

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.

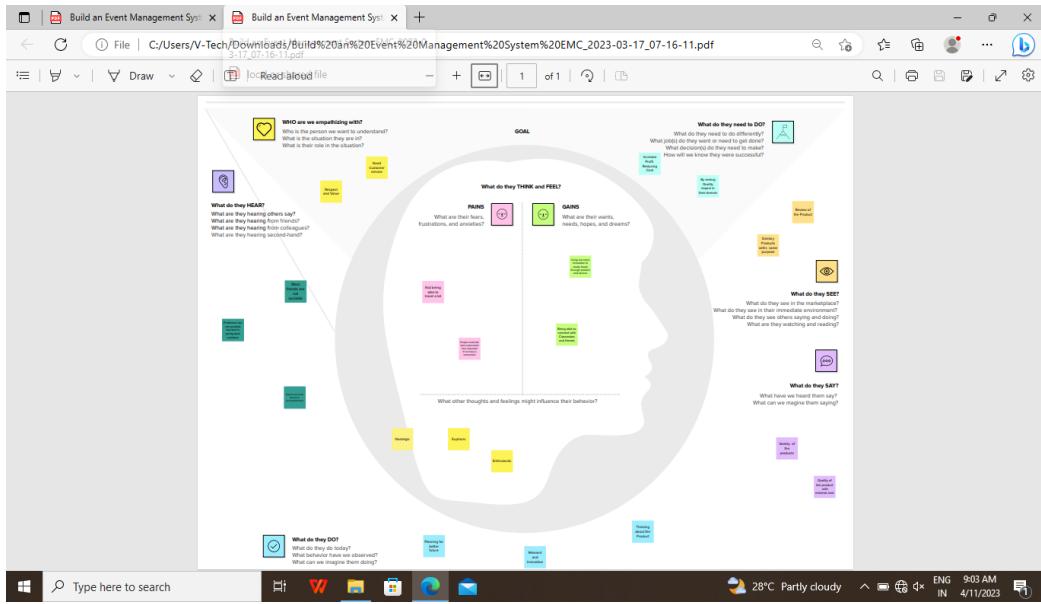
Event management is the process of creating and maintaining an event. This process spans from the very beginning of planning all the way to post-event strategizing.

We will learn

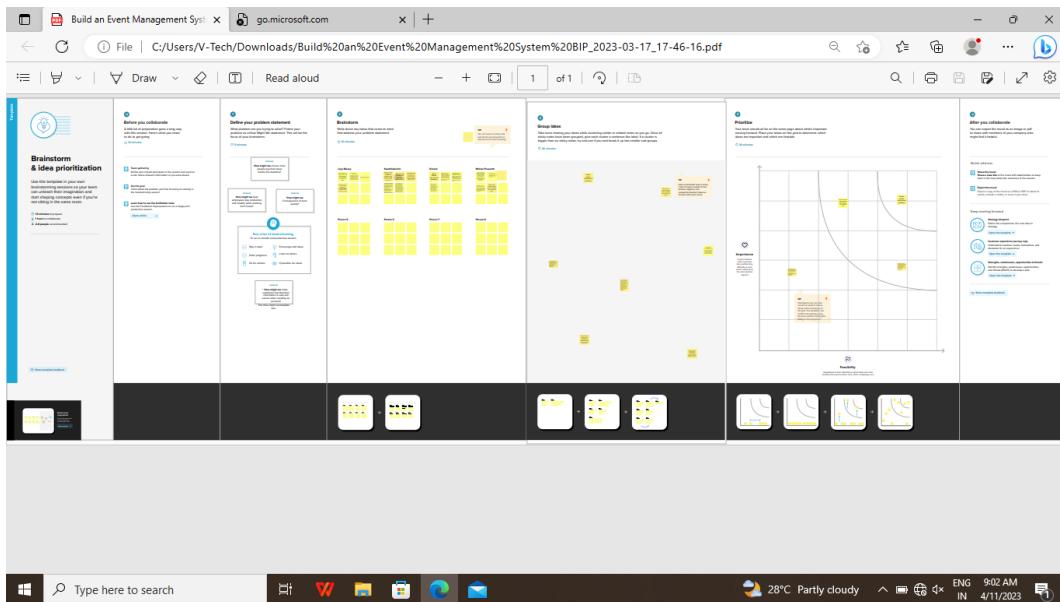
1. Real Time Salesforce Project
2. Object & Relationship in Salesforce
3. Create Salesforce Org

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	
obj1		
obj1	Field label	Data type
	Event	Text
	Attendees	Auto Number
obj2		
obj2	Field label	Data type
	Speaker	Text Area
	Vendor	E-Mail

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.

Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag-and-drop tools
- Customize your data model with code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with CSS or any leading edge web framework

Salesforce

Sign up for your Salesforce Developer Edition
A full-featured copy of the Platform, for free.

Name:
Your first name Last name

Email:
 Your email address

User:
 Your login name

Company:
 Company Name

Country/Region:
 Select Country/Region

Postal Code:
 Your postal code

Comments:
 I'm a company executive
By checking this box you agree to the terms of use and the Master License Agreement and to the storing and processing of your personal data by Salesforce as described in the Privacy Statement, including use for marketing purposes.

[Sign me up](#)

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

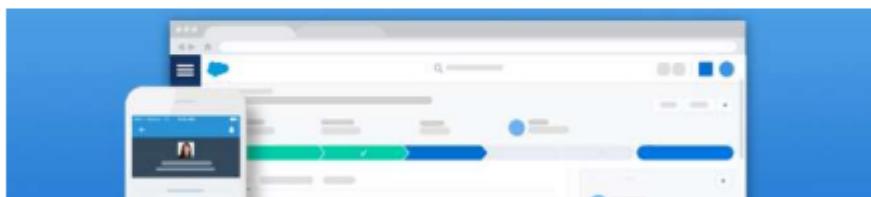
1 message

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.

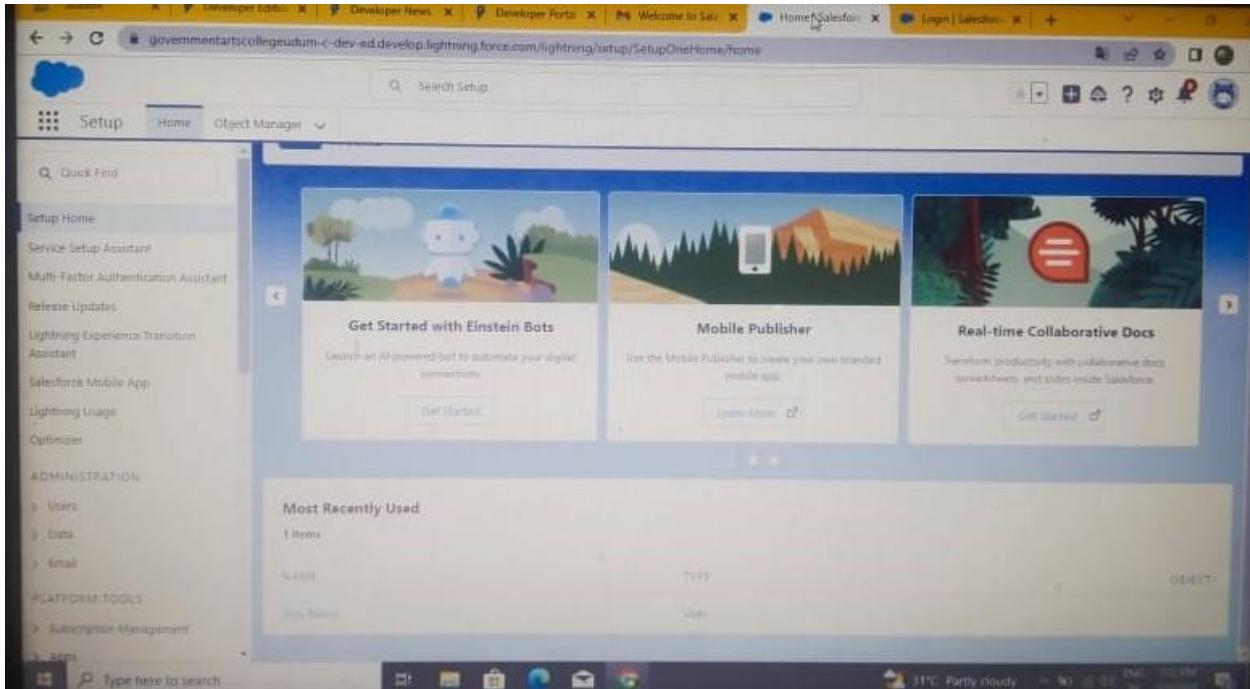
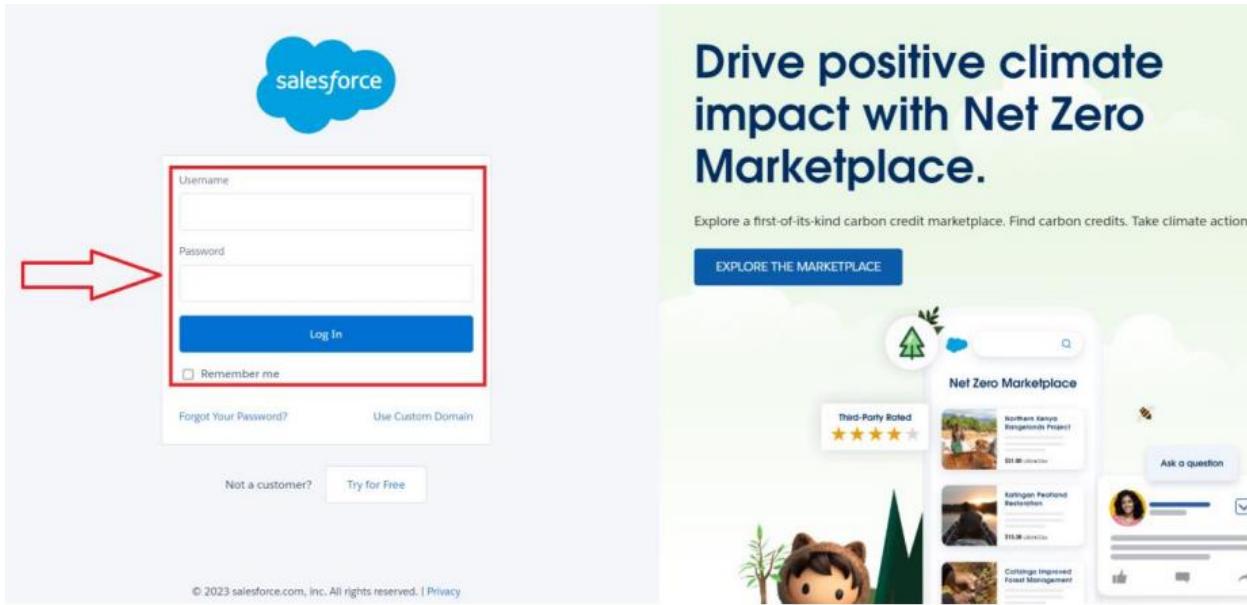
Verify Account

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!



