

# **PROJECT REPORT ON**

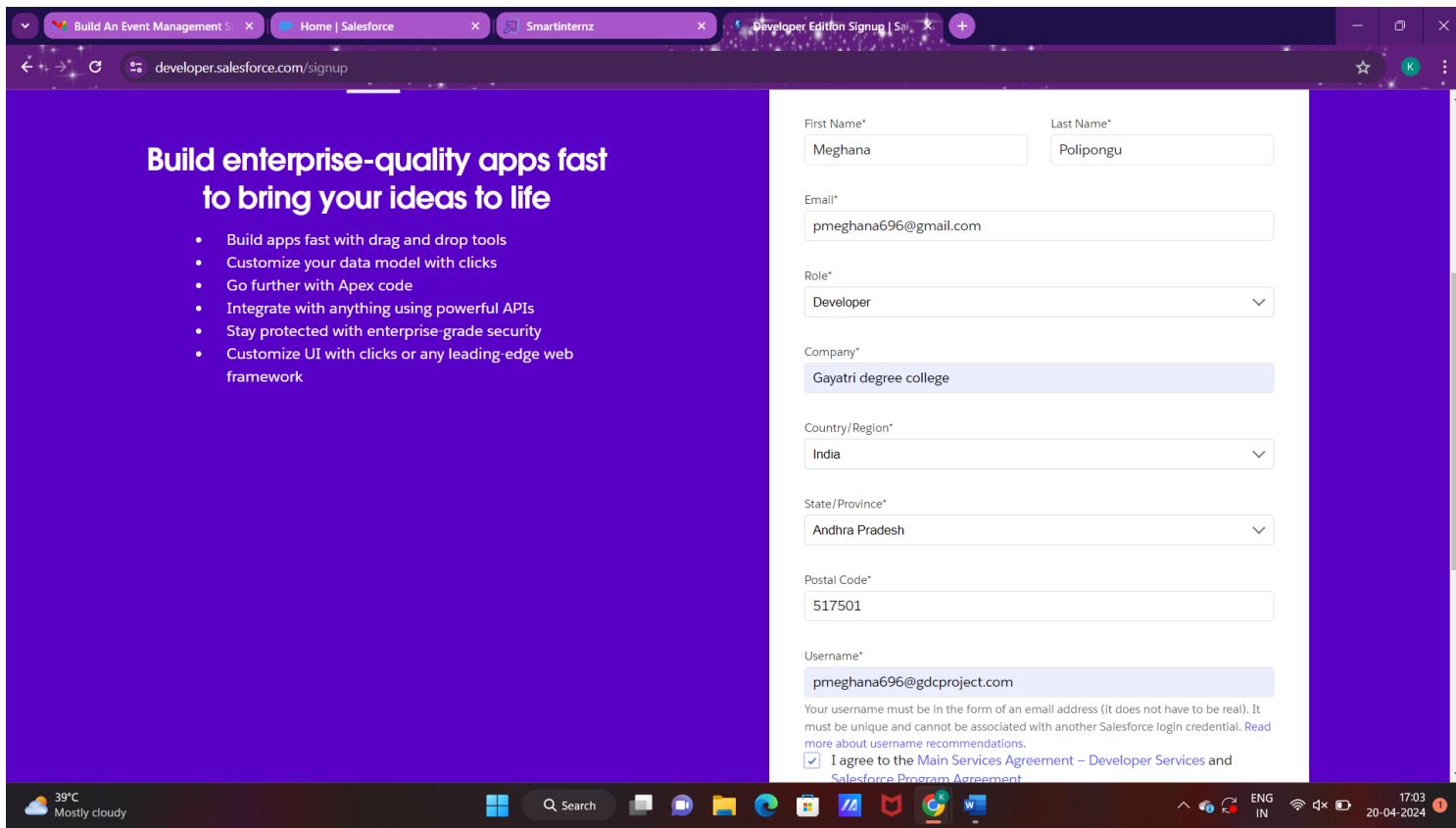
## **Build An Event Management System Using Salesforce - (Developer)**

### **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**

- ⑨ 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: MEGHANA POLIPONGU
    - Email: [pmeghana696@gmail.com](mailto:pmeghana696@gmail.com)
    - Role: SALESFORCE DEVELOPER
    - Company: College Name - GAYATRI DEGREE COLLEGE – TIRUPATI
    - Country: India
    - Postal Code: pin code – 517501
    - Username:[pmeghana696@gdcproject.com](mailto:pmeghana696@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 three tabs: 'Smartinternz', 'Object Manager | Salesforce', and 'Developer Edition Signup | Sa...'. The main title is 'gayatridegreecollege-15e-dev-ed.lightning.force.com/lightning/setup/ObjectManager/home'. Below the title, there's a search bar with 'Search Setup' and a 'Cloud' icon. The main content area is titled 'Object Manager' with a sub-section 'SETUP'. It displays a table with one item: 'Occasion'. The table has columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The 'Occasion' entry has the following details: Label 'Occasion', API Name 'Occasion\_\_c', Type 'Custom Object', Description 'Custom Object', Last Modified '16/04/2024', and Deployed status indicated by a checkmark. A search bar at the top right contains 'occasion'. There are buttons for 'Schema Builder' and 'Create'. The bottom of the screen shows a taskbar with various icons and a system tray with weather information (38°C, Partly sunny), system controls, and a date/time stamp (13:01, 20-04-2024).

