

# Problem Statement: Salesforce Event Registration & Feedback App

Event management is a critical function for organizations, institutions, and communities. Whether it's workshops, seminars, conferences, or social gatherings, each event involves multiple moving parts — from planning and promotion to attendee registration, communication, and post-event feedback. Despite its importance, most small and mid-sized organizations still rely on a patchwork of spreadsheets, emails, and third-party forms to handle these tasks.

This fragmented approach creates several challenges:

## 1. Inefficient Registration Processes

Attendee registration is often handled manually or through separate online forms with no direct integration into a centralized system. This results in scattered data, duplicate entries, and inconsistent attendee information.

Organizers spend hours cleaning up and merging spreadsheets before each event.

## 2. Inconsistent and Delayed Communication

Sending confirmation emails, reminders, or updates to attendees is usually done manually. When reminders go out late — or not at all — attendees miss important details, and engagement drops. This reduces the professionalism and reliability of the event experience.

## 3. Disconnected Feedback Collection

Feedback forms are typically created in external tools (Google Forms, SurveyMonkey, etc.), which are disconnected from attendee records. Analyzing this feedback requires manual data export and compilation. This not only wastes time but also delays insights that could improve future events.

## 4. Lack of Real-Time Insights and Reporting

Because all these functions are spread across different tools, organizers cannot see real-time attendance numbers, engagement metrics, or feedback summaries in one place. Management loses out on actionable insights, and event quality stagnates over time.

## 5. Impact on Attendee Experience

Disorganized registration, poor communication, and slow feedback handling leave attendees with a fragmented and unprofessional impression of the event. This can reduce repeat attendance, lower satisfaction scores, and harm the organization's reputation.

## The Need for a Unified System

Organizations need a single, integrated platform that manages all aspects of event organization — registration, communication, and feedback — in one place. Such a system should automate repetitive tasks

(like confirmation and reminder emails), store all data in a centralized database, and provide dashboards for instant analytics.

### **This Project Provides the Solution**

The Salesforce Event Registration & Feedback App addresses all these challenges by:

- Centralizing event, attendee, and feedback data within Salesforce.
- Automating registration confirmations, pre-event reminders, and post-event feedback requests.
- Allowing feedback to be directly linked to attendee and event records.
- Providing organizers with real-time reports and dashboards to measure attendance, engagement, and satisfaction.
- Optionally integrating AI to analyze feedback sentiment and summarize comments automatically.

This unified system reduces manual work, eliminates errors, speeds up communication, and improves the attendee experience — all while giving organizers powerful analytics to refine future event.

# Phase 2 (Org Setup) Work Completed

## 1. Salesforce Org Access & Preliminary Configuration

- Successfully logged in to the Salesforce Developer Org.
- Verified administrative access through the Setup (■) interface.

## 2. Company Information, Locale, and Time Zone

- Navigated to Setup > Company Settings > Company Information.
- Reviewed and updated Company Name, Default Locale, Default Language, Default Time Zone, and Default Currency.
- Ensured alignment of system time, reporting, and email communications with organizational settings.

## 3. Email Deliverability & Org-Wide Email Address

- Configured Setup > Email > Deliverability to 'All Email' to enable outbound messaging.
- Created and verified an Org-Wide Email Address (noreply@yourorg.com) for standardized communications.

## 4. Business Hours and Holiday Configuration

- Defined Business Hours (Monday–Friday, 09:00–18:00).
- Configured sample holidays under Setup > Company Settings > Business Hours / Holidays.

## 5. My Domain Configuration

- Registered and deployed My Domain: orgfarm-d7ad62acc7-dev-ed (partitioned enhanced domains).
- Enabled secure login, Experience Cloud compatibility, and improved URL management.

## 6. Experience Cloud Enablement

- Activated Digital Experiences via Setup > Digital Experiences > Settings.
- Created an initial site framework 'Event Portal' using an available template.

## 7. Role Hierarchy Implementation

- Created a structured Role Hierarchy: Manager (top-level), Organizer (reports to Manager), Support/Viewer (optional).
- Established clear data visibility and sharing policies.

## 8. Permission Set Creation

- Developed Permission Sets to manage access control:
- Organizer Access – Full CRUD on Event, Attendee, and Feedback.
- Manager Access – Read/Report access to all objects with analytics capabilities.
- Assigned permission sets to test users accordingly.

## 9. Profiles and Test Users

- Utilized the Standard User profile for typical users.
- Created test users (organizer1@..., manager1@...) with Salesforce licenses and assigned appropriate permission sets.

## 10. Organization-Wide Defaults & Sharing Settings

- Configured Setup ▢ Security ▢ Sharing Settings: Event, Attendee, and Feedback objects set to 'Private'.
- Established Sharing Rules to grant Manager/Organizer appropriate record access.

## 11. Public Group Creation

- Created 'Organizers Group' to simplify Sharing Rule management.

## 12. Guest User Configuration (Experience Site)

- Configured the Guest User Profile for the 'Event Portal' site with minimum required Read/Create permissions.

## 13. Lightning App Creation

- Developed a Lightning App titled 'Event Manager'.
- Added navigation tabs for Events, Attendees, Feedback, Reports, and Dashboards.

## 14. Reporting & Dashboard Structure

- Created folders 'Event Reports' and 'Event Dashboards'.
- Applied folder-level sharing with the Manager role.

## 15. Login Access Policies

- Temporarily enabled 'Administrators can log in as any user' for testing.

## 16. Sample Data Import

- Used Setup ▾ Data ▾ Data Import Wizard to import sample Event and Attendee data for testing.

## 17. Validation Testing

- Organizer created an Event.
- Manager viewed and reported on Events.
- Guest User registered as Attendee and submitted Feedback.
- Verified Permission Sets and Sharing Rules functioning as intended.

## 18. Dev Hub (Optional)

- Dev Hub not enabled yet; planned for SFDX integration at a later phase.

