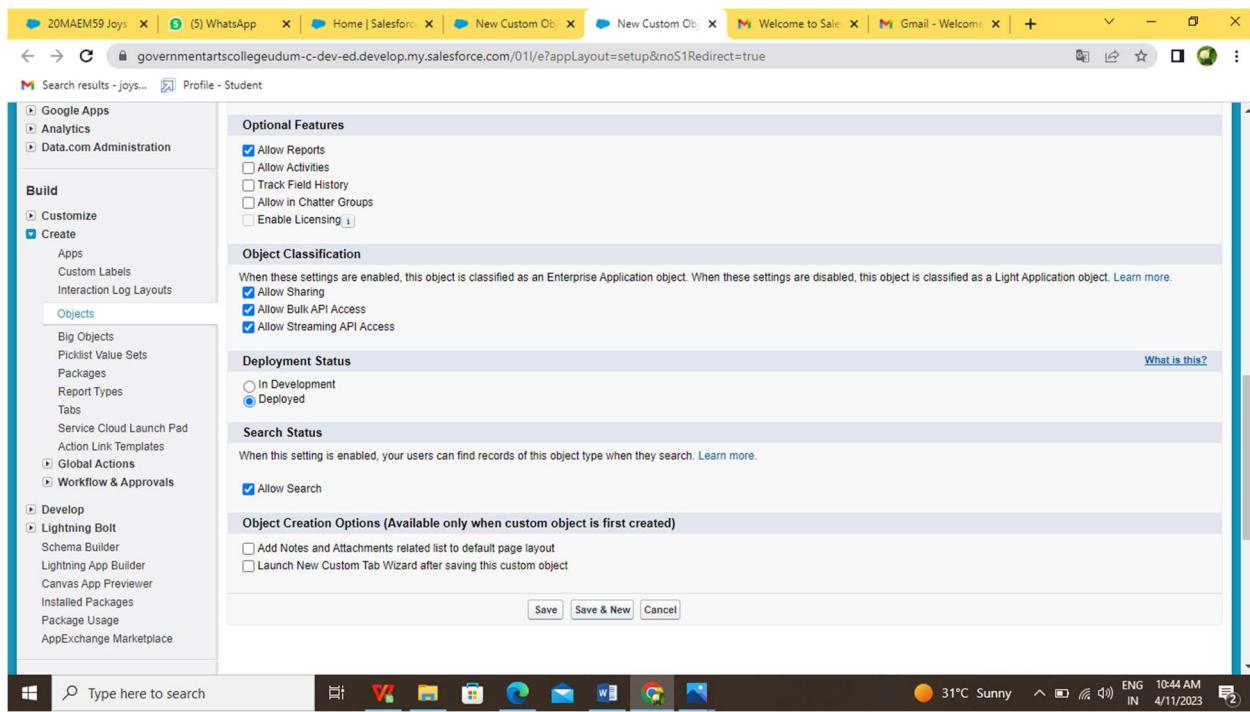


The screenshot shows the Salesforce Setup interface. On the left, a sidebar menu is open under the 'Create' section, specifically for 'Objects'. The main content area displays configuration options for a 'New Custom Object'. Under 'Optional Features', 'Allow Reports' is checked. In 'Object Classification', 'Allow Sharding' and 'Allow Bulk API Access' are checked. Under 'Deployment Status', 'Deployed' is selected. In 'Search Status', 'Allow Search' is checked. At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons.

Activity 3:

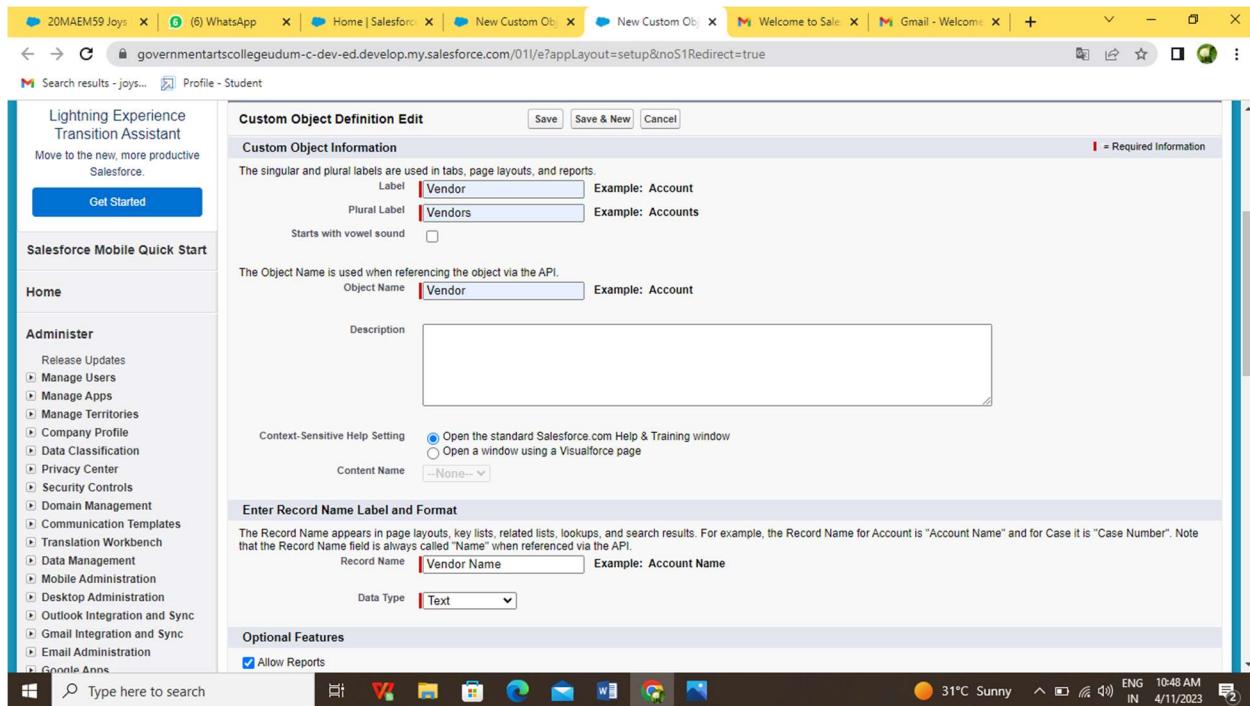
Creation of Speaker object:

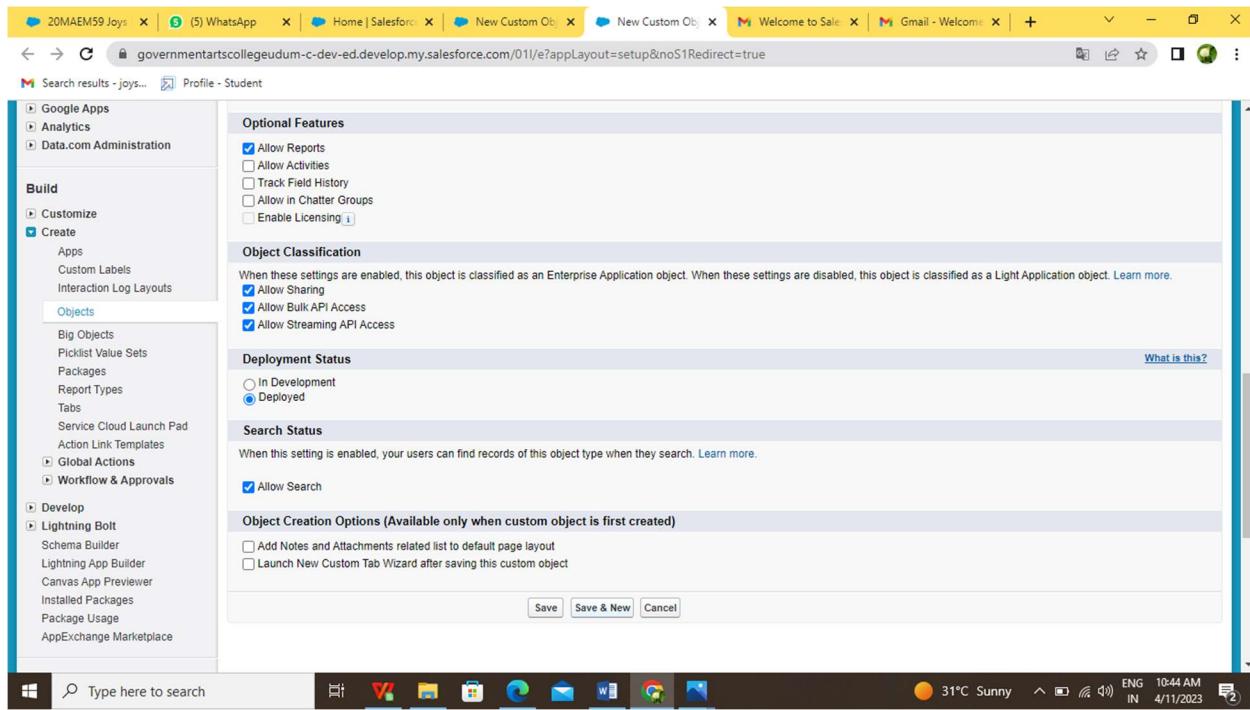
The screenshot shows the 'Custom Object Definition Edit' page. The 'Custom Object Information' section has 'Label' set to 'Speaker' and 'Plural Label' set to 'Speakers'. The 'Object Name' field also contains 'Speaker'. The 'Description' field is empty. Under 'Context-Sensitive Help Setting', 'Open the standard Salesforce.com Help & Training window' is selected. The 'Content Name' dropdown is set to 'None'. The 'Enter Record Name Label and Format' section shows 'Record Name' as 'Speaker Name' and 'Data Type' as 'Text'. The 'Optional Features' section includes 'Allow Reports', which is checked. At the top right, there are 'Save', 'Save & New', and 'Cancel' buttons.



