

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: JYOTHIKA RACHAGOLLA
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Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. [Read more about username recommendations.](#)

I agree to the [Main Services Agreement – Developer Services](#) and [Privacy Statement](#).

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).

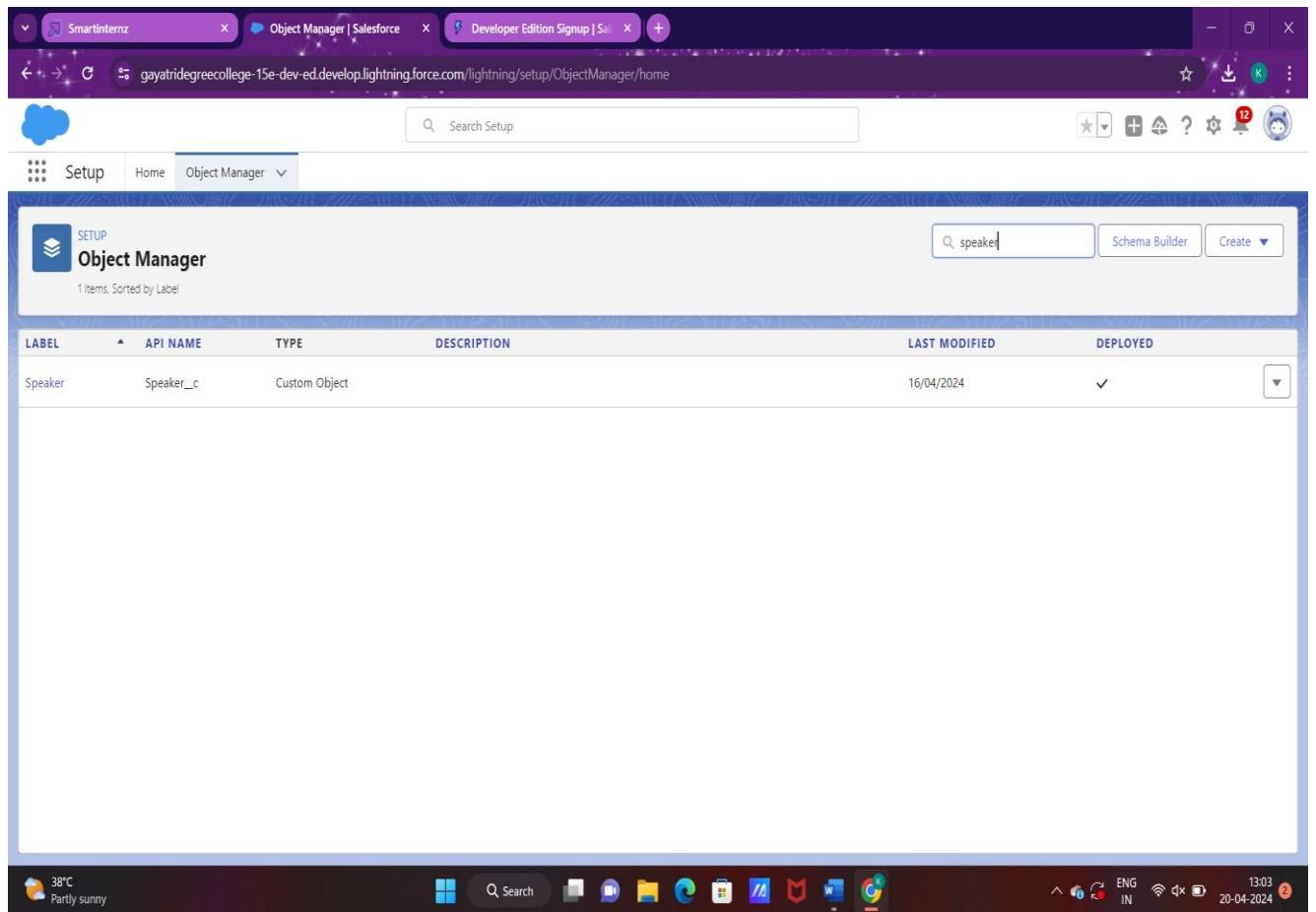
⑨ Creation Of Custom Object **Attendees**:

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' with a sub-section 'SETUP'. A search bar at the top right contains the text 'service appointment a'. Below the title, it says '1 Items. Sorted by Label'. A table lists one item: 'Service Appointment Attendee' with API name 'ServiceAppointmentAttendee' and type 'Standard Object'. The table has columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The last column is empty. At the bottom of the screen, the Windows taskbar shows the date as 20-04-2024 and the time as 13:02.