## Summary of Deliverables (Phase 2)

- Comprehensive configuration of the Salesforce Developer Org aligned with project requirements.
- Creation of a secure, role-based, and permission-controlled environment.
- Initial Experience Cloud site setup for future attendee interaction.
- Development of the 'Event Manager' Lightning App with reporting and dashboards.
- Successful validation of configurations using test users and sample data.



SETUP

## Business Hours

If you enter blank business hours for a day, that means your organization does not operate on that day.

### Business Hours Edit

Save

Cancel

#### Step 1. Business Hours Name

! \* = Required Information

Business Hours Name

Management and Review Time

Use these business hours as the default



Active



#### Step 2. Time Zone

Time Zone

(GMT+05:30) India Standard Time (Asia/Kolkata) ▼

#### Step 3. Business Hours

Sunday	12:00 AM	to	12:00 AM	<input checked="" type="checkbox"/> 24 hours
Monday	9:00 AM	to	10:00 PM	<input type="checkbox"/> 24 hours
Tuesday	9:00 AM	to	10:00 PM	<input type="checkbox"/> 24 hours
Wednesday	9:00 AM	to	10:00 PM	<input type="checkbox"/> 24 hours
Thursday	9:00 AM	to	10:00 PM	<input type="checkbox"/> 24 hours
Friday	9:00 AM	to	10:00 PM	<input type="checkbox"/> 24 hours
Saturday	9:00 AM	to	10:00 PM	<input type="checkbox"/> 24 hours

Save

Cancel



## ▼ Company Settings

Business Hours

## ▼ Calendar Settings

Public Calendars and  
ResourcesCompany Information

Data Protection and Privacy

Fiscal Year

Holidays

Language Settings

My Domain

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

SETUP

## Company Information

Company Information

## Gyan ganga Institute of Technology and Sciences

The organization's profile is below.

Help for this Page ?

[User Licenses \(10+\)](#) | [Permission Set Licenses \(10+\)](#) | [Feature Licenses \(11\)](#) | [Usage-based Entitlements \(10+\)](#)

## Organization Detail

[Edit](#)

Organization Name	Gyan ganga Institute of Technology and Sciences	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (United States)
Address	United States	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (United States) - USD
Enable Data Translation	<input type="checkbox"/>	Used Data Space	342 KB (7%) <a href="#">[View]</a>
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) <a href="#">[View]</a>
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	0 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00DgK00000Bqbjj
		Organization Edition	Developer Edition
		Instance	CAN96

Created By [OrgFarm EPIC](#), 9/16/2025, 8:30 PMModified By [OrgFarm EPIC](#), 9/20/2025, 11:26 PM[Edit](#)

# Phase -3

## Salesforce Custom Objects, Fields, Layouts, and Testing

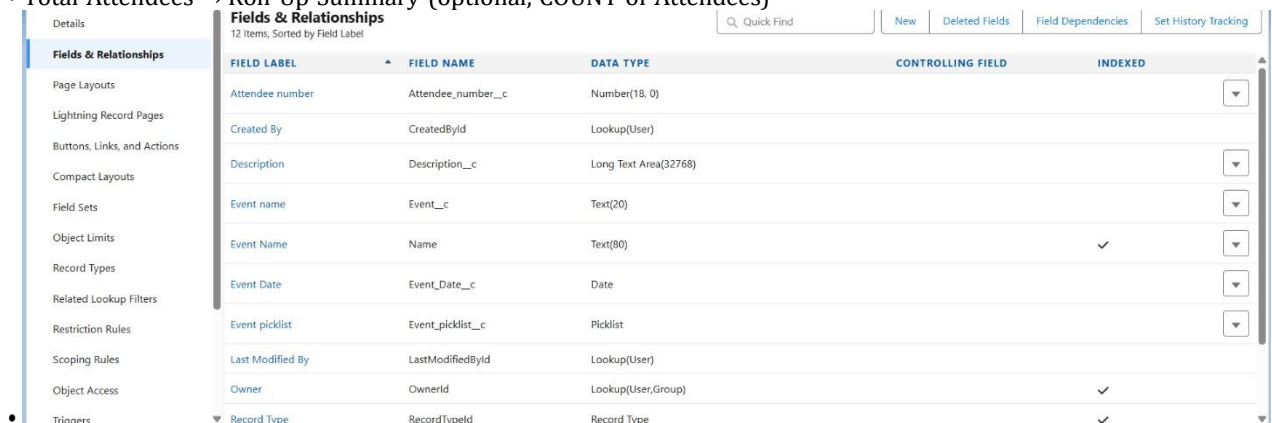
### 1. Custom Objects Creation

- Go to Setup → Object Manager → Create → Custom Object.
- Create Event object:
  - Label: Event
  - Plural Label: Events
  - Record Name: Event Name (Text)
  - Optional: enable Reports, Activities, Track Field History, etc.
- Repeat for Attendee and Feedback objects:
  - Attendee: Label Attendee, Plural Attendees, Record Name Attendee Name (Text)
  - Feedback: Label Feedback, Plural Feedbacks, Record Name Feedback Name (Auto Number or Text)

### 2. Add Fields & Relationships

#### Event Object Fields

- Event Name → Text (already created as Record Name)
- Event Date → Date
- Venue → Text
- Description → Long Text Area
- Total Attendees → Roll-Up Summary (optional, COUNT of Attendees)



The screenshot shows the 'Fields & Relationships' section for the 'Event' object in Salesforce. The left sidebar contains navigation links: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Object Access, and Triggers. The main content area displays a table of fields with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table lists 12 items, sorted by Field Label. The fields are: Attendee number (Number(18, 0)), Created By (Lookup(User)), Description (Long Text Area(32768)), Event name (Text(20)), Event Name (Text(80)), Event Date (Date), Event picklist (Picklist), Last Modified By (Lookup(User)), Owner (Lookup(User,Group)), and Record Type (Record Type).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Attendee number	Attendee_number__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Description	Description__c	Long Text Area(32768)		
Event name	Event__c	Text(20)		
Event Name	Name	Text(80)		✓
Event Date	Event_Date__c	Date		
Event picklist	Event_picklist__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Record Type	RecordTypeId	Record Type		✓

