



BUILD AN EVENT MANAGEMENT SYSTEM USING SALESFORCE

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Build an Event Management System using Salesforce

This Project helps in managing the on-going and upcoming events in an organization.

Project Description

The project aim is to provide real-time knowledge for all the students who have basic knowledge of Salesforce and Looking for a real-time project. This project will also help to those professionals who are in cross-technology and wanted to switch to Salesforce with the help of this project they will gain knowledge and can include into their resume as well.

What you'll learn

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

Introduction

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

At the start, an event manager makes planning decisions, such as the time, location, and theme of their event. During an event, event managers oversee the event live and make sure things run smoothly. After an event, event managers are tasked with reviewing event data, submitting KPI and ROI findings, and staying on the ball for any post-event offerings.

All different branches of planning go into event management, including various types of sourcing, designing, regulation checks, and on-site management. In event management, you could be in the process of creating a conference, a product launch, an internal sales kick-off, or even a wedding. Really, any event that requires considerable planning and execution is event management.

Milestone 1 - Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

<https://youtu.be/r9EX3IGde5k>

There are 5 types of salesforce editions:

1. **Essentials:** Designed for small businesses getting started with CRM to boost sales or service productivity. It includes a setup assistant and administration tools to customize your deployment as you grow.
2. **Professional:** Designed for businesses requiring full-featured CRM functionality. It includes straightforward and easy-to-use customization, integration, and administration tools to facilitate any small to midsize deployment.
3. **Enterprise:** Meets the needs of large and complex businesses. It gives you advanced customization and administration tools, in addition to all the functionality available in Professional Edition, that can support large-scale deployments. Enterprise Edition also includes access to Salesforce APIs, so you can easily integrate with back-office systems.
4. **Unlimited:** Maximizes your success and extends it across the entire enterprise through the Lightning Platform. It gives you new levels of platform flexibility for managing and sharing all your information on demand. Includes all Enterprise Edition functionality, Premier Support, full mobile access, unlimited custom apps, increased storage limits, and other features.
5. **Developer:** Provides access to the Lightning Platform and APIs. It lets developers extend Salesforce, integrate with other applications, and develop new tools and applications. Developer Edition also provides access to many of the features available in Enterprise Edition.

NOTE: Salesforce doesn't provide technical support for Developer Edition. But you can ask for help from developer community message boards after you register for the Lightning Platform developer website: developer.salesforce.com.

Activity:

Creating a Salesforce Developer Org:

A Developer org has all the features and licenses you need to get started with Salesforce.

1. Search [Developer.salesforce.com](https://developer.salesforce.com)

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

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

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

First Name* Last Name*

Email*

Role*

Company*

Country/Region*

Postal Code*

Username*

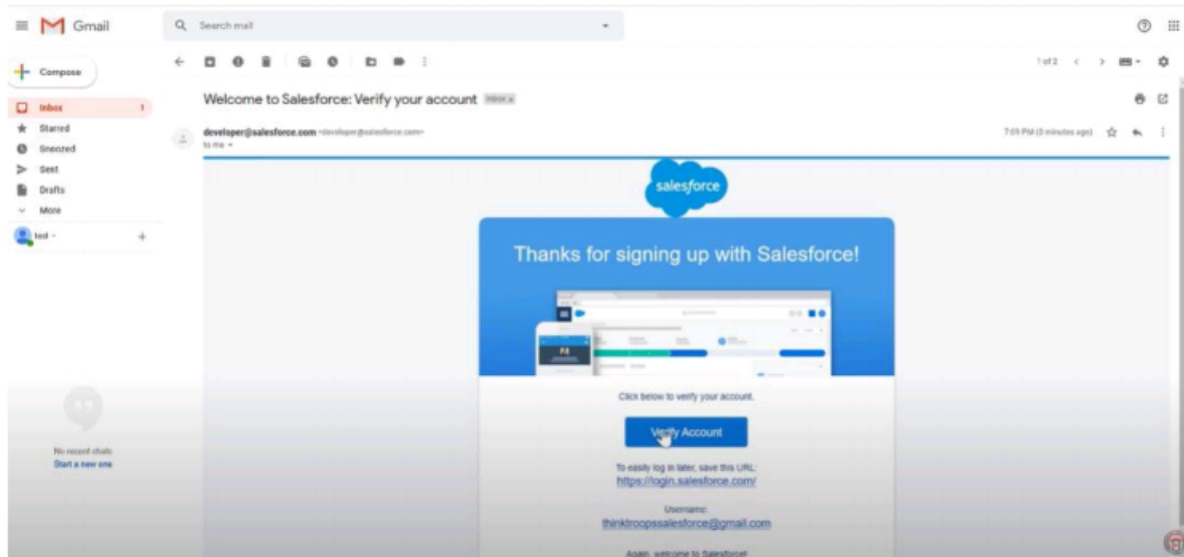
Your username must be in the form of an email address (it does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. Read more about username recommendations.

By registering, you confirm you have read and agree to the [Terms of Use](#) and the [Privacy Policy](#) and to the storing and processing of your personal data by Salesforce as described in the [Privacy Statement](#), including use for marketing purposes.

Sign me up

2. Enter the following details like First name, last name, Email, Role, Company, Country/Region, Postal code, and Username must be unique.

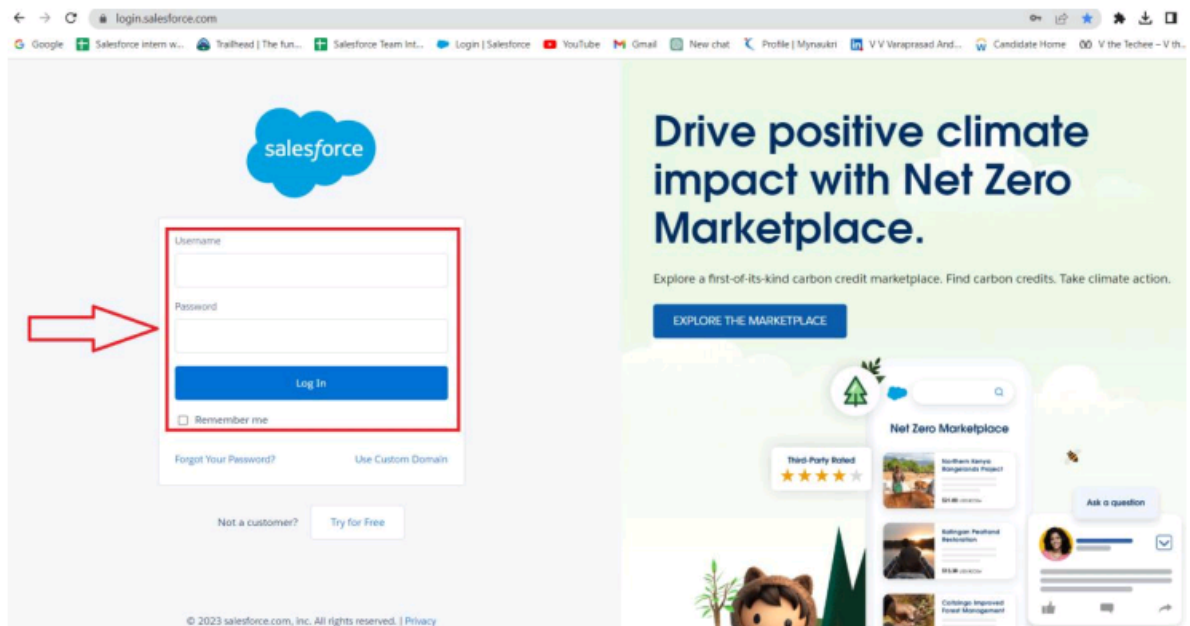
3. Click sign me up, after a few min you will receive a mail from salesforce org and by using the verify account link you can create your new password.