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. The main area is a table with the following data:

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:** The bottom status bar shows the weather as "38°C Partly sunny", system icons, and the 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.

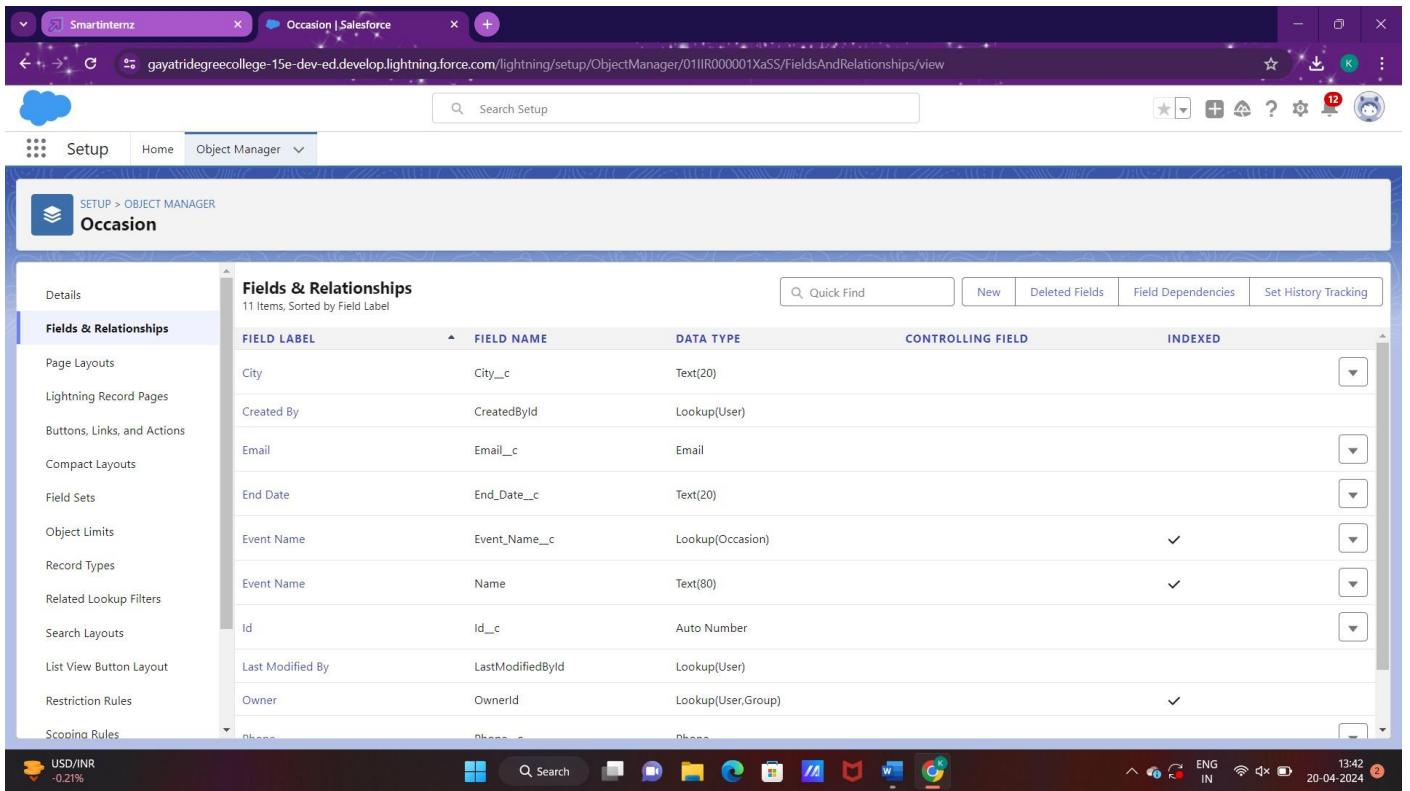
App Name ↑	Developer Name	Description	Last Modified Date	App Type	Visibility
Commerce	Commerce	Manage your store's products, catalogs, and pricebooks.	27/03/2024, 06:07 pm	Lightning	✓
Community	Community	Salesforce CRM Communities	27/03/2024, 06:07 pm	Classic	✓
Content	Content	Salesforce CRM Content	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 has a header "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		