#### Attendee Object Fields

- Attendee Name → Text (Record Name)
- Email → Email
- Phone → Phone
- Event → Master-Detail Relationship to Event



Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Attendee

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Fields & Relationships

9 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
Attendee Name	Attendee_Name__c	Text(50)		
Attendee Name	Name	Text(80)		✓
Check-In Status	Check_In_Status__c	Picklist		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email (External ID)		✓
Event	Event__c	Master-Detail(Event)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Phone	Phone__c	Phone		
Ticket Type	Ticket_Type__c	Picklist		

## Feedback Object Fields

- Feedback Name → Auto Number (Record Name)
- Rating → Number or Picklist
- Comments → Long Text Area
- Attendee → Lookup to Attendee
- Event → Lookup to Event

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

9 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
Attendee	Attendee__c	Lookup(Attendee)		✓
Comments	Comments__c	Long Text Area(32768)		
Created By	CreatedById	Lookup(User)		
Event	Event__c	Lookup(Event)		✓
Feedback Name	Name	Text(80)		✓
Feedback Title	Feedback_Title__c	Text(50)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Rating	Rating__c	Number(18, 0)		

## 3. Page Layouts

### Event Layout

- Fields: Event Name, Event Date, Venue, Description, Total Attendees
- Related Lists: Attendees, Feedback

## Attendee Layout

- Fields: Attendee Name, Email, Phone, Event
- Related List: Feedback

## Feedback Layout

- Fields: Feedback Name, Rating, Comments, Event, Attendee

## 4. Compact Layouts

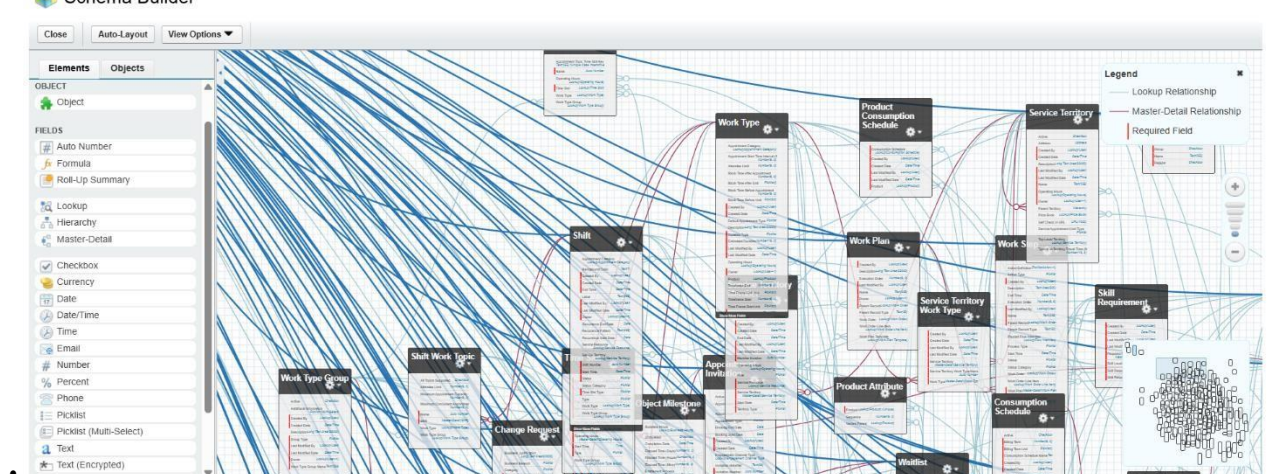
- Event: Event Name, Event Date, Venue
- Attendee: Attendee Name, Email, Event
- Feedback: Feedback Name, Rating, Attendee, Event
- Set each as Primary Compact Layout

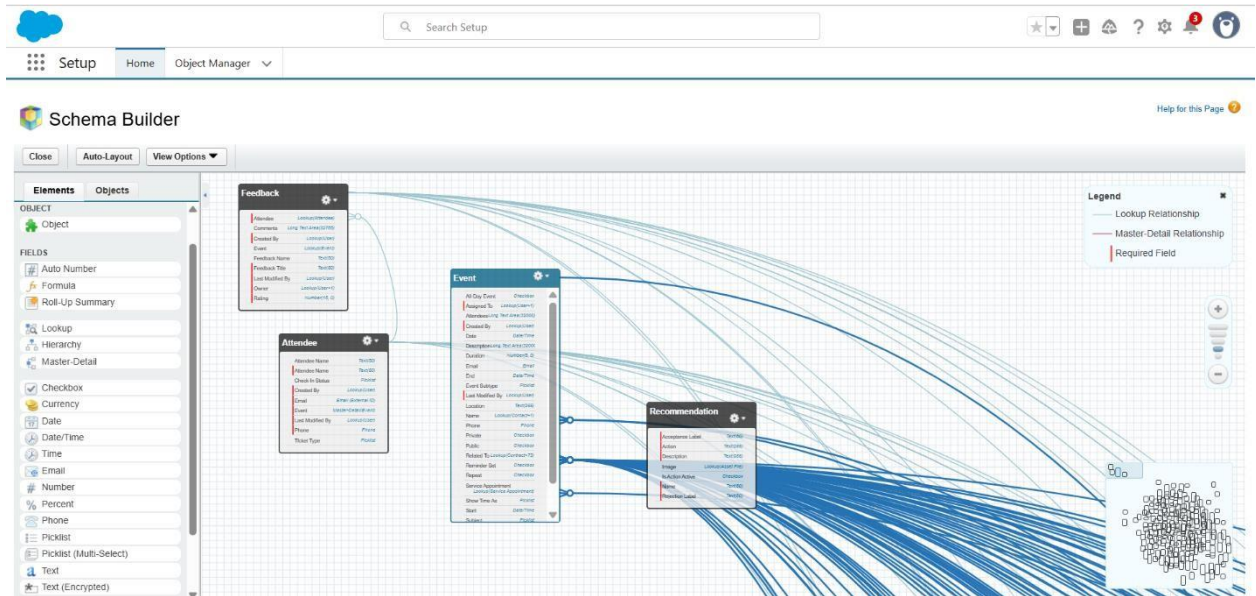
## 5. Record Types (Optional)