## ⑨ Creation Of Custom Object **Attendees**:

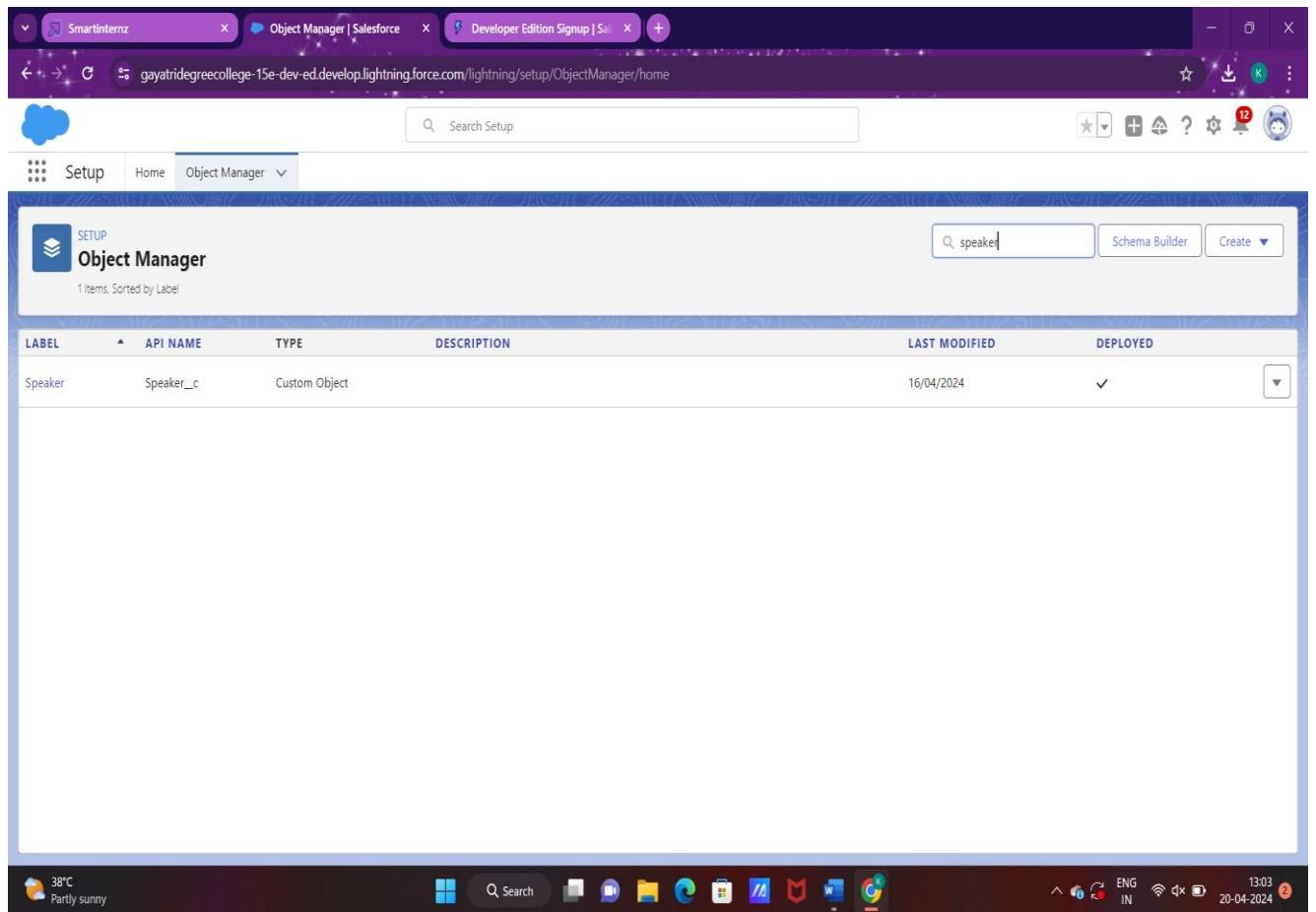
1. Click on the gear icon and then select Setup.
2. have a look on the extreme right you will find a Create Dropdown click on that &
3. select custom object
4. On the Custom Object Definition page, create the object as follows:
5. Label: Attendee
6. Plural Label: Attendees
7. Record Name: Attendee Name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

The screenshot shows the Salesforce Object Manager interface. At the top, there are three tabs: 'Smartinternz' (active), 'Object Manager | Salesforce', and 'Developer Edition Signup | Sal'. The URL in the address bar is 'gayatridegreecollege-15e-dev-ed.lightning.force.com/lightning/setup/ObjectManager/home'. The main content area is titled 'Object Manager' and shows a table with one item: 'Service Appointment Attendee'. The table has columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The 'Service Appointment Attendee' row has 'ServiceAppointmentAttendee' in the API Name column and 'Standard Object' in the Type column. A search bar at the top right contains the text 'service appointment a'. The bottom of the screen shows a Windows taskbar with various icons and a system tray indicating the date as 20-04-2024.