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).

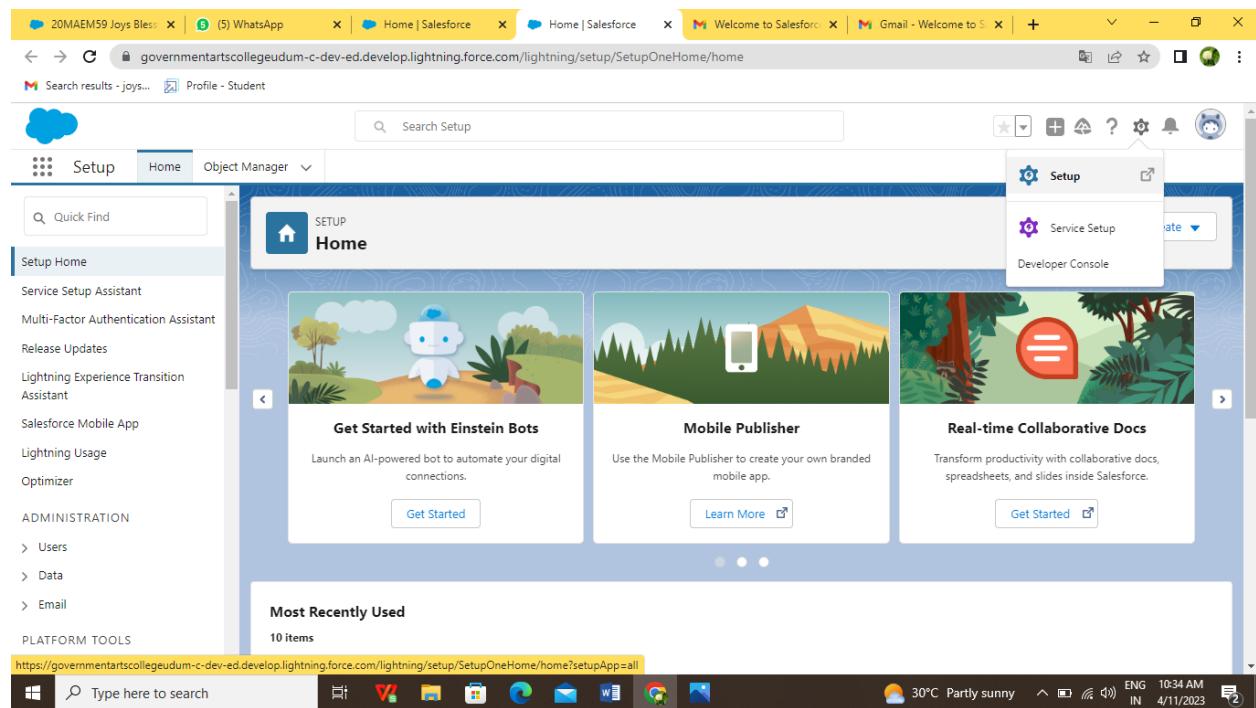
Salesforce objects are of two types:

- 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

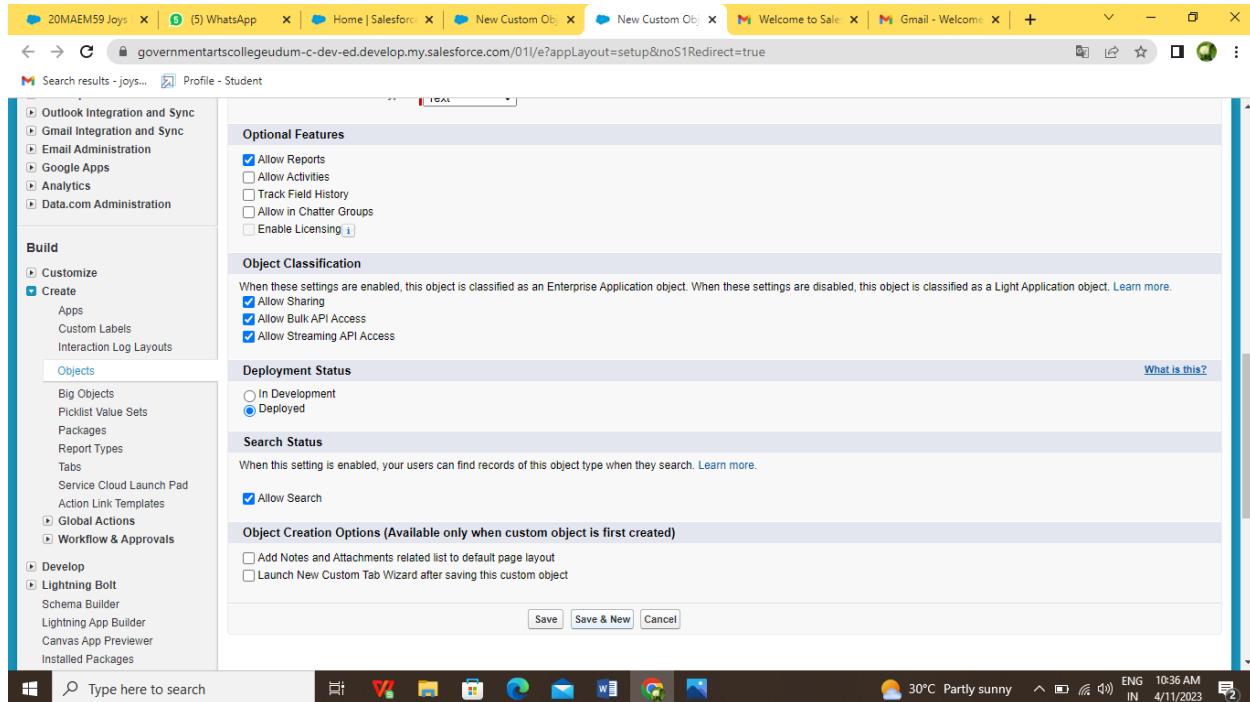
Creation of Objects for Event Management:

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.



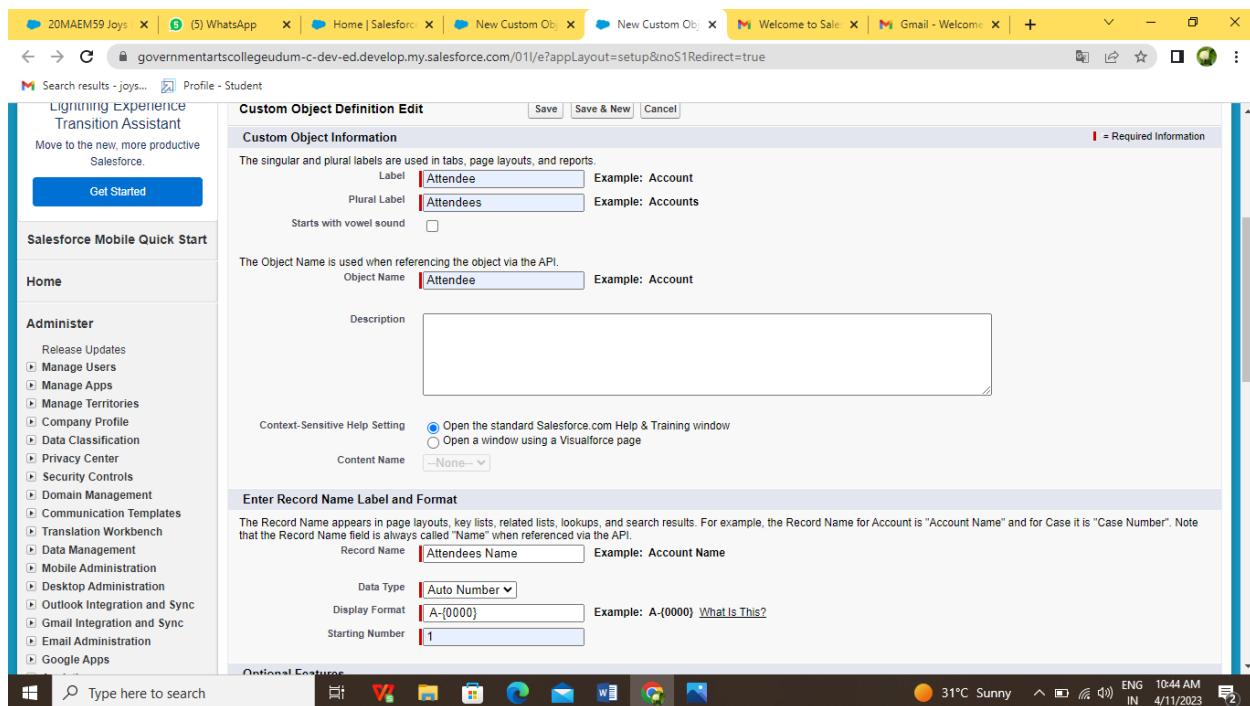
The screenshot shows the Salesforce Object Manager interface. At the top, there are several tabs: '20MAEM59 Joys Ble' (active), '(5) WhatsApp', 'Home | Salesforce', 'Object Manager | Sale', 'Welcome to Salesforce', 'Gmail - Welcome to S', and '+'. Below the tabs, the URL is 'governmentartscollegeudum-c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home'. The main area has a search bar 'Search Setup' and a toolbar with icons for 'Star', 'Plus', 'Cloud', 'Question', 'Settings', 'Bell', and a user profile. A sub-menu for 'Object Manager' is open, showing options like 'Custom Object' and 'Custom Object from Spreadsheet'. The main table lists standard objects with columns: LABEL, API NAME, TYPE, DESCRIPTION, and LAST MODIFIED. The last modified column shows 'Custom Object from Spreadsheet'. The table includes rows for Account, Activity, Alternative Payment Method, API Anomaly Event Store, Appointment Invitation, Appointment Invitee, Appointment Topic Time Slot, Asset, Asset Action, and Asset Action Source.