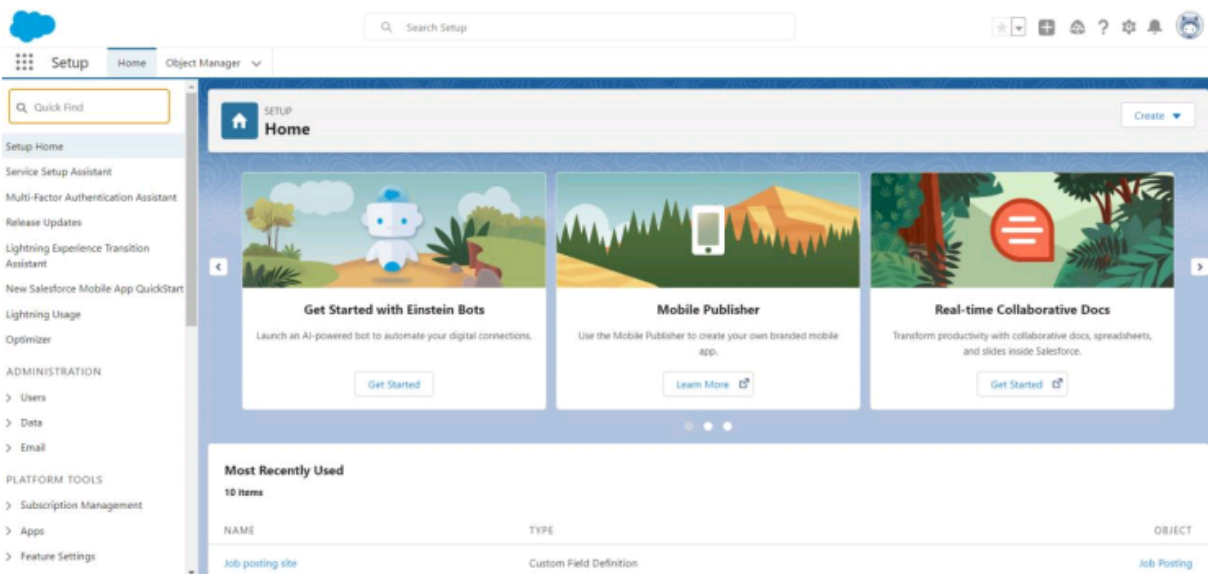
4. Click save.

5. Search login.salesforce.com

6. By using username and password you can enter the salesforce org.



The setup page will appear as below.



Milestone 2 – Object:

What is an object?

Salesforce objects are database tables that permit you to store data that is specific to an organization. It consists of fields (columns) and records (rows).

Salesforce objects are of two types:

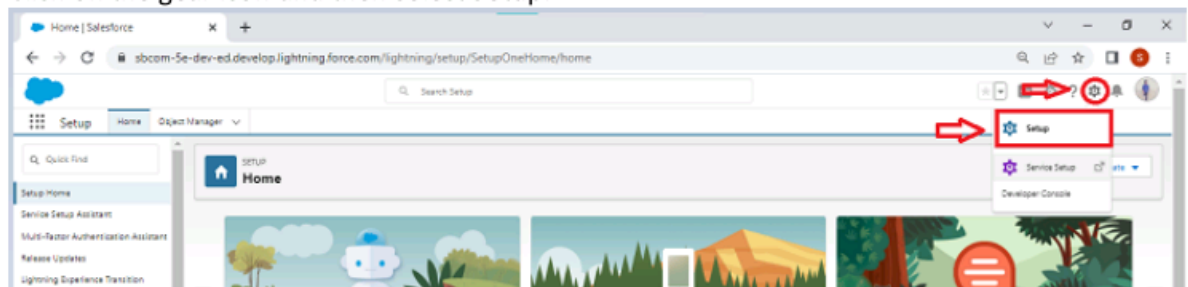
- **Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
- **Custom Objects:** Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

Activity 1:

Creation of Objects for Event Management:

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

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

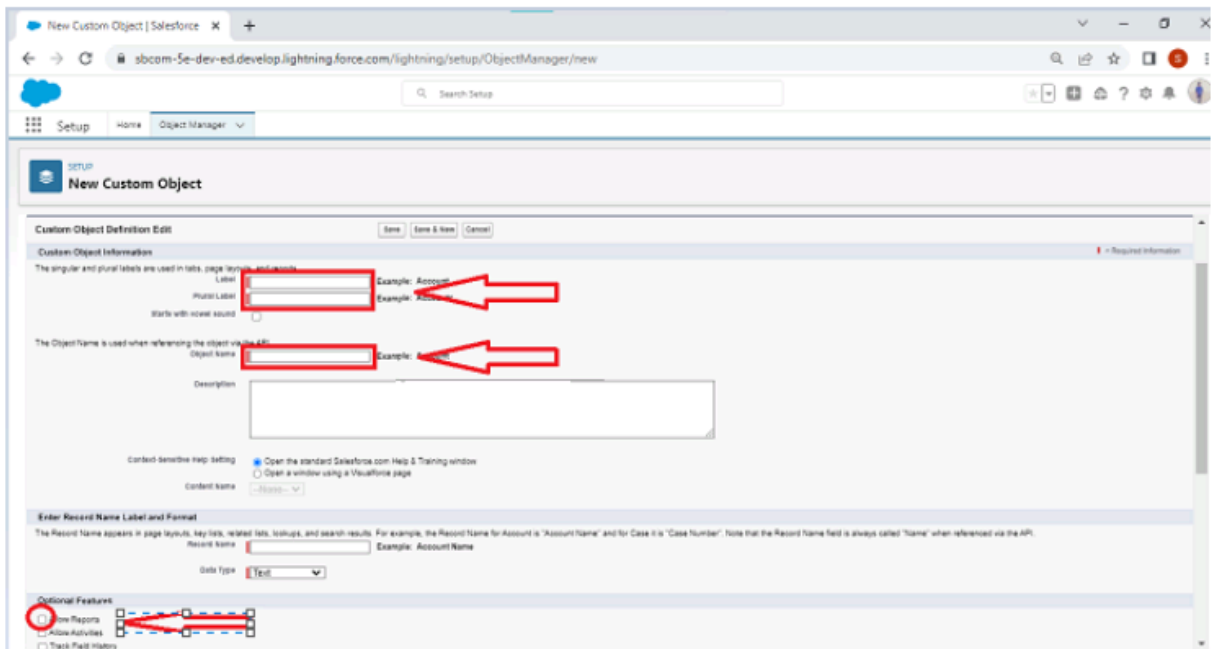


2. Click on the object manager tab just beside the home tab.



3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.

- On the Custom Object Definition page, create the object as follows:
- Label: Event
- Plural Label: Events
- Record Name: Event Name
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save.



The screenshot shows the 'Optional Features' section of the Salesforce Custom Object Definition page. It includes checkboxes for 'Allow Reports', 'Allow Activities', 'Track Field History', 'Allow in Chatter Groups', and 'Enable Licensing'. Below this is the 'Object Classification' section with checkboxes for 'Allow Sharing', 'Allow Bulk API Access', and 'Allow Streaming API Access'. The 'Deployment Status' section has radio buttons for 'In Development' and 'Deployed'. The 'Search Status' section has a checkbox for 'Allow Search'. At the bottom, the 'Object Creation Options' section includes checkboxes for 'Add Notes and Attachments related list to default page layout' and 'Launch New Custom Tab Wizard after saving this custom object'. The 'Save' button is highlighted with a red box and an arrow pointing to it from below.

Activity 2:

Creation of Attendees 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, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
 - a. On the Custom Object Definition page, create the object as follows:
 - b. Label: Attendee
 - c. Plural Label: Attendees
 - d. Record Name: Attendee Name
 - e. Check the Allow Reports checkbox
 - f. Check the Allow Search checkbox
 - g. Click Save.