- Create Public Event Record Type for Event object
- Clone from Master layout
- Enable for required profiles
- Assign appropriate Page Layout

## 6. Schema Builder

- Go to Setup → Schema Builder
- Select Event, Attendee, Feedback objects
- Check relationships:
- Attendee → Event (Master-Detail)
- Feedback → Event / Attendee (Lookup)
- Verify Roll-Up Summary field on Event → Total Attendees














## 7. Testing & Verification

- App Launcher → Event tab → New Event record → Fill details → Save
- Attendee tab → New Attendee → Select Event → Save
- Feedback tab → New Feedback → Select Attendee + Event → Save
- Verify Page Layouts and Related Lists


The Developer Edition interface shows the 'Feedback' record details for 'Rajveer'. The top navigation bar includes buttons for 'New Contact', 'Edit', and 'New Opportunity'. The main content area displays the 'Details' tab with fields for Feedback Name, Feedback Title, Event, Attendee, Rating, and Comments. The 'Related' section shows a list of related records, including 'Wedding' and 'Rajveer'. The bottom of the page shows the 'Created By' and 'Last Modified By' information, both attributed to 'Vibhuti Shivhare'.




Developer Edition

Welcome


Attendee  
**Rajveer**

[New Contact](#)
[Edit](#)
[New Opportunity](#)

Related

Details

Attendee Name

Rajveer

Attendee Name

Rajveer

Email

rajveer@gamil.com

Event

Wedding

Phone

(900) 002-0068


Ticket Type

Other


Check-In Status


Other


Created By


Vibhuti Shivhare  
9/23/2025, 1:49 AM


Last Modified By


Vibhuti Shivhare  
9/23/2025, 1:49 AM




Developer Edition

Welcome


Event  
**Wedding**

Related

Details

Event Name

Wedding

Event name

Wedding

Event Date

9/22/2025

Event picklist

Other

Attendee number

150

Venue


XYZ

Description ⓘ


\*Total Attendees

0


Created By


Vibhuti Shivhare  
9/23/2025, 1:46 AM

Owner


Vibhuti Shivhare

Last Modified By


Vibhuti Shivhare  
9/23/2025, 1:46 AM

## Phase 4: Process Automation (Admin)

This phase covers automating business processes in Salesforce using admin tools like Validation Rules, Workflow Rules, Process Builder, Flow Builder, and more.

### Validation Rules

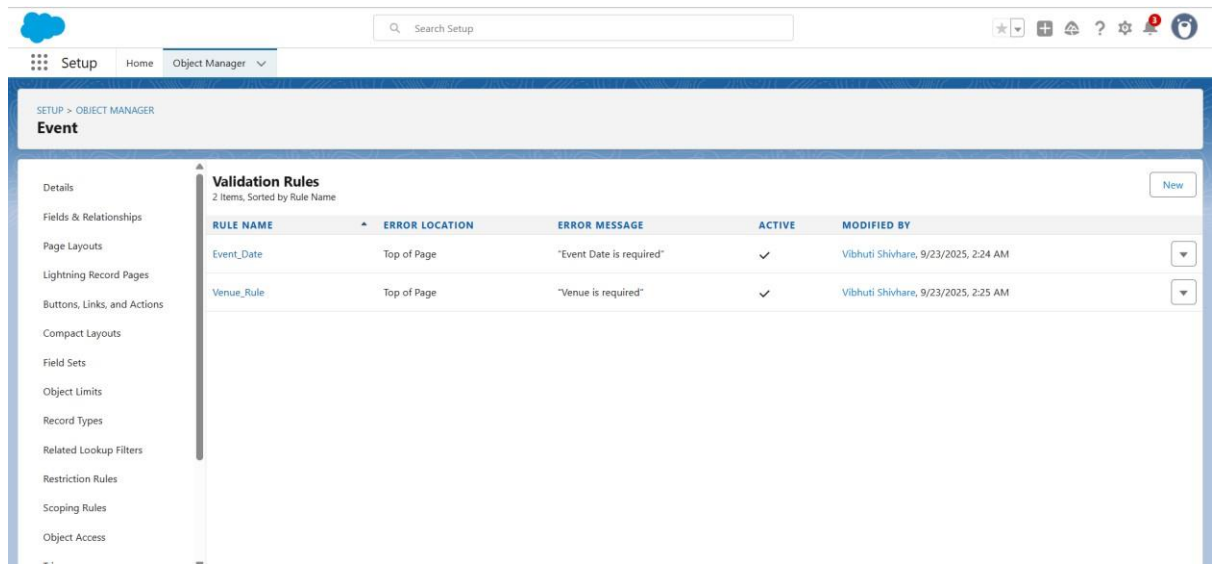
**Purpose:** Ensure data integrity by enforcing specific criteria before a record is saved.

**Key Points:**

- Use formulas to define conditions.
- Display error messages when validation fails.
- Example: Ensure End\_Date\_\_c is after Start\_Date\_\_c.

**Steps to Create:**

1. Go to **Setup** → **Object Manager** → **[Object]** → **Validation Rules**.
2. Click **New**.
3. Enter **Rule Name** and **Description**.
4. Define the **Error Condition Formula**.
5. Enter **Error Message** and location (field-level or top of page).
6. Save and activate.



