

PROJECT REPORT ON

Build An Event Management System Using Salesforce - (Developer)

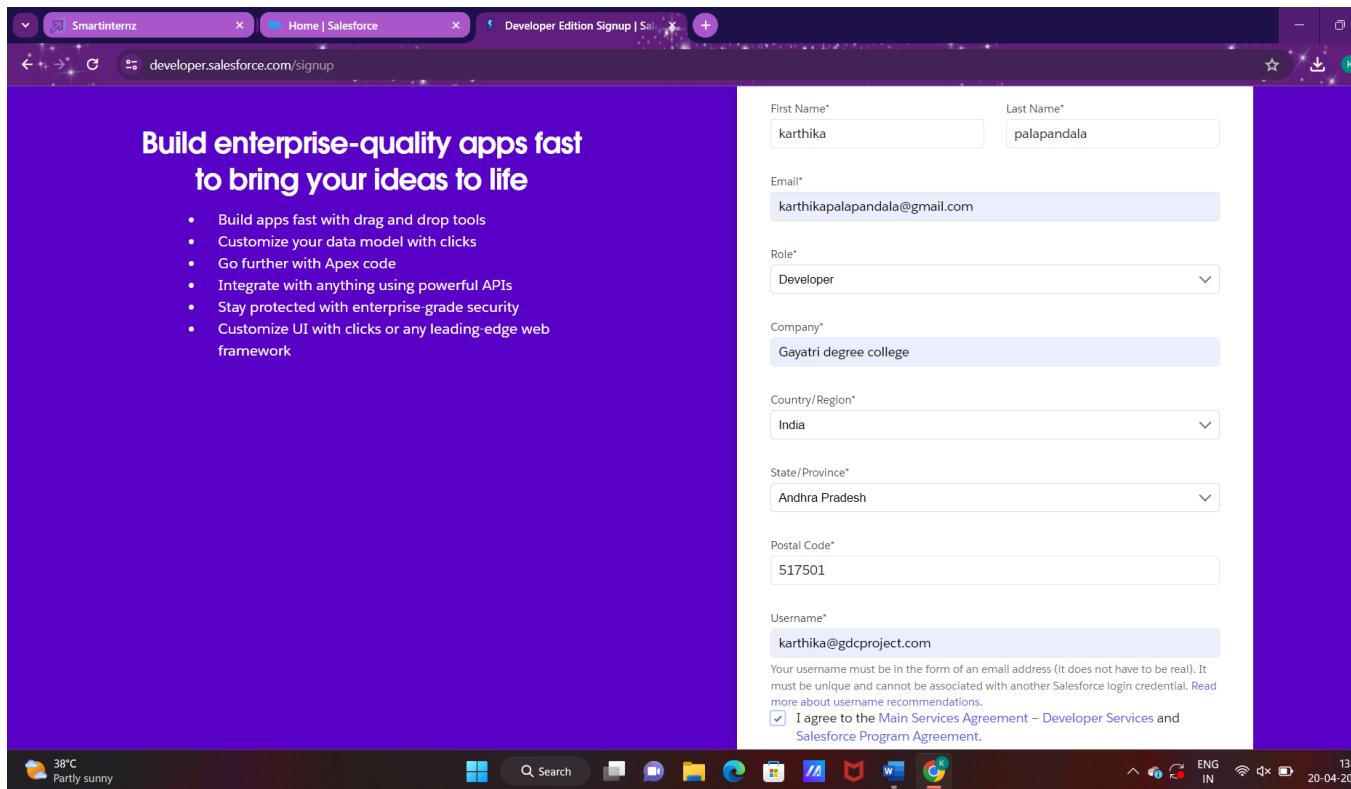
Introduction:

An event management system is a digital tool that streamlines the planning, organization, and execution of events. It encompasses a range of features such as event registration, ticketing, venue selection, scheduling, attendee engagement, and post-event analysis. An event management system within Salesforce allows you to access all relevant data in one centralized location.

Milestone – 01 - Creating a Developer Edition

➔ Go to [developers.salesforce.com](https://developer.salesforce.com)

- Click on sign up
- On the signup form, enter the following details:
 - First name & Last name: KARTHIKA PALAPANDALA
 - Email: karthikapalapandala@gmail.com
 - Role: SALESFORCE DEVELOPER
 - Company: College Name - GAYATRI DEGREE COLLEGE – TIRUPATI
 - Country: India
 - Postal Code: pin code – 517501
 - Username: karthikapalapandala@gdcproject.com



Milestone – 02- Objects Creation

Objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types: 1) Standard object 2) Custom objects

Objects involved in Event Management are: Occasion, Attendees, Speakers and vendors

Creation Of Custom Object Occasion:

1. on the gear icon and then select Setup.

2. Click have a look on the extreme right you will find a Create Dropdown click on that &
3. select custom object
4. On the Custom Object Definition page, create the object as follows:
5. Label: Occasion
6. Plural Label: Occasions
7. Record Name: Event Name
8. Check the Allow Reports checkbox
9. Check the Allow Search checkbox
10. Click Save.