Activity 4:

Creation of Vendors object:





Milestone 3 – Tab:

Tabs in Salesforce help users view the information at a glance. It displays the data of objects and other web content in the application.

There are mainly 4 types of tabs:

Standard Object Tabs:

Standard object tabs display data related to standard objects.

Custom Object Tabs:

Custom object tabs display data related to custom objects. These tabs look and function just like standard tabs.

Web Tabs:

Web Tabs display any external Web-based application or Web page in a Salesforce tab.

Visualforce Tabs: Visualforce Tabs display data from a Visualforce Page

Activity 1:

Creation of Event tab:

The screenshot shows the Salesforce Lightning Experience interface. On the left, there's a sidebar with links like 'Home', 'Administrator', and 'Salesforce Mobile Quick Start'. The main area is titled 'Edit Custom Object Tab Events'. It contains fields for 'Tab Label' (set to 'Events'), 'Object' (set to 'Event'), and 'Tab Style' (set to 'Apple'). Below these are optional fields for a 'Splash Page Custom Link' (set to 'None') and a 'Description' (empty). At the bottom are 'Save' and 'Cancel' buttons. The top navigation bar shows multiple tabs open, including 'Home | Sales', 'New Cust...', 'Home | Sales', 'Tabs | Sales', 'Edit Cust...', 'Welcome', 'Gmail - W...', and others.

Activity 2:

Creation of Attendee tab:

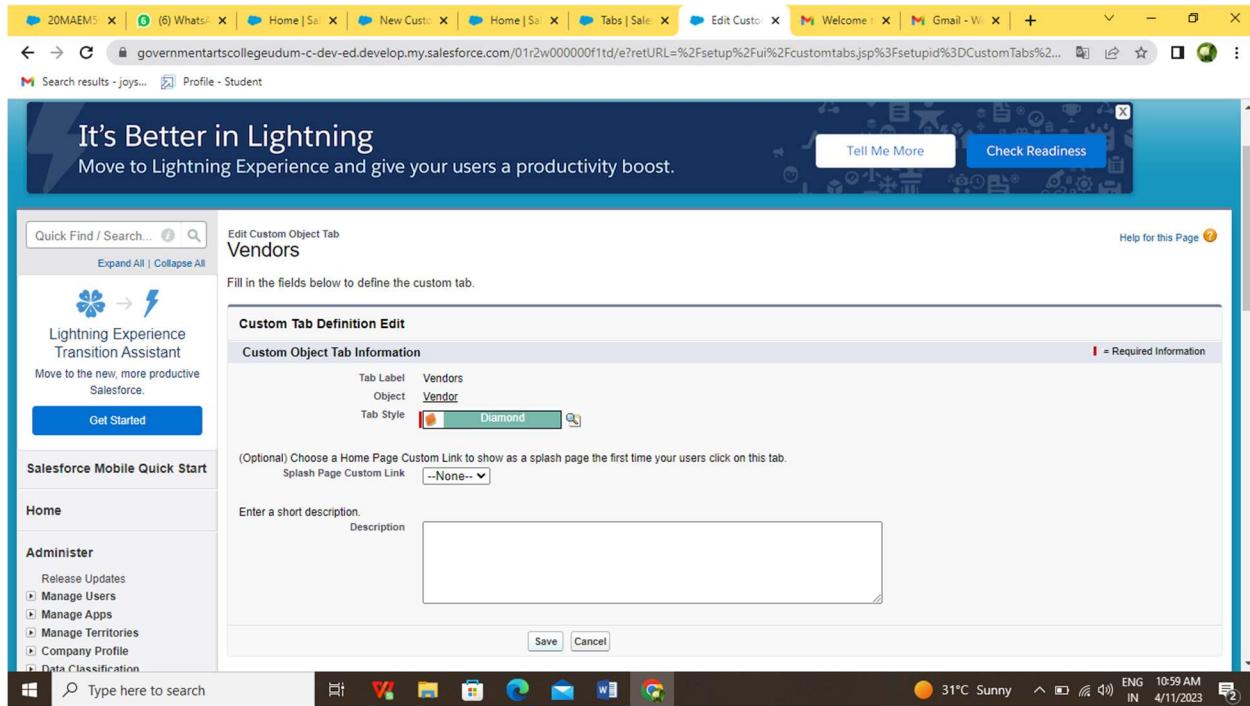
This screenshot is similar to the previous one but for the 'Attendees' object. The main area is titled 'Edit Custom Object Tab Attendees'. The 'Tab Label' is set to 'Attendees', 'Object' is set to 'Attendee', and 'Tab Style' is set to 'Boat'. The rest of the interface is identical, including the sidebar, the optional splash page link, the description field, and the save/cancel buttons. The top navigation bar shows the same set of tabs as the first screenshot.

Activity 3:

Creation of Speakers tab:

The screenshot shows the Salesforce Lightning Experience interface. At the top, there are several tabs: '20MAEMS', '(5) WhatsApp', 'Home | Sales', 'New Cust...', 'Home | Sales', 'Tabs | Sales', 'Edit Cust...', 'Welcome', 'Gmail - W...', and a '+' sign. Below the tabs, a banner reads 'It's Better in Lightning' and 'Move to Lightning Experience and give your users a productivity boost.' On the left, a sidebar includes 'Lightning Experience Transition Assistant' with a 'Get Started' button, 'Salesforce Mobile Quick Start' with 'Home' and 'Administrator' sections, and a search bar. The main content area is titled 'Edit Custom Object Tab' for 'Speakers'. It asks to 'Fill in the fields below to define the custom tab.' Under 'Custom Tab Definition Edit', it shows 'Custom Object Tab Information' with 'Tab Label' set to 'Speakers', 'Object' set to 'Speaker', and 'Tab Style' set to 'Car'. An optional 'Splash Page Custom Link' dropdown is set to '--None--'. A text area for 'Description' is empty. At the bottom right are 'Save' and 'Cancel' buttons. The system status bar at the bottom shows '31°C Sunny', 'ENG IN 10:59 AM', and the date '4/11/2023'.

Activity 4: Creation of Vendor tab



Milestone 3 – Application:

Application:

Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs.

There are 2 types of Salesforce applications:

- Standard apps: these apps come with every occurrence of Salesforce as default. Community, Call Center, Content, Sales, Marketing, Salesforce Chatter, Site.com, and App Launcher are included in these apps. The description, logo, and label of a standard app cannot be altered.
- Custom apps: these apps are created according to the needs of a company. They can be made by putting custom and standard tabs together. Logos for custom apps can be changed.

Activity

Create the Event Management Construction app

The screenshot shows a browser window with multiple tabs open at the top, including '20MAEMS', '(7) WhatsApp', 'Home | Sales', 'New Cust...', 'Home | Sales', 'App Mana...', 'Custom Tab...', 'Welcome', 'Gmail - W...', and '+'. The main content area is titled 'Lightning Experience App Manager' under the 'SETUP' tab. A search bar at the top says 'Search results - joys... Profile - Student'. Below it, there's a 'Cloud' icon and navigation links for 'Setup', 'Home', and 'Object Manager'. A sidebar on the left has a search bar and a 'Apps' section with 'App Manager' selected. A message says 'Didn't find what you're looking for? Try using Global Search.' The central part of the screen is titled 'Clone Apps(Beta)' and contains a note about enabling app cloning. A table lists four existing apps:

App Name	Developer	Description	Last Modified	Type
All Tabs	AllTabSet	Build CRM Analytics	09/03/2023, 7:1...	Classic
Analytics Studio	Insights	Build CRM Analytics	09/03/2023, 7:1...	Classic
App Launcher	AppLauncher	App Launcher	09/03/2023, 7:1...	Classic
Bolt Solutions	LightningBolt	Discover and...	09/03/2023, 7:1...	Lightning

The bottom of the screen shows the Windows taskbar with icons for File Explorer, Google Chrome, and other applications. The system tray displays the URL 'https://governmentartscollegegedum-c-dev-ed.develop.lightning.force.com/one/o...', the date '4/11/2023', the time '11:06 AM', the temperature '31°C Sunny', and battery status.

Screenshot of the "New Lightning App" setup page in the Salesforce Lightning Experience.

The page title is "New Lightning App".

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

- * App Name: Event Management
- * Developer Name: Event_Management

App Branding

- Image:
- Primary Color Hex Value: #0070D2

Description

Next

Below the form, there is a table showing existing apps:

ID	Name	Type	Last Modified	Theme	Action
3	App Launcher	AppLauncher	App Launcher t...	09/03/2023, 7:1...	Classic
4	Bolt Solutions	LightningBolt	Discover and ...	09/03/2023, 7:1...	Lightning

At the bottom of the page, there is a search bar and a system status bar.

Screenshot of the "New Lightning App" setup page in the Salesforce Lightning Experience, showing the "Available Items" and "Selected Items" sections.

The page title is "New Lightning App".