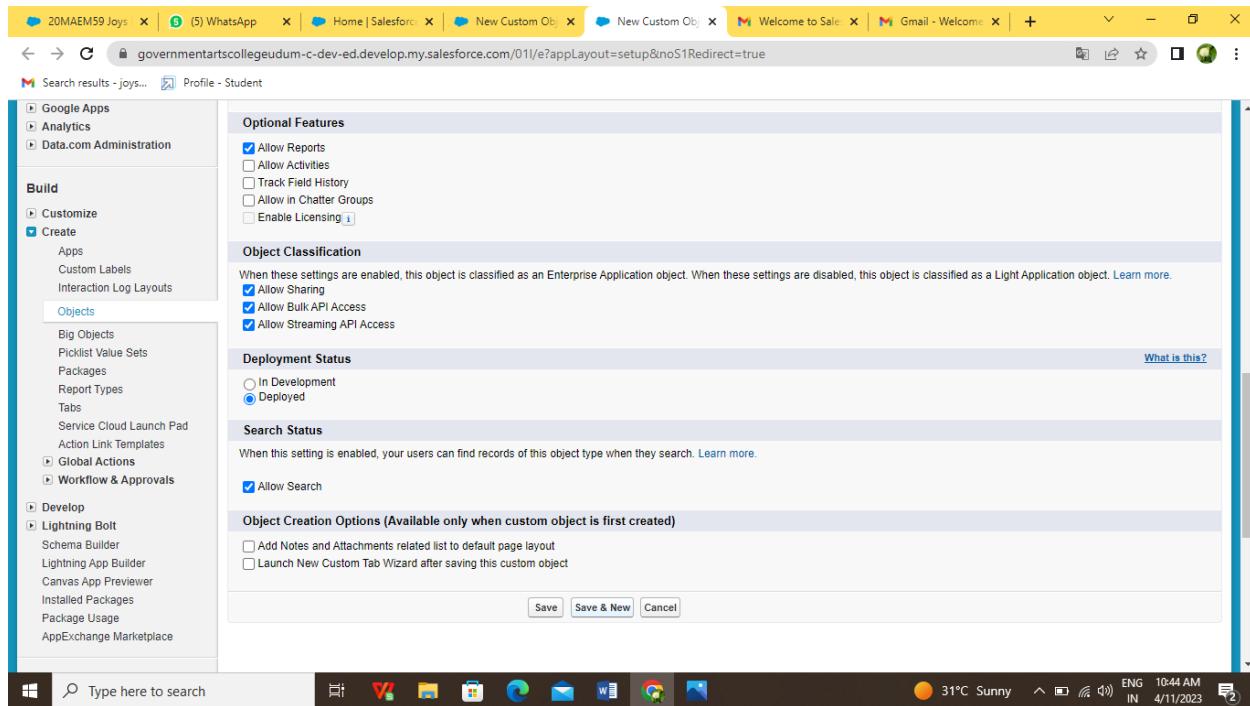
The screenshot shows the 'Custom Object Definition Edit' page for creating a new custom object. The URL is 'https://governmentartscollegeudum-c-dev-ed.develop.my.salesforce.com/01/e?appLayout=setup&noS1Redirect=true'. The left sidebar has sections for 'Lightning Experience Transition Assistant', 'Salesforce Mobile Quick Start', 'Home', and 'Administer' with various sub-options like 'Manage Users', 'Data Classification', 'Privacy Center', etc. The main form is titled 'Custom Object Definition Edit' with buttons 'Save', 'Save & New', and 'Cancel'. It has a section for 'Custom Object Information' where 'Label' is set to 'Event' and 'Plural Label' is set to 'Events'. There's a checkbox 'Starts with vowel sound'. Below that, it says 'The Object Name is used when referencing the object via the API.' with 'Object Name' set to 'Event' and 'Example: Account'. There's 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'. A 'Content Name' dropdown is set to 'None'. The next section is 'Enter Record Name Label and Format' with a note about record names appearing in page layouts, key lists, related lists, lookups, and search results. It shows 'Record Name' as 'Event Name' and 'Example: Account Name'. The 'Data Type' is set to 'Text'. The final section is 'Optional Features' with a checked checkbox for 'Allow Reports'. The bottom status bar shows '30°C Partly sunny', 'ENG IN 10:34 AM 4/11/2023', and a battery icon.



Activity 2:

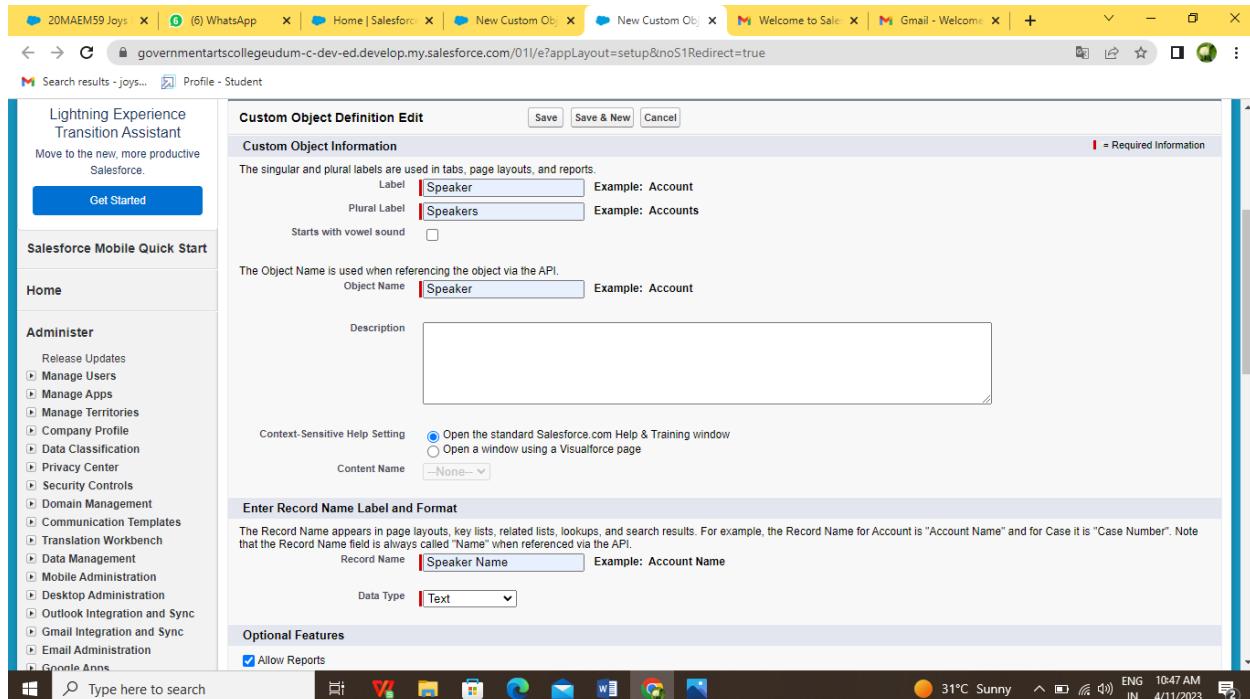
Creation of Attendees object

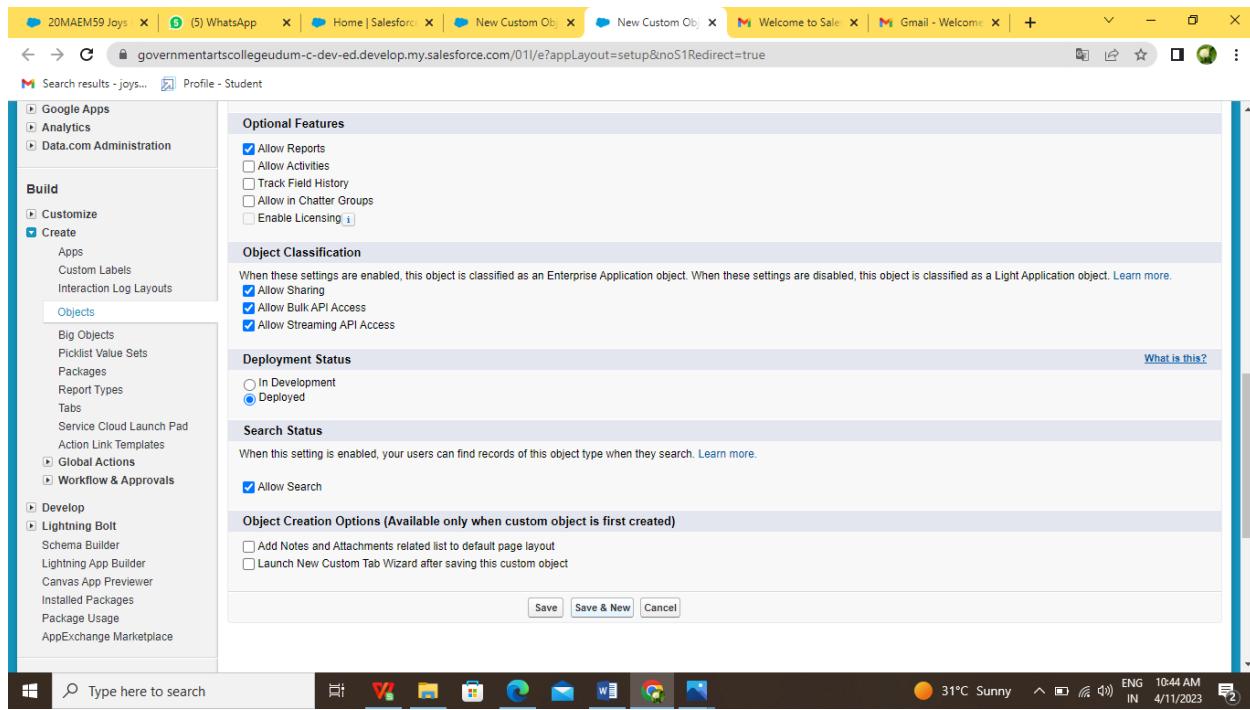




Activity 3:

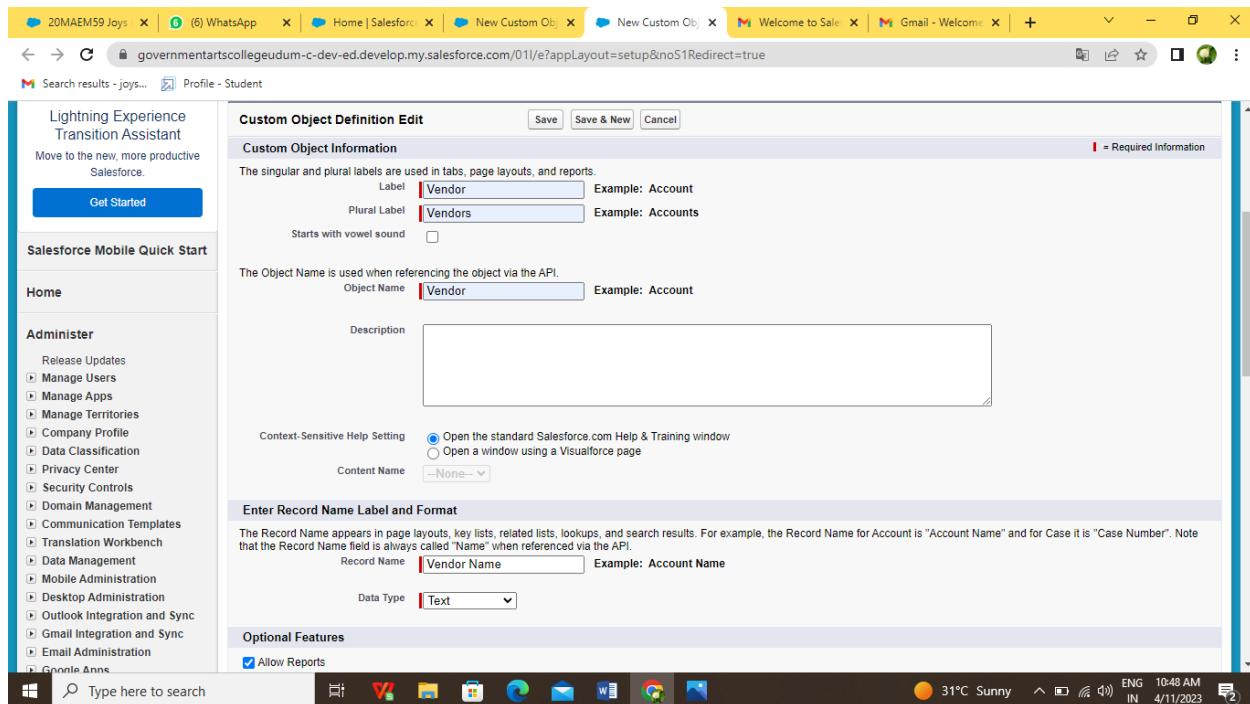
Creation of Speaker object:

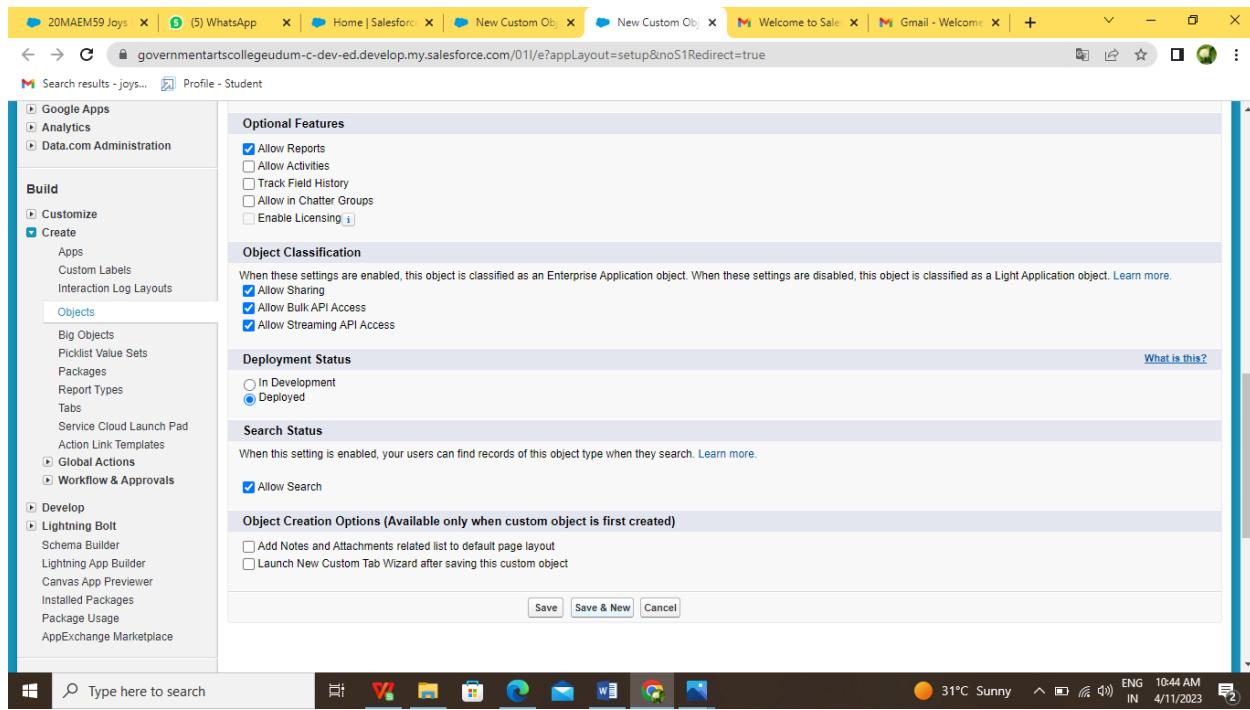




Activity 4:

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 shows a 'Custom Tab Definition Edit' section where 'Tab Label' is set to 'Events', 'Object' is set to 'Event', and 'Tab Style' is set to 'Apple'. Below this, there's a note about choosing a 'Splash Page Custom Link' and a 'Description' field. At the bottom are 'Save' and 'Cancel' buttons. The top navigation bar shows various tabs and the URL governmentartscollegeudum-c-dev-ed.my.salesforce.com/01r2w000000f1tE/e?retURL=%2Fsetup%2Fu%2Fcustomtabs.jsp%3Fsetupid%3DCustomTabs%26.... The status bar at the bottom right shows '31°C Sunny', 'ENG IN', and the date '4/11/2023'.

Activity 2:

Creation of Attendee tab:

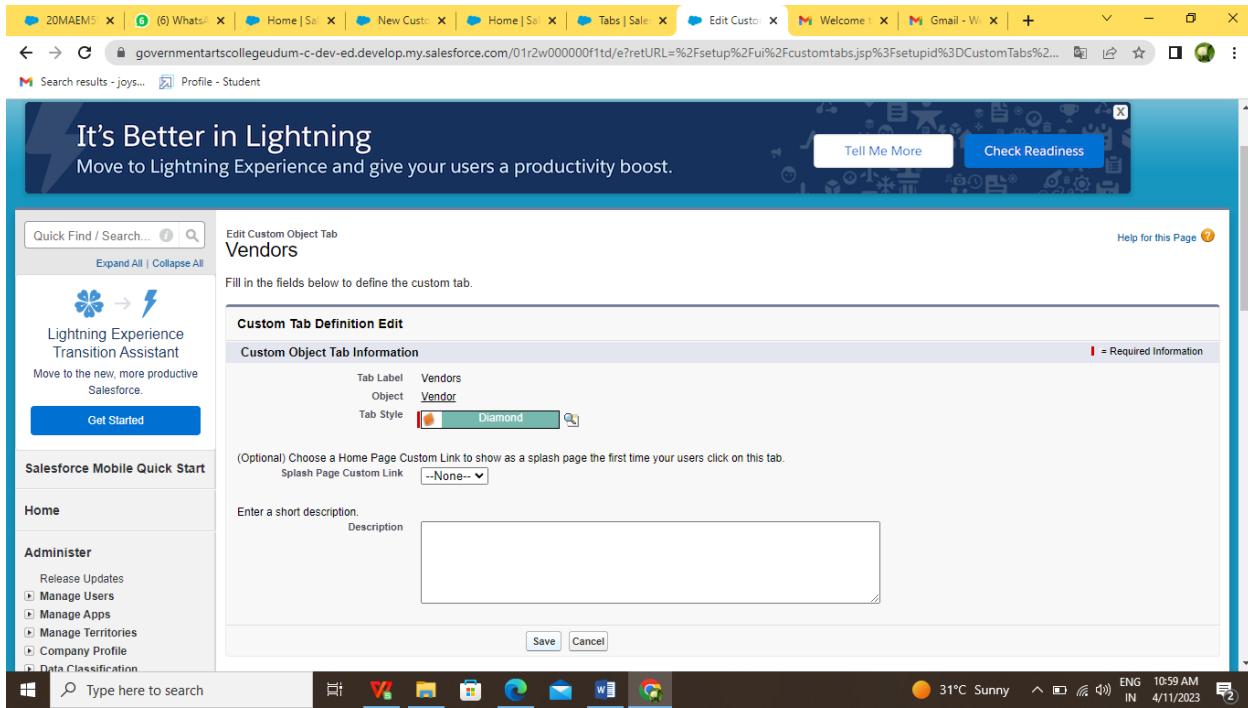
This screenshot is similar to the previous one but shows the creation of a 'Attendees' tab. The 'Object' dropdown in the 'Custom Tab Definition Edit' section is now set to 'Attendee'. The rest of the interface, including the sidebar, main title, and status bar, is identical to the first screenshot.

Activity 3:

Creation of Speakers tab:

The screenshot shows a Salesforce Lightning Experience interface. At the top, there is a navigation bar with several tabs: '20MAEMS', '(6) WhatsApp', 'Home | Sales', 'New Cust...', 'Home | Sales', 'Tabs | Sales', 'Edit Custom...', 'Welcome', 'Gmail - W...', and a '+' sign. Below the navigation bar, a banner reads 'It's Better in Lightning' and 'Move to Lightning Experience and give your users a productivity boost.' On the left, there is a sidebar with sections for 'Lightning Experience Transition Assistant' (with a 'Get Started' button), 'Salesforce Mobile Quick Start' (with a 'Home' link), and 'Administrator' (with links for 'Release Updates', 'Manage Users', 'Manage Apps', 'Manage Territories', 'Company Profile', 'Data Classification', 'Privacy Center', and 'Security Controls'). A search bar at the bottom left says 'Type here to search'. The main content area is titled 'Edit Custom Object Tab' for 'Speakers'. It contains a form with fields: 'Tab Label' (Speakers), 'Object' (Speaker), 'Tab Style' (Car), and a note about choosing a 'Splash Page Custom Link' (set to 'None'). There is also a 'Description' text area and 'Save' and 'Cancel' buttons. The status bar at the bottom right 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:

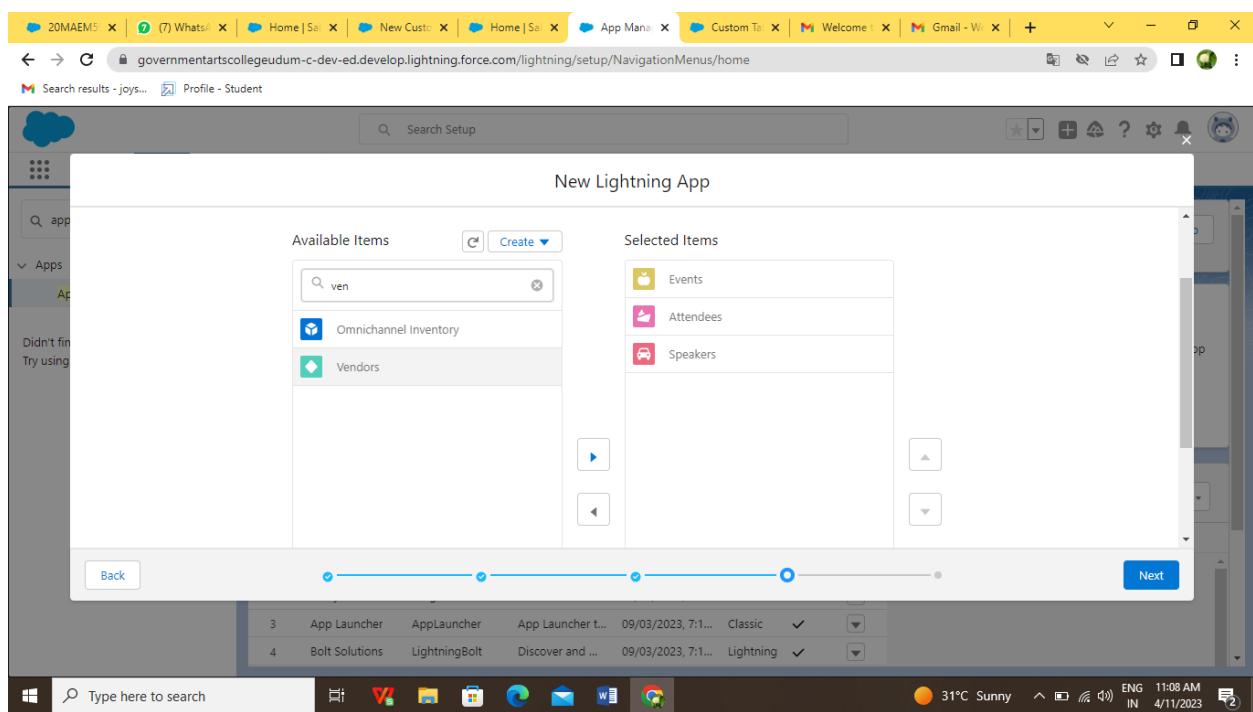
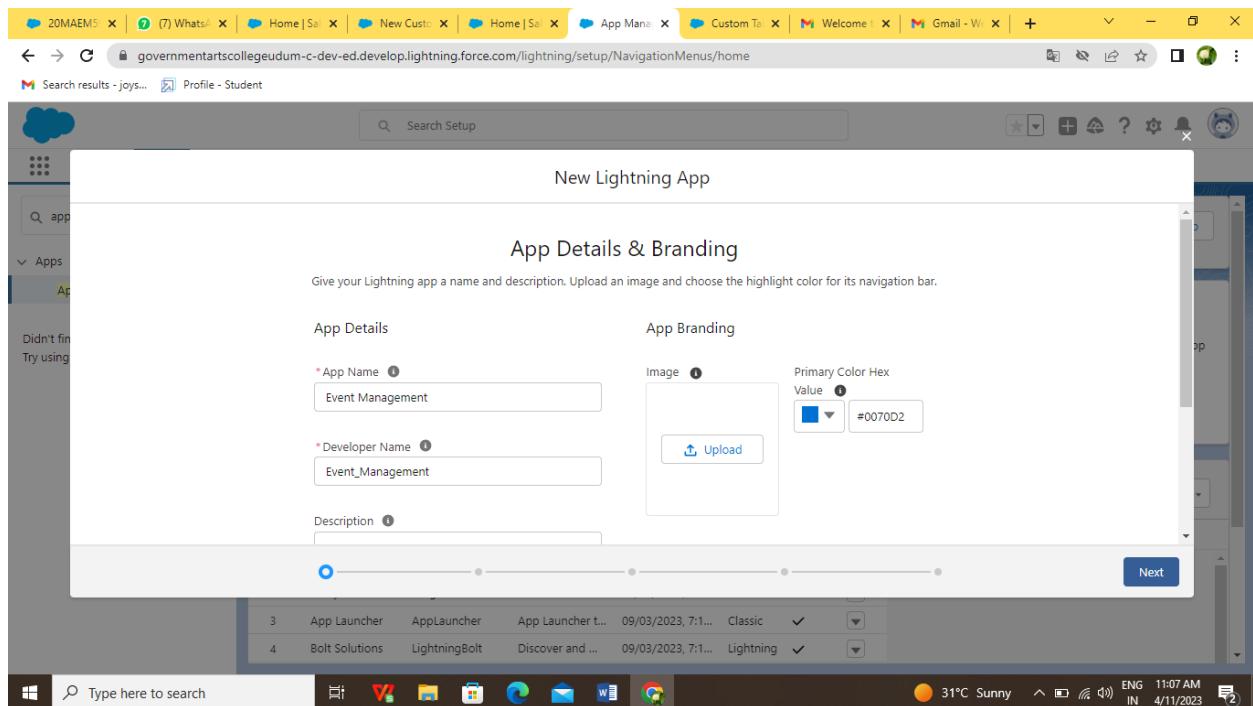
- Standard apps: these apps come with every occurrence of Salesforce as default. Community, Call Center, Content, Sales, Marketing, Salesforce Chatter, Site.com, and App Launcher are included in these apps. The description, logo, and label of a standard app cannot be altered.
- Custom apps: these apps 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.

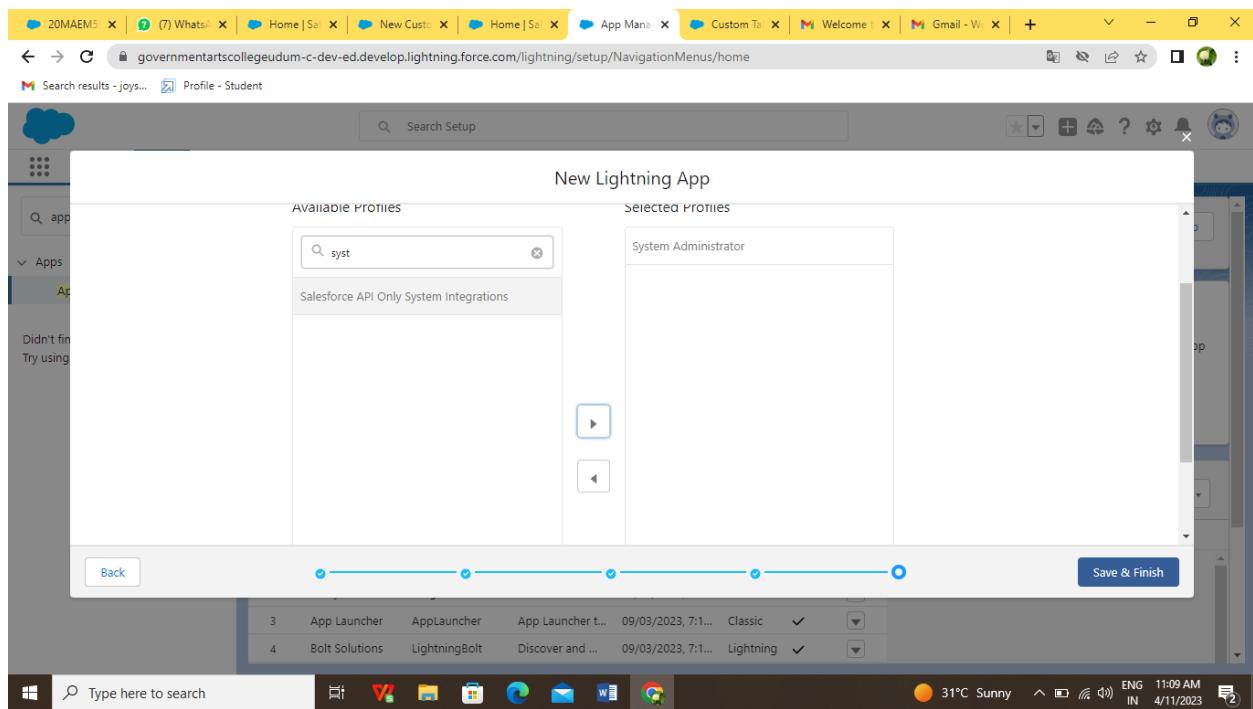
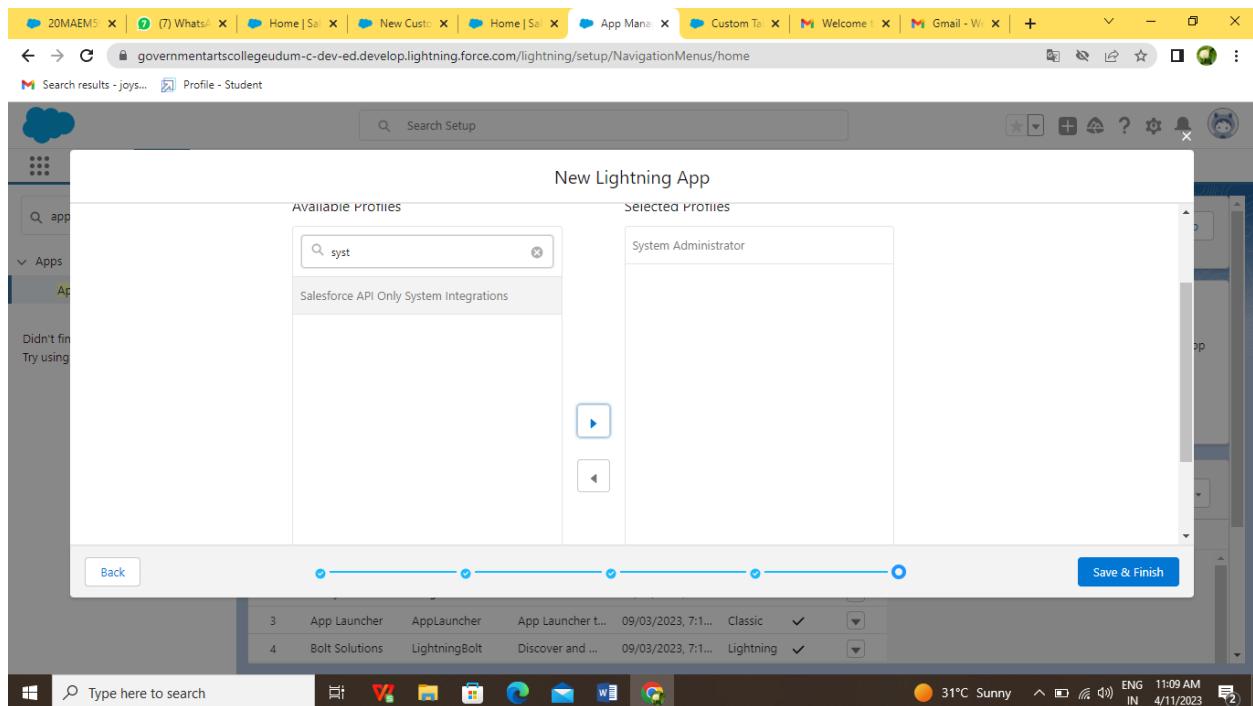
Activity

Create the Event Management Construction app

The screenshot shows a Microsoft Edge browser window displaying the Lightning Experience App Manager. The URL in the address bar is <https://governmentartscollegegedum-c-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home>. The page title is "Lightning Experience App Manager". The left sidebar has a search bar and navigation links for "Setup", "Home", and "Object Manager". The main content area is titled "Clone Apps(Beta)" and contains a note about enabling app cloning. A table lists four existing apps: "All Tabs", "Analytics Studio", "App Launcher", and "Bolt Solutions". The bottom of the screen shows the Windows taskbar with various pinned icons and the system tray.