The screenshot shows the Salesforce Object Manager page. At the top, there are tabs for 'Setup', 'Home', and 'Object Manager'. The 'Object Manager' tab is active. A search bar at the top right contains the text 'occasion'. Below the search bar, there is a 'Schema Builder' button and a 'Create' button. The main area displays a table with one row of data. The columns are labeled 'LABEL', 'API NAME', 'TYPE', 'DESCRIPTION', 'LAST MODIFIED', and 'DEPLOYED'. The single row shows 'Occasion' as the Label, 'Occasion__c' as the API Name, 'Custom Object' as the Type, an empty Description field, the date '16/04/2024' as the Last Modified date, and a checked Deployed status. The bottom of the screen shows the Windows taskbar with various pinned icons and system status indicators.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Occasion	Occasion__c	Custom Object		16/04/2024	<input checked="" type="checkbox"/>

➔ Creation Of Custom Object **Attendees**:

1. Click on the gear icon and then select Setup.
2. have a look on the extreme right you will find a Create Dropdown click on that &
3. select custom object

4. On the Custom Object Definition page, create the object as follows:
5. Label: Attendee
6. Plural Label: Attendees
7. Record Name: Attendee Name
8. Check the Allow Reports checkbox
9. Check the Allow Search checkbox
10. Click Save.

The screenshot shows a Microsoft Edge browser window with the address bar pointing to gayatridgeeconomics-15e-dev-ed.lightning.force.com/lightning/setup/ObjectManager/home. The main content is the 'Object Manager' page under the 'SETUP' tab. A single item, 'Service Appointment Attendee', is listed in the table. The table has columns for Label, API Name, Type, Description, Last Modified, and Deployed. The 'Label' column shows 'Service Appointment Attendee', 'API NAME' shows 'ServiceAppointmentAttendee', 'Type' is 'Standard Object', and there is no description or deployment information. The table header includes 'Search appointment a:' and 'Create' buttons. The bottom of the screen shows the Windows taskbar with various pinned icons and system status indicators.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Service Appointment Attendee	ServiceAppointmentAttendee	Standard Object			

→ Creation Of Custom Object **Speakers**:

1. Click on the gear icon and then select Setup.
2. have a look on the extreme right you will find a Create Dropdown click on that &
3. select custom object
4. On the Custom Object Definition page, create the object as follows:
5. Label: Speaker

6. Plural Label: Speakers
7. Record Name: Speakers Name
8. Check the Allow Reports checkbox
9. Check the Allow Search checkbox
10. Click **Save.**

The screenshot shows the Salesforce Object Manager interface. At the top, there are three tabs: 'Setup', 'Home', and 'Object Manager'. The 'Object Manager' tab is selected. In the center, there's a search bar with the query 'speaker' and a 'Schema Builder' button. Below the search bar, a table lists one item:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Speaker	Speaker_c	Custom Object		16/04/2024	✓

At the bottom of the screen, there's a taskbar with various icons and a system status bar showing weather (38°C, Partly sunny), date (20-04-2024), and time (13:03).

→ Creation Of Custom Object **vendors**:

1. Click on the gear icon and then select Setup.
2. have a look on the extreme right you will find a Create Dropdown click on that &
3. select custom object
4. On the Custom Object Definition page, create the object as follows:

5. Label: Speaker
6. Plural Label: Speakers
7. Record Name: Speakers Name
8. Check the Allow Reports checkbox
9. Check the Allow Search checkbox
10. Click Save.

The screenshot shows the Salesforce Object Manager page. At the top, there are three tabs: 'Smartinternz' (active), 'Object Manager | Salesforce', and 'Developer Edition Signup | Sales'. Below the tabs is a search bar with the placeholder 'Search Setup'. The main area is titled 'Object Manager' with a sub-header '1 Items, Sorted by Label'. A table lists the object details:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Vendor	Vendor__c	Custom Object		16/04/2024	✓

At the bottom of the screen, there is a taskbar with various icons and a system status bar showing '38°C Partly sunny', 'ENG IN', '20-04-2024', and '13:04'.

→ Creation Of Custom Object **Event Service**:

Salesforce Junction Objects give you a way to create a many-to-many relationship between Salesforce objects. They are created using a custom object to relate two other objects via two master-detail relationships.

1. Click on the gear icon and then select Setup.
 2. have a look on the extreme right you will find a Create Dropdown click on that &
 3. select custom object
 4. On the Custom Object Definition page, create the object as follows:
 5. Label: Event Service
 6. Plural Label: Event Services
 7. Record Name: Event Services Name
 8. Check the Allow Reports checkbox
 9. Check the Allow Search checkbox
10. Click Save.

The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with tabs for 'Setup', 'Home', and 'Object Manager'. The main area is titled 'Object Manager' and shows a single item: 'Event Service'. The table details are as follows:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Event Service	Event_Service__c	Custom Object		16/04/2024	✓

At the bottom of the screen, there's a taskbar with various icons and system status information.

Milestone – 03- Tabs

A tab is like a user interface that used to build records for objects and to view the records in the objects.

Tabs basically categorize into 4 different sections-

- ❖ **Standard Object Tab:**

Standard object tabs display data related to standard objects.