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, Buttons, Links, and Actions, etc. The main content area is titled 'Fields & Relationships' and shows a table of fields for the 'Attendee' object. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status. One field, 'Tickets', is highlighted and has its data type set to 'Picklist'. The table shows other fields such as 'Attendee Name', 'cancel', 'Confirm', 'Created By', 'Event Name', 'Last Modified By', 'Not confirmed', 'pending.', and 'Tickets'. The 'Attendee' object is also listed in the 'Object Manager' dropdown at the top.

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:

- Header:** Developer Edition Signup | Sale, Smartinternz, Occasions with Attendee | Sale, Occasion | Salesforce, Verify your identity in Salesforce.
- Page:** SETUP > OBJECT MANAGER > Occasion
- Section:** Fields & Relationships
- Custom Field Definition Detail:**
 - Field Label:** Event Name
 - Field Name:** Event_Name
 - API Name:** Event_Name__c
 - Description:** Help Text
 - Data Owner:** Data Owner
 - Field Usage:** Data Sensitivity Level, Compliance Categorization
 - Created By:** jyothika.yadav 16/04/2024, 11:25 am
 - Modified By:** jyothika.yadav 16/04/2024, 11:25 am
 - Object Name:** Occasion
 - Data Type:** Lookup
- Lookup Options:**
 - Related To:** Occasion
 - Related List Label:** Occasions
 - Required:**
 - What to do if the lookup record is deleted?**: Clear the value of this field.
 - Child Relationship Name:** Occasions
- Buttons:** Edit, Set Field-Level Security, View Field Accessibility, Where is this used?
- Help:** Help for this Page

⊕ 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

The screenshot shows the Salesforce Object Manager interface for the 'Vendor' object. The left sidebar has a 'Fields & Relationships' section with various options like Page Layouts, Lightning Record Pages, Buttons, etc. The main area is titled 'Fields & Relationships' and contains a table with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table rows include:

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.), Language (ENG IN), Date (20-04-2024), Time (14:22).

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

+ 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
Profiles

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

Help for this Page

Profile Detail

Name	Event vendors profile	Custom Profile
User License	Salesforce	<input checked="" type="checkbox"/>
Description		
Created By	jyothika.yadav	16/04/2024, 11:39 am
Modified By	jyothika.yadav	18/04/2024, 8:52 pm

Page Layouts

Standard Object Layouts	Global	Location Group	Location Group Layout
Email Application	Not Assigned	Location Group Assignment	Location Group Assignment Layout
Home Page Layout	DE Default	Macro	Macro Layout
Account	Account Layout	Object Milestone	Object Milestone Layout
Alternative Payment Method	Alternative Payment Method Layout	Operating Hours	Operating Hours Layout
Appointment Invitation	Appointment Invitation Layout	Opportunity	Opportunity Layout

35°C Mostly cloudy

ENG IN 20-04-2024 19:33

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 content area displays the details for a user named 'Sanjay Gupta'. The 'User Detail' section includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, Receive Approval Request Emails, Federation ID, Role, User License, Profile, Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, Data.com User Type, Accessibility Mode (Classic Only), Debug Mode, and High-Contrast Palette on Charts. A 'User Profile Help for this Page' button is also visible.

