



3 RESULT

3.1 Data Model:

Object name	Fields in the Object	
Event	City	Data Type
	Start Date	Date/Time
	End date	Date/Time
Attendee	Id	Auto Number
	Phone	Phone
	Email	Email
	Tickets	Picklist
	Event	Master-detail Relationship
Speaker	Bio	Area
	e-mail	Email
	Event	Look-up Relationship
Vendor	e-mail	Email
	Phone	Phone
	e-mail	Email
	Event	Look-up Relationship
	Service Provider	Data Type

3.2 Activity & Screenshot

Milestone -1

We have created the developer account and login for Salesforce account.

Milestone 2-Object:

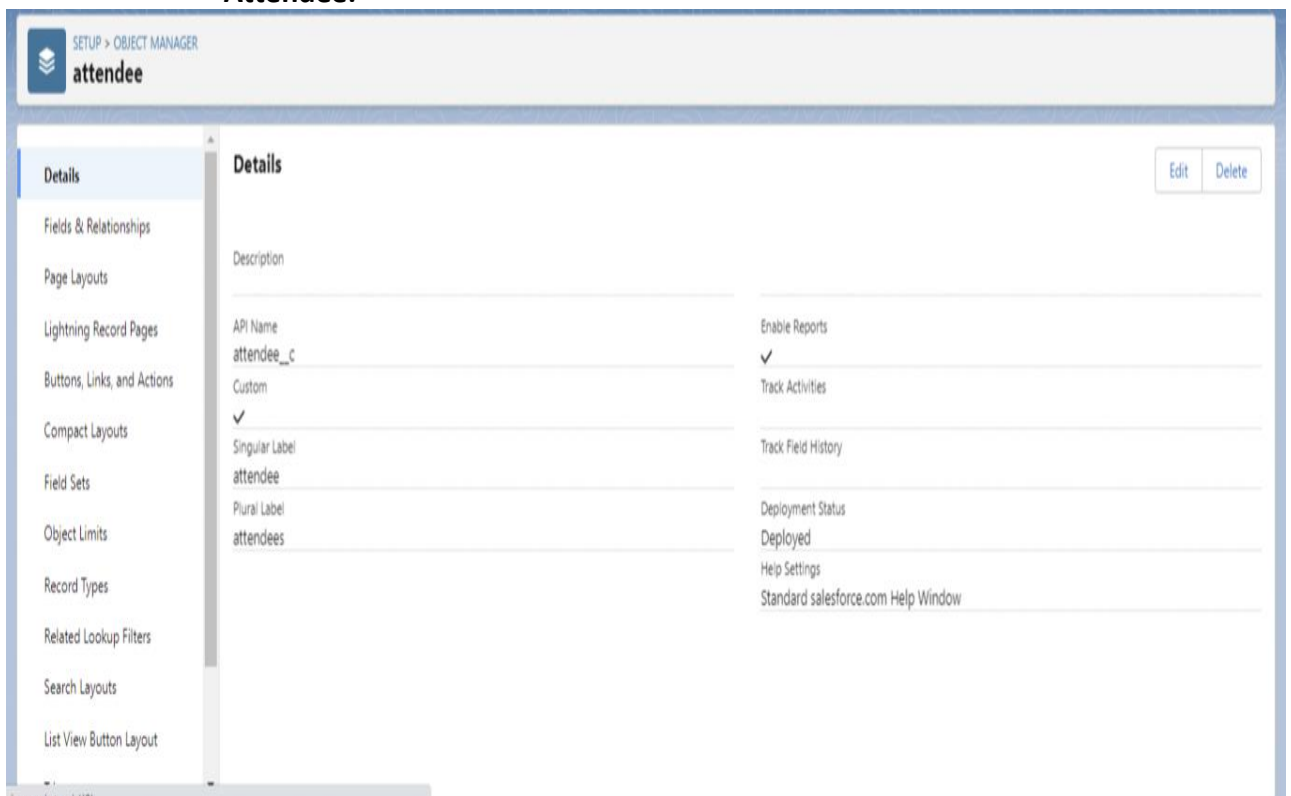
Event:

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



The screenshot shows the Salesforce Object Manager interface for the 'Event' object. The left sidebar contains a navigation menu with options: Fields, List View Button Layout, Search Layout, Related Lookup Filters, Record Types, Object Limits, Field Sets, Compact Layout, Buttons, Links, and Actions, Lightning Record Pages, Page Layouts, and Fields & Relationships. The 'Fields' option is selected. The main area displays the 'Event' object configuration. The 'API Name' is 'event__c' and the 'Plural Name' is 'events'. The 'Description' field is empty. The 'Enable Reports' checkbox is checked. The 'Track Activities' checkbox is checked. The 'Track Field History' checkbox is checked. The 'Deployment Status' is 'Deployed'. The 'Help Settings' are set to 'Standard salesforce.com Help Window'. The bottom of the screen shows the 'Setup > Object Manager' breadcrumb and the 'attendee' object name.


Attendee:



The screenshot shows the Salesforce Object Manager interface for the 'Attendee' object. The left sidebar contains a navigation menu with options: 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, and List View Button Layout. The 'Details' option is selected. The main area displays the 'Attendee' object configuration. The 'API Name' is 'attendee__c' and the 'Plural Name' is 'attendees'. The 'Description' field is empty. The 'Enable Reports' checkbox is checked. The 'Track Activities' checkbox is checked. The 'Track Field History' checkbox is checked. The 'Deployment Status' is 'Deployed'. The 'Help Settings' are set to 'Standard salesforce.com Help Window'. The bottom of the screen shows the 'Setup > Object Manager' breadcrumb and the 'attendee' object name.

Speaker :

SETUP > OBJECT MANAGER

 **speaker**

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

Details

Description

API Name
speaker__c

Custom
✓

Singular Label
speaker

Plural Label
speakers

Enable Reports
✓

Track Activities

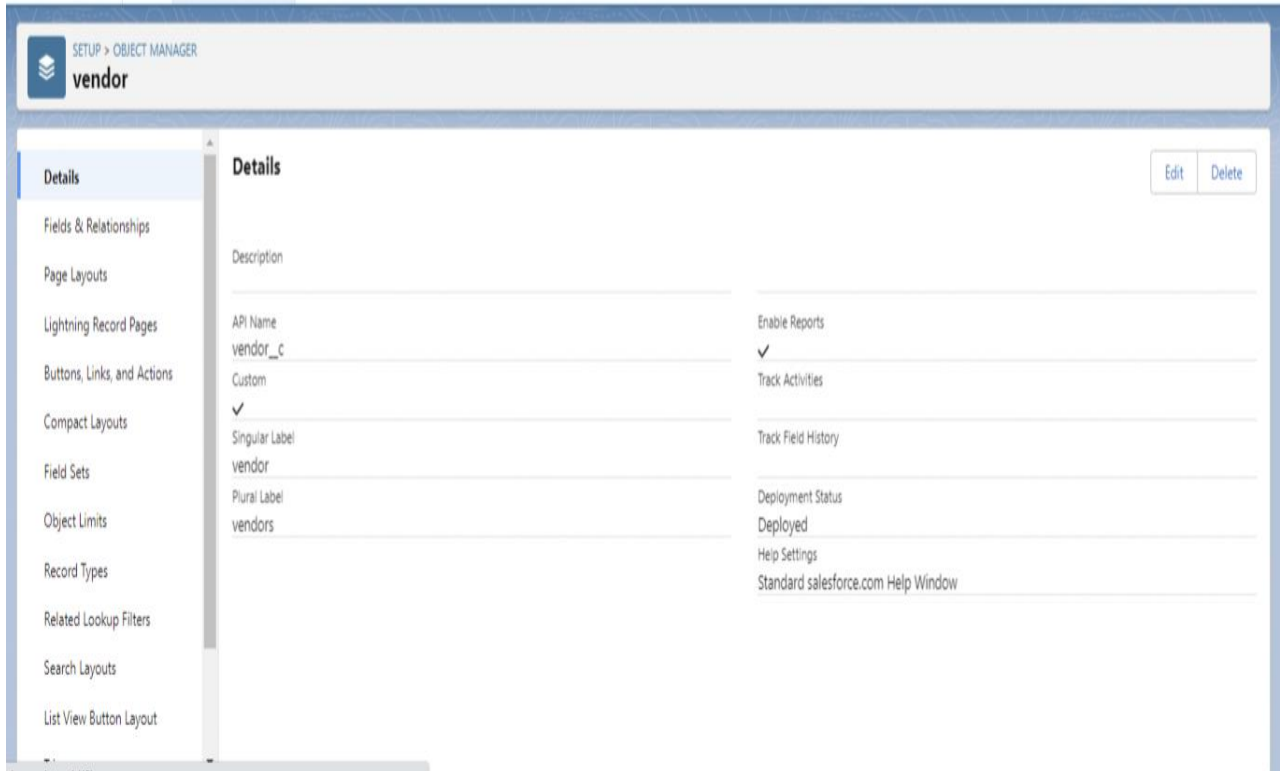
Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