Activity 3:

Creation of Speaker 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, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
 - a. On the Custom Object Definition page, create the object as follows:
 - b. Label: Speaker

- c. Plural Label: Speakers
- d. Record Name: Speaker Name
- e. Check the Allow Reports checkbox
- f. Check the Allow Search checkbox
- g. Click Save.

Activity 4:

Creation of Vendors 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, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
 - a. On the Custom Object Definition page, create the object as follows:
 - b. Label: Vendor
 - c. Plural Label: Vendors
 - d. Record Name: Vendor Name
 - e. Check the Allow Reports checkbox
 - f. Check the Allow Search checkbox
 - g. Click Save.

Milestone 3 – Tab:

Tab

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

There are mainly 4 types of tabs:

Standard Object Tabs:

Standard object tabs display data related to standard objects.

Custom Object Tabs:

Custom object tabs display data related to custom objects. These tabs look and function just like standard tabs.

Web Tabs:

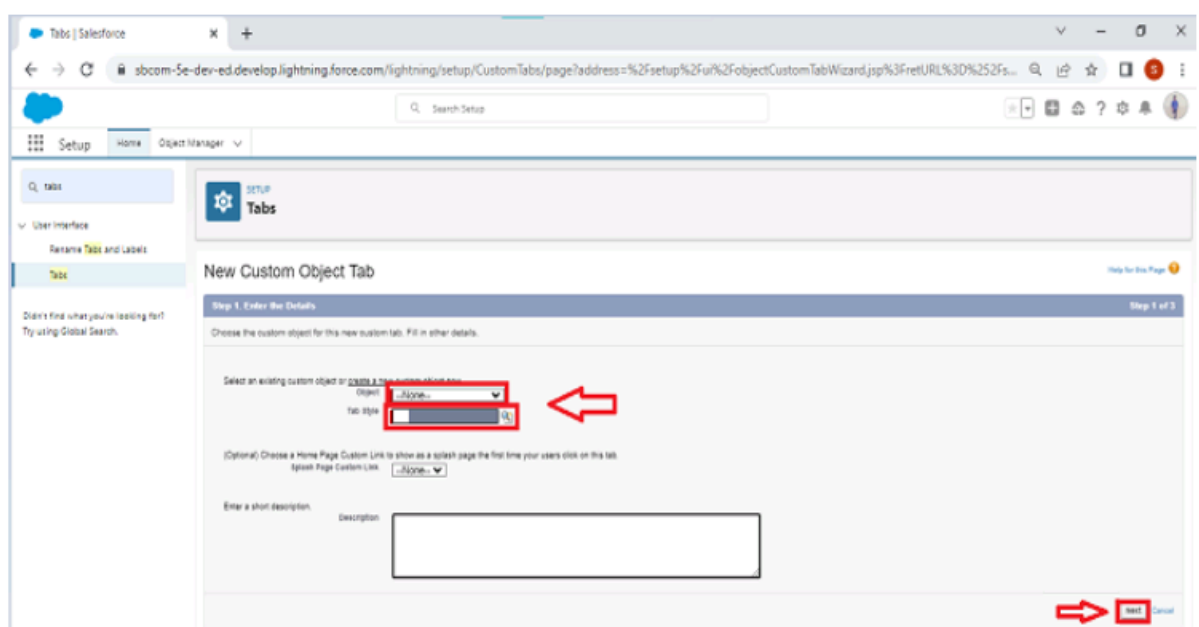
Web Tabs display any external Web-based application or Web page in a Salesforce tab.

Visualforce Tabs display data from a Visualforce Page.

Activity 1:

Now create a custom tab.

1. Click on Home tab, enter Tabs in Quick Find and select Tabs.



3. For Object, select Event.
4. For Tab Style, select any icon.
5. Leave all defaults as is. Click Next, Next, and Save.

Activity 2:

Creation of Attendee tab:

Now create a custom tab.

1. Click on Home tab, enter Tabs in Quick Find and select Tabs.
2. Under custom object tabs, click New.
3. For Object, select Attendee.
4. For Tab Style, select any icon.
5. Leave all defaults as is. Click Next, Next, and Save.

Activity 3:

Creation of Speakers tab:

Now create a custom tab.

1. Click on Home tab, enter Tabs in Quick Find and select Tabs.
2. Under custom object tabs, click New.
3. For Object, select Speaker.
4. For Tab Style, select any icon.
5. Leave all defaults as is. Click Next, Next, and Save.

Activity 4:

Creation of Vendor tab:

Now create a custom tab.

1. Click on Home tab, enter Tabs in Quick Find and select Tabs.
2. Under custom object tabs, click New.
3. For Object, select Vendor.
4. For Tab Style, select any icon.
5. Leave all defaults as is. Click Next, Next, and Save.

Milestone 3 – Application:

What is an 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:

- Standard apps: these apps come with every occurrence of Salesforce as default. Community, Call Center, Content, Sales, Marketing, Salesforce Chatter, Site.com, and App Launcher are included in these apps. The description, logo, and label of a standard app cannot be altered.
- Custom apps: these apps are created according to the needs of a company. They can be made by putting custom and standard tabs together. Logos for custom apps can be changed.

Activity

Create the Event Management Construction app

- From Setup, enter App Manager in the Quick Find and select App Manager.

App Name	Developer Name	Description	Last Modified	App Type	✓
1 All Tabs	All Tabs		04/12/2022, 10:13 am	Classic	
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	04/12/2022, 10:13 am	Classic	✓
3 App Launcher	App Launcher	App Launcher tabs	04/12/2022, 10:13 am	Classic	✓
4 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	04/12/2022, 10:16 am	Lightning	✓
5 Chatter Desktop	Chatter_Desktop	Chatter Desktop is an Adobe AIR-based desktop application that lets Chatter users stay connecte...	23/12/2022, 4:08 pm	Connected (Managed)	✓
6 Chatter Mobile for BlackBerry	Chatter_Mob_BlackBerry	The Salesforce.com Chatter Mobile app lets you access Chatter data on the go. Use it to view tes...	23/12/2022, 4:08 pm	Connected (Managed)	✓
7 College Management System	Radzen	demo app	08/12/2022, 4:18 pm	Lightning	✓
8 Community	Community	Salesforce CRM Communities	04/12/2022, 10:13 am	Classic	✓
9 Content	Content	Salesforce CRM Content	04/12/2022, 10:13 am	Classic	✓
10 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	04/12/2022, 10:13 am	Lightning	✓

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

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name ⓘ
Name your app...

* Developer Name ⓘ
Enter a developer name...

Description ⓘ
Enter a description...

App Branding

Image ⓘ
Upload

Primary Color Hex Value
#0070C2

Org Theme Options
☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

Next

- Under App Options, leave the default selections and click Next.
- Under Utility Items, leave as is and click Next.
- From Available Items, select Events, Attendees, speakers, vendors, Reports, and Dashboards and move them to Selected Items. Click Next.

New Lightning App

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

Create

Type to filter list...

- Accounts
- Activities
- Alert Settings
- All Sites
- Alternative Payment Methods
- App Launcher
- Appointment Invitations

Selected Items

No items selected

Back

Next

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

New Lightning App

User Profiles

Choose the user profiles that can access this app.

Available Profiles

Type to filter list...

- Analytics Cloud Integration User
- Analytics Cloud Security User
- Authenticated Website
- Authenticated Website
- Contract Manager
- Cross Org Data Proxy User
- Custom: Sales Profile

Selected Profiles

No Profiles selected

Back

Save & Finish

- To verify your changes, click the App Launcher, type School Management and select the School Management app.

Note:

1. App Launcher-Displays available apps.
2. App Name-Displays the current selected app.
3. Navigation menu-Displays the tabs available inside the app.

Milestone 4 – Fields:

What are fields?