❖ **Custom Object Tab:**

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.

➔ **Creation Of Custom Tab- Occasion, Attendee, Speaker, Vendor, Event service**

1. Navigate to setup and home
2. Enter Tabs in Quick Find Box and select Tabs
3. Under Custom Object Tabs, click New
4. For Object, select occasion
5. For Tab Style, select any icon
6. Leave all defaults as is. Click Next, Next, and Save
7. Now create custom Tabs for Attendee, Speaker, Vendor, Event service by following above steps.

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

- Header:** Shows tabs for "Smartintern" and "Tabs | Salesforce".
- Page Title:** "Custom Tabs" under the "SETUP" tab.
- Search Bar:** A search bar with the placeholder "Search Setup" and a magnifying glass icon.
- Left Sidebar:** A sidebar with a "User Interface" section containing "Rename Tabs and Labels" and "Tabs".
- Content Area:**
 - Custom Tabs Section:** A table titled "Custom Object Tabs" showing five rows of tabs:

Action	Label	Tab Style	Description
Edit Del	Attendees	Bank	
Edit Del	Event Services	Can	
Edit Del	Occasions	Airplane	
Edit Del	Speakers	Books	
Edit Del	Vendors	Building	
 - Web Tabs Section:** A table titled "Web Tabs" showing the message "No Web Tabs have been defined".
 - Visualforce Tabs Section:** A table titled "Visualforce Tabs" showing the message "No Visualforce Tabs have been defined".
 - Lightning Component Tabs Section:** A table titled "Lightning Component Tabs" showing the message "No Lightning Component Tabs have been defined".
- Bottom Bar:** Includes weather information ("38°C Partly sunny"), a search bar, and various system icons.
- System Status:** Shows "ENG IN" and the date "20-04-2024" at the bottom right.

Milestone – 04- Lightning App

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: 1) Standard Apps 2) Custom Apps

❖ Creation Of Event Management App

1. Navigate to setup and home

2. enter App Manager in the Quick Find and select App Manager

3. Click New Lightning App. Enter Event Management as the App Name, then click Next

4. Under App Options, leave the default selections and click Next.

5. Under Utility Items, leave as is and click Next.

6. From Available Items, select Occasions, Attendees, speakers, vendors, Event Service,

7. Reports and Dashboards and move them to Selected Items. Click next

8. From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save &

Finish.

The screenshot shows the Salesforce App Manager interface. On the left, the navigation sidebar is open, showing categories like Data, Apps, Connected Apps, External Client Apps, Lightning Bolt, Mobile Apps, and Salesforce Branding. Under the Apps category, 'App Manager' is selected. In the center, the main content area is titled 'Lightning Experience App Manager' and displays a table of 23 items. The table has columns for App Name, Developer Name, Description, Last Modified Date, App Type, and Visibility. The row for 'Event Management' is highlighted, showing it was last modified on 16/04/2024 at 10:54 am by 'Event_Management'. The developer name is 'Commerce' and the description is 'Manage your store's products, catalogs, and pricebooks.' The app type is 'Lightning' and visibility is checked. At the bottom of the table, there are buttons for 'New Lightning App' and 'New Connected App'.

App Name ↑	Developer Name	Description	Last Modified Date	App Type	Visibility
Commerce	Commerce	Manage your store's products, catalogs, and pricebooks.	21/03/2024, 09:57 pm	Lightning	✓
Community	Community	Salesforce CRM Communities	27/03/2024, 6:07 pm	Classic	✓
Content	Content	Salesforce CRM Content	27/03/2024, 6:07 pm	Classic	✓
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	27/03/2024, 6:07 pm	Lightning	✓
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	27/03/2024, 6:07 pm	Lightning	✓
Event Management	Event_Management		16/04/2024, 10:54 am	Lightning	✓
Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	27/03/2024, 6:07 pm	Lightning	✓
Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	27/03/2024, 6:07 pm	Classic	✓
Platform	Platform	The fundamental Lightning Platform	27/03/2024, 6:07 pm	Classic	✓
Queue Management	QueueManagement	Create and manage queues for your business.	27/03/2024, 6:07 pm	Lightning	✓
Sales	Sales	The world's most popular sales force automation (SFA) solution	27/03/2024, 6:07 pm	Classic	✓
Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	27/03/2024, 6:07 pm	Lightning	✓
Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one...	27/03/2024, 6:07 pm	Lightning	✓
Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	27/03/2024, 6:07 pm	Classic	✓

Milestone – 05- Fields & Relationships

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: 1) Standard fields 2) Custom fields

❖ Creation Of Fields for the Occasion Object

- 1. Click the gear icon and select Setup. This launches Setup in a new tab.**
- 2. Click the Object Manager tab next to Home.**
- 3. Select Occasion.**
- 4. Select Fields & Relationships from the left navigation, and click Next**
- 5. Select the Text as the Data Type, then click Next.**
- 6. For Field Label, enter City. And length (20).**
- 7. Click Next, Next, then Save & New.**
- 8. Similarly create an End Date field also.**