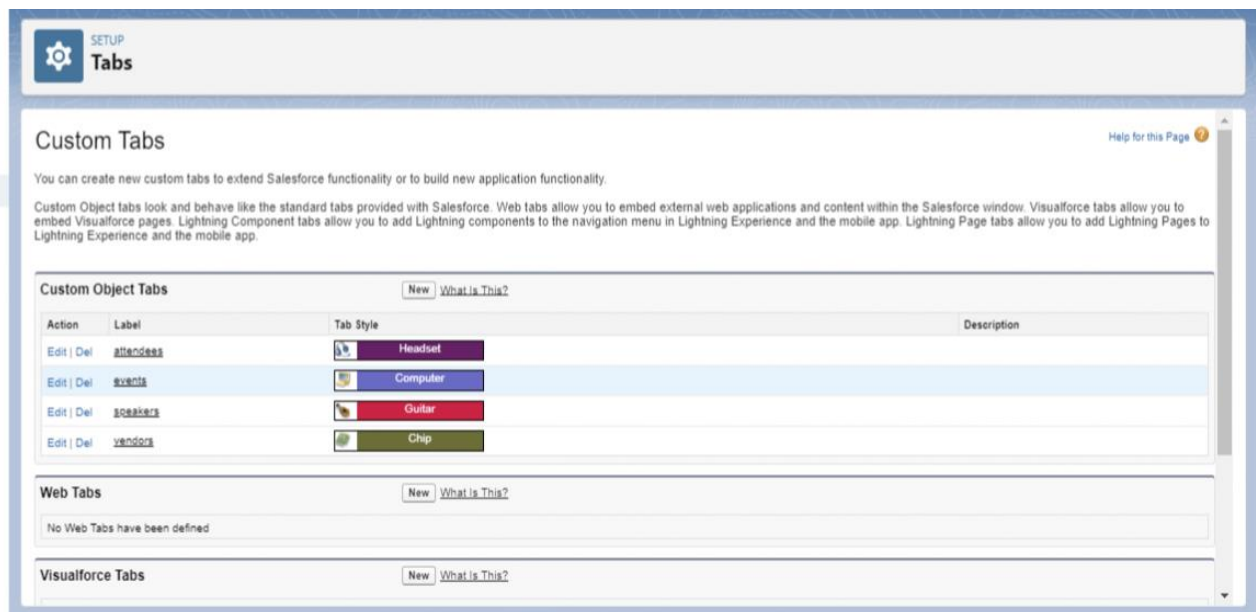
EditDelete

Vendor:



Milestone 3-Tab:

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



Milestone 4-Application:

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

Enable App Cloning ☒ Enabled

19 Items • Sorted by App Name • Filtered by All appmenuItems - TabSet Type

	App Name ↑	Developer Name	Description	Last Modified ...	App ...	Vi...	
1	All Tabs	AllTabSet		22/03/2023, 1:13 pm	Classic		
2	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	22/03/2023, 1:13 pm	Lightning	✓	
3	Community	Community	Salesforce CRM Communities	22/03/2023, 1:13 pm	Classic		
4	CPQ Integration User Connected A...	CPQIntegrationUserApp		22/03/2023, 1:13 pm	Connected		
5	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	22/03/2023, 1:13 pm	Lightning	✓	
6	Event Management	Event_Management		23/03/2023, 2:54 pm	Lightning	✓	
7	Lead Generation	Lead_Generation	Generate leads faster, and qualify and nurture prospects using best p...	22/03/2023, 1:13 pm	Lightning	✓	
8	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	22/03/2023, 1:13 pm	Lightning	✓	
9	Marketing	Marketing	Best-in-class on-demand marketing automation	22/03/2023, 1:13 pm	Classic		
10	Platform	Platform	The fundamental Lightning Platform	22/03/2023, 1:13 pm	Classic		
11	Relationship Management	Relationship_Management	Build stronger customer relationships, manage renewals, and stay or...	22/03/2023, 1:13 pm	Lightning	✓	
12	Sales	Sales	The world's most popular sales force automation (SFA) solution	22/03/2023, 1:13 pm	Classic		

Milestone 5-Fields :

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


Fields & Relationships
7 Items, Sorted by Field Label

Q, Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
city	city__c	Text(30)		
Created By	CreatedById	Lookup(User)		
End Date	End_Date__c	Date/Time		
event management Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Start Date	Start_Date__c	Date/Time		

Milestone 6-Profile :

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



SETUP


Profiles

User Profiles

Below is a list of the profiles for your organization. You can view more detailed information by clicking on the profile link.

Profile			
Action	Name	User License	Custom
Edit	Chatter External User	Chatter External	<input type="checkbox"/>
Edit	Chatter Free User	Chatter Free	<input type="checkbox"/>
Edit	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
Edit	Contract Manager	Salesforce	<input type="checkbox"/>
Edit	CPQ Integration User	CPQ Integration User	<input type="checkbox"/>
Edit Del	Event user profile	Salesforce	<input checked="" type="checkbox"/>
Edit Del	Event vendors profile	Salesforce	<input checked="" type="checkbox"/>
Edit	Identity User	Identity	<input type="checkbox"/>
Edit	Marketing User	Salesforce	<input type="checkbox"/>
Edit	Minimum Access - Salesforce	Salesforce	<input type="checkbox"/>
Edit	Solution Manager	Salesforce	<input type="checkbox"/>
Edit	Standard User	Salesforce	<input type="checkbox"/>
Edit	System Administrator	Salesforce	<input type="checkbox"/>

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



SETUP

Users

All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: All Users Edit Create New User

New User

Reset Password(s)

Add Multiple Users

Action	Full Name	Alias	Username	Last Login	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty00d2w00000rentweaj.sdrmyceozfgy@chatter.salesforce.com			<input type="checkbox"/>	Chatter Free User
Edit	G. Naveen Kumar	NQ	naveenkumary5603-svpo@force.com	13/04/2023, 3:18 pm		<input checked="" type="checkbox"/>	System Administrator
Edit	Gyula Sanjay	Sanj	naveenkumary5603@gmail.com	25/03/2023, 12:25 pm		<input checked="" type="checkbox"/>	Event user profile
Edit	Sharma, Rahul	Rahul	naveenkumary2403@gmail.com			<input checked="" type="checkbox"/>	Event vendors profile
Edit	Soonar, Exec	soon	swcsponor.d4mfunnvgz49-oua5f8ktpca@example.com			<input type="checkbox"/>	Event vendors profile