⊕ 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 left sidebar is titled 'User Management Settings' and includes sections for Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and a selected 'Users' section. The main content area is titled 'User Detail' for 'Rahul Sharma'. It shows the following details:

Name	Rahul Sharma	Role	Salesforce
Alias	Rahus	User License	Event vendors profile
Email	jyothikayadav467@gmail.com [Verify]	Active	<input checked="" type="checkbox"/>
Username	rahulsharma@thesmartbridgered.com	Marketing User	<input type="checkbox"/>
Nickname	Rahu	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"/> View
Manager		Debug Mode	<input type="checkbox"/> View
Receive Approval Request Emails	Only if I am an approver	High-Contrast Palette on Charts	<input type="checkbox"/> View
Federation ID			

At the bottom of the page, there are several browser tabs open, including 'Developer Edition Signup | Sale', 'Smartinternz', 'Occasions with Attendee | Sale', 'Users | Salesforce', and 'Verify your identity in Salesforce'. The system status bar at the bottom right shows the date (20-04-2024), time (19:35), and battery level.

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:** Developer Edition Signup | Sale, Smartinternz, Occasions with Attendee | Sale, Permission Sets | Salesforce, Verify your identity in Salesforce.
- Page Title:** gayatridegreecollege-4af-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PSIR00000199NL
- Left Sidebar:** Setup, Home, Object Manager, Search bar (user).
- Main Content:**
 - Section:** Permission Sets
 - Sub-Section:** Event Permits
 - Buttons:** Find Settings, Clone, Edit Properties, Manage Assignments, View Summary (Beta)
 - Permission Set Overview:**

Description	API Name
Event Activation Required	Event_Permits
Namespace Prefix	jyothika_yadav_
Created By	16/04/2024, 11:54 am
Last Modified By	jyothika_yadav_
Permission Set Groups Added To	0
 - Apps Section:**
 - 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 (35°C, Mostly cloudy), Taskbar (Search, Microsoft Edge, Google Chrome, etc.), and System status (ENG IN, 20-04-2024, 19:30).

⊕ 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 the Salesforce Setup interface with the following details:

- Header:** Developer Edition Signup | Sale, Smartinternz, Occasions with Attendee | Sale, Permission Sets | Salesforce, Verify your identity in Salesforce.
- Page:** Permission Sets
- Left Sidebar:** Setup, Home, Object Manager, Search bar (user).
- Section:** Users, Permission Set Groups, Permission Sets (selected), Profiles, Public Groups, Queues, Roles, User Management Settings, Users, Feature Settings, Data.com, Service, Embedded Service, User Interface, Action Link Templates.
- Current View:** Permission Set Overview for Vendor Permits.
- Table Headers:** Description, License, Session Activation Required, Permission Set Groups Added To, API Name, Namespace Prefix, Created By, Last Modified By.
- Table Data:** Vendor Permits, jyothika.yadav, 16/04/2024, 12:00 pm, jyothika.yadav, 16/04/2024, 12:00 pm.
- Section:** Apps, Assigned Apps, Assigned Connected Apps, Object Settings, App Permissions, Apex Class Access, Visualforce Page Access.
- Bottom:** Weather (35°C, Mostly cloudy), System bar with various icons (Search, File, Home, etc.), Date (20-04-2024), Time (19:36).

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

The screenshot shows a Salesforce Lightning page titled 'Recently Viewed | Occasions'. The top navigation bar includes links for 'Developer Edition Signup | Sales', 'Smartinternz', 'Recently Viewed | Occasions', 'Permission Sets | Salesforce', and 'Verify your identity in Salesforce'. Below the navigation is a search bar and a toolbar with icons for star, plus, question mark, gear, and other functions. The main content area displays a list titled 'Occasions Recently Viewed' with 4 items updated a few seconds ago. The list includes:

Event Name
1 mehindi
2 engagement
3 birthday
4 Marriage

On the right side of the list are standard Salesforce edit and delete icons. At the bottom of the page, there's a weather widget showing '35°C Mostly cloudy', a taskbar with various application icons, and a system status bar with the date '20-04-2024' and time '19:36'.