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





Milestone 4 – Fields:

Fields:

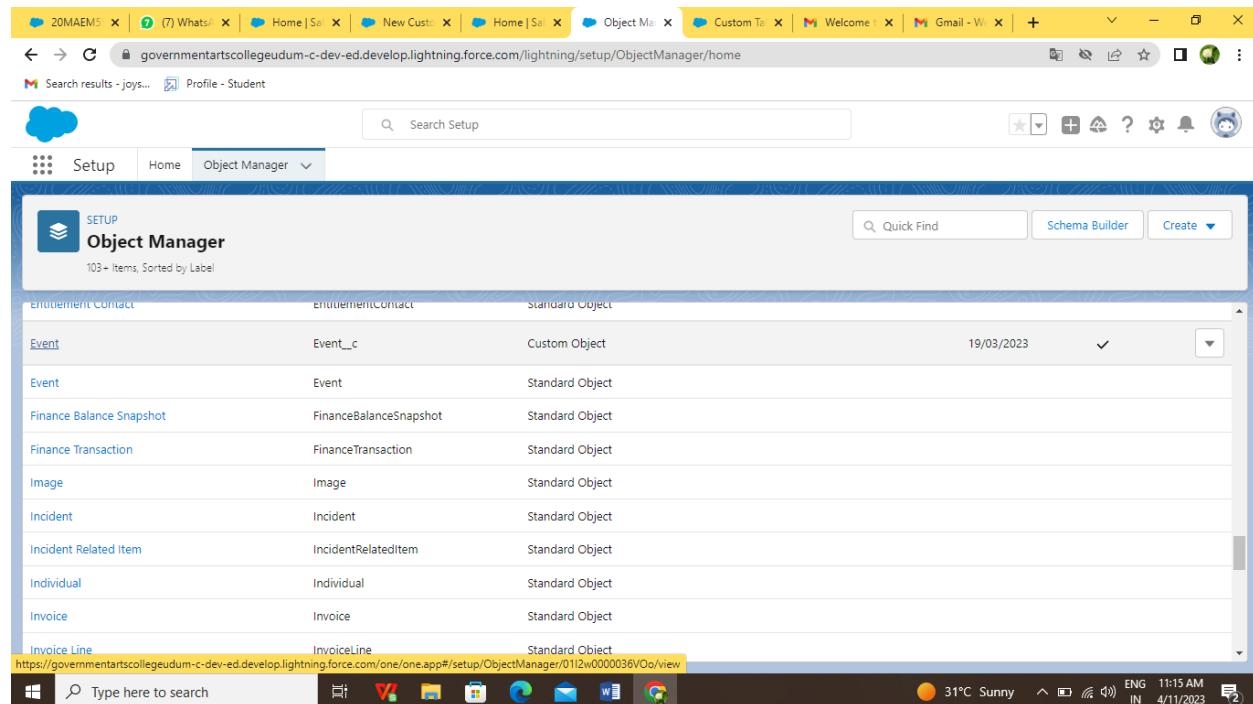
Fields in Salesforce represents what the columns represent in relational databases. It can store data values which are required for a particular object in a record.

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. The URL in the browser is <https://governmentartscollegeudum-c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home>. The page displays a list of objects with their names, labels, and types. The objects listed are: Entitlement Contact, Event, Event__c, Finance Balance Snapshot, Finance Transaction, Image, Incident, Incident Related Item, Individual, Invoice, and Invoice Line. The 'Event' object is highlighted with a yellow background. The page includes a search bar, a quick find bar, and a schema builder button.

Name	Label	Type
Entitlement Contact	EntitlementContact	Standard Object
Event	Event__c	Custom Object
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
Invoice Line	InvoiceLine	Standard Object

The screenshot shows the Salesforce Setup interface for the Event object. On the left, a sidebar lists various setup categories like Page Layouts, Lightning Record Pages, and Field Sets. The main content area is titled "Fields & Relationships" and displays a table of fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Chennai	Chennai_c	Text(50)		
Created By	CreatedById	Lookup(User)		
Email	Email_c	Email		
Event	Event_c	Master-Detail(Speaker)	✓	
Event Name	Name	Text(80)	✓	
Last Modified By	LastModifiedById	Lookup(User)		
Phone	Phone_c	Phone		

The screenshot shows the Salesforce Setup interface for creating a new custom field. The left sidebar includes sections for Customize, Deploy, and Monitor. The main area shows a list of field types with descriptions:

- 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 (Long): Allows users to enter up to 255 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.

At the bottom right 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 plus sign for new records. 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 "Step 2 of 4". The form fields include "Field Label" (set to "City"), "Length" (set to "50"), "Field Name" (set to "City"), and "Description" (empty). There is also a "Help Text" section. On the left sidebar, there is a "Lightning Experience Transition Assistant" section with a "Get Started" button, and a "Salesforce Mobile Quick Start" section with "Home" and "Administrator" links. The bottom of the screen shows the Windows taskbar with various pinned icons and system status indicators.

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 plus sign for new records. A banner at the top says "Object Manager | Sale" and "Event: New Custom F". Below the banner, the main content area is titled "Object Manager". It displays a table of objects with their names, types, and last modified dates. The table includes rows for Asset Action Source, Asset Relationship, Asset State Period, Assigned Resource, Associated Location, Attendee (Custom Object), Authorization Form, Authorization Form Consent, Authorization Form Data Use, and Authorization Form Text. The "Attendee" row is highlighted with a yellow background. The bottom of the screen shows the Windows taskbar with various pinned icons and system status indicators.

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

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

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), and Time (11:20 AM).

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

- Left Sidebar:** Get Started, Salesforce Mobile Quick Start (Home, Administrator), and a long list of Admin categories including 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, and Gmail Integration and Sync.
- Dialog:** Step 1. Choose the field type

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

Data Type	Description
<input type="radio"/> None Selected	Select one of the data types below.
<input checked="" type="radio"/> Auto Number	A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
<input type="radio"/> 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.
<input type="radio"/> 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.
<input type="radio"/> 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.
<input type="radio"/> 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: <ul style="list-style-type: none"> 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.
<input type="radio"/> External Lookup Relationship	Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
<input type="radio"/> Checkbox	Allows users to select a True (checked) or False (unchecked) value.
<input type="radio"/> 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.
<input type="radio"/> Date	Allows users to enter a date or pick a date from a popup calendar.
<input type="radio"/> 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), and Time (11:21 AM).

The screenshot shows the Salesforce Classic interface. At the top, there are several open tabs including 'Attendee: New C', 'Event: New Cust...', 'Gmail - Welcome', etc. The main content area displays a banner with the text 'It's Better in Lightning' and 'Move to Lightning Experience and give your users a productivity boost.' Below the banner, the page title is 'Attendee New Custom Field'. The main form is titled 'Step 2. Enter the details' and includes fields for 'Field Label' (set to 'Id'), 'Display Format' (set to 'A-{0000}'), 'Starting Number' (set to '1'), 'Field Name' (set to 'Id'), and 'Description'. A note says 'Example: A-{0000}' with a link 'What Is This?'. There is also a checkbox for 'Generate Auto Number for existing records'. On the left sidebar, there is a 'Lightning Experience Transition Assistant' section with a 'Get Started' button, and a 'Salesforce Mobile Quick Start' section with links for 'Home' and 'Administrator'. The bottom of the screen shows the Windows taskbar with various pinned icons.

Activity 3:

Creation of fields for the Speakers objects:

The screenshot shows the Salesforce Lightning Experience interface. The top navigation bar includes tabs for 'Object Manager', 'Attendee: New C', 'Event: New Cust...', 'Gmail - Welcome', etc. 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 (e.g., Standard Object or Custom Object), and a date field (e.g., 19/03/2023, 03/04/2023). The bottom of the screen shows the Windows taskbar with various pinned icons.

The screenshot shows the Salesforce Object Manager interface. The left sidebar has 'Setup' selected. The main area displays the 'Speaker' object's details, specifically the 'Fields & Relationships' section. A table lists the 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	LastModifiedBy/d	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Speaker Name	Name	Text(80)		✓

The screenshot shows the Salesforce Field Definition dialog. The left sidebar has 'Setup' selected. The main area shows a list of field types:

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

Descriptions for each field type are provided on the right. At the bottom right are 'Next' and 'Cancel' buttons.

Salesforce Home | Sales | Speaker | Sales | Speaker: New | Attendee: New | Event: New | Gmail - Welcome | +

governmentartscollegeudum-c-dev-ed.develop.my.salesforce.com/p/setup/field/NewCustomFieldStageManager

Search results - joys... Profile - Student

Profile - Student

23

Search... Search

Switch to Lightning Experience Joys Blessy Setup Help Service

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... Search

Expand All | Collapse All

Lightning Experience Transition Assistant

Move to the new, more productive Salesforce.

Get Started

Salesforce Mobile Quick Start

Home

Administrator

Type here to search

32°C Sunny ENG 11:27 AM IN 4/11/2023

Speaker New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label: Bio

Field Name: Bio

Description:

Help Text:

Previous Next Cancel



Salesforce Home | Sales | Speaker | Sales | Speaker: New | Attendee: New | Event: New | Gmail - Welcome | +

governmentartscollegeudum-c-dev-ed.develop.my.salesforce.com/p/setup/field/NewCustomFieldStageManager

Search results - joys... Profile - Student

Profile - Student

23

Search... Search

Switch to Lightning Experience Joys Blessy Setup Help Service

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... Search

Expand All | Collapse All

Lightning Experience Transition Assistant

Move to the new, more productive Salesforce.

Get Started

Salesforce Mobile Quick Start

Home

Administrator

Type here to search

32°C Sunny ENG 11:27 AM IN 4/11/2023

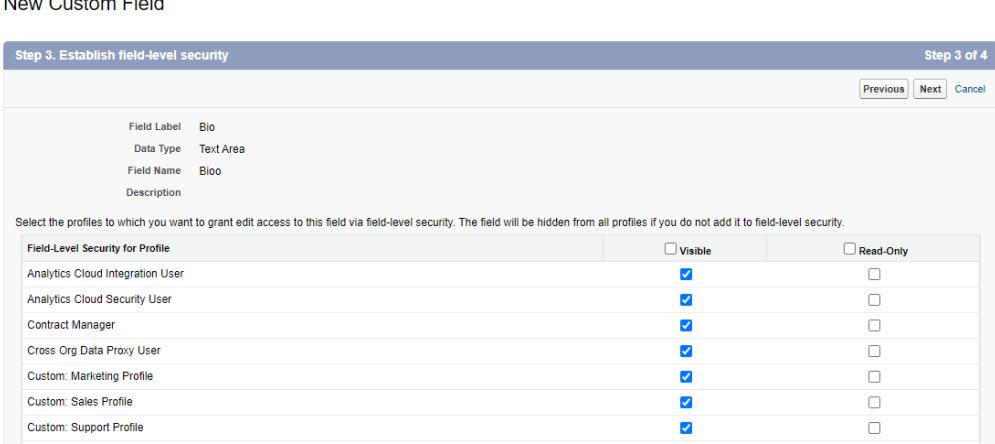
Speaker New Custom Field

Step 3. Establish field-level security Step 3 of 4

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"/>



The screenshot shows the Salesforce Setup interface. The top navigation bar includes tabs like '20MAEM59', '(7) WhatsApp', 'Home | Sales', 'Speaker | Sales', 'Speaker: New', 'Attendee: New', 'Event: New', 'Gmail - Welcome', and a '+' button. The main title is 'New Custom Field' under the 'Speaker' object. The current step is 'Step 4. Add to page layouts' of 4. The form fields are: Field Label (Bio), Data Type (Text Area), Field Name (Bio), and Description (empty). Below the form, it says 'Select the page layouts that should include this field.' with two checkboxes: 'Add Field' (checked) and 'Page Layout Name' (checked). Underneath, there's a note: 'When finished, click Save & New to create more custom fields, or click Save if you are done.' At the bottom right are 'Previous', 'Save & New', 'Save', and 'Cancel' buttons. On the left sidebar, there's a 'Lightning Experience Transition Assistant' section with a 'Get Started' button, and a 'Salesforce Mobile Quick Start' sidebar with links like Home, Administrator, Release Updates, Manage Users, etc.