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

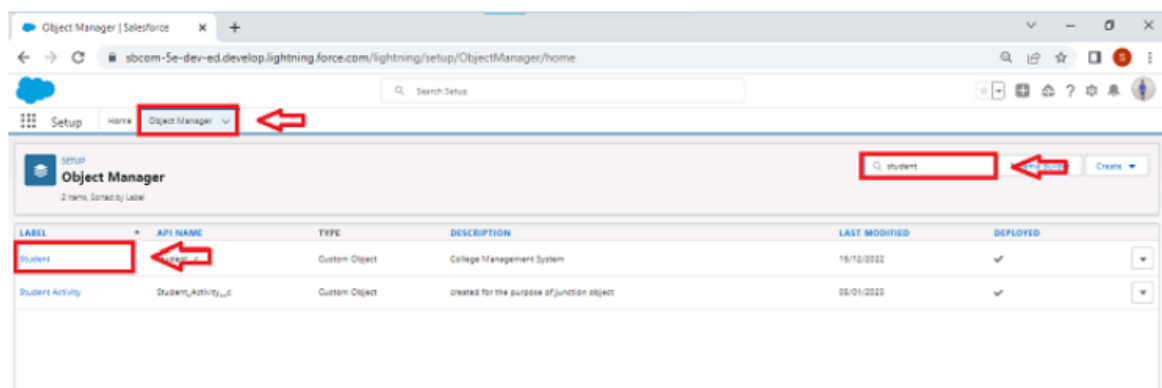
There are 2 types of fields in salesforce:

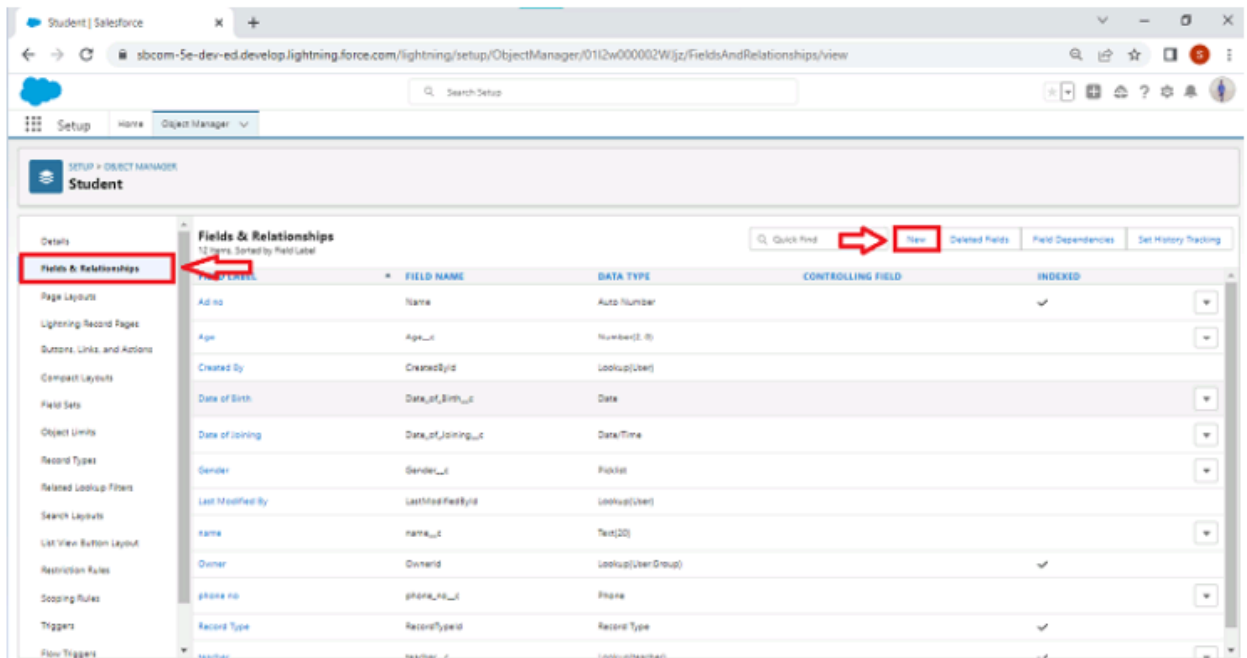
- Standard fields: There are four standard fields in every custom object that are Created By, Last Modified By, Owner, and the field created at the time of the creation of an object.
These fields cannot be deleted or edited and they are always required. For standard objects, the fields which are present by default in them and cannot be deleted from standard objects are standard fields.
- Custom fields: The Custom fields which are added by the administrator/developer to meet the business requirements of any organization. They may or may not be required.

Activity 1:

Creation of fields for the Event objects:

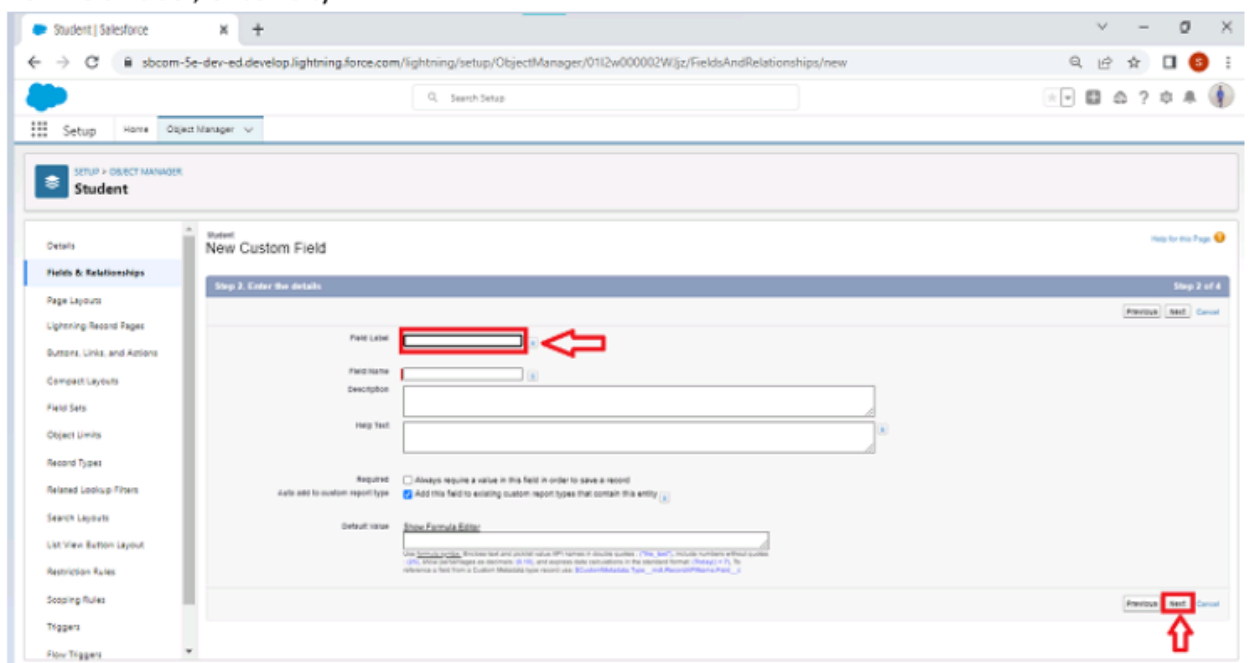
1. click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Event.
4. Select Fields & Relationships from the left navigation, and click New





Now we're ready to make a custom field. Let's do this!

5. Select the Text as the Data Type, then click Next.
6. For Field Label, enter City.



7. Click Next, Next, then Save & New.

Now let's create the other fields and we must choose the data types of the fields carefully. Let's have a look at it.

For example, a phone number is a number field. For that we need to select the phone as datatype.