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

## ⑨ 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.



## ⑨ 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

- Check the Allow Search checkbox
- Click Save.

The screenshot shows the Salesforce Object Manager interface. At the top, there are three tabs: 'Smartinternz' (active), 'Object Manager | Salesforce', and 'Developer Edition Signup | Sales'. Below the tabs, the URL is 'gayatridegreecollege-15e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home'. The main header has a search bar with 'Search Setup' and a gear icon. The navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Object Manager' with a sub-header '1 Items. Sorted by Label'. A table lists one item: 'Vendor' (Label), 'Vendor\_c' (API Name), 'Custom Object' (Type), and '16/04/2024' (Last Modified). There is also a 'Create' button. The bottom of the screen shows the Windows taskbar with various pinned icons and system status.

## ⑨ 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 masterdetail relationships.

- Click on the gear icon and then select Setup.
- have a look on the extreme right you will find a Create Dropdown click on that &
- select custom object
- On the Custom Object Definition page, create the object as follows:
- 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 are tabs for 'Setup', 'Home', and 'Object Manager'. The 'Object Manager' tab is active. Below the tabs, there's a search bar with the placeholder 'Search Setup' and a search icon. To the right of the search bar are buttons for 'Schema Builder' and 'Create'. A message '1 Items. Sorted by Label' is displayed above the table. The main area is a table with the following columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. There is one row in the table:

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 a system status bar showing '38°C Partly sunny', 'ENG IN', '20-04-2024', and a battery level.

## 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.

## ⑨ 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:** The title bar displays "Smartinternz" and "Tabs | Salesforce".
- Search Bar:** A search bar labeled "Search Setup" is present.
- Navigation:** The left sidebar includes "Setup", "Home", and "Object Manager".
- Custom Tabs Section:** The main content area is titled "Custom Tabs". It contains a sub-section "Custom Object Tabs" with the following data:

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:** Below the Custom Object Tabs, there is a section titled "Web Tabs" which states "No Web Tabs have been defined".
- Visualforce Tabs Section:** Below the Web Tabs, there is a section titled "Visualforce Tabs" which states "No Visualforce Tabs have been defined".
- Lightning Component Tabs Section:** Below the Visualforce Tabs, there is a section titled "Lightning Component Tabs" which states "No Lightning Component Tabs have been defined".
- System Status:** At the bottom left, it shows "38°C Partly sunny".
- Taskbar:** At the bottom right, it shows system icons for battery, signal, and date/time ("20-04-2024 13:07").

## **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.

## Milestone – 05- Fields & Relationships

Fields in Salesforce represents what the columns represent in relational databases. It can store data values

The screenshot shows the Salesforce App Manager interface. The left sidebar has a search bar and sections for 'Salesforce Mobile App', 'Data', 'Apps' (which is selected), 'Connected Apps', 'External Client Apps', 'Lightning Bolt', and 'Mobile Apps'. The main content area is titled 'Lightning Experience App Manager' and displays a table of 23 installed apps. The columns are: App Name, Developer Name, Description, Last Modified Date, App Type, and Visibility. The table includes rows for Commerce, Community, Content, Data Manager, Digital Experiences, Event Management, Lightning Usage App, Marketing CRM Classic, Platform, Queue Management, Sales, Sales Console, Sales Chatter, and several classic apps like Salesforce CRM Communities, Salesforce Content, etc.