Activity 4:

Creation of fields for the Vendors objects

The screenshot shows the Lightning Object Manager interface. The top navigation bar includes tabs like '20MAEM59', '(7) WhatsApp', 'Home | Sales', 'Object Manager' (highlighted in yellow), 'Speaker: New', 'Attendee: New', 'Event: New', 'Gmail - Welcome', and a '+' button. The main title is 'Object Manager'. The page shows a table of objects: Social Persona, Speaker, Store, Student, Task, Time Slot, User, User Provisioning Request, Vendor, and Voice Call. Each row contains the object name, its label (e.g., SocialPersona, Speaker_c, WebStore, Student_c, Task, TimeSlot, User, UserProvisioningRequest, Vendor_c, VoiceCall), its type (Standard Object or Custom Object), and a date column. At the bottom right are 'Quick Find', 'Schema Builder', and 'Create' buttons. On the left sidebar, there's a 'Setup' icon and a 'Object Manager' section with a dropdown menu.

Screenshot of the Salesforce Setup interface showing the Fields & Relationships section for the Vendor object.

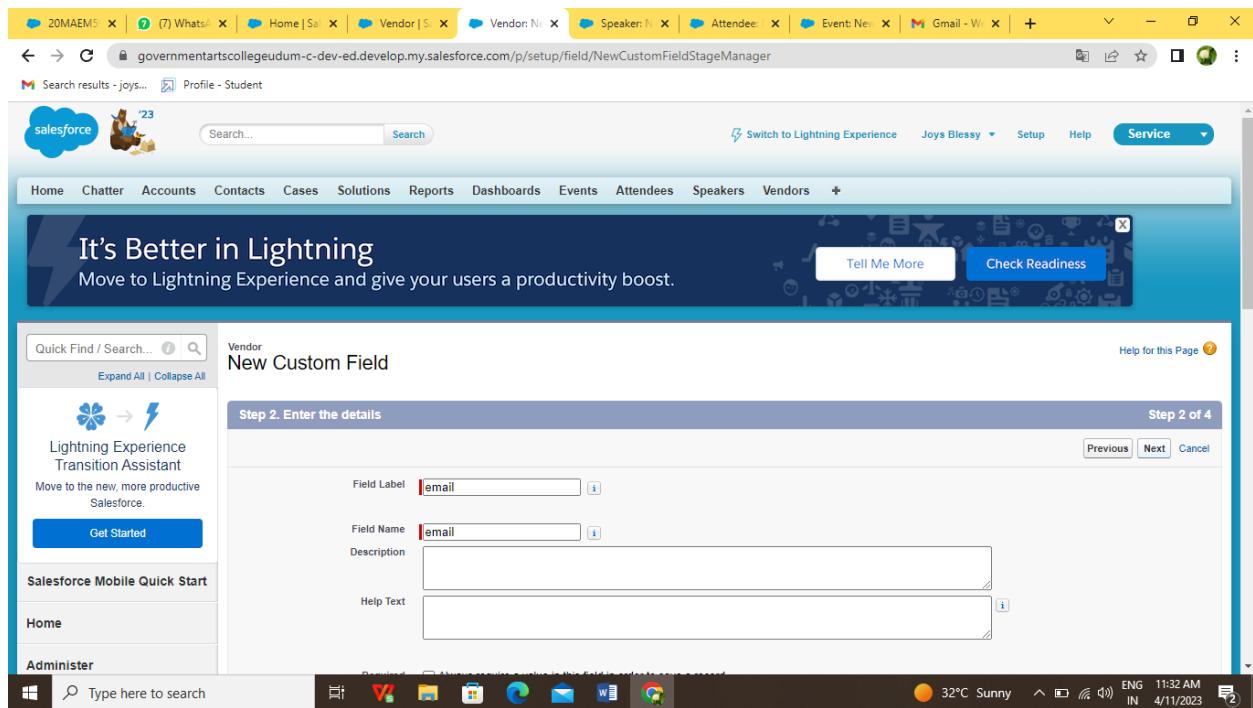
Vendor Object Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Email	Email_c	Email		
Event	Event_c	Lookup(Event)		✓
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone_c	Phone		
Service Provider	serviceprovider_c	Text(50)		

Screenshot of the Salesforce Setup interface showing the selection of field types for a new custom field.

Select Field Type

- 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 classic interface. At the top, there's a banner with the message "It's Better in Lightning" and "Move to Lightning Experience and give your users a productivity boost." Below the banner, the "Profiles" page is displayed. On the left, there's a sidebar with links like "Lightning Experience Transition Assistant", "Salesforce Mobile Quick Start", "Home", and "Administrator". The main content area shows a table of profiles with columns for "Action", "Profile Name", "User License", and "Custom". One row is selected, highlighting "Salesforce API Only System Integrations" under "Profile Name" and "Salesforce Integration" under "User License". The bottom of the screen shows the Windows taskbar with various pinned icons.

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

This screenshot shows the same Salesforce classic interface as the previous one, but with a different set of profiles listed in the table. The "Salesforce API Only System Integrations" profile is now highlighted. The bottom of the screen shows the Windows taskbar with various pinned icons.

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

Salesforce - governmentartscollegeudum-c-dev-ed.develop.my.salesforce.com

Profile - Student

20MAI | (7) Wi | Profile | Clone | Profile | Vendor | Vendo | Speak | Attendee | Event | Gmail | +

Search results - joys... Profile - Student

Profile - Student

It's Better in Lightning

Move to Lightning Experience and give your users a productivity boost.

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: Event

Save Cancel

Lightning Experience Transition Assistant

Move to the new, more productive Salesforce.

Get Started

Salesforce Mobile Quick Start

Home

Administrator

Type here to search

32°C Sunny ENG IN 4/11/2023

Salesforce - governmentartscollegeudum-c-dev-ed.develop.my.salesforce.com

Profile - Student

20MAI | (7) Wi | Profile | Profile | Vendor | Vendo | Speak | Attendee | Event | Gmail | +

Search results - joys... Profile - Student

Profile Detail

Name: Events
User License: Salesforce
Description:
Created By: Joys Blessy, 11/04/2023, 11:41 am
Modified By: Joys Blessy, 11/04/2023, 11:41 am

Custom Profile: ✓

Page Layouts

Object	Layout	Description
Global	Global Layout	[View Assignment]
Email Application	Not Assigned	[View Assignment]
Home Page Layout	DE Default	[View Assignment]
Account	Account Layout	[View Assignment]
Alternative Payment Method	Alternative Payment Method Layout	[View Assignment]
Appointment Invitation	Appointment Invitation Layout	[View Assignment]
Asset	Asset Layout	[View Assignment]
Asset Action	Asset Action Layout	[View Assignment]
Asset Action Source	Asset Action Source Layout	[View Assignment]

Standard Object Layouts

Object	Layout	Description
Object Milestone	Object Milestone Layout	[View Assignment]
Operating Hours	Operating Hours Layout	[View Assignment]
Opportunity	Opportunity Layout	[View Assignment]
Opportunity Product	Opportunity Product Layout	[View Assignment]
Order	Order Layout	[View Assignment]
Order Product	Order Product Layout	[View Assignment]
Payment	Payment Layout	[View Assignment]
Payment Authorization	Payment Authorization Layout	[View Assignment]
Payment Authorization Adjustment	Payment Authorization Adjustment Layout	[View Assignment]

Public Groups
Queues
Login History
Identity Provider Event Log
Identity Verification History

Manage Apps

Type here to search

32°C Sunny ENG IN 4/11/2023

The screenshot shows the Salesforce Setup interface for managing user profiles. At the top, there are sections for 'Brokers', 'Events', and 'Properties' with checkboxes indicating profile assignments. Below this is the 'Session Settings' section, which includes fields for 'Session Times Out After' (set to '2 hours of inactivity') and 'Session Security Level Required at Login' (set to 'None'). The 'Password Policies' section contains various configuration options: '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' (unchecked), 'Require a minimum 1 day password lifetime' (unchecked), and 'Don't immediately expire links in forgot password emails' (unchecked). At the bottom of the page, there are 'Save', 'Save & New', and 'Cancel' buttons.

Activity 2:

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

The screenshot shows the Salesforce Lightning Experience interface. At the top, there is a banner encouraging users to move to Lightning Experience. The main content area is titled 'Clone Profile' and displays a form for cloning an existing profile. The form includes fields for 'Existing Profile' (set to 'Standard User'), 'User License' (set to 'Salesforce'), and 'Profile Name' (set to 'Event Vendors profile'). There are also 'Save' and 'Cancel' buttons. On the left side, there is a sidebar with a 'Lightning Experience Transition Assistant' section, a 'Get Started' button, and navigation links for 'Home', 'Salesforce Mobile Quick Start', 'Home', and 'Administer'. The bottom of the screen shows the Windows taskbar with various pinned icons and system status indicators.

The screenshot shows the Salesforce Lightning Experience interface. At the top, there's a banner with the text "It's Better in Lightning" and "Move to Lightning Experience and give your users a productivity boost." Below the banner, the page title is "Event Vendors profile". The left sidebar includes links for "Lightning Experience Transition Assistant", "Salesforce Mobile Quick Start", "Home", and "Administrator". The main content area displays "Profile Detail" for the "Event Vendors profile". The profile has a "Name" of "Event Vendors profile", "User License" set to "Salesforce", and is a "Custom Profile". It was created by "Joy's Blessy" on 11/04/2023, 11:47 am, and modified by the same user on the same date and time. The "Page Layouts" section shows "Standard Object Layouts". The bottom of the screen shows a taskbar with various icons and system status information.

The screenshot shows the "Password Policies" configuration page in the Salesforce Lightning Experience. The page 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). There are also checkboxes for "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, there are "Save", "Save & New", and "Cancel" buttons. The bottom of the screen shows a taskbar with various icons and system status information.