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 (Occurrences with Attendees) or run it.**

New Occasions with Attendees

Attendee: Attendee Name	Id	Occasion: Event Name	City	End Date	Tickets	Email	Phone.	Event Name
geetha (1)	1	Marriage	Bengaluru	17-6-2024	Premium	456@gmail.com	9876543210	-
Subtotal								
pavitra (1)	2	birthday	chennai	19-11-2024	Premium	789@gmail.com	1234567891	-
Subtotal								
varshini (1)	4	mehndi	Delhi	11-5-2024	Premium	234@gmail.com	345678987	-
Subtotal								
yamini (1)	3	engagement	hyderabad	12-9-2024	Premium	345@gmail.com	5678902345	-
Total (4)								

Row Counts Detail Rows Subtotals Grand Total

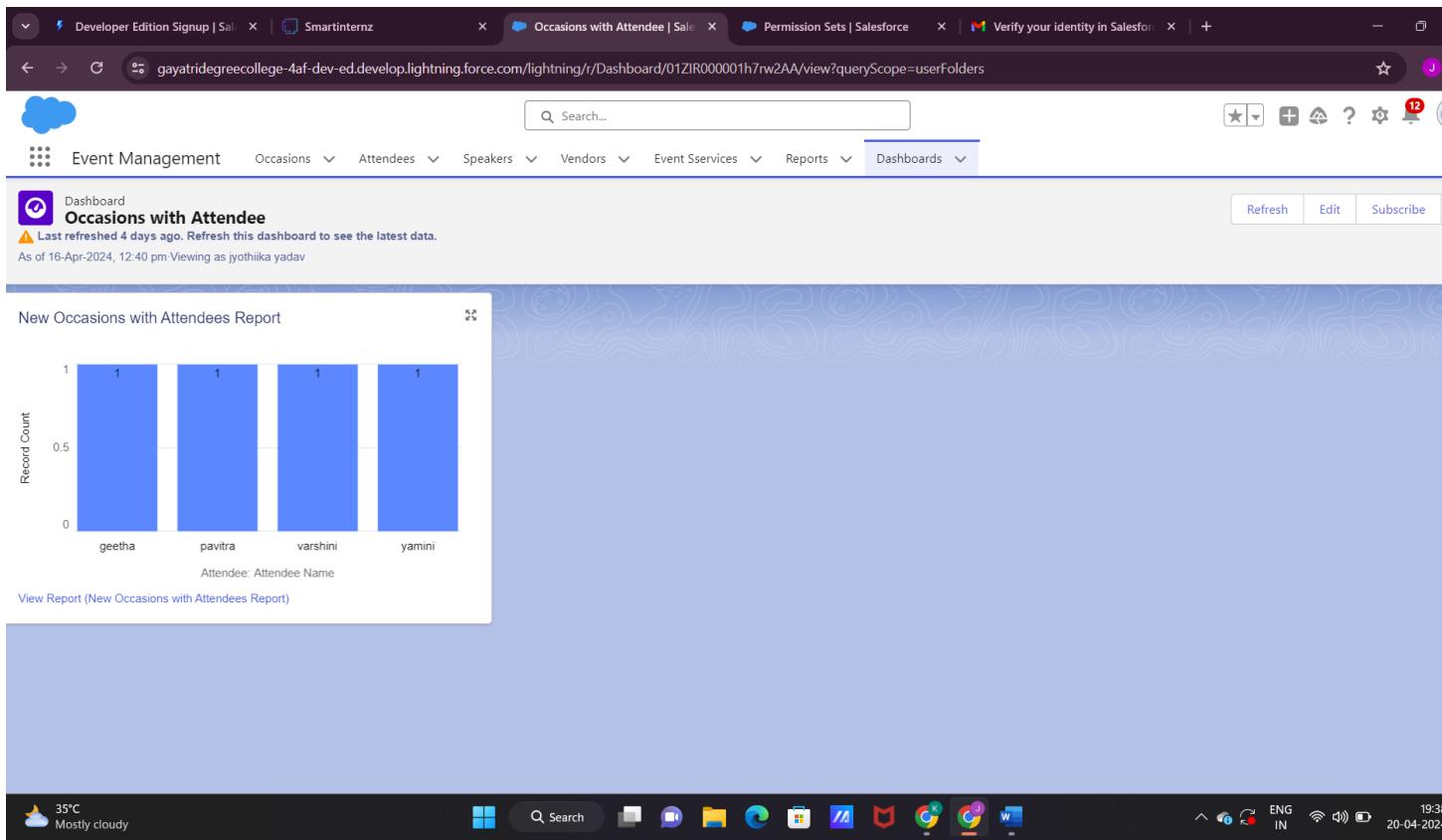
35°C Mostly cloudy

ENG IN 20-04-2024