New User

Reset Password(s)

Add Multiple Users

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

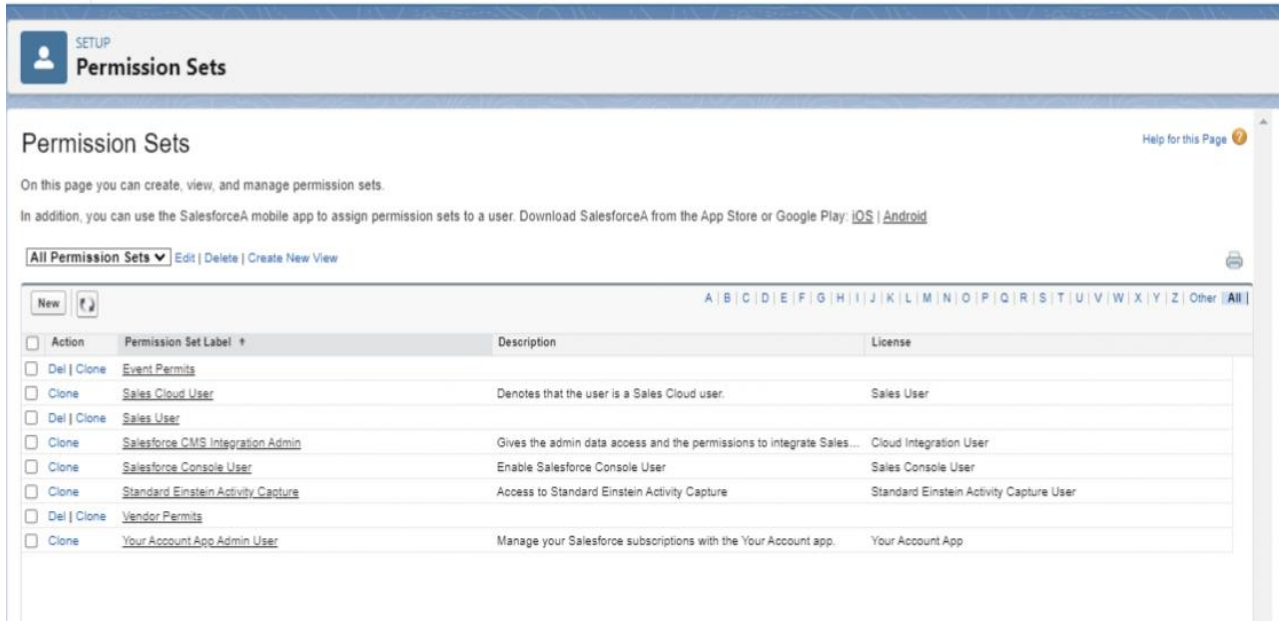
Z

Other

All

Milestone 8-Permissoin sets :

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles. Create permission sets to grant access among logical groupings of users, regardless of their primary job function.



The screenshot shows the Salesforce 'Permission Sets' page. At the top, there's a 'SETUP' header with a user icon and the text 'Permission Sets'. Below this, the page title 'Permission Sets' is displayed, followed by a 'Help for this Page' link. A brief description states: 'On this page you can create, view, and manage permission sets. In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)'.

Below the description, there's a filter bar showing 'All Permission Sets' with options to 'Edit', 'Delete', or 'Create New View'. A 'New' button is also present. A navigation bar with letters A-Z and 'Other' is visible. The main content is a table with columns: Action, Permission Set Label, Description, and License.