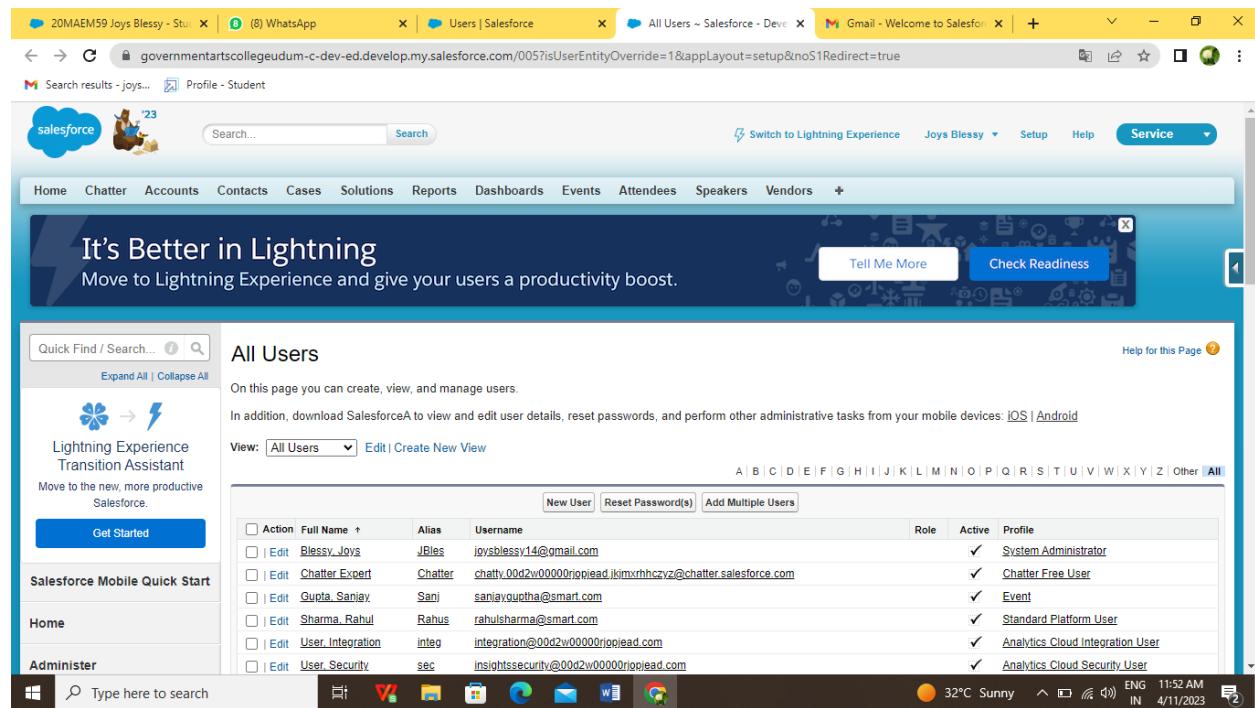
Milestone 6 – User:

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 multiple browser tabs open. The active tab is 'All Users ~ Salesforce - Dev'. The main content area displays the 'All Users' page with a table listing several users. The table columns include Action, Full Name, Alias, Username, Role, Active, and Profile. The users listed are:

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

The screenshot shows the Salesforce classic 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...'. Below the tabs, the URL is governmentartscollegeudum-c-dev-ed.develop.my.salesforce.com/005/e?retURL=%2F005%3FisUserEntityOverride%3D1%26appLayout%3Dsetup%26noS1Redirect.... The page title is 'Profile - Student'. The main content area displays a banner: 'It's Better in Lightning' and 'Move to Lightning Experience and give your users a productivity boost.' Below the banner, the 'New User' page is open. The left sidebar includes links for 'Lightning Experience Transition Assistant', 'Salesforce Mobile Quick Start', 'Home', and 'Administrator'. The right sidebar shows system status: 32°C Sunny, ENG IN 11:55 AM, and a date of 4/11/2023.

New User

User Edit

General Information

First Name	Sanjay
Last Name	Gupta
Alias	sgupt
Email	joysblessy14@gmail.com
Username	sanjaygupta@thesmartbridg
Nickname	Sanju
Title	
Company	
Department	
Division	
Role	<None Specified>
User License	Salesforce Platform
Profile	Standard Platform User
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>

Save Save & New Cancel

Help for this Page

Activity 2:

Create a user with a username as "Rahul Sharma"

The screenshot shows the Salesforce classic interface, identical to the previous one but with different user information. The 'New User' page is open, and the 'General Information' section shows the following data:

First Name	Rahul
Last Name	Sharma
Alias	Rahus
Email	joysblessy14@gmail.com
Username	rahulsharma@thesmartbridg
Nickname	Rahu
Title	
Company	
Department	
Division	
Role	<None Specified>
User License	Salesforce Platform
Profile	Standard Platform User
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>

Save Save & New Cancel

Help for this Page

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. The top navigation bar includes tabs for 'Permission Sets | Salesforce' and 'Permission Sets ~ Salesforce'. The main content area displays a list of permission sets with columns for Action, Permission Set Label, Description, and License. The 'Buyer' permission set is highlighted. The sidebar on the left provides links for 'Lightning Experience Transition Assistant', 'Salesforce Mobile Quick Start', 'Home', and 'Administrator'. The bottom status bar shows system information like weather (32°C Sunny), battery level, and network connectivity.

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Buyer	Allows access to the store. Lets users see products and c...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer Manager	Includes all Buyer capabilities, and allows access to man...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	CRM User	Denotes that the user is a Sales Cloud or Service Cloud ...	CRM User
<input type="checkbox"/>	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Contact Center Admin	Manage Service Cloud Voice contact centers that use Am...	Service Cloud Voice User

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	<input type="checkbox"/>

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

Lightning Experience Transition Assistant

Move to the new, more productive Salesforce.

Get Started

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

32°C Sunny ENG IN 12:06 PM 4/11/2023

Screenshot of the Salesforce Home page with a banner encouraging migration to Lightning Experience.

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

Permission Set Event Permit

Permission Set Overview

Description	Event_Permit
License	
Session Activation Required	<input type="checkbox"/>
Last Modified By	Joys Blessy, 11/04/2023, 12:07 pm

Apps

Assigned Apps: Settings that specify which apps are visible in the app menu
[Learn More](#)

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

Lightning Experience Transition Assistant

Move to the new, more productive Salesforce.

Get Started

Salesforce Mobile Quick Start

Home

Administrator

Type here to search

32°C Sunny ENG IN 12:07 PM 4/11/2023

The screenshot shows the Salesforce Setup interface. On the left, the navigation pane is open with the 'Permission Sets' option selected under 'Users'. The main area displays a list of users with columns for Full Name, Title, Phone, and Email. Three users are listed: Joys Blessy, Rahul Sharma, and Sanjay Gupta, all with the same email address (joysblessy14@gmail.com). The status bar at the bottom indicates it's 12:08 PM on April 11, 2023.

Activity 2:

From setup search “permission sets”

The screenshot shows the Salesforce classic interface. A search bar at the top has "permission sets" typed into it. The main content area is titled "Permission Set Create" and contains fields for "Label" (set to "permission sets") and "API Name" (set to "permission_sets"). The status bar at the bottom indicates it's 12:09 PM on April 11, 2023.

The screenshot shows the Salesforce Lightning Experience interface. At the top, there are several tabs open in the browser: '20MAEM59 Joys Bless...', '(8) WhatsApp', 'Permission Sets | Sale...', 'Permission Set: perm...', 'Permission Sets | Sale...', 'Gmail - Welcome to S...', and a new tab. 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 (Joys Blessy, 11/04/2023, 12:09 pm), API Name (permission_sets), Namespace Prefix, and Created By (Joys Blessy, 11/04/2023, 12:09 pm). Below this, the 'Apps' section lists 'Assigned Apps' and 'Assigned Connected Apps'. On the left sidebar, there's a 'Lightning Experience Transition Assistant' section with a 'Get Started' button, followed by 'Salesforce Mobile Quick Start' and 'Administrator' sections. The bottom of the screen shows a taskbar with various icons and system status information.

The screenshot shows the Salesforce Lightning Experience interface. The browser tabs are identical to the previous screenshot. The main content area displays the 'Select Users to Assign' page under 'PERMISSION SET 'PERMISSION SETS' > MANAGE ASSIGNMENT EXPIRATION'. It shows a list of users selected for assignment: Joys Blessy (joysblessy14@gmail.com), Rahul Sharma (joysblessy14@gmail.com), and Sanjay Gupta (joysblessy14@gmail.com). The left sidebar shows the 'Setup' menu with 'Permission Sets' selected. The bottom of the screen shows a taskbar with various icons and system status information.

Milestone 8 – Reports

Reports:

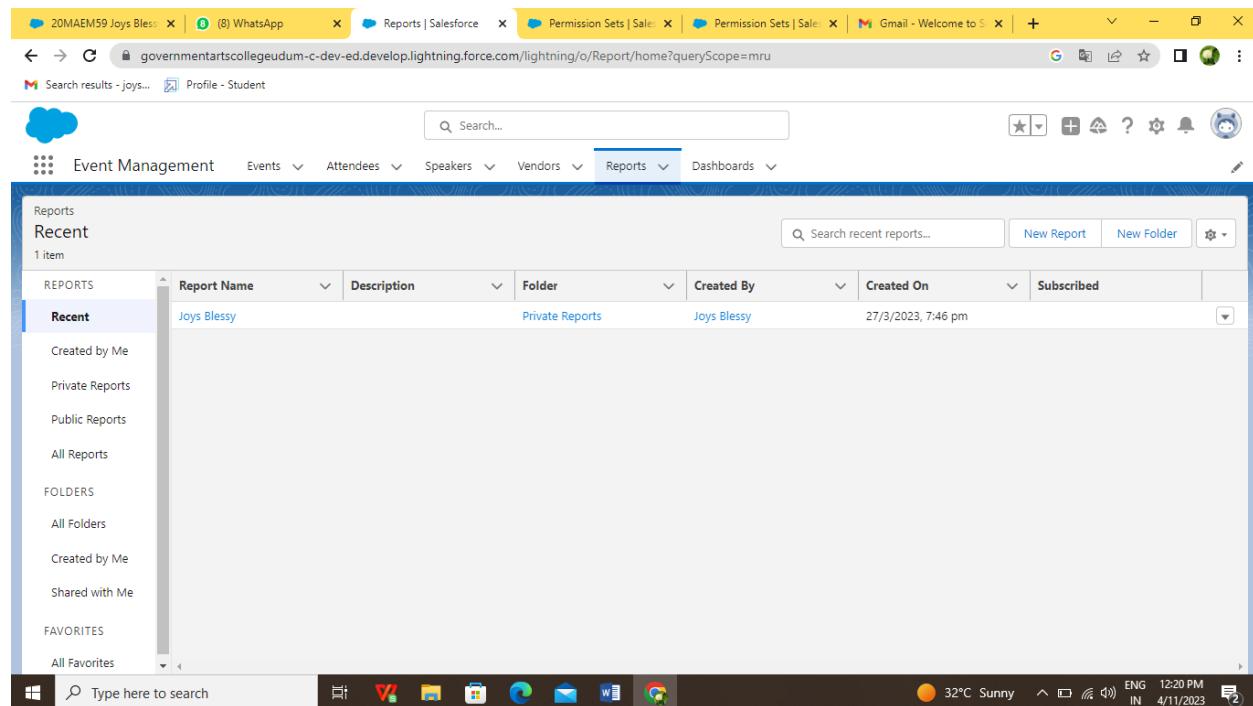
Reports in Salesforce is a list of records that meet a particular criterion which gives an answer to a particular question. These records are displayed as a table that can be filtered or grouped based on any field.

There are 4 types of report formats in Salesforce:

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

Activity

Creating a Report:



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.