Available Items

- ven
- Omnichannel Inventory
- Vendors

Selected Items

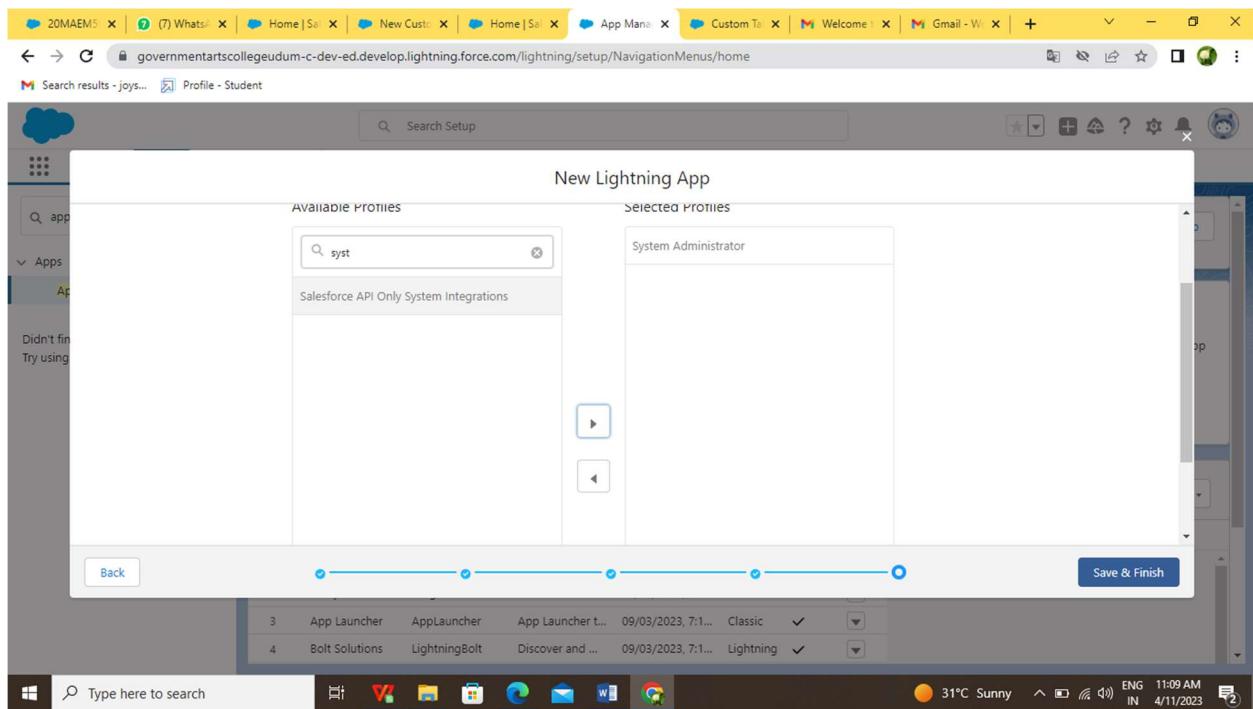
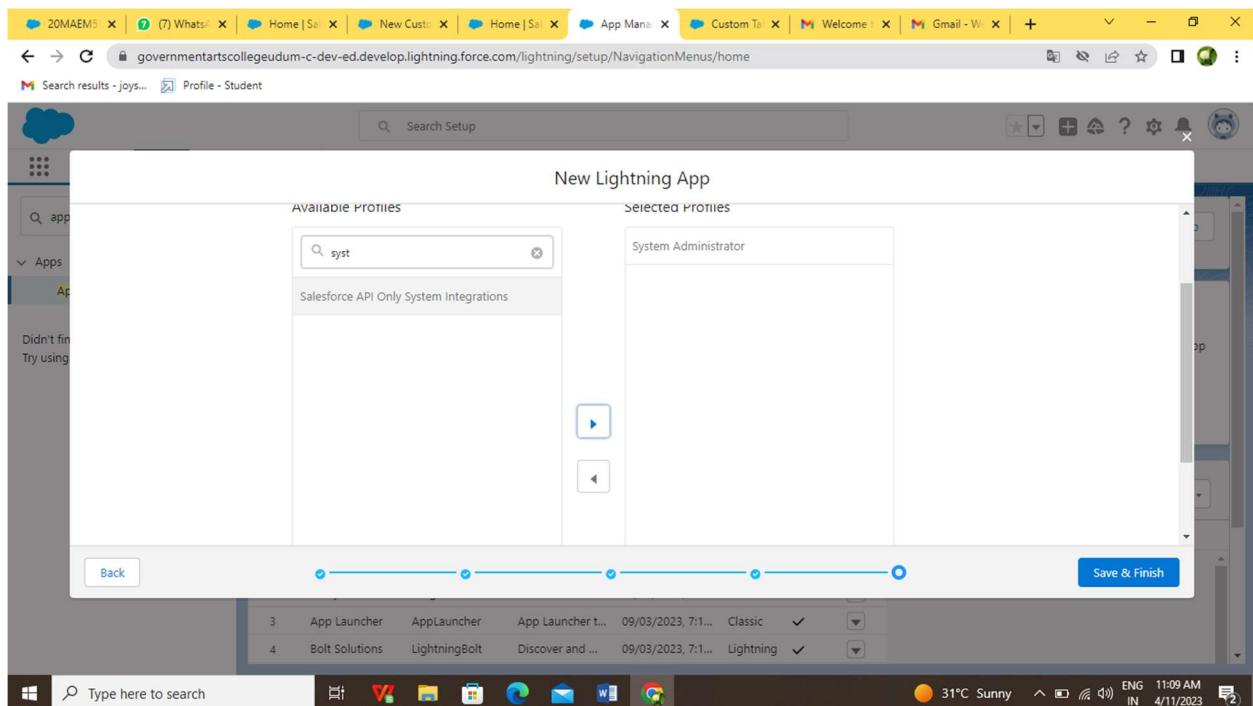
- Events
- Attendees
- Speakers

Back **Next**

Below the form, there is a table showing existing apps:

ID	Name	Type	Last Modified	Theme	Action
3	App Launcher	AppLauncher	App Launcher t...	09/03/2023, 7:1...	Classic
4	Bolt Solutions	LightningBolt	Discover and ...	09/03/2023, 7:1...	Lightning

At the bottom of the page, there is a search bar and a system status bar.



Milestone 4 – Fields:

Fields:

Fields in Salesforce represents what the columns represent in relational databases. It can store data values which are required for a particular object in a record.

There are 2 types of fields in salesforce:

- Standard fields: There are four standard fields in every custom object that are Created By, Last Modified By, Owner, and the field created at the time of the creation of an object. These fields cannot be deleted or edited and they are always required. For standard objects, the fields which are present by default in them and cannot be deleted from standard objects are standard fields.
- Custom fields: The Custom fields which are added by the administrator/developer to meet the business requirements of any organization. They may or may not be required.

Activity 1:

Creation of fields for the Event objects:

The screenshot shows the Salesforce Object Manager page. At the top, there's a navigation bar with tabs like Setup, Home, and Object Manager. Below that is a search bar labeled "Search Setup". The main area is titled "Object Manager" and shows a list of objects with their details. The objects listed are:

Name	Label	Type	Last Modified
Event	Event__c	Custom Object	19/03/2023
Event	Event	Standard Object	
Finance Balance Snapshot	FinanceBalanceSnapshot	Standard Object	
Finance Transaction	FinanceTransaction	Standard Object	
Image	Image	Standard Object	
Incident	Incident	Standard Object	
Incident Related Item	IncidentRelatedItem	Standard Object	
Individual	Individual	Standard Object	
Invoice	Invoice	Standard Object	

At the bottom of the page, there's a footer with a search bar, a toolbar with various icons, and system status information including temperature (31°C), weather (Sunny), battery level, and network connectivity.

The screenshot shows the Salesforce Lightning Experience interface. The top navigation bar includes tabs like Home, New Custom Object, Event, Custom Tab, Welcome, and Gmail. Below the bar, a search bar and a profile icon are visible. The main content area is titled "Event" under "SETUP > OBJECT MANAGER". On the left, a sidebar lists options such as Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The "Fields & Relationships" section displays a table with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table lists fields like Chennai, Created By, Email, Event, Event Name, Last Modified By, and Phone, each with its corresponding data type and field dependencies.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes tabs like Home, New Custom Object, Event, Custom Tab, Welcome, and Gmail. Below the bar, a search bar and a profile icon are visible. The main content area is titled "Event: N" under "Customize". On the left, a sidebar lists categories: Customize, Create, Develop, Lightning Bolt, Schema Builder, Lightning App Builder, Canvas App Previewer, Installed Packages, Package Usage, AppExchange Marketplace, Deploy, Deployment Settings, Deployment Status, and Monitor. The "Customize" section is expanded, showing various field types: Picklist, Picklist (Multi-Select), Text (selected), Text Area, Text Area (Long), Text Area (Rich), Text (Encrypted), Time, and URL. Each field type has a brief description. At the bottom right of the customization pane, there are "Next" and "Cancel" buttons.

The screenshot shows the Salesforce Lightning Experience setup interface. The top navigation bar includes links for Home, Chatter, Accounts, Contacts, Cases, Solutions, Reports, Dashboards, Events, Attendees, Speakers, Vendors, and a search bar. A banner at the top says "It's Better in Lightning" and "Move to Lightning Experience and give your users a productivity boost." Below the banner, the main content area is titled "Event New Custom Field". It displays "Step 2. Enter the details" and shows the following configuration:

- Field Label: City
- Length: 50
- Field Name: City
- Description: (empty)
- Help Text: (empty)

On the left sidebar, there are sections for "Lightning Experience Transition Assistant" (Get Started), "Salesforce Mobile Quick Start", "Home", and "Administrator". The status bar at the bottom shows system information: 32°C Sunny, ENG, 11:17 AM, IN, 4/11/2023.