Lets see this

1. Select the Date/time as the Data Type, then click Next.
2. For Field Label, enter Start Date.
3. Check the required check box.
4. Click Next, Next, then Save & New.
5. Similarly create a End Date field also

Activity 2:

Creation of fields for the Attendees objects:

1. Select the Auto number as the Data Type, then click Next.
2. For Field Label, enter Id.
3. Click Next, Next, then Save & New
4. Select the phone as the Data Type, then click Next.
5. For Field Label, Phone.
6. Click Next, Next, then Save & New.
7. Select the Email as the Data Type, then click Next.
8. For Field Label, enter Email.
9. Click Next, Next, then Save & New.
10. From Setup, click Object Manager and select Student.
11. Click Fields & Relationships, then New.
12. Select Picklist as the Data Type and click Next.
13. For Field Label enter Tickets.
14. Select Enter values, with each value separated by a new line and enter these values:
 - Premium
 - Gold
 - Silver
15. Click Next, Next, then Save & New

Activity 3:

Let's create a master-detail relationship with Event object

1. Select master-detail Relationship as the Data Type and click Next.
2. For Related to, enter Event.
3. Click Next.
4. For Field Label, Event Name.
5. Click Next, Next, Next and Save.

Activity 4:

Creation of fields for the Speakers objects:

1. Select the Text Area as the Data Type, then click Next.
2. For Field Label, enter Bio.
3. Click Next, Next, then Save & New.
4. Select the Email as the Data Type, then click Next.
5. For Field Label, e-mail.
6. Click Next, Next, then Save & New

Let's create a Look-up relationship with Event object

1. Select Look-up Relationship as the Data Type and click Next.
2. For Related to, enter Event.
3. Click Next.
4. For Field Label, Event Name.
5. Click Next, Next, Next and Save.

Activity 5:

Creation of fields for the Vendors objects:

1. Select the Email as the Data Type, then click Next.
2. For Field Label, e-mail.
3. Click Next, Next, then Save & New.
4. Select the phone as the Data Type, then click Next.
5. For Field Label, Phone.
6. Click Next, Next, then Save & New.
7. Select the Email as the Data Type, then click Next.
8. For Field Label, e-mail.
9. Click Next, Next, then Save & New
10. Select the Text as the Data Type, then click Next.
11. For Field Label, enter Service Provider.
12. Click Next, Next, then Save & New.
13. Select Look-up Relationship as the Data Type and click Next.
14. For Related to, enter Event.
15. Click Next.
16. For Field Label, Event Name.
17. Click Next, Next, Next and Save.

Milestone 5 – Profile:

What is a profile?

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

A profile can be assigned to many users, but user can be assigned single profile at a time.

Activity 1:

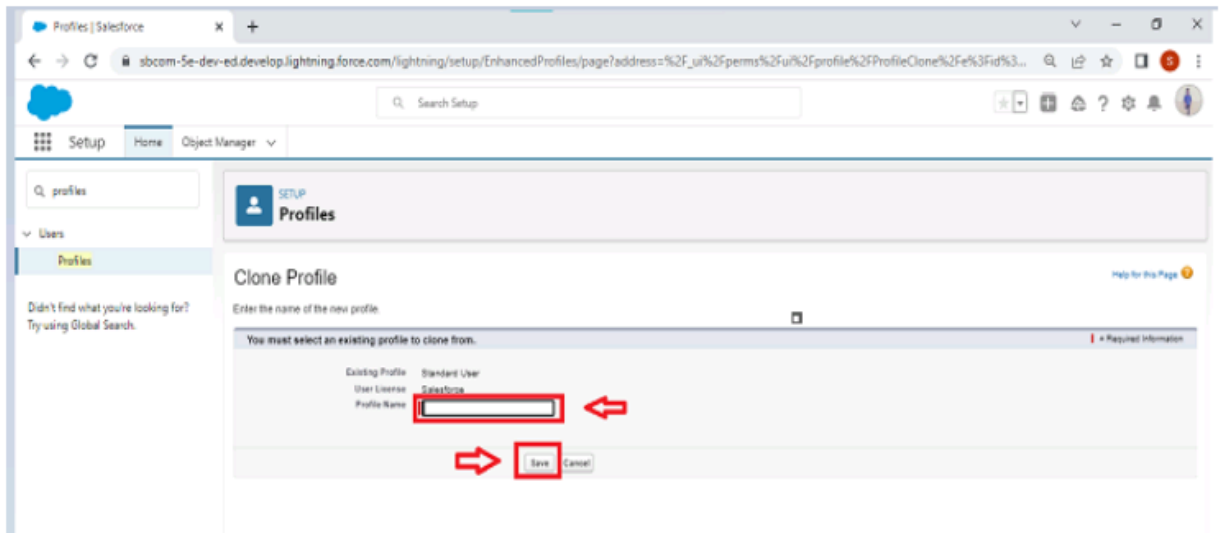
Creation on profile:

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.

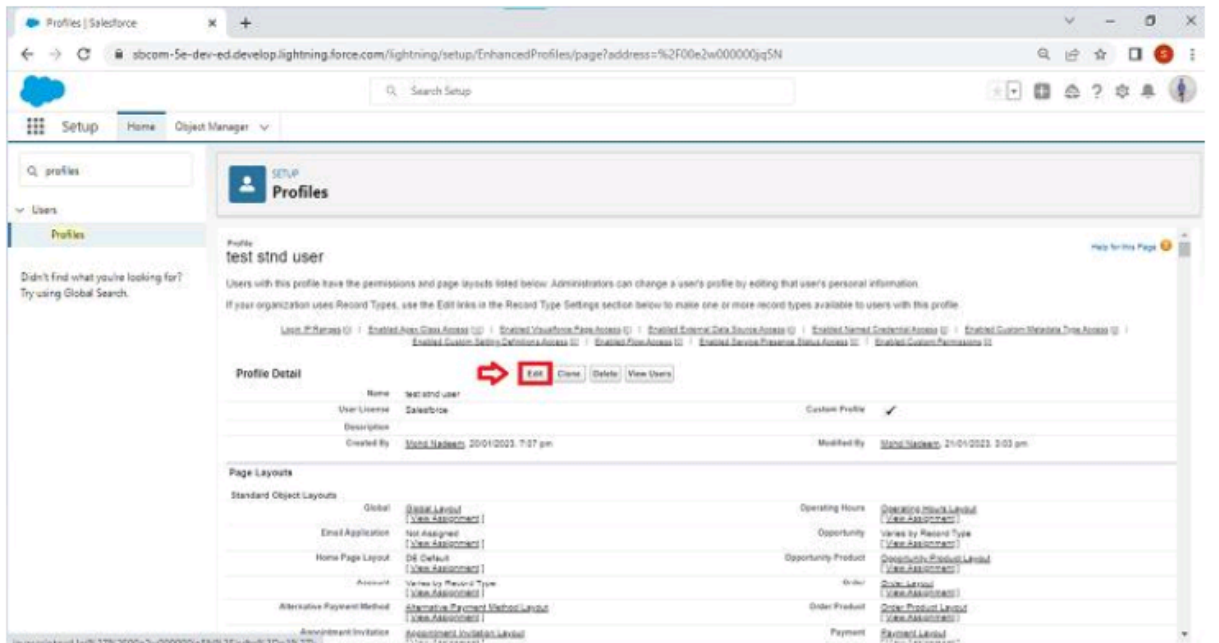
The screenshot shows the Salesforce Setup interface for Profiles. The left sidebar has a search bar with 'profiles' entered and the 'Profiles' link selected. The main content area shows a table of profiles with columns: Action, Profile Name, User License, and Custom. The 'Standard User' profile is highlighted, and the 'Clone' button next to it is also highlighted.