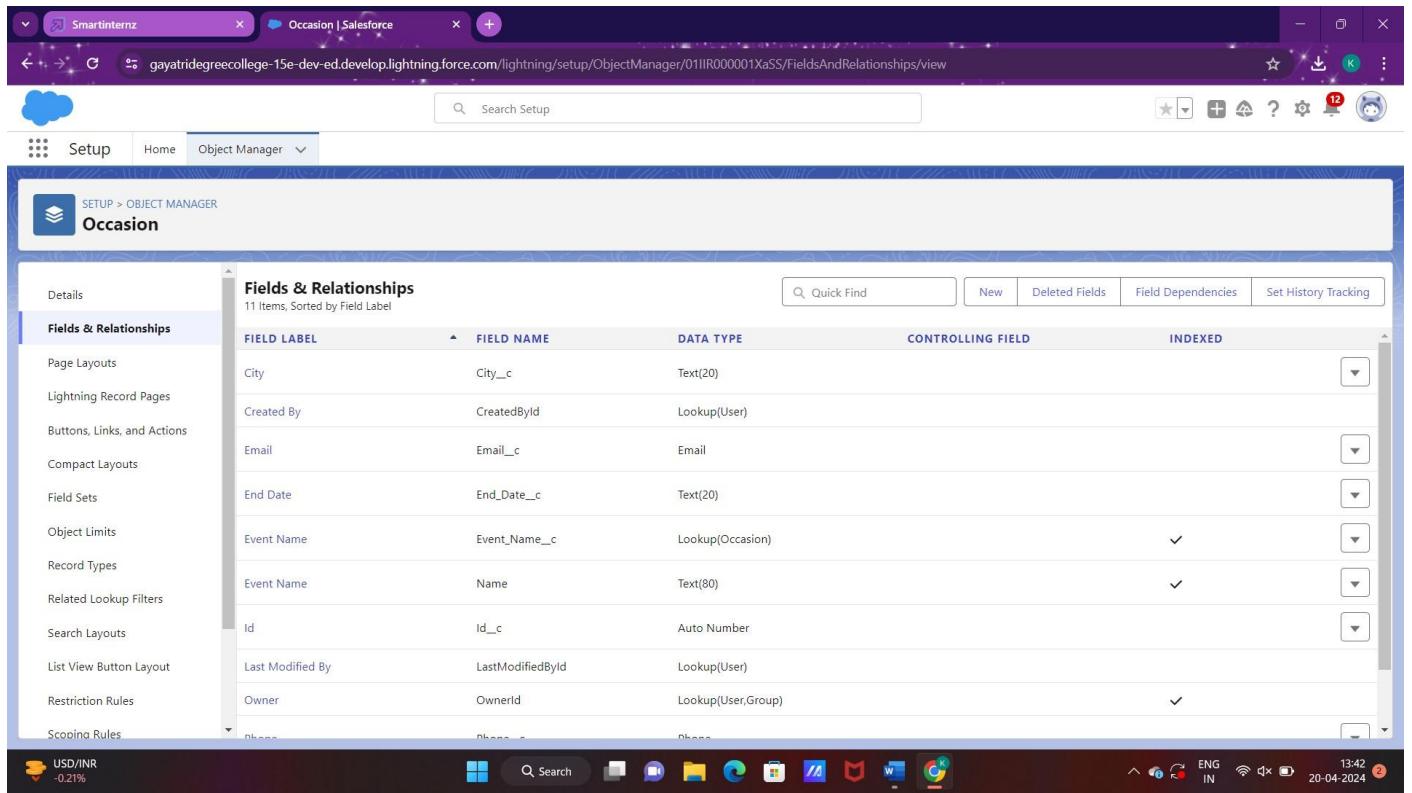
App Name ↑	Developer Name	Description	Last Modified Date	App Type	Visibility
Commerce	Commerce	Manage your store's products, catalogs, and pricebooks.	27/03/2024, 06:07 pm	Lightning	✓
Community	Community	Salesforce CRM Communities	27/03/2024, 06:07 pm	Classic	✓
Content	Content	Salesforce CRM Content	27/03/2024, 06:07 pm	Classic	✓
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	27/03/2024, 06:07 pm	Lightning	✓
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	27/03/2024, 06:07 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, 06:07 pm	Lightning	✓
Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	27/03/2024, 06:07 pm	Classic	✓
Platform	Platform	The fundamental Lightning Platform	27/03/2024, 06:07 pm	Classic	✓
Queue Management	QueueManagement	Create and manage queues for your business.	27/03/2024, 06:07 pm	Lightning	✓
Sales	Sales	The world's most popular sales force automation (SFA) solution	27/03/2024, 06:07 pm	Classic	✓
Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	27/03/2024, 06:07 pm	Lightning	✓
Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one...	27/03/2024, 06:07 pm	Lightning	✓
Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	27/03/2024, 06:07 pm	Classic	✓

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. The top navigation bar includes tabs for Smartinternz, Occasion | Salesforce, and a plus sign icon. Below the navigation is a search bar labeled "Search Setup". The main content area is titled "SETUP > OBJECT MANAGER Occasion". On the left, there's a sidebar with links like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main table is titled "Fields & Relationships" and lists 11 items, sorted by Field Label. The columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data includes:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Text(20)		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
End Date	End_Date__c	Text(20)		
Event Name	Event_Name__c	Lookup(Occasion)		✓
Event Name	Name	Text(80)		✓
Id	Id__c	Auto Number		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		

The bottom of the screen shows the Windows taskbar with various pinned icons and system status indicators.

## 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**

The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main content area is titled 'Fields & Relationships' and displays a table of fields for the 'Attendee' object. The table includes columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. One row is highlighted, showing 'Tickets' as the field label, 'Tickets\_c' as the field name, 'Picklist' as the data type, and a checkmark in the 'INDEXED' column. The bottom status bar shows the weather as '40°C Partly sunny' and the date/time as '20-04-2024 13:49'.

Fields & Relationships 9 Items, Sorted by Field Label				
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	CreatedBy	Lookup(User)		▼
Event Name	Event_Name_c	Master-Detail(Occasion)		✓
Last Modified By	LastModifiedBy	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 Setup interface with the following details:

- Tab Bar:** Build An Event Management, Occasion | Salesforce, Smartinternz, Developer Edition Signup | Sa, +
- Page Header:** gayatridgeeconomics-tir93-dev-ed.lightning.force.com/lightning/setup/ObjectManager/0115h000002qvQJ/FieldsAndRelationships/00N5h00000Lcp03/view
- Left Sidebar:** Setup, Home, Object Manager
- Section Header:** SETUP > OBJECT MANAGER Occasion
- Field Definition Detail:**
  - Custom Field Definition Detail:** Event Name
  - Field Information:**

Field Label	Event Name	Object Name	Occasion
Field Name	Occasion	Data Type	Lookup
API Name	Occasion__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
  - Validation Rules [0]**
  - Buttons:** Edit, Set Field-Level Security, View Field Accessibility, Where is this used?
- Fields & Relationships:** Details, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules.
- Bottom Bar:** Weather (39°C, Mostly cloudy), Taskbar icons (Search, File, Chat, etc.), System status (ENG IN, 20-04-2024, 17:10).