Activity 2:

Creation of fields for the Attendees objects

The screenshot shows the Salesforce Object Manager setup interface. The top navigation bar includes links for Home, Object Manager, and a search bar. The main content area is titled "Object Manager" and shows a list of objects with their respective types:

Object	Type
Asset Action Source	AssetActionSource
Asset Relationship	AssetRelationship
Asset State Period	AssetStatePeriod
Assigned Resource	AssignedResource
Associated Location	AssociatedLocation
Attendee	Custom Object
Authorization Form	AuthorizationForm
Authorization Form Consent	AuthorizationFormConsent
Authorization Form Data Use	AuthorizationFormDataUse
Authorization Form Text	AuthorizationFormText

The "Attendee" object is highlighted with a yellow background. The status bar at the bottom shows system information: 32°C Sunny, ENG, 11:20 AM, IN, 4/11/2023.

The screenshot shows the Salesforce Setup interface with the following details:

- Tab Bar:** SETUP > OBJECT MANAGER
- Object Name:** Attendee
- Left Sidebar:**
 - Details
 - Fields & Relationships** (selected)
 - Page Layouts
 - Lightning Record Pages
 - Buttons, Links, and Actions
 - Compact Layouts
 - Field Sets
 - Object Limits
 - Record Types
 - Related Lookup Filters
 - Search Layouts
- Fields & Relationships Table:**

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Attendee Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Tickets	Tickets__c	Picklist		
- System Navigation:** Search Setup, Home, Object Manager
- System Status:** Type here to search, Taskbar icons, Weather (32°C Sunny), Date (4/11/2023), Time (11:20 AM), ENG IN

The screenshot shows the Lightning Experience Transition Assistant with the following details:

- Left Sidebar:**
 - Lightning Experience Transition Assistant
 - Get Started
 - Salesforce Mobile Quick Start
 - Home
 - Administrator
 - Release Updates
 - Manage Users
 - Manage Apps
 - Manage Territories
 - Company Profile
 - Data Classification
 - Privacy Center
 - Security Controls
 - Domain Management
 - Communication Templates
 - Translation Workbench
 - Data Management
 - Mobile Administration
 - Desktop Administration
 - Outlook Integration and Sync
 - Gmail Integration and Sync
- Step 1: Choose the field type:**

Specify the type of information that the custom field will contain.

Data Type:

 - None Selected: Select one of the data types below.
 - Auto Number: A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
 - Formula: A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
 - Roll-Up Summary: A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
 - Lookup Relationship: Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
 - Master-Detail Relationship: Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
 - The relationship field is required on all detail records.
 - The ownership and sharing of a detail record are determined by the master record.
 - When a user deletes the master record, all detail records are deleted.
 - You can create rollup summary fields on the master record to summarize the detail records.
 - External Lookup Relationship: Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
 - Checkbox: Allows users to select a True (checked) or False (unchecked) value.
 - Currency: Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
 - Date: Allows users to enter a date or pick a date from a popup calendar.
 - Date/Time: Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
- System Navigation:** Type here to search, Taskbar icons, Weather (32°C Sunny), Date (4/11/2023), Time (11:21 AM), ENG IN

The screenshot shows the Salesforce Lightning Experience setup interface. The top navigation bar includes tabs like Home, Chatter, Accounts, Contacts, Cases, Solutions, Reports, Dashboards, Events, Attendees, Speakers, Vendors, and a plus sign. A banner at the top says "It's Better in Lightning" and "Move to Lightning Experience and give your users a productivity boost." Below the banner, a sidebar on the left contains links for "Lightning Experience Transition Assistant", "Get Started", "Salesforce Mobile Quick Start", "Home", and "Administrator". The main content area is titled "Attendee New Custom Field" and "Step 2. Enter the details". It shows fields for "Field Label" (Id), "Display Format" (A-{0000}), "Starting Number" (1), "Field Name" (Id), and "Description". There are also "Help Text" and "Generate Auto Number for existing records" checkboxes. Buttons for "Tell Me More", "Check Readiness", "Previous", "Next", and "Cancel" are visible. The bottom of the screen shows a taskbar with various icons and a system status bar indicating 32°C Sunny, ENG, IN, and the date 4/11/2023.

Activity 3:

Creation of fields for the Speakers objects:

The screenshot shows the Salesforce Object Manager setup page. The top navigation bar includes tabs like Setup, Home, and Object Manager. The main content area is titled "Object Manager" and shows a list of objects: Session Hijacking Event Store, Shift, Shift Engagement Channel, Shift Work Topic, Skill Requirement, Social Persona, Speaker, Store, Student, and Task. Each object entry includes its name, object type (Standard Object or Custom Object), and a creation date (e.g., 19/03/2023). A "Schema Builder" button is visible at the top right of the list. The bottom of the screen shows a taskbar with various icons and a system status bar indicating 32°C Sunny, ENG, IN, and the date 4/11/2023.

The screenshot shows the Salesforce Object Manager interface for the 'Speaker' object. On the left, a sidebar lists various setup options like Page Layouts, Lightning Record Pages, Buttons, etc. The main content area is titled 'Fields & Relationships' and displays a table of fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Bio	Bio_c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Event	Speaker_c	Lookup(Event)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Speaker Name	Name	Text(80)		✓

The screenshot shows the Salesforce Setup page for creating a new custom field. The left sidebar includes options like Lightning Bolt, Schema Builder, and Monitor. The main area shows a list of field types:

- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)
- Text (Encrypted) (Info)
- Time
- URL

Each option has a brief description. At the bottom right are 'Next' and 'Cancel' buttons.

Salesforce Home | Chatter | Accounts | Contacts | Cases | Solutions | Reports | Dashboards | Events | Attendees | Speakers | Vendors | +

Speaker: New Custom Field Stage Manager

It's Better in Lightning
Move to Lightning Experience and give your users a productivity boost.

New Custom Field

Step 2. Enter the details

Field Label: Bio

Field Name: Bio

Description:

Help Text:

Step 2 of 4

Get Started

Salesforce Mobile Quick Start

Home

Administrator

Quick Find / Search... Search

Switch to Lightning Experience Joys Blessy Setup Help Service

Type here to search

32°C Sunny ENG 11:27 AM IN 4/11/2023

Salesforce Home | Chatter | Accounts | Contacts | Cases | Solutions | Reports | Dashboards | Events | Attendees | Speakers | Vendors | +

Speaker: New Custom Field Stage Manager

It's Better in Lightning
Move to Lightning Experience and give your users a productivity boost.

New Custom Field

Step 3. Establish field-level security

Field Label: Bio

Data Type: Text Area

Field Name: Bio

Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Event	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Step 3 of 4

Get Started

Salesforce Mobile Quick Start

Home

Administrator

Release Updates

Manage Users

Manage Apps

Manage Territories

Company Profile

Data Classification

Privacy Center

Security Controls

Quick Find / Search... Search

Switch to Lightning Experience Joys Blessy Setup Help Service

Type here to search

32°C Sunny ENG 11:27 AM IN 4/11/2023

The screenshot shows the Salesforce Lightning Experience Transition Assistant. On the left, there's a sidebar with links like 'Home', 'Administrator', and 'Release Updates'. The main area is titled 'New Custom Field' and is on 'Step 4. Add to page layouts'. It shows a field named 'Bio' with type 'Text Area'. Below it, a section asks to select page layouts for the field. Two options are checked: 'Add Field' and 'Speaker Layout'. At the bottom, there are buttons for 'Previous', 'Save & New', 'Save', and 'Cancel'.

Activity 4:

Creation of fields for the Vendors objects

The screenshot shows the Salesforce Object Manager. The top navigation bar includes links for 'Setup', 'Home', and 'Object Manager'. The main area is titled 'Object Manager' and shows a list of 171 items. The table includes columns for Name, Label, Type, and Last Modified. Some entries include 'Social Persona', 'Speaker', 'Store', 'Student', 'Task', 'Time Slot', 'User', 'User Provisioning Request', 'Vendor', 'Voice Call', and 'Standard Object'. The 'Vendor' row is highlighted in yellow.

Name	Label	Type	Last Modified
Social Persona	SocialPersona	Standard Object	
Speaker	Speaker_c	Custom Object	19/03/2023
Store	WebStore	Standard Object	
Student	Student_c	Custom Object	03/04/2023
Task	Task	Standard Object	
Time Slot	TimeSlot	Standard Object	
User	User	Standard Object	
User Provisioning Request	UserProvisioningRequest	Standard Object	
Vendor	Vendor_c	Custom Object	19/03/2023
Voice Call	VoiceCall	Standard Object	

Screenshot of the Salesforce Lightning Experience setup page for the 'Vendor' object.

The left sidebar shows the 'Fields & Relationships' section under 'Object Manager'.