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

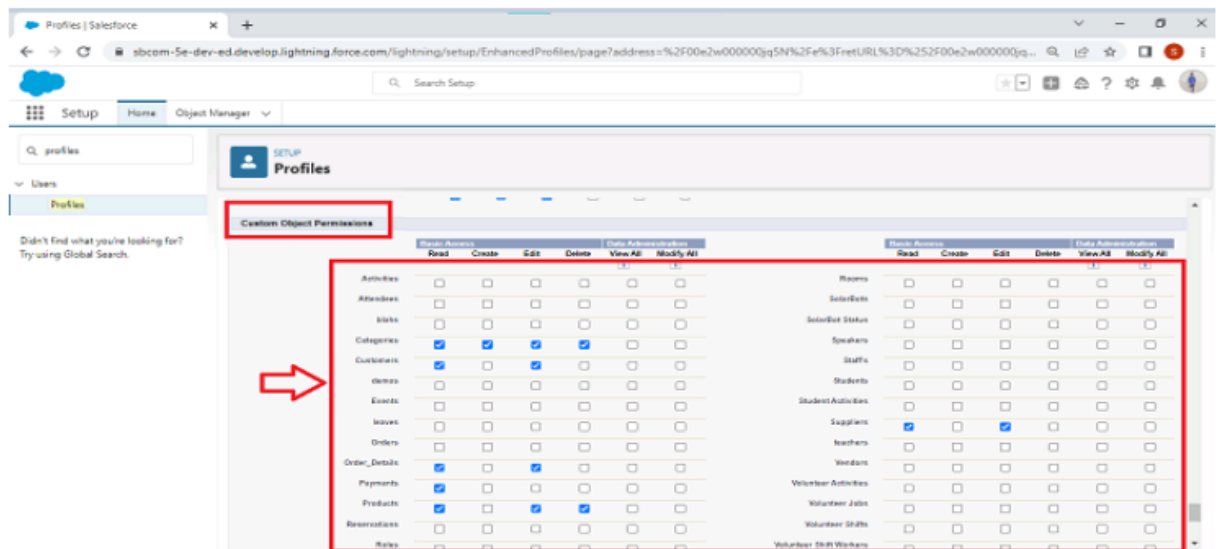
4. For Profile Name, enter Event user profile.
5. Click **Save**.



6. While still on the Event profile page, then click **Edit**.



7. Scroll down to Custom Object Permissions and Give view all access permissions to the Attendees, speakers and vendors.



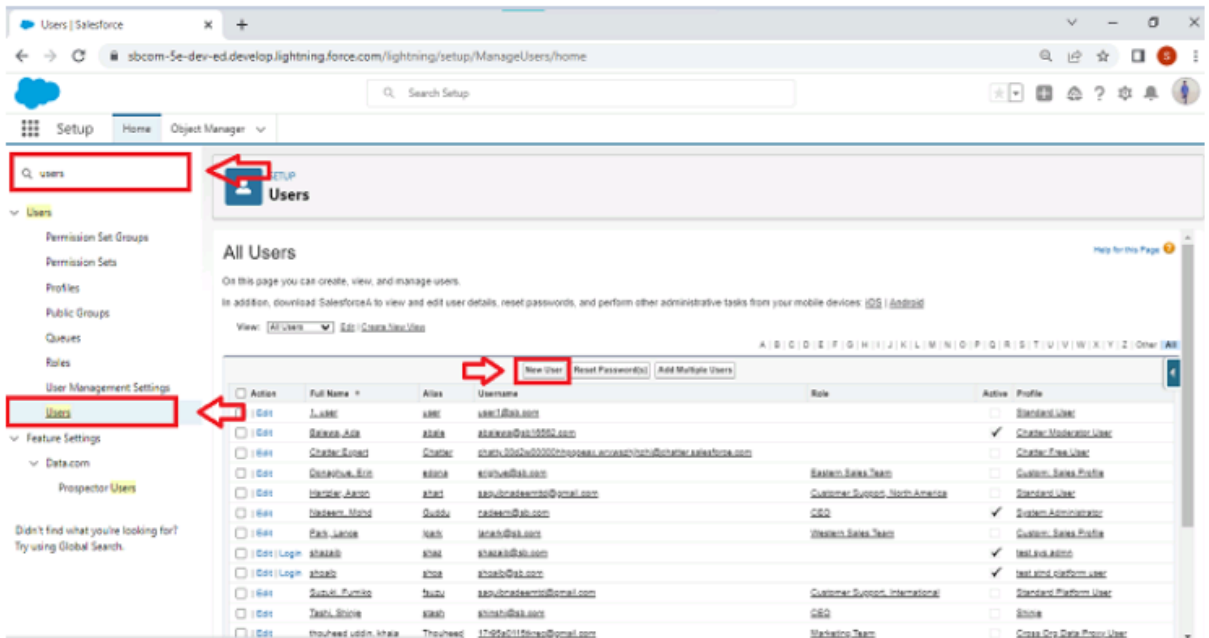
Activity 2:

Create a profile with the profile name as "Event 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.

Future studies

Downloaded from <http://ajphaphysocpharm.sagepub.com/> at 10:06 11 September 2014



- 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

Activity 2:

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: Rahu
- Email: provide your personal email id for future reference
- Username: rahulsharma@thesmartbridge.com
- Nickname: Rahu
- Role: leave it as default
- User License: Salesforce
- Profile: Event vendors profile

Milestone 7 – Permission sets:

What is a permission set?

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles. Create permission sets to grant access among logical groupings of users, regardless of their primary job function. For example, let's say you have several users who must delete and transfer leads. You can create a permission set based on the tasks that these users must perform and include the permission set within permission set groups based on job functions.

Activity 1:

Creating a Permission Set:

- From setup search "permission sets" in quick find and select **permission set** then click on **New**

The screenshot shows the Salesforce 'Permission Sets' setup page. Red boxes and arrows highlight the following elements:

- A search bar in the top left containing the text 'permission sets'.
- A red box around the 'Permission Sets' link in the left-hand navigation menu.
- A red box around the 'New' button located at the top of the main content area.

The main content area displays a list of existing permission sets. The table below represents the data shown in this list:

Action	Permission Set Label	Description	License
<input type="checkbox"/> Clone	Billing Portal		
<input type="checkbox"/> Clone	Buyer	Allows access to the store. Lets users see products and categories. ...	B2B Buyer Permission Set One Seat
<input type="checkbox"/> Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to manage carts a...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/> Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/> Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/> Clone	Contact Center Agent	Manage Service Cloud Voice contact centers that use Amazon Con...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that u...	Service Cloud Voice User
<input type="checkbox"/> Clone	Experience Profile Manager		Salesforce
<input type="checkbox"/> Clone	Facility Manager	Lets users create, read, edit, and delete locations, subscriptions, que...	Facility Manager
<input type="checkbox"/> Clone	Field Service Mobile	Give your mobile workforce access to the Field Service mobile app. ...	Field Service Mobile
<input type="checkbox"/> Clone	Merchant Admin	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Seat
<input type="checkbox"/> Clone	Order Management Agent	Read Access to all entities enabled by Order Management	Lightning Order Management User

- Enter label as: Event Permits and Save.

Permission Sets | Salesforce

sbcom-5e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp

Setup Home Object Manager

permission sets

Users

Permission Sets

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

Permission Set Create

Save Cancel

Enter permission set information

Label

API Name

Description

Session Activation Required ☐

Select the type of users who will use this permission set

Who will use this permission set?