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 the following details:

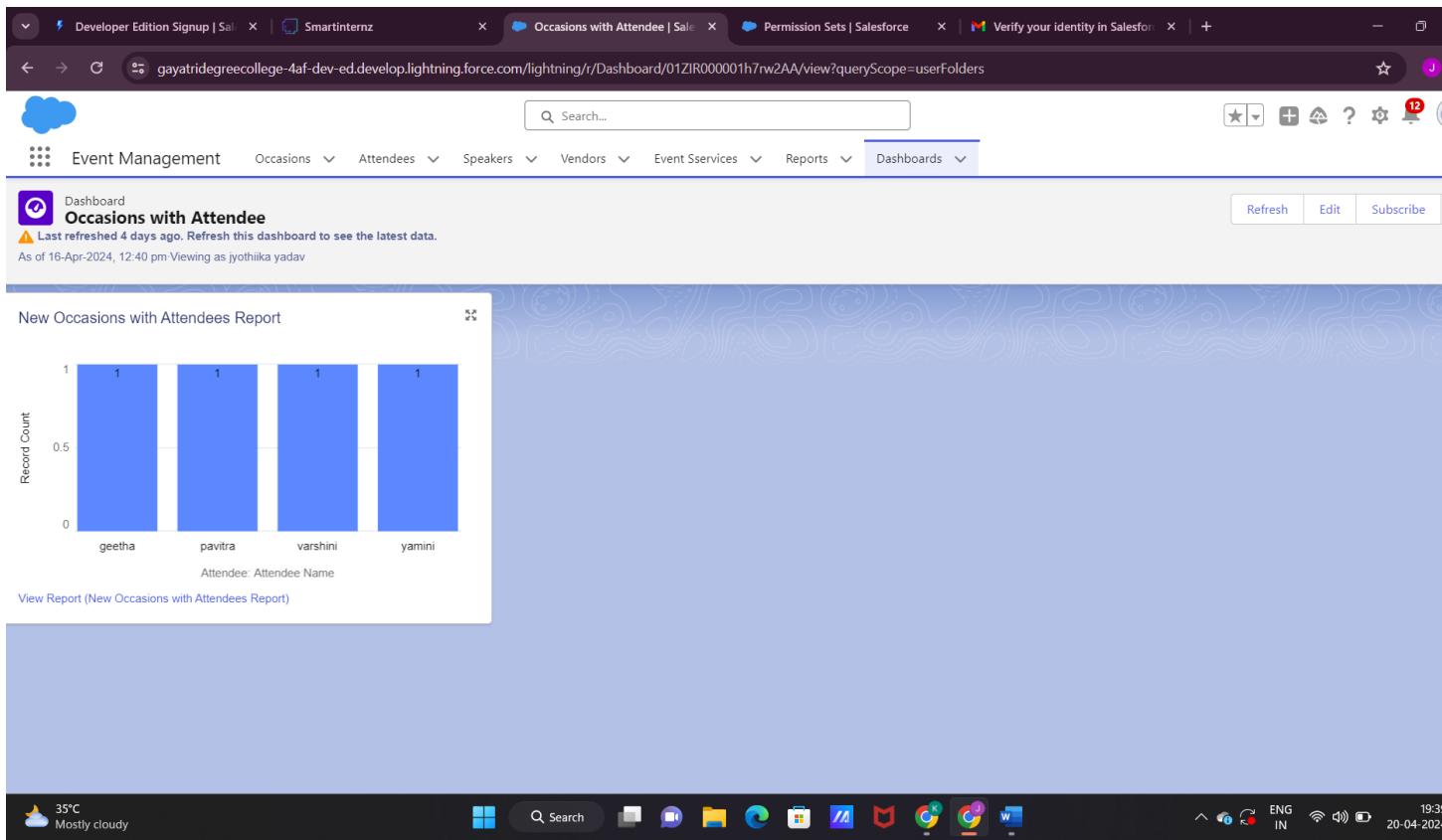
- Header:** Developer Edition Signup | Sale, Smartinternz, New Occasions with Attendees, Permission Sets | Salesforce, Verify your identity in Salesfor.
- Page Title:** gayatridegreecollege-4af-dev-ed.develop.lightning.force.com/lightning/r/Report/000IR00000cy6V2AQ/view?queryScope=userFolders
- Page Header:** Event Management, Occasions, Attendees, Speakers, Vendors, Event Services, Reports, Dashboards.
- Section:** Report: Occasions with Attendees, New Occasions with Attendees Report.
- Table:** A data grid showing 4 total records. The columns are: Attendee: Attendee Name, Id, Occasion: Event Name, City, End Date, Tickets, Email, Phone., and Event Name.