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

- Page Header:** Smartinternz, Occasion | Salesforce, gayatridegreecollege-15e-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01IIR00001XaSS/FieldsAndRelationships/view
- Navigation Bar:** Setup, Home, Object Manager
- Left Sidebar:** SETUP > OBJECT MANAGER
Occasion
- Table:** Fields & Relationships
- Table Headers:** FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, INDEXED
- Table Data:** (11 items, Sorted by Field Label)
 - City (Field Name: City_c, Data Type: Text(20))
 - Created By (Field Name: CreatedByld, Data Type: Lookup(User))
 - Email (Field Name: Email_c, Data Type: Email)
 - End Date (Field Name: End_Date_c, Data Type: Text(20))
 - Event Name (Field Name: Event_Name__c, Data Type: Lookup(Occasion))
 - Event Name (Field Name: Name, Data Type: Text(80))
 - Id (Field Name: Id_c, Data Type: Auto Number)
 - Last Modified By (Field Name: LastModifiedByld, Data Type: Lookup(User))
 - Owner (Field Name: OwnerId, Data Type: Lookup(User,Group))
 - Phone (Field Name: Phone_c, Data Type: Phone)
- Bottom Navigation:** USD/INR -0.21%, Search, Home, App Launcher, ENG IN, 20-04-2024, 13:42

❖ Creation Of Fields for the Attendee Object

- 1. Click on the gear icon and then select Setup.**

- 2.Click on the object manager tab just beside the home tab.**
- 3. After the above steps, Select Attendee Object**
- 4.Now Select Fields and relationships from setup menu of the Attendee object.**
- 5. Click new and select picklist fields**
- 6. Next enter label name Tickets and select enter values option(Prememium, Gold, Silver)**
- 7. Next , Next and Save**

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Attendee Name	Name	Text(80)		✓
cancel	cancel_c	Text(20)		▼
Confirm	Confirm_c	Text(20)		▼
Created By	CreatedById	Lookup(User)		▼
Event Name	Event_Name_c	Master-Detail(Occasion)		✓
Last Modified By	LastModifiedById	Lookup(User)		▼
Not confirmed	Not_confirmed_c	Text(20)		▼
pending.	pending_c	Text(20)		▼
Tickets	Tickets_c	Picklist		▼

❖ Creation Of Master-Detail Relationship

- 1. Click fields & relationships and click new**
- 2. Select Master relationship & click next**
- 3. choose the related object as Occasion & click next**
- 4.Give the field label (Event Name) & click next, next, next and save**

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for 'Smartinternz' and 'Occasion | Salesforce'. The main page title is 'SETUP > OBJECT MANAGER Occasion'. On the left, a sidebar lists various setup categories like Page Layouts, Lightning Record Pages, and Field Sets. The central content area displays the details of a custom field named 'Event Name' for the 'Occasion' object. The 'Field Information' section shows the field label 'Event Name', field name 'Event_Name', API name 'Event_Name__c', and data type 'Lookup' (set to 'Occasion'). Other details include a description, help text, data owner, field usage, data sensitivity level, and compliance categorization. The 'Lookup Options' section indicates the field is related to 'Occasion' and has a child relationship named 'Occurrences'. The bottom of the screen shows the Windows taskbar with various pinned icons and system status indicators.

❖ Creation Of Fields for the Speaker object

. Select the Text Area as the Data Type, then click Next. For Field Label, enter Bio.

Click Next, Next, then Save & New.

2. Select the Email as the Data Type, then click Next. For Field Label, Email.

Click Next, Next, then Save & New

3. Select the Phone as the Data Type, then click Next.

For Field Label, Phone.

4. Click Next, next the save and New

Fields & Relationships
7 items, Sorted by Field Label

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

❖ Creation Of Fields for the Vendor object

1. Select the phone as the Data Type, then click Next. For Field Label, Phone.

Click Next, Next, then Save & New.

2. Select the Email as the Data Type, then click Next. For Field Label, Email.

Click Next, Next, then Save & New

3. Select the Text as the Data Type, then click Next.

For Field Label, enter Service Provider and length (30). Click Next, Next, then Save & New.

4. Select Lookup Relationship as the Data Type and click Next. For Related to, enter Occasion.

5. Click Next and for the Field Label Name. Click Next, next , next and save

Fields & Relationships					
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Created By	CreatedBy	Lookup(User)		
Lightning Record Pages	Email	Email_c	Email		
Buttons, Links, and Actions	Event Name	Event_Name__c	Lookup(Occasion)	✓	
Compact Layouts	Last Modified By	LastModifiedBy	Lookup(User)		
Field Sets	Owner	OwnerId	Lookup(User,Group)	✓	
Object Limits	Phone	Phone_c	Phone		
Record Types	Service Provide	Service_Provide__c	Text(30)		
Related Lookup Filters	Vendor Name	Name	Text(80)	✓	

❖ Creation Relationship on Event Service object

1. Let's create a Master-Detail relationship with Event Service object

- Click fields & relationships and click new
- Select Master-Detail relationship & click next
- Choose the related object as Occasion & click next Give the field label(Event Name) & click next, next, next and Save