## + 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

The screenshot shows the Salesforce Object Manager interface for the 'Speaker' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main content area is titled 'Fields & Relationships' and displays a table of existing fields. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Bio	Bio_c	Text Area(255)		
Created By	CreatedBy	Lookup(User)		
Email	Email_c	Email		
Last Modified By	LastModifiedBy	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**  
8 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Email	Email_c	Email		
Event Name	Event_Name__c	Lookup(Occasion)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		
Phone	Phone_c	Phone		
Service Provide	Service_Provide__c	Text(30)		
Vendor Name	Name	Text(30)		

## ⊕ 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 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 with the following details:

- Header:** Smartinternz, Event Service | Salesforce, gayatridegreecollege-15e-dev-ed.lightning.force.com
- Page:** SETUP > OBJECT MANAGER
- Object:** Event Service
- Section:** Fields & Relationships
- Table:** Displays 5 items, sorted by Field Label. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

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)		✓

- Left Sidebar:** Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules.
- Bottom Bar:** Weather (41°C, Mostly cloudy), Taskbar icons (Search, File, etc.), System status (ENG IN, 14:22, 20-04-2024).

## 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 Atteendees, Speakers and vendors

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

- Left Sidebar:** Shows the 'Profiles' section under 'Users' in the navigation tree.
- Profile Detail:** Displays the 'Event user profile' with the following fields:
  - Name: Event user profile
  - User License: Salesforce
  - Description: (empty)
  - Created By: MEGHANA POLIPONGU, 16/04/2024, 11:38 am
  - Modified By: MEGHANA POLIPONGU, 16/04/2024, 11:40 am
- Page Layouts:** Lists standard object layouts for various objects like Global, Email Application, Home Page Layout, Account, Alternative Payment Method, etc., with their respective assignments.
- Custom Object Permissions:** Shows a table of permissions for various objects like Lead, Opportunity, Case, etc., with checkboxes for 'View All' and 'Edit' access.

## + 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.

**Profile**  
**Event vendors profile**

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

**Profile Detail**

Name	Event vendors profile	Custom Profile	<input checked="" type="checkbox"/>
User License	Salesforce	Location	Location Layout [View Assignment]
Description		Location Group	Location Group Layout [View Assignment]
Created By	MEGHANA POLIPONGU, 16/04/2024, 11:41 am	Location Group Assignment	Location Group Assignment Layout [View Assignment]
		Macro	Macro Layout [View Assignment]
		Object Milestones	Object Milestones [View Assignment]

**Page Layouts**

Standard Object Layouts	Global	Legal Entity
Email Application	Global Layout [View Assignment]	Legal Entity Layout [View Assignment]
Home Page Layout	Not Assigned [View Assignment]	Location Layout [View Assignment]
Account	DE Default [View Assignment]	Location Group Layout [View Assignment]
Alternative Payment Method	Account Layout [View Assignment]	Location Group Assignment Layout [View Assignment]
	Alternative Payment Method Layout [View Assignment]	Macro Layout [View Assignment]

Javascript:srcUp(%27%2F00e5h000000fhR%3Fisdp%3Dp1%27);      Appointment Invitations      Appointment Invitations Layout      Object Milestones      View by Record Type

## Milestone – 07– User

### ⊕ Creating an user

- 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

- Click on save.

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. The main panel displays the 'User Detail' for 'Sanjay Gupta'. The user's name is listed as 'Sanjay Gupta' with an alias 'sgupt'. The email address is 'pmeghana696@gmail.com' with a verify link. The username is 'sanjaygupta1@thesmartbridge.com'. The nickname is 'Sanju'. The role is 'Salesforce' and the profile is 'Event user.profile'. Other details include department, division, address, time zone (GMT+05:30 India Standard Time (Asia/Kolkata)), locale (English (India)), language (English), and delegated approver. The 'Edit' button is visible at the top right of the detail panel.

## + 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. The main window displays the 'User Detail' page for a user named 'Rahul Sharma'. The page includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, Receive Approval Request Emails, and Federation ID. It also shows User License (Salesforce), Profile (Event vendors profile), Active status (checked), and various role checkboxes like Marketing User, Offline User, etc. The sidebar on the left has 'Users' selected under 'User Management Settings'.