The main content area displays the 'Fields & Relationships' table:

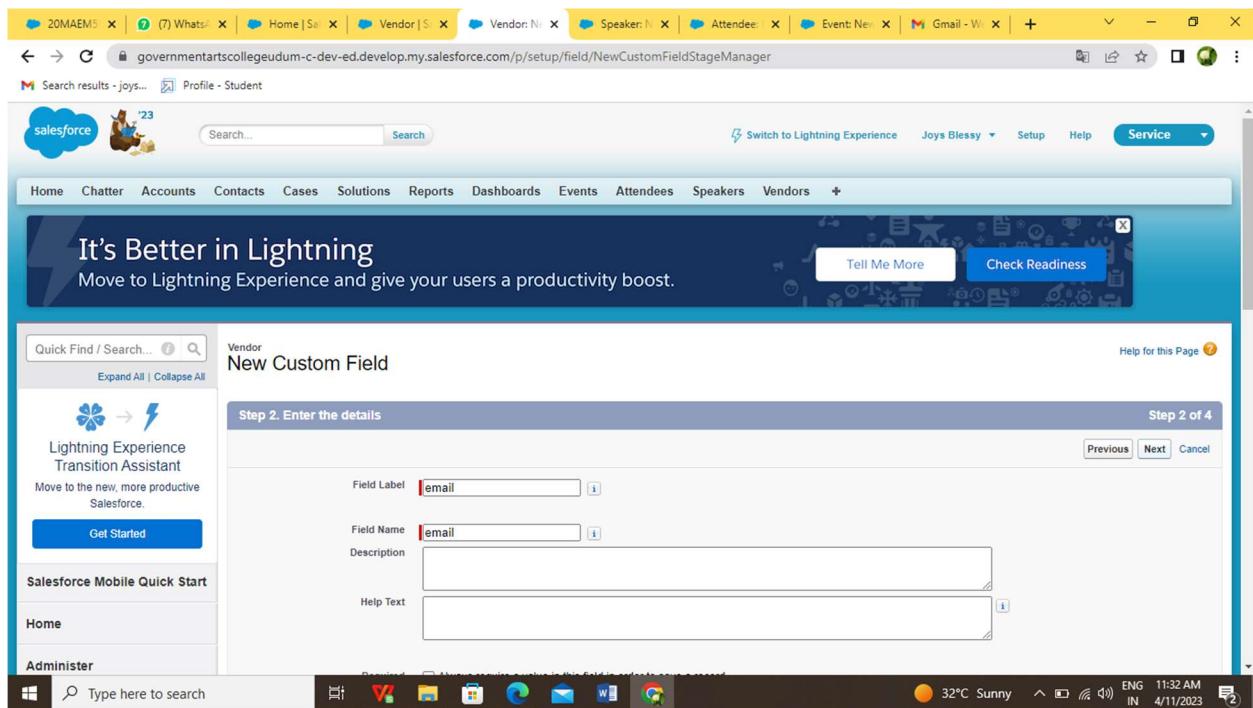
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Email	Email_c	Email		
Event	Event__c	Lookup(Event)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		
Service Provider	serviceprovider_c	Text(50)		

Screenshot of the Salesforce classic setup page for creating a new custom field.

The left sidebar shows the 'Field Types' section under 'Build'.

The main content area shows the 'Field Type' selection screen:

- Currency: Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
- Date: Allows users to enter a date or pick a date from a popup calendar.
- Date/Time: Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
- Email: Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
- Geolocation: Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
- Number: Allows users to enter any number. Leading zeros are removed.
- Percent: Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
- Phone: Allows users to enter any phone number. Automatically formats it as a phone number.
- Picklist: Allows users to select a value from a list you define.
- Picklist (Multi-Select): Allows users to select multiple values from a list you define.
- Text: Allows users to enter any combination of letters and numbers.
- Text Area: Allows users to enter up to 255 characters on separate lines.
- Text Area (Long): Allows users to enter up to 131,072 characters on separate lines.
- Text Area (Rich): Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
- Text (Encrypted): Allows users to enter any combination of letters and numbers and store them in encrypted form.
- Time: Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" are all valid times for this field.
- URL: Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

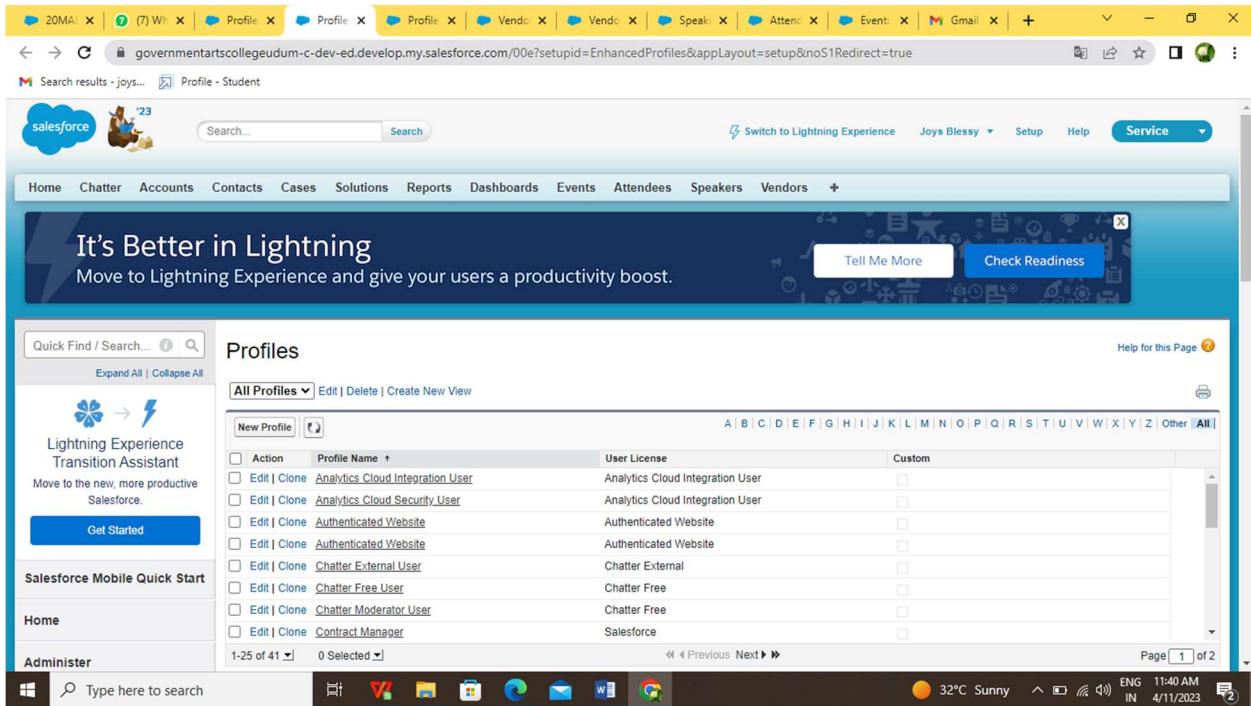


Milestone 5 – Profile:

Profile:

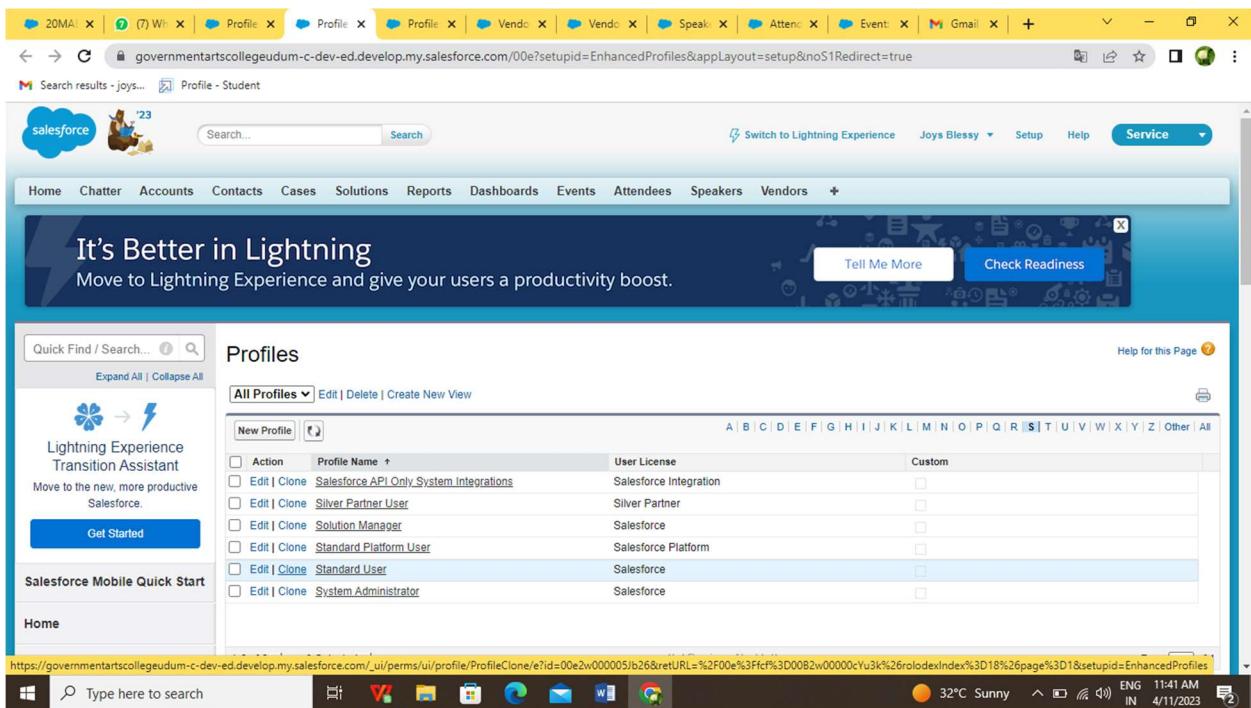
A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges. A profile can be assigned to many users, but user can be assigned single profile at a time.