Attendee: Attendee Name	Id	Occasion: Event Name	City	End Date	Tickets	Email	Phone.	Event Name
geetha (1)	1	Marriage	Bengaluru	17-6-2024	Premium	456@gmail.com	9876543210	-
Subtotal								
pavitra (1)	2	birthday	chennai	19-11-2024	Premium	789@gmail.com	1234567891	-
Subtotal								
varshini (1)	4	mehndi	Delhi	11-5-2024	Premium	234@gmail.com	345678987	-
Subtotal								
yamini (1)	3	engagement	hyderabad	12-9-2024	Premium	345@gmail.com	5678902345	-
Subtotal								
Total (4)								

- Bottom Bar:** Row Counts, Detail Rows, Subtotals, Grand Total, Weather (35°C, Mostly cloudy), App Launcher, Search, and various browser icons.

† 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

① 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.**

Developer Edition Signup | Sale X | Smartinternz X | Occasions with Attendee | Sale X | Approval Processes | Salesforce X | Verify your identity in Salesforce X | +

gayatridegreecollege-4af-dev-ed.develop.lightning.force.com/lightning/setup/ApprovalProcesses/page?address=%2F04alR00000oOg9

Setup Home Object Manager ▾

Search Setup

appova

Data Mass Transfer Approval Requests

Process Automation Approval Processes

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Approval Processes

Attendee: Attendee approval process

< Back to Approval Process List

Process Definition Detail

Process Name	Attendee approval process	Active	✓
Unique Name	Attendee_approval_process	Next Automated Approver Determined By	
Description			
Entry Criteria	Attendee: cancel EQUALS True		
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	✓
Approval Assignment Email Template			
Initial Submitters	Occasion Owner		
Created By	jyothika.yadav 18/04/2024, 8:47 pm	Modified By	jyothika.yadav 18/04/2024, 9:03 pm

Initial Submission Actions

Action	Type	Description
Record Lock		Lock the record from being edited
Field Update		Cancel Status

Edit | Remove Add Existing Add New

Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Initial Step	1	Attendee approval with cancel checkbox				

35°C Mostly cloudy

Cloud icon

Search bar

File, Chat, Folder, Chrome, Microsoft Edge, Microsoft Word, Google Sheets, Google Slides, Google Drive, Microsoft Excel icons

ENG IN

20-04-2024 19:40