2. Let's create a Master-Detail relationship with Event Service object

- click fields & relationships and click next
- Select Master- Detail relationships and click new
- Choose the related oject as Vendor & click next and Give the field label (Vendor Name) & click next,next,next and save

The screenshot shows the Salesforce Setup interface for the Event Service object. The left sidebar has a tree view with 'Fields & Relationships' selected. The main area is titled 'Fields & Relationships' and shows a table with the following data:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Event Name	Event_Name__c	Master-Detail(Occasion)		✓
Event Services Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Vendor Name	Vendor_Name__c	Master-Detail(Vendor)		✓

Milestone – 06 – Profile

❖ Creation Of profile

1. From Setup enter Profiles in the Quick Find box, and select Profiles.
2. From the list of profiles, find Standard User.
3. Click Clone.
4. For Profile Name, enter Event User profile.
5. Click Save.
6. While still on the Event profile page, then click Edit.
7. Scroll down to Custom Object Permissions and Give view all access permissions to the Attendees, Speakers and vendors

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

- Header:** Smartinternz, Profiles | Salesforce
- Search Bar:** Search Setup
- Navigation:** Setup, Home, Object Manager
- Quick Find:** profile
- Section:** Profiles
- Profile Name:** Event user profile
- Profile Detail:** Name: Event user profile, User License: Salesforce, Description: , Created By: karthika palapandala, Created Date: 16/04/2024, 11:35 am, Modified By: karthika palapandala, Modified Date: 19/04/2024, 11:45 am, Custom Profile: checked
- Page Layouts:** Standard Object Layouts table showing various layouts for different objects like Global, Email Application, Home Page Layout, Account, Alternative Payment Method, etc.
- Sidebar:** Users, Profiles, Help for this Page

❖ Create a profile with the profile name as “Even Vendors Profile”

1. From Setup enter Profiles in the Quick Find box, and select Profiles.
2. From the list of profiles, find Standard User.
3. Click Clone.
4. For Profile Name, enter Event vendors profile.
5. Click Save.
6. While still on the Event profile page, then click Edit.
7. Scroll down to Custom Object Permissions and Give view all access permissions to the Attendees, speakers and vendors.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes tabs for 'Setup', 'Home', and 'Object Manager'. A search bar at the top right says 'Search Setup'. The main content area is titled 'Profiles' and shows a profile named 'Event vendors profile'. Below the title, it says 'Profile' and 'Event vendors profile'. It notes that users with this profile have specific permissions and page layouts. A note says '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.' A list of permissions follows, including 'Login IP Ranges (0)', 'Enabled Apex Class Access (0)', 'Enabled Visualforce Page Access (0)', etc. The 'Profile Detail' section shows the profile's name, user license (Salesforce), and creation and modification details. The 'Page Layouts' section lists standard object layouts for various objects like Global, Email Application, Home Page Layout, Account, Alternative Payment Method, and more. The bottom of the screen shows a Windows taskbar with icons for File Explorer, Task View, Start, Edge, Microsoft Word, Microsoft Excel, Microsoft Powerpoint, Microsoft OneDrive, Microsoft Teams, and Google Chrome. The system tray shows the date (20-04-2024), time (14:36), battery level, and network status.

Milestone – 07– User

❖ Creating an user

1. From setup type “users” in quick find and select users, then click New User

First Name: Sanjay **Last Name:** Gupta

Alias: Sanj

Email: provide your personal email id for future reference

Username: sanjaygupta@thesmartbridge.com

Nickname: Sanju

Role: leave it as default

User License: Salesforce

Profile: Event User Profile

2. Click on save.

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

- Page Header:** Smartinternz, Users | Salesforce
- Search Bar:** Search Setup
- Left Sidebar:**
 - Setup
 - Home
 - Object Manager
 - Users (selected)
 - Permission Set Groups
 - Permission Sets
 - Profiles
 - Public Groups
 - Queues
 - Roles
 - User Management Settings (selected)
 - Users (selected)
 - Feature Settings
 - Data.com
 - Prospector Users
 - Service
 - Embedded Service
 - Messaging for In-App and Web User Verification
 - User Interface
 - Action Link Templates
- Top Bar Buttons:** Cloud icon, Search icon, Home icon, Object Manager icon, Help icon, Notifications icon.
- Content Area:**
 - User Detail:** Sanjay Gupta

Name	Sanjay Gupta	Role	Salesforce
Alias	Sanj	User License	Profile
Email	karthikapalajgandala@gmail.com [Verify]	Active	Event user profile
Username	sanjaygupta@thesmartbridgeblue.com	Marketing User	<input type="checkbox"/>
Nickname	Sanju	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
Address		Site.com Publisher User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	WDC User	<input type="checkbox"/>
Locale	English (India)	Mobile Push Registrations	View
Language	English	Data.com User Type	View
Delegated Approver		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Manager		Debug Mode	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver <th>High-Contrast Palette on Charts</th> <td><input type="checkbox"/></td>	High-Contrast Palette on Charts	<input type="checkbox"/>
Federation ID			
- Bottom Bar:** USD/INR -0.21%, Q. Search, various application icons, system status icons (ENG IN, 20-04-2024, 14:41).