Action	Permission Set Label	Description	License
<input type="checkbox"/> Del Clone	Event Permits		
<input type="checkbox"/> Clone	Sales Cloud User	Denotes that the user is a Sales Cloud user.	Sales User
<input type="checkbox"/> Del Clone	Sales User		
<input type="checkbox"/> Clone	Salesforce CMS Integration Admin	Gives the admin data access and the permissions to integrate Sales...	Cloud Integration User
<input type="checkbox"/> Clone	Salesforce Console User	Enable Salesforce Console User	Sales Console User
<input type="checkbox"/> Clone	Standard Einstein Activity Capture	Access to Standard Einstein Activity Capture	Standard Einstein Activity Capture User
<input type="checkbox"/> Del Clone	Vendor Permits		
<input type="checkbox"/> Clone	Your Account App Admin User	Manage your Salesforce subscriptions with the Your Account app.	Your Account App

Milestone 9-Reports :

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

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Marketing Exec Leads by Source		Sales and Marketing Reports	Naveen Kumar G	22/3/2023, 1:13 pm	<input type="checkbox"/>
Created by Me	Sales Person Activity		Sales and Marketing Reports	Naveen Kumar G	22/3/2023, 1:13 pm	<input type="checkbox"/>
Private Reports	Sales Exec Pipeline		Sales and Marketing Reports	Naveen Kumar G	22/3/2023, 1:13 pm	<input type="checkbox"/>
Public Reports	vendors with event Report		Private Reports	Naveen Kumar G	30/3/2023, 11:22 am	<input type="checkbox"/>
All Reports	speakers with event Report		Private Reports	Naveen Kumar G	30/3/2023, 11:21 am	<input type="checkbox"/>
	events Report		Private Reports	Naveen Kumar G	30/3/2023, 11:19 am	<input type="checkbox"/>
FOLDERS	events with attendees Report		Private Reports	Naveen Kumar G	30/3/2023, 11:19 am	<input type="checkbox"/>
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

Trailhead Profile Public URL

Team Lead 1: <https://trailblazer.me/id/naveg24>

Team member 1: <https://trailblazer.me/id/m20bma009>

Team member 2: <https://trailblazer.me/id/ramet27>

Team member 3: <https://trailblazer.me/id/slakshmanan29>

4 **ADVANTAGES & DISADVANTAGE**

Data organized and presented by a CRM platform leads to a better understanding of customers. This leads to better messaging and outreach, much of which can be done with automation, which helps we offer better, more efficient customer service.

Many customers claim that Salesforce customer service is unresponsive and some emails and calls can remain unanswered for months. Also, when users reach out to support for help, they seem not to have a solution for their problem.

5 **APPLICATIONS**

The next topic in this tutorial on what is Salesforce is about Salesforce applications. Here, we have a look at a few applications that make Salesforce popular.

Customer Service: Salesforce provides excellent customer service from anywhere in the world. It helps in resolving customer issues faster and improves support agent response time. Salesforce allows we to unify email, social, phone, and chat support and helps manage every channel from one view.

Customize Data: Salesforce allows we to handle and customize different types of data. It helps we track real-time analytics and enhance the customer experience.

Flexible Data Reporting and Analysis: Salesforce allows flexible data reporting and analysis. Here, sales representatives can create their reports to check the accounts they haven't worked on for a while.

Understand Customer Data: The Salesforce tool makes we understand customer data, identify their interests and perception. we can locate and re-engage inactive customers and increase sales by tracking customer interaction.

6 **CONCLUSION**

Salesforce is a popular CRM platform today. After reading this tutorial, we would know what CRM is, why Salesforce, what is Salesforce, Salesforce services, and its applications.

If we are interested to learn more about Salesforce check out Simplilearn's Salesforce Admin Certification Training where you will learn how to manage and develop apps for one of the most popular CRM platforms worldwide.

7 **FUTURE SCOPE**

There are 3.3 million jobs expected in the Salesforce ecosystem by 2022. More than 200K Companies have switched to Salesforce. The annualized growth of the platform is expected to be 65 percent.

Project Report Template

According to IDC, it is the number one CRM system that leads the market, with 19.7% of the total market share.