## 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

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

- Header:** Build An Event Management, Permission Sets | Salesforce, Smartinternz, Developer Edition Signup | Sa, +
- Search Bar:** Search Setup
- Left Sidebar:** Setup, Home, Object Manager, permission (selected), Users, Permission Set Groups, Permission Sets (selected), Custom Code, Custom Permissions.
- Middle Content:**
  - Section:** Permission Sets
  - Sub-Section:** Event Permits
  - Buttons:** Find Settings..., Clone, Edit Properties, Manage Assignments, View Summary (Beta)
  - Table:** Permission Set Overview (empty)
  - Section:** 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
- Bottom:** Weather (39°C, Mostly cloudy), Taskbar (Search, File, Home, Recent, etc.), System Status (ENG IN), Date (20-04-2024), Time (17:15).

## + 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

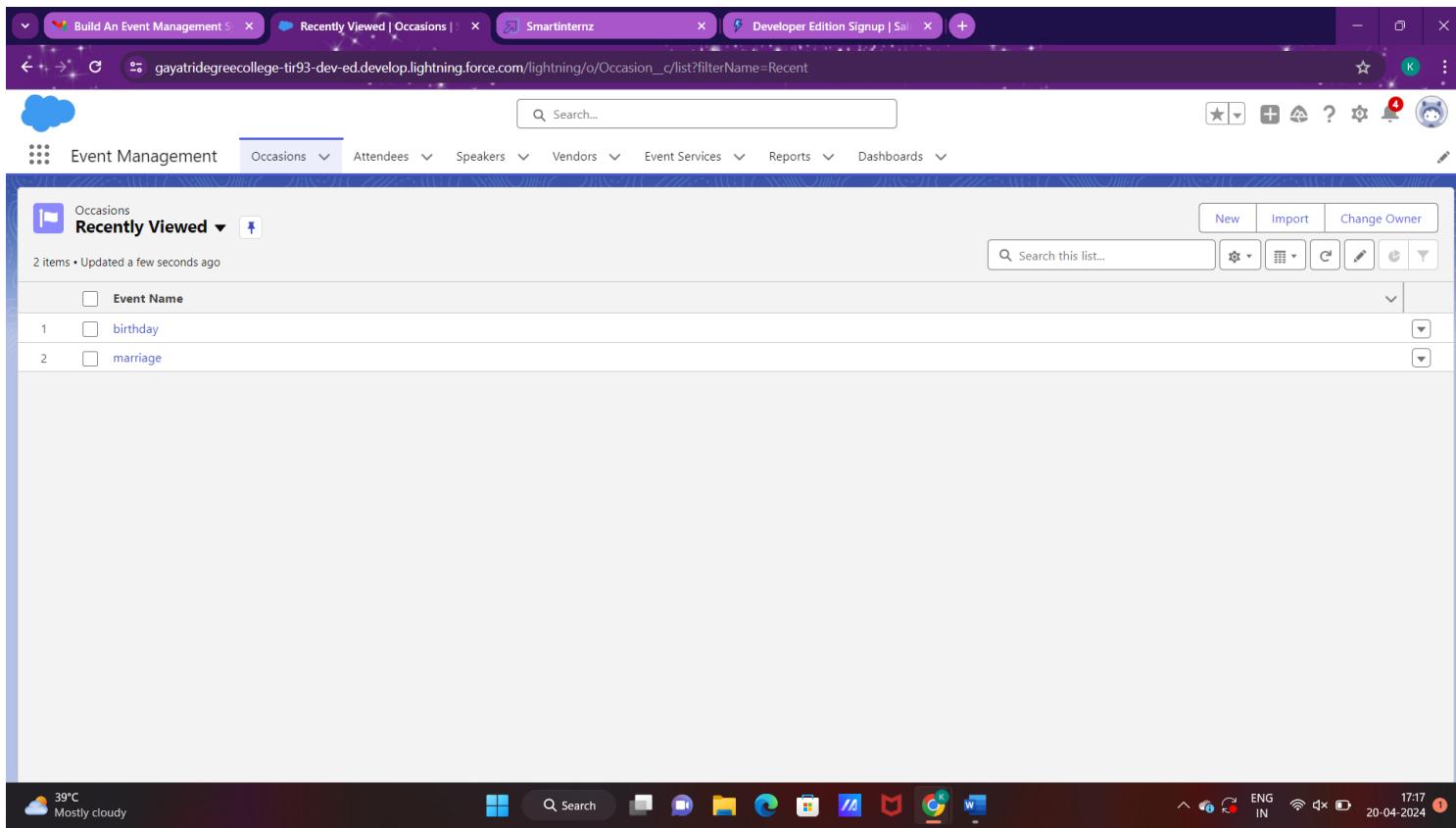
The screenshot shows a Salesforce Lightning environment with the following details:

- Header:** The top navigation bar includes tabs for "Build An Event Management", "Permission Sets | Salesforce", "Smartinternz", and "Developer Edition Signup | Sal".
- Page Title:** The main title is "Permission Sets" under the "SETUP" tab.
- Search Bar:** A search bar at the top right contains the placeholder "Search Setup".
- Left Sidebar:** The sidebar has sections for "Setup", "Home", "Object Manager", and "permission". Under "Users", it lists "Permission Set Groups" and "Permission Sets". Under "Custom Code", it lists "Custom Permissions". A message says "Didn't find what you're looking for? Try using Global Search."
- Content Area:** The main content displays the "Vendor Permits" permission set. It includes fields for "Description" (empty), "License" (empty), "Session Activation Required" (unchecked), and "Permission Set Groups Added To" (0). The API Name is "Vendor\_Permits" and the Namespace Prefix is "MEGHANA POLIPONGU". The record was created by "MEGHANA POLIPONGU" on 16/04/2024, 12:09 pm and last modified by the same user on the same date and time.
- Bottom Navigation:** The footer includes a weather icon (39°C, Mostly cloudy), a search bar, and system status icons (ENG IN, battery, signal, etc.). The date is 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