Activity 1: Creation on profile



The screenshot shows the Salesforce Profiles page. On the left, there is a sidebar with the 'Lightning Experience Transition Assistant' section, which includes a 'Get Started' button. The main content area displays a table of profiles, with the first few rows shown below:

Action	Profile Name	User License	Custom
Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
Edit Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
Edit Clone	Chatter External User	Chatter External	<input type="checkbox"/>
Edit Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
Edit Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
Edit Clone	Contract Manager	Salesforce	<input type="checkbox"/>



The screenshot shows the Salesforce Profiles page. On the left, there is a sidebar with the 'Lightning Experience Transition Assistant' section, which includes a 'Get Started' button. The main content area displays a table of profiles, with the first few rows shown below:

Action	Profile Name	User License	Custom
Edit Clone	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
Edit Clone	Solution Manager	Salesforce	<input type="checkbox"/>
Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
Edit Clone	Standard User	Salesforce	<input type="checkbox"/>
Edit Clone	System Administrator	Salesforce	<input type="checkbox"/>

Salesforce - 20MAI | (7) WI | Profile | Clone | Profile | Vend... | Vend... | Speak | Attend | Event | Gmail | + | Search results - joys... | Profile - Student

governmentartscollegeudum-c-dev-ed.develop.my.salesforce.com/_ui/perms/ui/profile/ProfileClone/e?id=00e2w000005jb26&retURL=%2F00e%3Ffcf%3D00B2w0... |

23

Search... Search

Home Chatter Accounts Contacts Cases Solutions Reports Dashboards Events Attendees Speakers Vendors +

It's Better in Lightning Move to Lightning Experience and give your users a productivity boost.

Tell Me More Check Readiness

Quick Find / Search...

Expand All | Collapse All

Lightning Experience Transition Assistant
Move to the new, more productive Salesforce.
[Get Started](#)

Salesforce Mobile Quick Start

Home Administer

Type here to search

32°C Sunny ENG IN 11:41 AM 4/11/2023

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile Standard User
User License Salesforce
Profile Name

Save Cancel

Help for this Page

Salesforce - 20MAI | (7) WI | Profile | Profile | Vend... | Vend... | Speak | Attend | Event | Gmail | + | Search results - joys... | Profile - Student

governmentartscollegeudum-c-dev-ed.develop.my.salesforce.com/00e2w000000s8RV?setupid=EnhancedProfiles |

32°C Sunny ENG IN 11:41 AM 4/11/2023

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[Get Started](#)

Salesforce Mobile Quick Start

Home Administer

Release Updates
Manage Users
Users
Mass Email Users
Roles
Permission Sets
Permission Set Groups
User Management Settings
Profiles
Public Groups
Queues
Login History
Identity Provider Event Log
Identity Verification History
Manage Apps

Type here to search

32°C Sunny ENG IN 11:42 AM 4/11/2023

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information. If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges | Enabled Apex Class Access | Enabled Visualforce Page Access | Enabled External Data Source Access | Enabled Named Credential Access | Enabled Custom Metadata Type Access | Enabled Custom Setting Definitions Access | Enabled Flows Access | Enabled Service Presence Status Access | Enabled Custom Permissions

Profile Detail

Name	Events	Custom Profile
User License	Salesforce	<input checked="" type="checkbox"/>
Description		
Created By	Joys Blessy, 11/04/2023, 11:41 am	Modified By Joys Blessy, 11/04/2023, 11:41 am

Page Layouts

Standard Object Layouts	Global	Object Milestone
Global Layout	[View Assignment]	Object Milestone Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Operating Hours Layout [View Assignment]
Home Page Layout	DE Default [View Assignment]	Opportunity Layout [View Assignment]
Account	Account Layout [View Assignment]	Opportunity Product Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Order Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Order Product Layout [View Assignment]
Asset	Asset Layout [View Assignment]	Payment Layout [View Assignment]
Asset Action	Asset Action Layout [View Assignment]	Payment Authorization Layout [View Assignment]
Asset Action Source	Asset Action Source Layout [View Assignment]	Payment Authorization Adjustment Layout [View Assignment]

The screenshot shows the 'Profile - Student' configuration screen in the Salesforce Setup. It includes sections for Session Settings (Session Times Out After: 2 hours of inactivity, Session Security Level Required at Login: None) and Password Policies (User passwords expire in: 90 days, Enforce password history: 3 passwords remembered, Minimum password length: 8, Password complexity requirement: Must include alpha and numeric characters, Password question requirement: Cannot contain password, Maximum invalid login attempts: 10, Lockout effective period: 15 minutes, Obscure secret answer for password resets, Require a minimum 1 day password lifetime, and Don't immediately expire links in forgot password emails). At the bottom are Save, Save & New, and Cancel buttons.

Activity 2:

Create a profile with the profile name as "Event vendors profile".

The screenshot shows the 'Clone Profile' page in the Salesforce Lightning Experience. It displays a sidebar with 'Lightning Experience Transition Assistant' and 'Salesforce Mobile Quick Start' sections. The main content area shows a message about moving to Lightning Experience and provides 'Tell Me More' and 'Check Readiness' buttons. Below this is a form titled 'Clone Profile' where the user is prompted to 'Enter the name of the new profile.' A note states 'You must select an existing profile to clone from.' The 'Existing Profile' dropdown is set to 'Standard User', 'User License' is 'Salesforce', and the 'Profile Name' field contains 'Event Vendors profile'. At the bottom are Save and Cancel buttons.

Salesforce Home Page (Lightning Experience)

The page displays a banner encouraging users to move to Lightning Experience for a productivity boost. It shows a sidebar with the "Event Vendors profile" selected under "Profiles". The main content area shows the profile details for "Event Vendors profile", including its name, user license (Salesforce), and creation date (11/04/2023). A "Profile Detail" section includes buttons for Edit, Clone, Delete, and View Users.

Salesforce Setup Page (Session Settings)

The page shows the "Session Settings" section of the setup. It includes fields for session timeout (2 hours of inactivity), security level required at login (None), and password policies. The password policies section includes settings for password expiration (90 days), history (3 passwords remembered), minimum length (8), complexity (must include alpha and numeric characters), and other requirements like lockout and obscure secret answers.

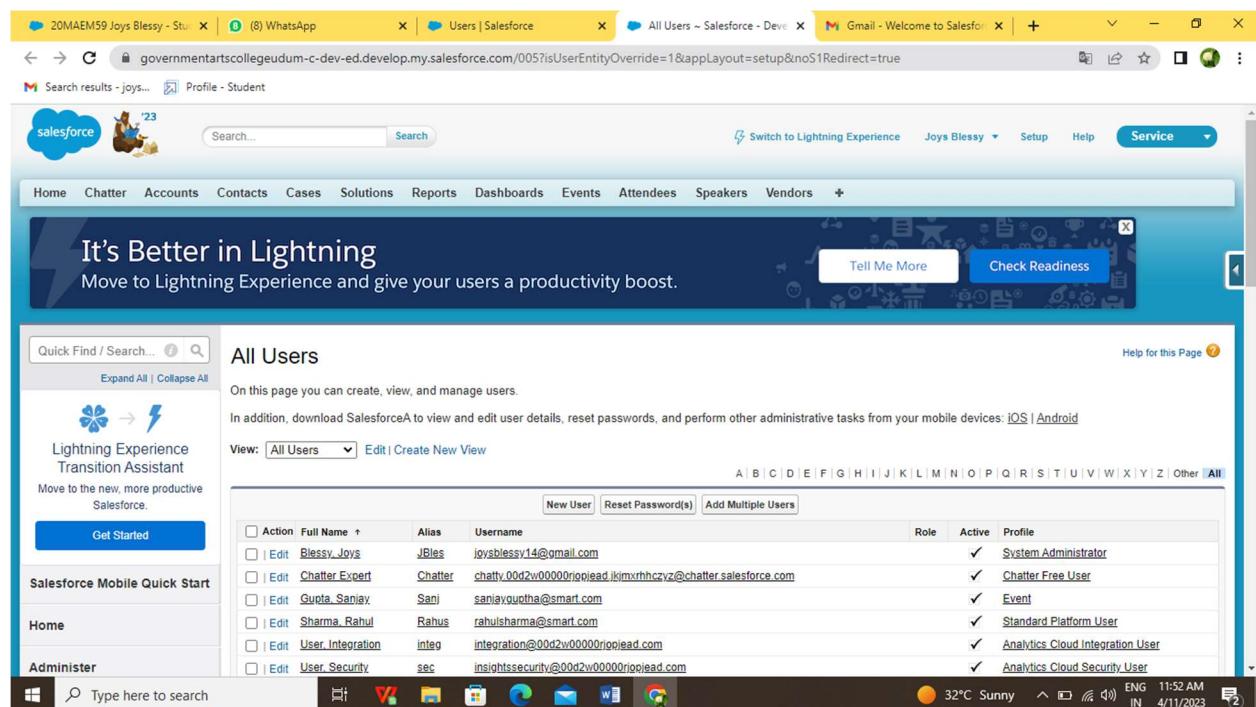
Milestone 6 – User:

User:

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

Activity 1:

Creating a User



The screenshot shows the Salesforce classic interface with the following details:

- Header:** The title bar shows multiple open tabs: "20MAEM59 Joys Blessy - Student", "(8) WhatsApp", "Users | Salesforce", "All Users ~ Salesforce - Dev...", and "Gmail - Welcome to Salesfo...".
- Search Bar:** A search bar with placeholder text "Search results - joys..." and a "Profile - Student" dropdown.
- Top Navigation:** Includes links for "Switch to Lightning Experience", "Joys Blessy", "Setup", "Help", and "Service".
- Breadcrumbs:** "Home > Chatter > Accounts > Contacts > Cases > Solutions > Reports > Dashboards > Events > Attendees > Speakers > Vendors > +".
- Hero Bar:** A blue banner with the text "It's Better in Lightning" and "Move to Lightning Experience and give your users a productivity boost." It includes "Tell Me More" and "Check Readiness" buttons.
- Left Sidebar:** Includes sections for "Lightning Experience Transition Assistant" (with a "Get Started" button), "Salesforce Mobile Quick Start", "Home", and "Administrator".
- Content Area:** The main area is titled "All Users" and contains a table with the following data:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Blessy_Joys	JBlas	joysblessy14@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Chatter_Expert	Chatty	00d2w00000rjopjead.jkimxrhhc2yz@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Gupta_Sanay	Sani	sanjaygupta@smart.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Event
<input type="checkbox"/>	Sharma_Rahul	Rahus	rahulsharma@smart.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	User_Integration	integ	integration@00d2w00000rjopjead.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@00d2w00000rjopjead.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User

The bottom of the screen shows a Windows taskbar with icons for File Explorer, Google Sheets, Google Slides, Google Photos, Google Chrome, and Microsoft Edge. The system tray shows the date (4/11/2023), time (11:52 AM), battery level (ENG IN), and signal strength.