❖ Creating another user

1. Create a user with a username as “Rahul Sharma”, and assign him the sales executive profile. From setup type “users” in quick find and select users, then click New User

First Name: Rahul

Last Name: Sharma

Alias: Rahus

Email: provide your personal email id for future reference

Username: rahulsharma@thesmartbridge.com

Nickname: Rahu

Role: leave it as default

User License: Salesforce Platform

Profile: Event Vendors profile

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

- Header:** Smartinternz, Users | Salesforce
- Search Bar:** Search Setup
- Left Sidebar:**
 - Permission Set Groups
 - Permission Sets
 - Profiles
 - Public Groups
 - Queues
 - Roles
 - User Management Settings (highlighted)
 - Users (highlighted)
 - Feature Settings
 - Data.com
 - Prospector Users (highlighted)
 - Service
 - Embedded Service
 - Messaging for In-App and Web User Verification
 - User Interface
 - Action Link Templates
- Current Page:** User Detail for **Rahul Sharma**
- User Detail Fields:**

Category	Value	Role
Name	Rahul Sharma	Salesforce
Alias	Rahus	User License
Email	karthikapalajgandala@gmail.com (Verify)	Profile
Username	rahulsharma@thesmarbridgebrown.com	Active
Nickname	Rahu	Marketing User
Title		Offline User
Company		Knowledge User
Department		Flow User
Division		Service Cloud User
Address		Site.com Contributor User
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User
Locale	English (India)	WDC User
Language	English	Mobile Push Registrations
Delegated Approver		Data.com User Type
Manager		Accessibility Mode (Classic Only)
Receive Approval Request Emails	Only if I am an approver	Debug Mode
Federation ID		High-Contrast Palette on Charts
- Bottom Bar:** Weather (40°C, Mostly cloudy), Q. Search, and various application icons.
- System Status:** ENG IN, 14:43, 20-04-2024

Milestone – 08– Permission Sets

❖ Creating a Permission Set

1. From setup search “permission sets” in quick find and select permission set then click on New
2. Enter label as: Event Permits and save.
3. After saving the permission click on the Manage assignment
4. Now click on the Add Assignment
5. Now select the users which you create and click on the next Assign, Done

Smartinternz

Permission Sets | Salesforce

Setup Home Object Manager

permission

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

Didn't find what you're looking for?
Try using Global Search.

Event Permits

Find Settings... Clone Edit Properties Manage Assignments View Summary (Beta)

Permission Set Overview

Description	API Name	Namespace Prefix
License	Event_Permits	
Session Activation Required		Created By karthika palapandala, 16/04/2024, 11:54 am
Permission Set Groups Added To	0	Last Modified By karthika palapandala, 16/04/2024, 11:54 am

Apps

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

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

Object Settings
Permissions to access objects and fields, and settings such as tab availability

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access
Permissions to execute Apex classes

Visualforce Page Access
Permissions to execute Visualforce pages

40°C Mostly cloudy

Q. Search

ENG IN 20-04-2024

❖ Creating another Permission Set

1. From setup search “permission sets” in quick find and select permission set then click on New
2. Enter label as: Vendor Permits and Save.
3. After saving the permission click on the Manage assignment
4. Now click on the Add Assignment
5. Now select the users and click on next Assing, Done

Smartinternz

Permission Sets | Salesforce

Setup Home Object Manager

permission

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

Didn't find what you're looking for?
Try using Global Search.

Vendor Permits

Find Settings... Clone Edit Properties Manage Assignments View Summary (Beta)

Permission Set Overview

Description	API Name	Namespace Prefix
License	Vendor_Permits	
Session Activation Required		Created By karthika palapandala, 16/04/2024, 11:59 am
Permission Set Groups Added To	0	Last Modified By karthika palapandala, 16/04/2024, 11:59 am

Apps

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

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

Object Settings
Permissions to access objects and fields, and settings such as tab availability

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access
Permissions to execute Apex classes

Visualforce Page Access
Permissions to execute Visualforce pages

USD/INR -0.21%

Q. Search

ENG IN 20-04-2024

Milestone – 08– User Adoption

❖ Create a Record (Occasion)

1. Click on App Launcher on left side of screen.

2. Search Event Management & click on it.

3. Click on Occasion Tab.

4. Click new and fill details & Save

The screenshot shows the Salesforce Lightning interface. At the top, there's a navigation bar with tabs for 'Smartinternz' and 'Recently Viewed | Occasions'. Below the navigation bar is a search bar and a toolbar with various icons. The main content area displays a list titled 'Recently Viewed' under the 'Occurrences' tab. The list shows four items, each with a checkbox and a name: 1. Haldi, 2. engagement, 3. Birthday, and 4. Marriage. To the right of the list are buttons for 'New', 'Import', and 'Change Owner'. Below the list is a search bar and a set of filter and sort icons. At the bottom of the screen, there's a taskbar with various application icons and system status indicators like battery level and date/time.