## ⊕ 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 Salesforce Lightning interface with a report titled "Report: Occasions with Attendees". The report displays one record:

Occasion: Event Name	Attendee: Attendee Name	Phone	Email	City	End Date
birthday (1)	chanu	-	-	tirupathi	30-5-2024

Below the table, there are subtotal and total rows:

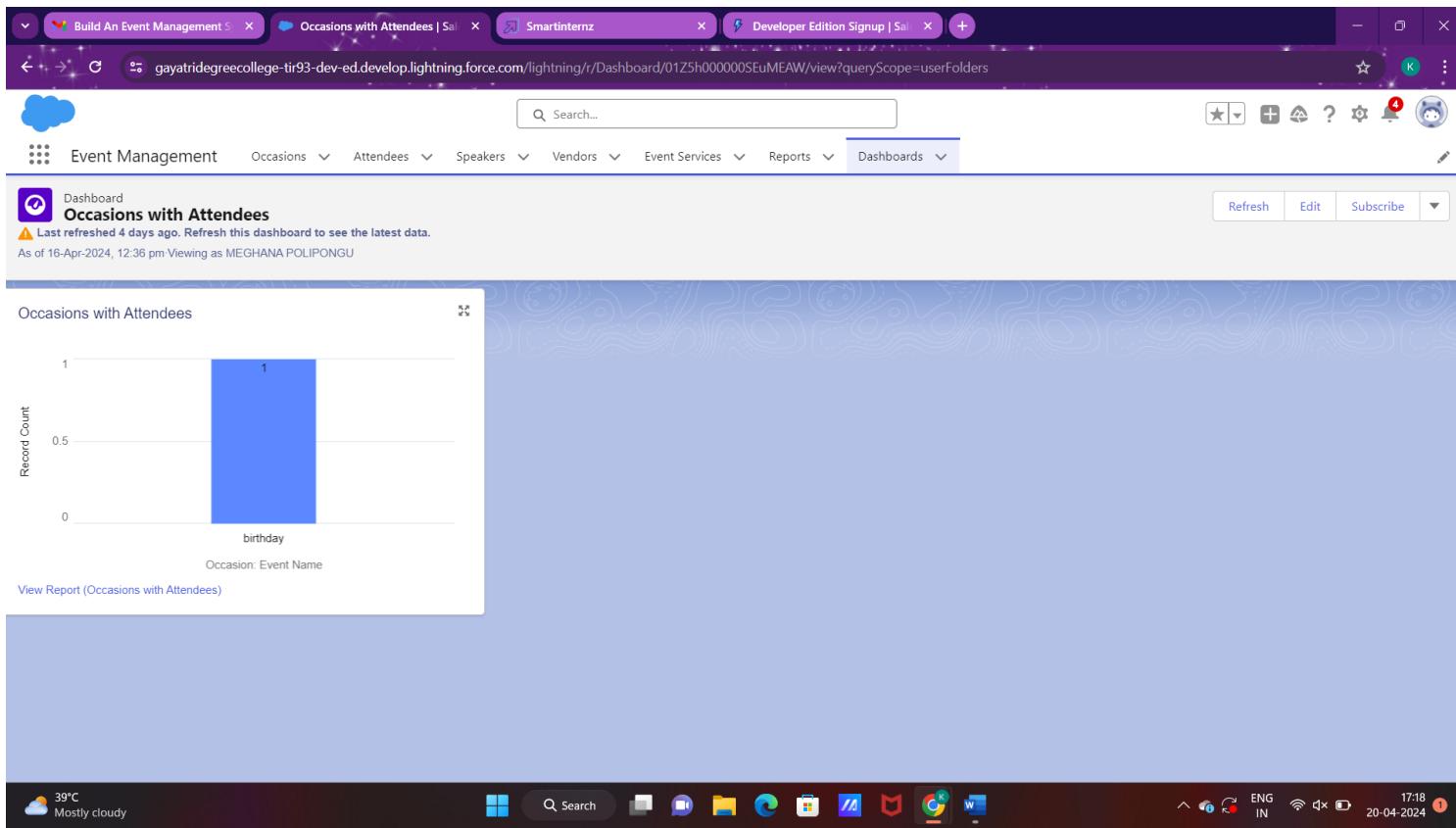
Subtotal
Total (1)

At the bottom of the report, there are filtering and sorting options, as well as a toolbar with buttons for "Enable Field Editing", "Add Chart", and "Edit".