The screenshot shows the Salesforce Lightning Experience interface. At the top, there are several tabs: '20MAEM59 Joys Blessy - Student', '(8) WhatsApp', 'Users | Salesforce', 'New User ~ Salesforce - Dev', and 'Gmail - Welcome to Salesfo...'. The main content area displays a promotional banner for 'Lightning Experience' with the text 'It's Better in Lightning' and 'Move to Lightning Experience and give your users a productivity boost.' Below the banner, the 'New User' creation page is open. The 'User Edit' form has the 'General Information' tab selected. The 'General Information' section contains fields for First Name (Sanjay), Last Name (Gupta), Alias (sgupt), Email (joysblessy14@gmail.com), Username (sanjaygupta@thesmartbridg), Nickname (Sanju), Title (Blank), Company (Blank), Department (Blank), and Division (Blank). To the right of these fields are dropdown menus for Role ('None Specified'), User License ('Salesforce Platform'), Profile ('Standard Platform User'), and Active status (checked). Other optional checkboxes include Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, and Site.com Contributor User. At the bottom of the form are 'Save', 'Save & New', and 'Cancel' buttons. On the left side of the screen, there is a sidebar with sections for 'Lightning Experience Transition Assistant' (Get Started button), 'Salesforce Mobile Quick Start' (Home and Administer buttons), and a search bar. The system status bar at the bottom shows the date (4/11/2023), time (11:55 AM), and location (IN 32°C Sunny). The status bar also includes icons for battery, signal, and network.

Activity 2:

Create a user with a username as "Rahul Sharma"

This screenshot shows the same Salesforce Lightning Experience interface as the previous one, but with different user information entered. The 'User Edit' form has the 'General Information' tab selected. The 'General Information' section now contains fields for First Name (Rahul), Last Name (Sharma), Alias (Rahus), Email (joysblessy14@gmail.com), Username (rahulsharma@thesmartbridg), Nickname (Rahu), Title (Blank), Company (Blank), Department (Blank), and Division (Blank). The rest of the form and the surrounding environment are identical to the first screenshot, including the sidebar, status bar, and tabs at the top.

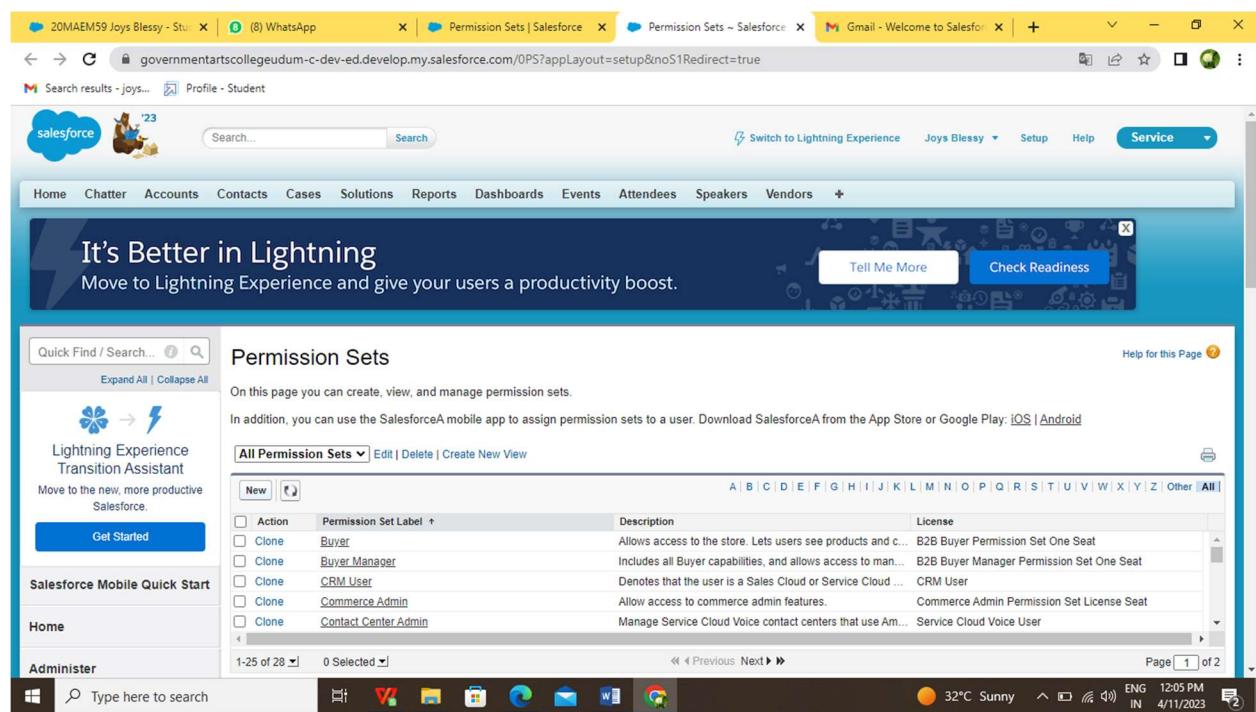
Milestone 7 – Permission sets:

Permission set:

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles. Create permission sets to grant access among logical groupings of users, regardless of their primary job function. For example, let's say you have several users who must delete and transfer leads. You can create a permission set based on the tasks that these users must perform and include the permission set within permission set groups based on job functions.

Activity 1:

Creating a Permission Set



The screenshot shows the Salesforce Lightning Experience interface. At the top, there are multiple browser tabs open, including '20MAEM59 Joys Blessy - Student', '(8) WhatsApp', 'Permission Sets | Salesforce', 'Permission Sets ~ Salesforce', and 'Gmail - Welcome to Salesfo...'. The main navigation bar includes links for Home, Chatter, Accounts, Contacts, Cases, Solutions, Reports, Dashboards, Events, Attendees, Speakers, Vendors, and a plus sign for more options. A prominent banner at the top says 'It's Better in Lightning' and encourages moving to Lightning Experience. Below the banner, the 'Permission Sets' page is displayed. It features a table with columns for Action, Permission Set Label, Description, and License. The table lists several permission sets, such as 'Buyer', 'Buyer Manager', 'CRM User', 'Commerce Admin', and 'Contact Center Admin'. The 'Buyer' permission set is highlighted with a blue border. The table includes a header row with letters A through Z and an 'All' option. At the bottom of the page, there are buttons for 'Edit', 'Delete', and 'Create New View'. The bottom of the screen shows the Windows taskbar with various pinned icons like File Explorer, Google Chrome, and Mail, along with system status indicators for battery level, signal strength, and date/time (12:05 PM, 4/11/2023).

Screenshot of the Salesforce Permission Set Create page.

Permission Set Create

Enter permission set information

- Label: Event Permits
- API Name: Event_Permits
- Description: (empty)
- Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?
-Choose --None-- if you plan to assign this permission set to multiple users with different user and permission set licenses.
-Choose a specific user license if you want users with only one license type to use this permission set.
-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Not sure what a permission set license is? [Learn more here.](#)

License: --None--

Save Cancel

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Salesforce Mobile Quick Start

Home

Administrator

- Release Updates
- Manage Users
 - Users
 - Mass Email Users
 - Roles
- Permission Sets
 - Permission Set Groups
 - User Management Settings
 - Profiles
 - Public Groups
 - Queues

Type here to search

Screenshot of the Salesforce Permission Set Overview page for the 'Event Permit' permission set.

Permission Set Event Permit

Permission Set Overview

Description	API Name	Namespace Prefix	Created By
License	Event_Permit		Joys Blessy, 11/04/2023, 12:07 pm
Session Activation Required			
Last Modified By	Joys Blessy, 11/04/2023, 12:07 pm		

Apps

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform
[Learn More](#)

Assigned Apps	Assigned Connected Apps
Settings that specify which apps are visible in the app menu	Settings that specify which connected apps are visible in the app menu

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[Get Started](#)

Salesforce Mobile Quick Start

Home

Administrator

Type here to search

The screenshot shows the Salesforce Setup interface. The left sidebar is open, showing various setup options like Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration, and Users. Under Users, the 'Permission Set Groups' section is expanded, showing 'Permission Sets' selected. The main area displays a list of users with checkboxes next to their names: Joys Blessy, Rahul Sharma, and Sanjay Gupta. Each user has an email address listed next to their name.

Activity 2:

From setup search “permission sets”

The screenshot shows the Salesforce classic interface. The top navigation bar includes links for Home, Chatter, Accounts, Contacts, Cases, Solutions, Reports, Dashboards, Events, Attendees, Speakers, Vendors, and a search bar. A banner at the top encourages moving to Lightning Experience. The main content area is titled 'Permission Set Create'. It has sections for 'Enter permission set information' (Label: 'permission sets', API Name: 'permission_sets', Description: empty), 'Session Activation Required' (unchecked), and 'Select the type of users who will use this permission set' (Who will use this permission set? dropdown). On the left, there's a sidebar with 'Lightning Experience Transition Assistant' (Get Started button) and 'Salesforce Mobile Quick Start' (Home and Administrator buttons).