Rank	Event Name
1	Haldi
2	engagement
3	Birthday
4	Marriage

❖ View a Record (Occasion)

1. Click on App Launcher on left side of screen.

2. Search Event Management & click on it.

3. Click on Occasion Tab.

4. Click on any record name. You can see the details of the Event

❖ Delete a Record (Occasion)

1. Click on App Launcher on left side of screen.

2. Search Event Management & click on it.

3. Click on Occasion Tab.

4. Click on Arrow at right hand side on that Particular record.

5. Click delete and delete again

Milestone – 09-Reports

❖ Creating a Report

1. From the reports tab click on new report
2. Select the report type Occasions with Attendees for the report, and click Create
3. Customize your report accordingly and include all fields, Reports needs to be Grouped by one field. (ex – Created by) (require to enable add chart) then save (Occasions with Attendees) or run it.

The screenshot shows a web-based reporting interface. At the top, there's a navigation bar with tabs for Event Management, Occasions, Attendees, Speakers, Vendors, Event Services, Reports (which is currently selected), and Dashboards. Below the navigation is a search bar and a toolbar with various icons. The main content area is titled "Report: Occasions with Attendees" and "New Occasions with Attendees Report". It displays a table with the following data:

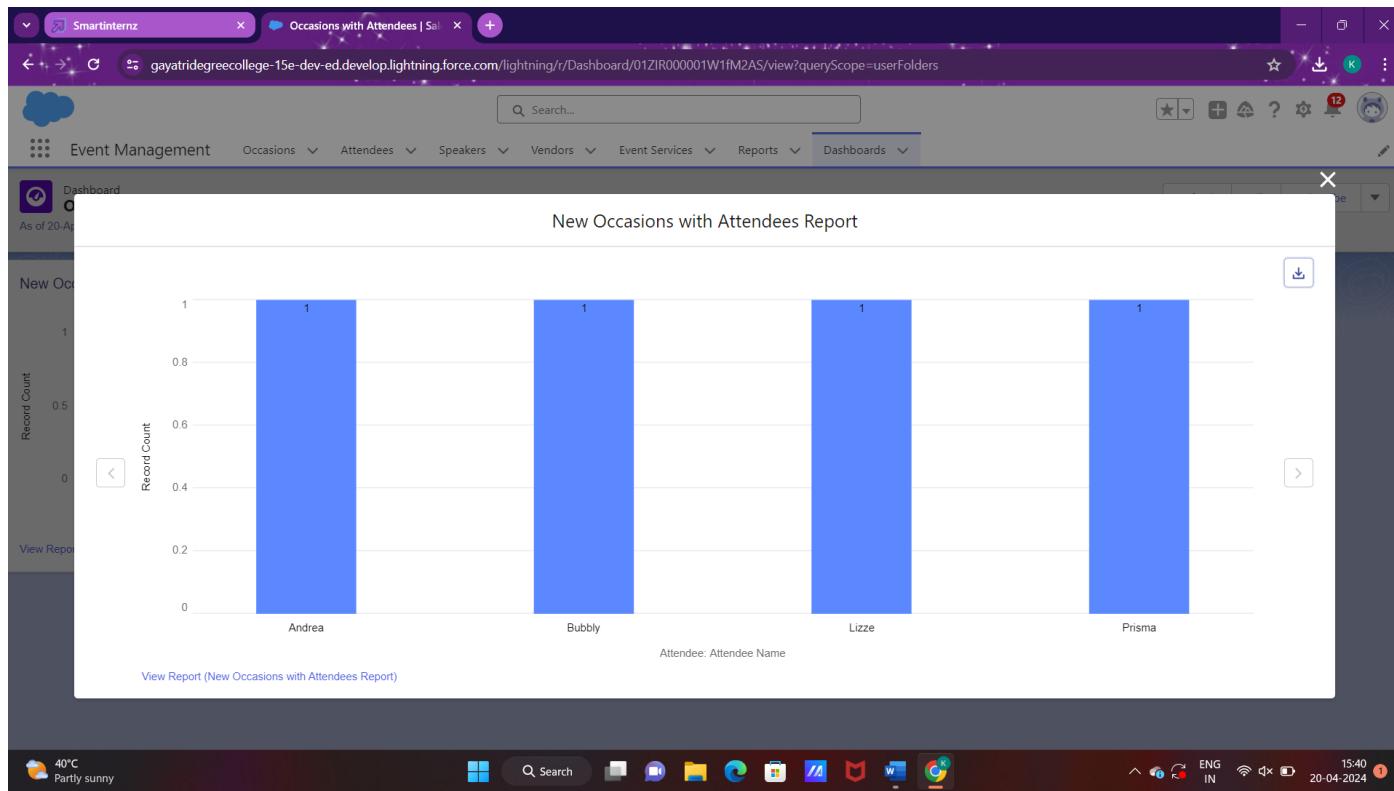
	Attendee: Attendee Name	Id	Occasion: Event Name	City	End Date	Email	Phone	Tickets	Event Name
	Andrea (1)	3	engagement	Hyderabad	12-09-24	678@gmail.com	5674328996	Premium	-
	Bubbly (1)	1	Marriage	Bengaluru	04-09-2024	123@gmail.com	123456789	Premium	-
	Lizze (1)	2	Birthday	chennai	11-05-24	456@gmail.com	987654321	Premium	-
	Prisma (1)	5	Haldi	Mumbai	17-06-24	598@gmail.com	2349870658	Premium	-
	Total (4)								

At the bottom of the report view, there are checkboxes for Row Counts, Detail Rows, Subtotals, and Grand Total, all of which are checked. The browser's status bar at the bottom right shows the date as 20-04-2024 and the time as 15:36.