- Choose "None" if you plan to assign this permission set to multiple users with different user and permission set licenses.
- Choose a specific user license if you want users with only one license type to use this permission set.
- Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

Not sure what a permission set license is? [Learn more here.](#)

License

Save Cancel

- After saving the permission click on the Manage assignment

Permission Sets | Salesforce

sbcom-5e-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2FDP52w000006svw7

Setup Home Object Manager

permission sets

Users

Permission Sets

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

Permission Set teacher permission

Find Settings... Clone Delete Edit Properties **Manage Assignments**

Permission Set Overview

Description	API Name teacher_permission
License	Namespace Profile
Session Activation Required <input type="checkbox"/>	Created By Mehdi Naderi 23/01/2023, 2:26 pm
Last Modified By Mehdi Naderi 23/01/2023, 2:28 pm	

Apps

Assigned Areas
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"

Open Class Access
Permissions to enable Apex classes

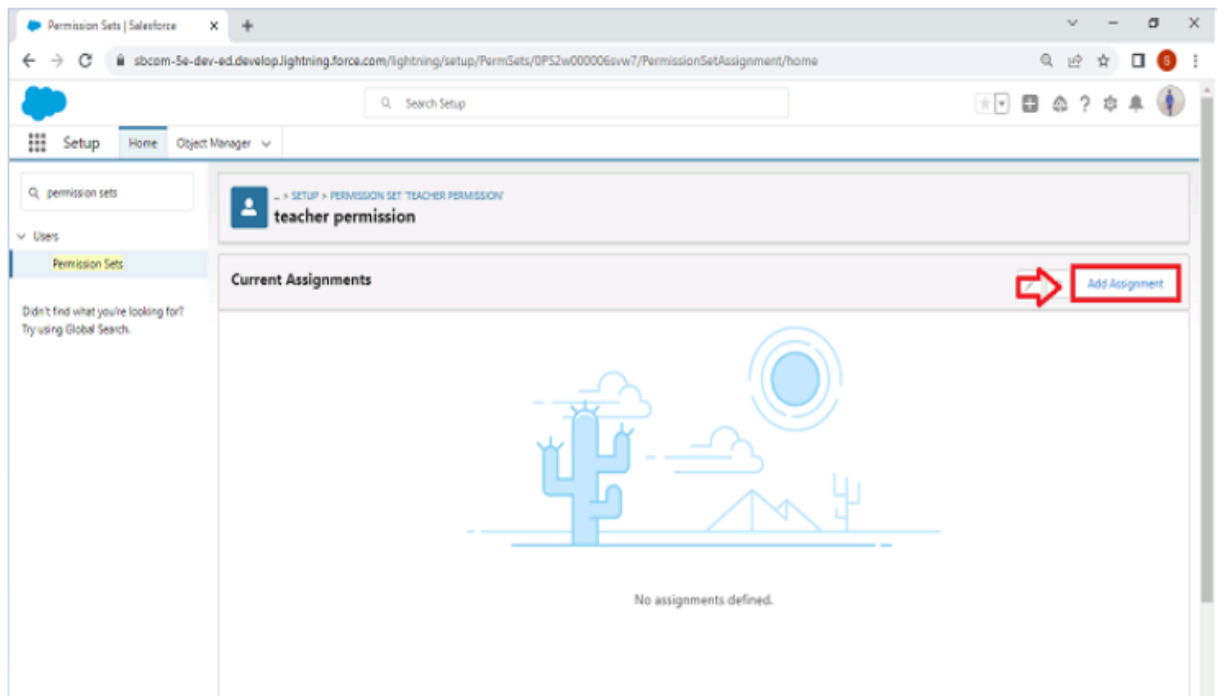
Visualforce Page Access
Permissions to enable Visualforce pages

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform

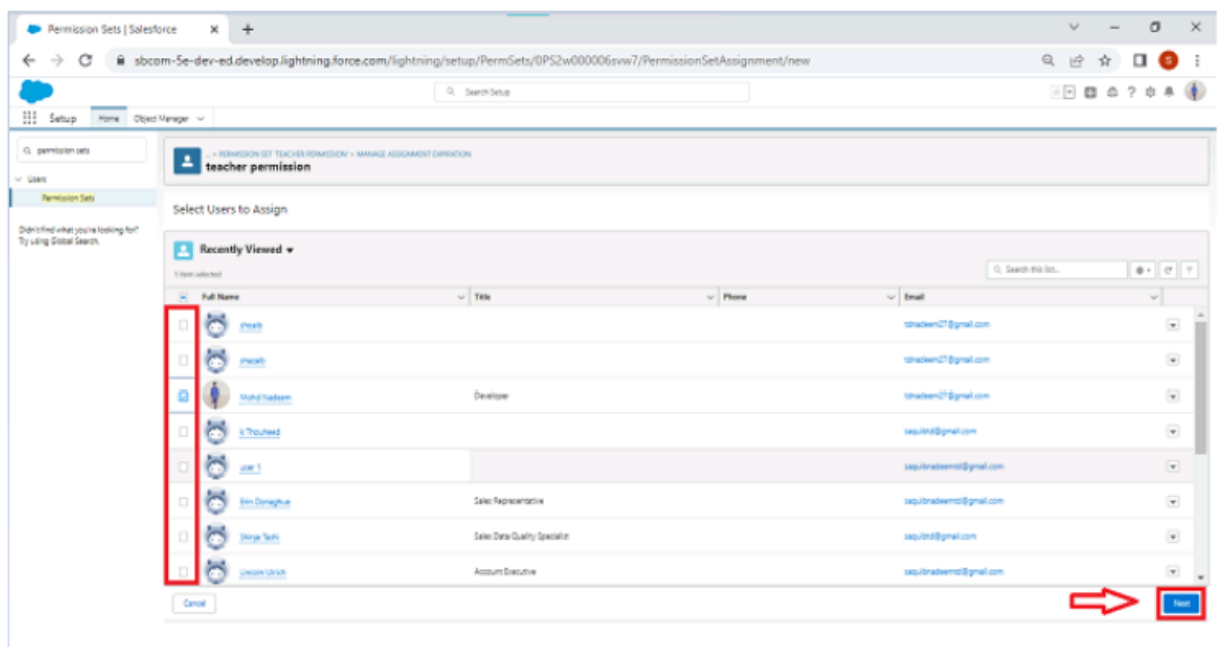
Learn More

External Data Source Access

- Now click on the Add Assignment



- Now select the users and click on save



Activity 2:

- From setup search “permission sets” in quick find and select **permission set** then click on **New**
- Enter label as: Vendor Permits and Save.
- After saving the permission click on the Manage assignment
- Now click on the Add Assignment
- Now select the users and click on save

Milestone 8 - Reports

What are Reports?

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

There are 4 types of report formats in Salesforce:

1. Tabular Reports:

This is the most basic report format. It just displays the row of records in a table with a grand total. While easy to set up they can't be used to create groups of data or charts and also cannot be used in Dashboards. They are mainly used to generate a simple list or a list with a grand total.

2. Summary Reports:

It is the most commonly used type of report. It allows grouping of rows of data, view subtotal, and create charts.

3. Matrix Report:

It is the most complex report format. Matrix report summarizes information in a grid format. It allows records to be grouped by both columns and rows. It can also be used to generate dashboards. Charts can be added to this type of report.

4. Joined Reports:

These types of reports let us create different views of data from multiple report types. The data in joined reports are organized in blocks. Each block acts as a subreport with its own fields, columns, sorting, and filtering. They are used to group and show data from multiple report types in different views.

Report types:

Report type determines which set of records will be available in a report. Every report is based on a particular report type. The report type is selected first when we create a report. Every report type has a primary object and one or more related objects. All these objects must be linked together either directly or indirectly.

- A report type cannot include more than 4 objects.
- Once a report is created its report type cannot be changed.

There are 2 types of report types:

1. Standard Report Types:

Standard Report Types are automatically included with standard objects and also with custom objects where “Allow Reports” is checked.

Standard report types cannot be customized and automatically include standard and custom fields for each object within the report type. Standard report types get created when an object is created, also when a relationship is created.

Note: Standard report types always have inner joins.

2. Custom Report Types:

Custom report types are reporting templates created to streamline the reporting process. Custom Reports are created by an administrator or User with “Manage Custom Report Types” permission. Custom report types are created when standard report types cannot specify which records will be available on reports.