The screenshot displays the Salesforce Setup interface, specifically the Object Manager section. It shows two tabs: 'Attendee' and 'Feedback'. Both tabs display a list of Validation Rules. The 'Attendee' tab shows four rules, and the 'Feedback' tab shows four rules. Each rule is listed with its name, error location, error message, active status, and modified by information.

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Attendee_Name	Top of Page	"Attendee Name is required"	✓	Vibhuti Shivhare, 9/23/2025, 2:36 AM
Email_required	Top of Page	"Email is required"	✓	Vibhuti Shivhare, 9/23/2025, 2:36 AM
Event_must_be_selected	Top of Page	"Attendee must be associated with an Event"	✓	Vibhuti Shivhare, 9/23/2025, 2:37 AM
Phone_number_required	Top of Page	"Phone Number is required"	✓	Vibhuti Shivhare, 9/23/2025, 2:39 AM

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Attendee	Top of Page	"Feedback must be associated with an Attendee"	✓	Vibhuti Shivhare, 9/23/2025, 2:45 AM
Event	Top of Page	"Feedback must be associated with an Event"	✓	Vibhuti Shivhare, 9/23/2025, 2:44 AM
Feedback_Title_required	Top of Page	"Feedback Title is required"	✓	Vibhuti Shivhare, 9/23/2025, 2:42 AM
Rating	Top of Page	"Rating must be between 1 and 5"	✓	Vibhuti Shivhare, 9/23/2025, 2:43 AM

## Workflow Rules

**Purpose:** Automate standard internal processes like sending emails, updating fields, or creating tasks based on record criteria.

### Components:

- **Rule Criteria:** When the workflow triggers.
- **Workflow Actions:** Email Alerts, Field Updates, Tasks, Outbound Messages.

### Steps to Create:

1. Go to **Setup → Workflow Rules**.
2. Click **New Rule** → Select Object → Next.
3. Define **Rule Criteria**.
4. Add **Workflow Actions**.



5. Save and **Activate**.

SETUP

Workflow Rules

Workflow Rule

WF\_Event\_NotifyManager

Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with workflow rules — and more! Salesforce plans to retire workflow rules and recommends building automation in Flow Builder. [Tell Me More](#) | [Migrate your workflow rules to flows](#)

Workflow Rule Detail

EditCloneDeactivate

Rule Name	WF_Event_NotifyManager	Object	Event
Active	✓	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description			
Rule Criteria	(Event: Event Name EQUALS Conference) AND (Event: Event picklist EQUALS Conference) AND (Event: Venue EQUALS Auditorium) AND (Event: Total Attendees GREATER THAN 0)		
Created By	Vibhuti Shivhare, 9/23/2025, 10:39 AM	Modified By	Vibhuti Shivhare, 9/24/2025, 12:58 AM

Workflow Actions

Edit

Immediate Workflow Actions

Type	Description
Email Alert	Sends an email to the Event Manager when a new Conference Event__c record is created, including Event Name, Event Date, Venue, and Total Attendees.
Field Update	Update Event Status

Time-Dependent Workflow Actions

[See an example](#)

SETUP

Workflow Rules

Workflow Rule

WF\_Attendee\_Confirmation

Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with workflow rules — and more! Salesforce plans to retire workflow rules and recommends building automation in Flow Builder. [Tell Me More](#) | [Migrate your workflow rules to flows](#)

Workflow Rule Detail

EditCloneDeactivate

Rule Name	WF_Attendee_Confirmation	Object	Attendee
Active	✓	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description			
Rule Criteria	Attendee: Attendee Name EQUALS Conference		
Created By	Vibhuti Shivhare, 9/23/2025, 11:38 AM	Modified By	Vibhuti Shivhare, 9/24/2025, 1:07 AM

Workflow Actions

Edit

Immediate Workflow Actions

Type	Description
Email Alert	*Send confirmation email to Attendee and notify Event Owner
Field Update	Update Attendee Status

Time-Dependent Workflow Actions

[See an example](#)

You cannot add new time triggers to an active rule. [Deactivate This Rule](#)

Edit

SETUP

Workflow Rules

Workflow Rule

WF\_Feedback\_NotifyOwner

Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with workflow rules — and more! Salesforce plans to retire workflow rules and recommends building automation in Flow Builder. [Tell Me More](#) | [Migrate your workflow rules to flows](#)

Workflow Rule Detail

EditCloneDeactivate

Rule Name	WF_Feedback_NotifyOwner	Object	Feedback
Active	✓	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description	*Notify Event Owner when new feedback is submitted and update Event Average Rating		
Rule Criteria	Feedback: Feedback Title EQUALS XYZ		
Created By	Vibhuti Shivhare, 9/23/2025, 12:10 PM	Modified By	Vibhuti Shivhare, 9/24/2025, 1:12 AM

Workflow Actions

Edit

Immediate Workflow Actions

Type	Description
Email Alert	Send Email to Event Owner
Field Update	Update Feedback Comments

Time-Dependent Workflow Actions

[See an example](#)

---

## 3 Process Builder

**Purpose:** Advanced automation that can update related records, launch flows, send emails, or call Apex.

### Steps to Create:

1. Go to **Setup → Process Builder → New**.
  2. Enter **Process Name** and select **The process starts when....**
  3. Add **Criteria** for triggering actions.
  4. Add **Immediate or Scheduled Actions** (Email Alerts, Field Updates, etc.).
  5. Save and **Activate**.
- 

## 4 Approval Process

**Purpose:** Automates record approvals with defined steps and approvers.

### Steps to Create:

1. Go to **Setup → Approval Processes → Create New Approval Process**.
  2. Choose **Use Standard Setup Wizard**.
  3. Define **Entry Criteria** and **Approvers**.
  4. Specify **Approval Steps** and **Actions** (Email Alerts, Field Updates, Tasks).
  5. Save and **Activate**.
- 

## 5 Flow Builder

**Purpose:** Powerful automation tool to create **Screen Flows, Record-Triggered Flows, Scheduled Flows, and Auto-launched Flows**.