Milestone – 10-Dashboard

❖ Creating a Dashboard

1. Click the Dashboards tab.
2. Click New Dashboard.
3. Name the dashboard Occasions with Attendees and click Create.
4. Click +Component.
5. Select Occasions with Attendees and click Select.
6. Select the Vertical Bar Chart component and click Add.
7. Click Save and then Done



Milestone – 11- View Reports and Dashboards

❖ View Report

1. Click on App Launcher on left side of screen.
2. Search Event Management & click on it.
3. Click on Reports Tab.
4. Click on Occasions with Attendees & see records.

Screenshot of a Salesforce Lightning interface showing a report titled "New Occasions with Attendees".

The report displays 4 records:

Attendee Name	Id	Occasion: Event Name	City	End Date	Email	Phone	Tickets	Event Name
Andrea (1)	3	engagement	Hyderabad	12-09-24	678@gmail.com	5674328996	Premium	-
Bubbly (1)	1	Marriage	Bengaluru	04-09-2024	123@gmail.com	123456789	Premium	-
Lizze (1)	2	Birthday	chennai	11-05-24	456@gmail.com	987654321	Premium	-
Prisma (1)	5	Haldi	Mumbai	17-06-24	598@gmail.com	2349870658	Premium	-

Total (4) rows.

Report settings at the bottom: Row Counts, Detail Rows, Subtotals, Grand Total.

System status bar at the bottom: 40°C, Partly sunny, ENG IN, 20-04-2024, 15:44.

❖ View Dashboard

- 1. Click on App Launcher on left side of screen.**
- 2. Search Event management & click on it.**
- 3. Click on Dashboard Tab.**
- 4. Click on Occasions with Attendees & see records**

Screenshot of a Salesforce Lightning interface showing a dashboard for "Occasions with Attendees".

The dashboard includes a chart titled "New Occasions with Attendees Report" showing the record count for four attendees:

Attendee Name	Record Count
Andrea	1
Bubbly	1
Lizze	1
Prisma	1

Report details: As of 20-Apr-2024, 3:39 pm. Viewing as karthika palapandala.

Dashboard tabs: Refresh, Edit, Subscribe.

System status bar at the bottom: 40°C, Partly sunny, ENG IN, 20-04-2024, 15:49.

Milestone – 12-Approval Process

❖ Approval Process

→ Click Setup and select Setup.

1. Select Process Automation | Approval Processes (or use the Quick Find and search for Approval Processes)

In the Manage Approval Processes For list, select Travel Approval.

2. Click Create New Approval Process and select Use Jump Start Wizard.

3. Enter the following parameters

For manage approval process select the attendee from the drop down

For the process Name : Attendee approval process

Unique name: Attendee_approval_process

4. Click on next.

5. From the field drop down select cancel and make operator equal and in value keep as true.

6. Leave as default

7. Now from fields to display column make sure that the Attendee Name is present

8. From the submitter type select owner and make sure that the record creator must be present in the allowed submitter section and click on save.

9. Then there will be dialogue box appear and select the no i will do it later

9. Now under Initial Submission action:

10. Click on new and select the field update and give the following details:

Name: Cancel Status

Unique Name: Cancel_Status

Field to update: Cancel Status

And keep value and pending.

11. Now we will see to keep the approval steps.

Name: Attendee records with cancel checkbox true

Unique Name:(auto -populated),click on next

Select enter this is following Criteria is met

12. From field drop down Select cancel and from operator drop down select equals and on value make it true

13. Now select the automatically assign to the approver and select user and keep the user as created user..

14. Now lets check the final approval action

15. Select the new and select the field update and give the following details.

Name: Confirm Cancel Status

Select field to update :Status

And keep the new value as: Confirm

16. Now let's check the Final rejection action. click on new and select the field update and enter the following details.

Name: Not confirmed cancel Status

Field to update: Cancel Status

keep value as : Not confirmed

17. And make the approval Process active.

The screenshot shows the Salesforce Setup interface with the 'Approval Processes' page open. The process 'Attendee: Attendee approval process' is selected. The 'Process Definition Detail' section includes fields for Process Name (Attendee approval process), Unique Name (Attendee_approval_process), Description, Entry Criteria (Attendee: cancel EQUALS true), Record Editability (Administrator ONLY), and Active status (checked). The 'Initial Submission Actions' section contains a 'Record Lock' action with the description 'Lock the record from being edited'. The 'Approval Steps' section lists a single step named 'Attendee: cancel checkbox true' with the description 'Attendee: cancel checkbox true, else Approve'. The status of the process is 'Active'.