The screenshot shows the Salesforce Lightning Experience interface. At the top, there are several tabs open in a browser window, including '20MAEM59 Joys Blessy', '(8) WhatsApp', 'Permission Sets | Sale...', 'Permission Set: perm...', 'Permission Sets | Sale...', 'Gmail - Welcome to S...', and others. The main content area displays the 'Permission Set Overview' page for a permission set named 'permission_sets'. The page includes fields for Description, License, Session Activation Required, Last Modified By, API Name ((permission_sets), Namespace Prefix, and Created By (Joys Blessy, 11/04/2023, 12:09 pm). Below this, the 'Apps' section shows settings for assigned apps and assigned connected apps. On the left sidebar, there are links for 'Lightning Experience Transition Assistant', 'Salesforce Mobile Quick Start', 'Home', and 'Administrator'. The bottom of the screen shows a Windows taskbar with various icons and system status.

The screenshot shows the Salesforce Setup interface. The left sidebar is expanded, showing sections like 'Setup Home', 'Service Setup Assistant', 'Multi-Factor Authentication Assistant', 'Release Updates', 'Lightning Experience Transition Assistant', 'Salesforce Mobile App', 'Lightning Usage', 'Optimizer', 'ADMINISTRATION', 'Users', 'Permission Set Groups', 'Permission Sets' (which is selected), 'Profiles', and 'Public Groups'. The main content area shows the 'PERMISSION SET 'PERMISSION SETS' > MANAGE ASSIGNMENT EXPIRATION' page. It displays a table titled 'Select Users to Assign' with columns for 'Full Name', 'Title', 'Phone', and 'Email'. Three users are selected: Joys Blessy (joysblessy14@gmail.com), Rahul Sharma (joysblessy14@gmail.com), and Sanjay Gupta (joysblessy14@gmail.com). A 'Recently Viewed' section is also visible. The bottom of the screen shows a Windows taskbar with various icons and system status.

Milestone 8 – Reports

Reports:

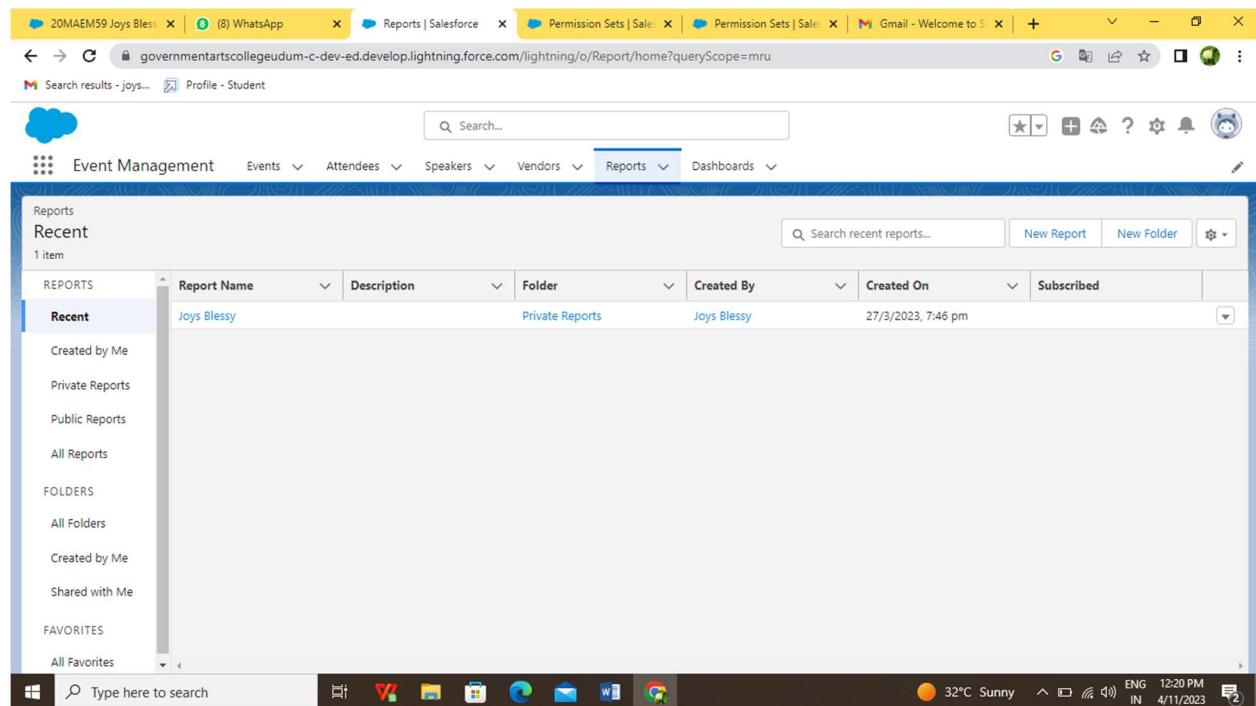
Reports in Salesforce is a list of records that meet a particular criterion which gives an answer to a particular question. These records are displayed as a table that can be filtered or grouped based on any field.

There are 4 types of report formats in Salesforce:

- Tabular Reports
- Summary Reports
- Matrix Report
- Joined Reports

Activity

Creating a Report:



The screenshot shows the Salesforce Lightning interface with the following details:

- Header:** Shows multiple open tabs including "Reports | Salesforce", "Permission Sets | Sale...", "Permission Sets | Sale...", and "Gmail - Welcome to S...".
- Search Bar:** Contains a search input field and various icons for navigation and settings.
- Page Navigation:** Includes links for "Event Management", "Events", "Attendees", "Speakers", "Vendors", "Reports" (which is the active tab), and "Dashboards".
- Report List:** A table titled "Recent" showing one report entry:

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Joys Blessy		Private Reports	Joys Blessy	27/3/2023, 7:46 pm	
- Left Sidebar:** A sidebar with sections for "Recent", "FOLDERS", and "FAVORITES".
- Bottom:** A taskbar with the Windows logo, a search bar, and pinned application icons (File Explorer, Edge, File Manager, Mail, Google Chrome). It also displays system status: 32°C Sunny, ENG IN, 12:20 PM, and a battery icon with 2% remaining.

Report: Accounts
Joys Blessy

	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	-	Joys Blessy	GenePoint	CA	Customer - Channel	Cold	09/03/2023
2	-	Joys Blessy	United Oil & Gas, UK	UK	Customer - Direct	-	09/03/2023
3	-	Joys Blessy	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	09/03/2023
4	-	Joys Blessy	Edge Communications	TX	Customer - Direct	Hot	09/03/2023
5	-	Joys Blessy	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	09/03/2023
6	-	Joys Blessy	Pyramid Construction Inc.	-	Customer - Channel	-	09/03/2023
7	-	Joys Blessy	Dickenson plc	KS	Customer - Channel	-	09/03/2023
8	-	Joys Blessy	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	09/03/2023
9	-	Joys Blessy	Express Logistics and Transport	OR	Customer - Channel	Cold	09/03/2023
10	-	Joys Blessy	University of Arizona	AZ	Customer - Direct	Warm	09/03/2023
11	-	Joys Blessy	United Oil & Gas Corp.	NY	Customer - Direct	Hot	09/03/2023
12	-	Joys Blessy	sForce	CA	-	-	09/03/2023
13	-	Automated Process	Sample Account for Entitlements	-	-	-	09/03/2023

4. Trailhead Profile Public URL

Team Lead - Joys Blessy J - <https://trailblazer.me/id/joysblessy>

Team Member 1 - Dinesh S - <https://trailblazer.me/id/dineshs05>

Team Member 2 - Swathilakshmi V - <https://trailblazer.me/id/swathilakshmi>

Team Member 3 - Mohan Prasath MG - <http://trailblazer.me/id/mmohan271>

Team Member 4 -Long Absent

BUILD AN EVENT MANAGEMENT SYSTEM USING SALESFORCE

ADVANTAGES & DISADVANTAGE

Advantage of Event Management

1. Opportunities for creativity

As an event manager, we can use our creative skills and talents to coordinate the details of parties and celebrations. Our client base might prefer different party styles, allowing us to take creative approaches to each event.

2. Ability to work on different events

An event manager often works on several types of events. For example, they might plan a business conference, holiday party, music festival or product launch.

3. Chance to work with diverse clients

We can meet a variety of clients from different backgrounds with unique goals for their events. This allows us to customize our skills and expertise when working with each customer.

Disadvantage of Event Management:

1. Unconventional work hours

Event managers often work nights and weekends to complete their responsibilities, sometimes in addition to normal office hours during the weekdays.

2. Time away from family and friends

Event planners might travel often to manage their tasks. This can result in time spent away from friends and family members.

APPLICATIONS

1. Collaborative work environment

Event managers often work on a team to manage and coordinate the details of their events. This can help you learn from other professionals in your field and try new approaches to event management.

2. High projections for job growth

Event planners can expect high projections for job growth in their field. According to the U.S. Bureau of Labor Statistics, the employment of meeting, convention and event planners is likely to grow 18% from 2020-2030.

4.CONCLUSION

Event Management System is user friendly and cost effective system, it is customized with activities related to event management life-cycle. It provides a new edge to management industry. SolutionDot always keep your objectives and goals on top priority while developing any plan of work.

In this project, we created Object, Tab, App, Fields, Profile, User, Permission sets and finally we created a report for our project.

In this project we have learnt about the basic knowledge of Salesforce and how to work in projects.

FUTURE SCOPE

The scope of event management as a career in India is vast. It's a thriving industry and is home to a million people. So, if you have a knack for creativity and want to redesign the perceptions of society, the event management industry is all for you.

Event management as a career is a multifaceted activity. It involves management, creation and development of events such as corporate conferences, wedding, festivities, formal parties etc.