### Types:

- **Screen Flow:** For user interaction.
- **Record-Triggered Flow:** Automates actions on create/update/delete.
- **Scheduled Flow:** Runs at specified intervals.
- **Auto-launched Flow:** Runs without user interaction, usually from Process Builder or Apex.

### Steps to Create:

1. Go to **Setup → Flow → New Flow**.
2. Select **Flow Type** → Click **Create**.



3. Drag **Elements** to define logic (Screen, Get Records, Update Records, Decision).
  4. Connect elements → Save → **Activate**.
- 

## Email Alerts

**Purpose:** Automatically send emails based on triggers.

**Steps to Create:**

1. Go to **Setup → Email Alerts → New Email Alert**.
  2. Choose **Object, Recipients**, and **Email Template**.
  3. Link to Workflow, Process Builder, or Flow.
  4. Save.
- 

## Field Updates

**Purpose:** Automatically update field values based on conditions.

**Steps to Create:**

1. Can be used with Workflow, Process Builder, or Flow.
  2. Define **Target Field** and **Update Logic** (Formula, Static Value, Related Field).
  3. Save and activate.
- 

## Tasks

**Purpose:** Automatically create tasks for users to follow up on records.

**Steps to Create:**

1. Available via Workflow, Process Builder, or Flow.
  2. Define **Task Subject, Due Date, Priority**, and **Assigned To**.
  3. Save and activate.
- 

## Custom Notifications

**Purpose:** Send real-time notifications to users in Salesforce mobile, desktop, or in-app.

**Steps to Create:**

1. Go to **Setup → Custom Notifications → New**.
2. Define **Notification Name, Channels**, and **Target Object**.
3. Use Workflow, Process Builder, or Flow to trigger notifications
4. Save.

---

## Phase 5: Apex Programming (Developer)

This phase introduces the fundamentals of **Apex programming** in Salesforce. It includes object-oriented programming concepts, triggers, SOQL/SOSL, collections, control statements, and asynchronous processing. Below is documentation with **working code examples** and explanations for key concepts.

---

### 📖 Classes & Objects

**Purpose:** Classes are blueprints for creating objects. They encapsulate variables (fields), methods (functions), and logic. Objects are instances of classes.

#### Example: Attendee Handler Class

```
public class AttendeeHandler {

    // Method to assign default status to new Attendees
    public static void assignDefaultStatus(List<Attendee_c> attendees) { for (Attendee_c att :
        attendees) {
            if (String.isBlank(att.Status_c)) { att.Status_c =
                'Registered';
            }
        }
    }

    // Method to link Feedback to Attendee
    public static void linkFeedback(List<Feedback_c> feedbackList) { for (Feedback_c fb :
        feedbackList) {
            if (fb.Attendee_c == null) {
                fb.Attendee_c = [SELECT Id FROM Attendee_c LIMIT 1].Id;
            }
        }
    }
}
```

---

## 27 Apex Triggers (before/after insert/update/delete)

**Purpose:** Triggers allow developers to execute custom logic **before or after DML operations** (insert, update, delete, undelete) on Salesforce records.

### EventFeedbackTrigger

trigger EventFeedbackTrigger on Feedback\_c (after insert, after update, after delete, after undelete) {

```
    Set<Id> eventIds = new Set<Id>();
```

```
    if (Trigger.isInsert || Trigger.isUndelete) {
        for (Feedback_c f : Trigger.new) if (f.Event_c != null) eventIds.add(f.Event_c);
    }
```

```
    if (Trigger.isDelete) {
        for (Feedback_c f : Trigger.old) if (f.Event_c != null) eventIds.add(f.Event_c);
    }
```

```
    if (Trigger.isUpdate) {
        for (Feedback_c fNew : Trigger.new) {
            Feedback_c fOld = Trigger.oldMap.get(fNew.Id); if (fNew.Event_c != null)
            eventIds.add(fNew.Event_c); if (fOld.Event_c != null)
            eventIds.add(fOld.Event_c);
        }
    }
```

```
    if (eventIds.isEmpty()) return;
```

```
    // Aggregate query for feedback counts
```

```
    Map<Id, Integer> eventToCount = new Map<Id, Integer>(); for (AggregateResult ar : [
        SELECT Event_c e, COUNT(Id) cnt FROM
        Feedback_c
        WHERE Event_c IN :eventIds GROUP
        BY Event_c
```

```
    ]) {
        eventToCount.put((Id) ar.get('e'),
        Integer.valueOf(String.valueOf(ar.get('cnt'))));
    }
```

```
    // Update Event records with new counts
```

```

List<Event__c> eventsToUpdate = new List<Event__c>();
for(Event__c ev : [SELECT Id, Feedback_Count__c FROM Event__c WHERE Id IN
:eventIds]) {
    Integer cnt = eventToCount.containsKey(ev.Id) ? eventToCount.get(ev.Id) : 0;
    ev.Feedback_Count__c = cnt; eventsToUpdate.add(ev);
}

if(!eventsToUpdate.isEmpty()) update eventsToUpdate;
}

```

This trigger keeps the **Feedback\_Count\_\_c** field on the **Event\_\_c** object up to date whenever feedback records are inserted, updated, deleted, or undeleted.