## 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.

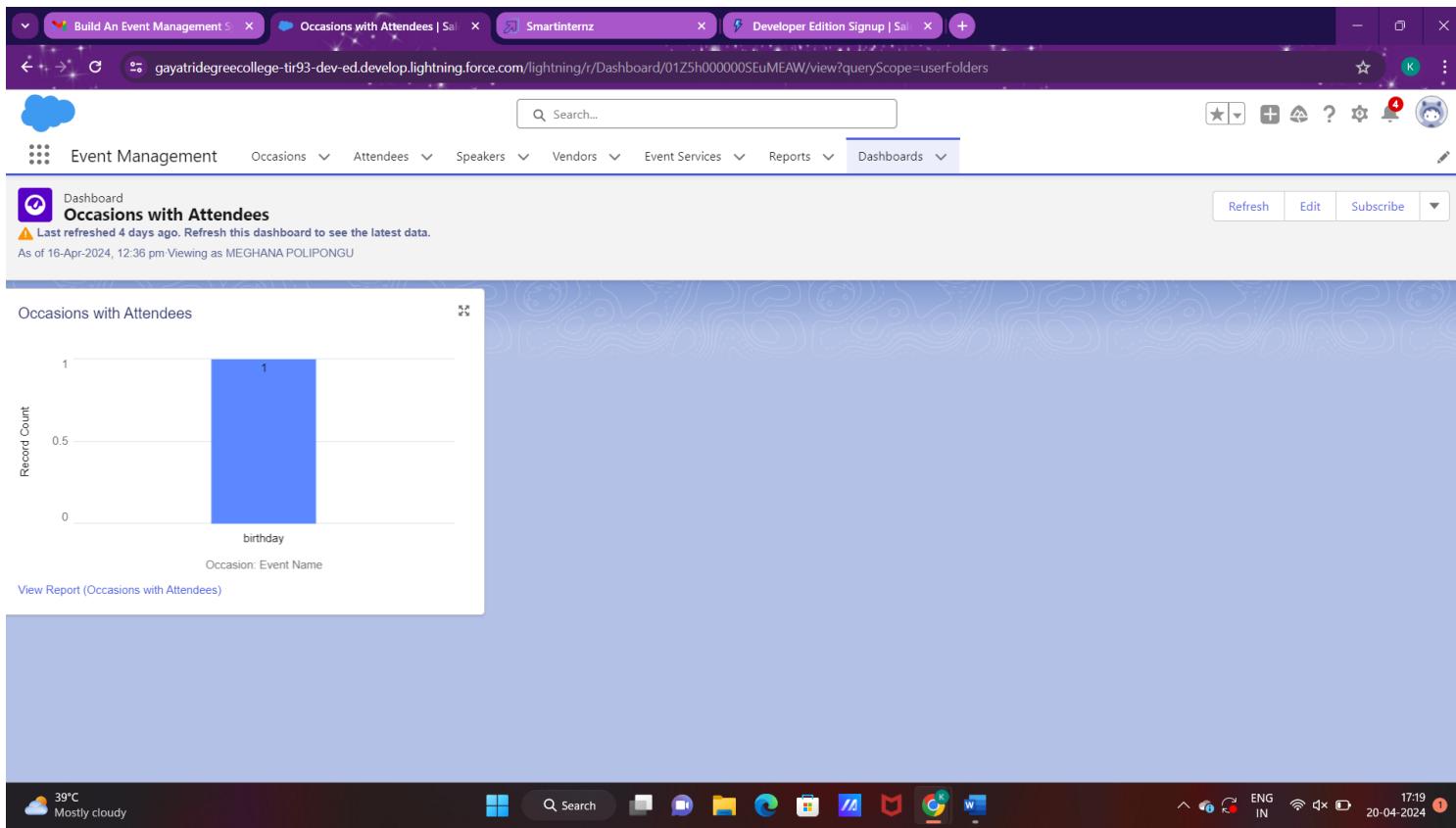
The screenshot shows a Salesforce Lightning interface with a purple header bar containing several tabs: "Build An Event Management", "Occurrences with Attendees | Sa", "Smartinternz", and "Developer Edition Signup | Sa". The main content area has a blue header with a cloud icon, a search bar, and navigation links for "Event Management", "Occurrences", "Attendees", "Speakers", "Vendors", "Event Services", "Reports", and "Dashboards". A sub-header indicates the report is for "Report: Occasions with Attendees" and "Occurrences with Attendees". The report table shows the following data:

	Occasion: Event Name	Attendee: Attendee Name	Phone	Email	City	End Date
	birthday (1)	chanu	-	-	tirupathi	30-5-2024
<b>Subtotal</b>						
<b>Total (1)</b>						

At the bottom of the report, there are buttons for "Row Counts", "Detail Rows", "Subtotals", and "Grand Total". Below the report is a dark footer bar with various icons and status information: weather (39°C, Mostly cloudy), system status (Search, File, Chat, Home, Recent, Google Chrome, Microsoft Edge, Microsoft Word, Microsoft Excel), language (ENG IN), connectivity (Wi-Fi, Cellular), and date/time (20-04-2024, 17:19).

## + 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**



## Milestone – 12-Approval Process

### ⊕ Approval Process

#### ⑨ 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.