In custom report types we can specify objects which will be available in a particular report. The primary object must have a relationship with other objects present in a report type either directly or indirectly.

There are 3 types of access levels of folders:

1. Viewer:

With this access level, users can see the data in a report but cannot make any changes except cloning it into a new report.

2. Editor:

With this access level, users can view and modify the reports it contains and can also move them to/from any other folders they have access level as Editor or Manager.

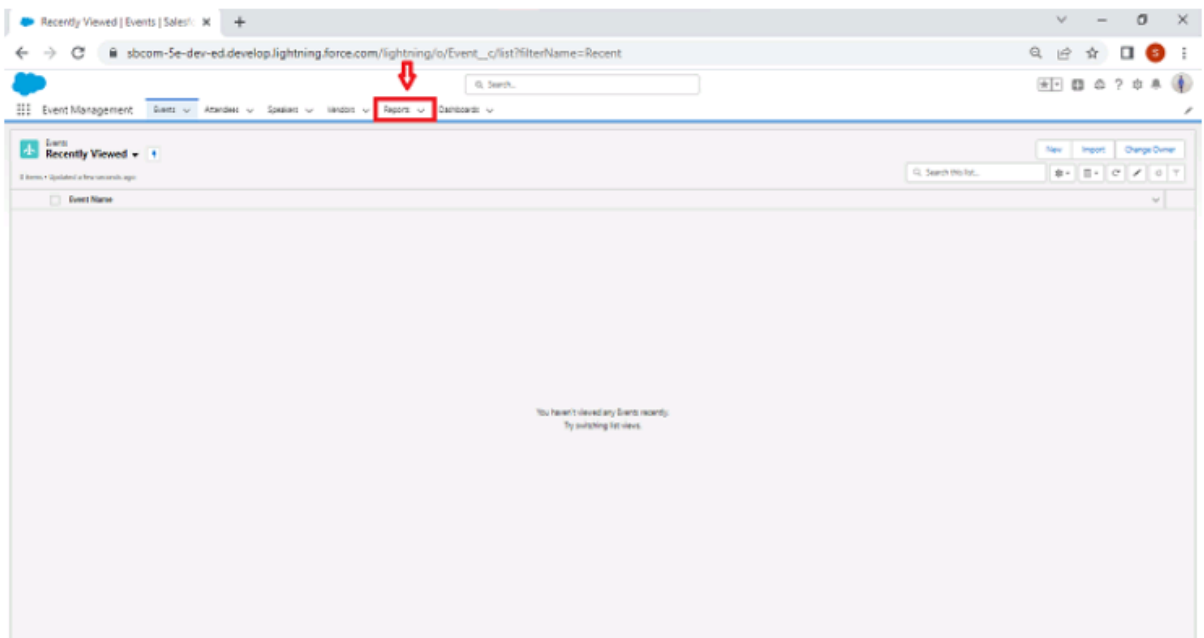
3. Manager:

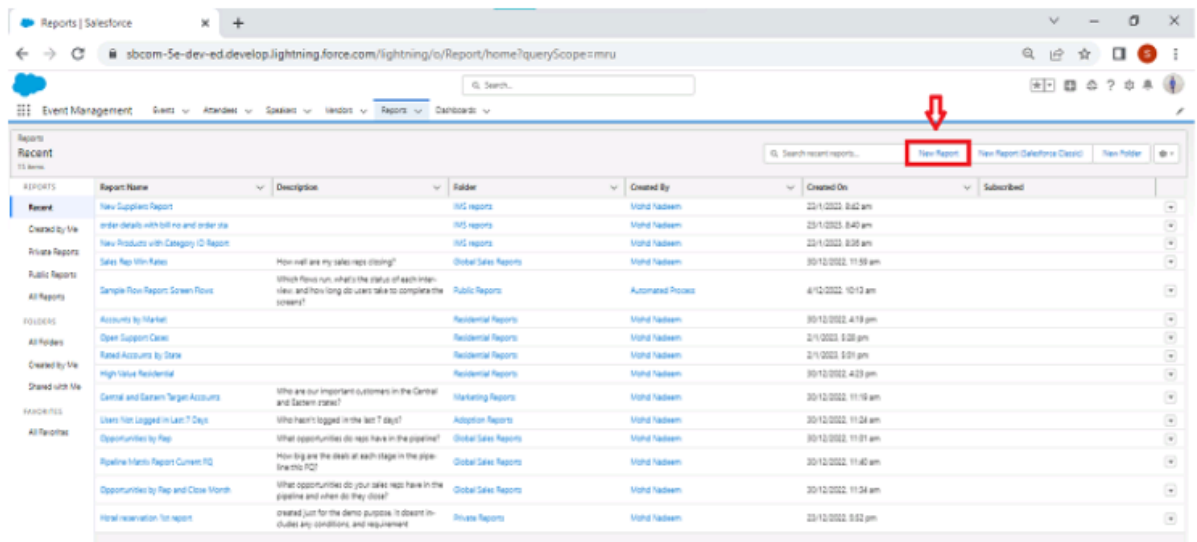
With this access level, users can do everything Viewers & Editors can do, plus they can also control other user's access levels to this folder. Also, users with Manager Access levels can delete the report.

Activity

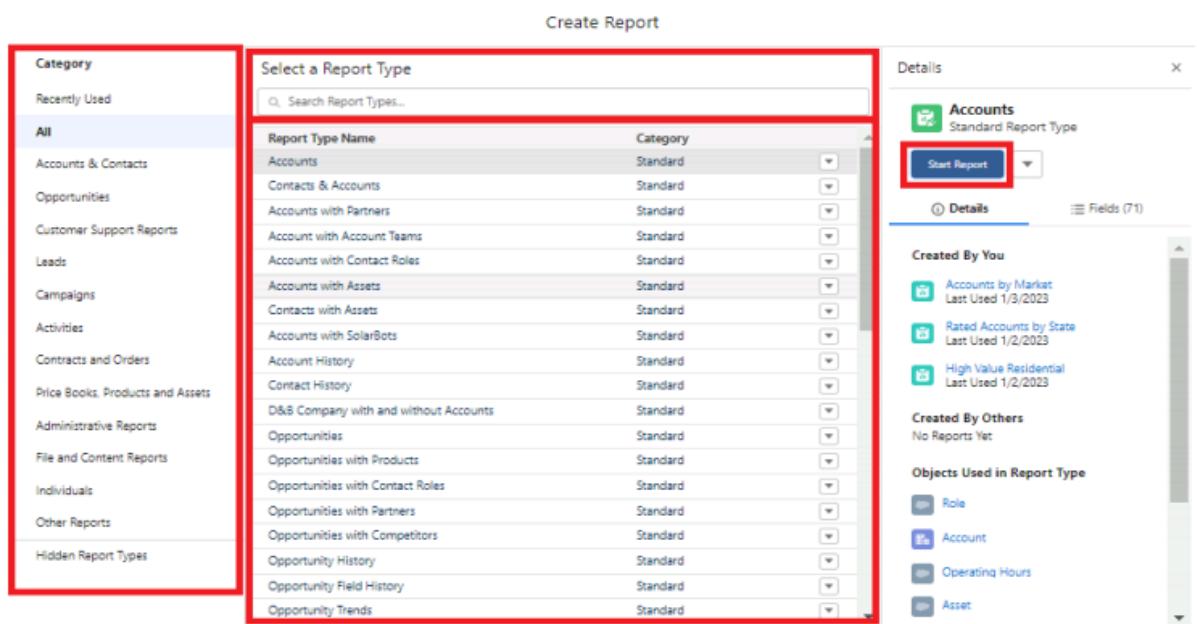
Creating a Report:

1. From the Reports tab, click New Report.





2. Select the report type Attendees with events for the report, and click Create.



3. Customize your report accordingly and include all fields, then save or run it.