## Anonymous Apex Test Script

```

try {
    // 1) Create Event
    Event__c ev = new Event__c(Name = 'Trigger Test Event', Event_Date__c =
Date.today().addDays(7), Event_picklist__c = 'Workshop', Attendee_Number__c = 10, Venue__c =
'Demo Venue');
    insert ev;

    // 2) Create an Attendee
    Attendee__c at = new Attendee__c(Name = 'Test Attendee for Trigger', Event__c = ev.Id);
    insert at;

    // 3) Create Feedback records
    List<Feedback__c> fbs = new List<Feedback__c>();
    fbs.add(new Feedback__c(Name = 'Feedback 1', Event__c = ev.Id, Attendee__c = at.Id,
Comments__c = 'Great event'));
    fbs.add(new Feedback__c(Name = 'Feedback 2', Event__c = ev.Id, Attendee__c = at.Id,
Comments__c = 'Loved it'));
    insert fbs;

    // 4) Query Event to check Feedback_Count__c
    ev = [SELECT Id, Feedback_Count__c FROM Event__c WHERE Id = :ev.Id]; System.debug('Feedback count
after insert: ' + ev.Feedback_Count__c);

    // 5) Delete one feedback delete fbs[0];
    ev = [SELECT Id, Feedback_Count__c FROM Event__c WHERE Id = :ev.Id]; System.debug('Feedback count
after delete: ' + ev.Feedback_Count__c);

    // 6) Undelete feedback undelete
    fbs[0];
    ev = [SELECT Id, Feedback_Count__c FROM Event__c WHERE Id = :ev.Id]; System.debug('Feedback count
after undelete: ' + ev.Feedback_Count__c);
}

```

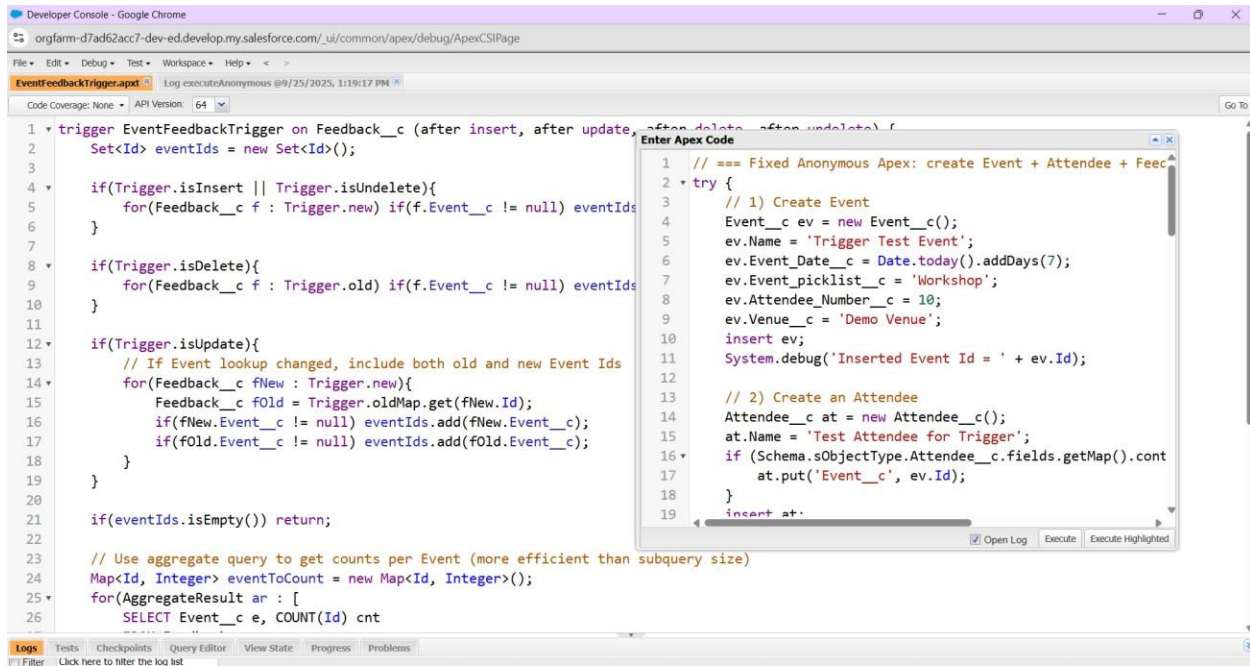
```

} catch (Exception ex) {
    System.debug('Exception: ' + ex.getMessage());
}

```

This is used in **Developer Console** → **Execute Anonymous** to test the **EventFeedbackTrigger** functionality.

It creates sample **Event**, **Attendee**, **Feedback** records and verifies that the **Feedback\_Count\_c** field on **Event\_c** updates correctly during **insert**, **delete**, and **undelete** operations.



## 37 Trigger Design Pattern

- Keep triggers lean by delegating logic to **Handler Classes**.
- Ensure **one trigger per object**.
- Support bulk operations.
- Example: `AttendeeTrigger` calls `AttendeeHandler.assignDefaultStatus()`.

## 47 SOQL & SOSL

- **SOQL**: Query records from a single object or related objects.

```
List<Event_c> events = [SELECT Id, Name FROM Event_c WHERE Venue_c = 'Demo Venue'];
```

- **SOSL**: Search across multiple objects.

```
List<List<SObject>> results = [FIND 'Workshop' IN ALL FIELDS RETURNING Event_c(Id, Name), Attendee_c(Id, Name)];
```

---

## 5.7 Collections: List, Set, Map

- **List**: Ordered collection.
  - **Set**: Unique values.
  - **Map**: Key-value pairs.
- 

## 6.7 Control Statements

- Use if, for, while, switchfor logic control.
  - Bulkify loops and avoid nested SOQL queries.
- 

## 7.7 Batch Apex

- Used for processing large data sets asynchronously in batches.
  - Implement Database.Batchableinterface.
- 

## 8.7 Queueable Apex

- Asynchronous processing with the ability to chain jobs.
  - More flexible than future methods.
- 

## 9.7 Scheduled Apex

- Schedule Apex jobs to run at specific times.
  - Implement Schedulableinterface.
- 

## 10.7 Future Methods

- Lightweight async execution for simple background tasks.
  - Must be static and return void.
- 

## 11.7 Exception Handling

- Use try-catch-finally blocks.
  - Catch DmlException and log errors properly.
-

## 17.27 Test Classes

- Ensure at least **75% code coverage** for deployment.
  - Test both positive and negative scenarios.
  - Use @isTestannotation.
- 

## 17.37 Asynchronous Processing

- Includes Batch Apex, Queueable Apex, Scheduled Apex, and Future Methods.
- Improves scalability and avoids governor limit issues.

**IN MY PROJECT I MAINLY USED APPEX TRIGGER (before/after insert/update/delete) AND OTHER THING AUTOMATICALLY GOT IMPLIMENTED**

# Phase 6: User Interface Development

This phase covers Salesforce UI customization using Lightning App Builder, Lightning Web Components (LWC), and Apex integration. It enables building dynamic, user-friendly interfaces for Salesforce users.

## 🔧 Lightning App Builder

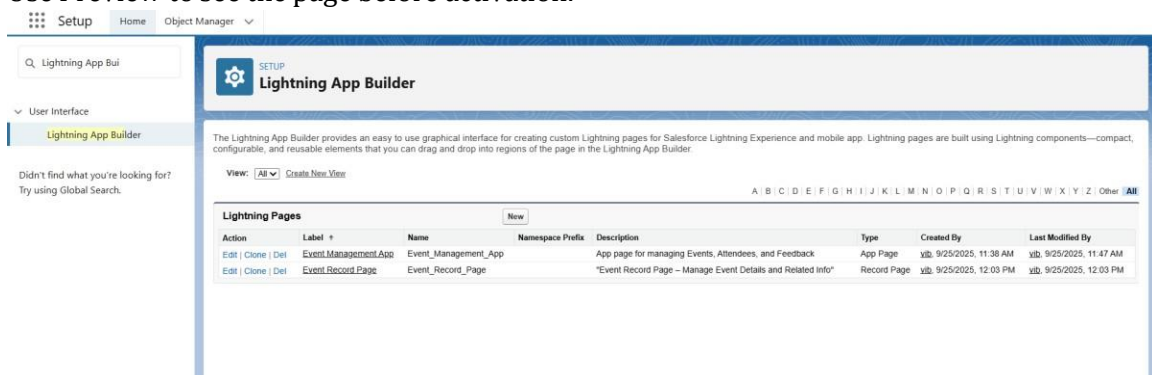
Purpose: Customize pages (Home, Record, App pages) using drag-and-drop components.

Steps:

- Go to Setup → Lightning App Builder.
- Click New → Choose Page Type (App Page, Home Page, Record Page).
- Enter Name & Description → Click Next.
- Choose Layout → Click Finish.
- Drag & drop standard or custom components.
- Click Save → Activate to make the page live.

Notes:


- Assign pages to Profiles or Apps.
- Use Preview to see the page before activation.



The screenshot shows the Salesforce Lightning App Builder interface. The left sidebar contains the navigation menu with 'Setup', 'Home', and 'Object Manager'. The main content area displays the 'Lightning App Builder' header and a table of 'Lightning Pages'. The table has columns for Action, Label, Name, Namespace Prefix, Description, Type, Created By, and Last Modified By. Two pages are listed: 'Event\_Management\_App' and 'Event\_Record\_Page'.


Action	Label	Name	Namespace Prefix	Description	Type	Created By	Last Modified By
<a href="#">Edit</a>   <a href="#">Clone</a>   <a href="#">Del</a>	Event_Management_App	Event_Management_App		App page for managing Events, Attendees, and Feedback	App Page	YD, 9/25/2025, 11:38 AM	YD, 9/25/2025, 11:47 AM
<a href="#">Edit</a>   <a href="#">Clone</a>   <a href="#">Del</a>	Event_Record_Page	Event_Record_Page		"Event Record Page – Manage Event Details and Related Info"	Record Page	YD, 9/25/2025, 12:03 PM	YD, 9/25/2025, 12:03 PM



 **Lightning App Builder**

Lightning Page

**Event\_Management\_App**

Help for this Page 

**Lightning Page Detail**

EditCloneDelete

▼ Information

Name	Event_Management_App	Label	Event Management App
Description	App page for managing Events, Attendees, and Feedback		

EditCloneDelete

**Assignments By App**

App
Event Management App
Sales

## Record Pages

Purpose: Customize object record layouts.

Steps:

- Open Lightning App Builder → Record Page.
- Select Object → Existing Page / New Page.
- Configure Sections and add components: Related lists, Custom LWCs, Tabs.

- Click Save → Activate → Assign to App, Record Type, or Profile.

The screenshot displays the Lightning App Builder interface. At the top, there are navigation buttons: 'Desktop', 'Shrink To View', 'Analyze', 'Activation...', and 'Save'. Below these, the 'Components' and 'Fields' tabs are visible. The 'Components' tab is active, showing a search bar and a list of standard components (42 total). The 'Event Record Page' is selected, and its configuration is shown on the right. The configuration includes a label 'Event Record Page', an API name 'Event\_Record\_Page', a page type 'Record Page', and an object 'Event'. The template is 'Header and Left Sidebar'. The description is 'Event Record Page – Manage Event Details and Related Info'. There is a checkbox for 'Enable page-level dynamic actions for the Salesforce mobile app'.

Below the main configuration area, there is a table of Lightning Pages. The table has columns: Action, Label, Name, Namespace Prefix, Description, Type, Created By, and Last Modified By. The table lists two pages: 'Event\_Management\_App' and 'Event\_Record\_Page'.

Action	Label	Name	Namespace Prefix	Description	Type	Created By	Last Modified By
<a href="#">Edit</a>   <a href="#">Clone</a>   <a href="#">Del</a>	Event_Management_App	Event_Management_App		App page for managing Events, Attendees, and Feedback	App Page	yib 9/25/2025, 11:38 AM	yib 9/25/2025, 11:47 AM
<a href="#">Edit</a>   <a href="#">Clone</a>   <a href="#">Del</a>	Event_Record_Page	Event_Record_Page		"Event Record Page – Manage Event Details and Related Info"	Record Page	yib 9/25/2025, 12:03 PM	yib 9/25/2025, 12:03 PM

## ⌨ Tabs

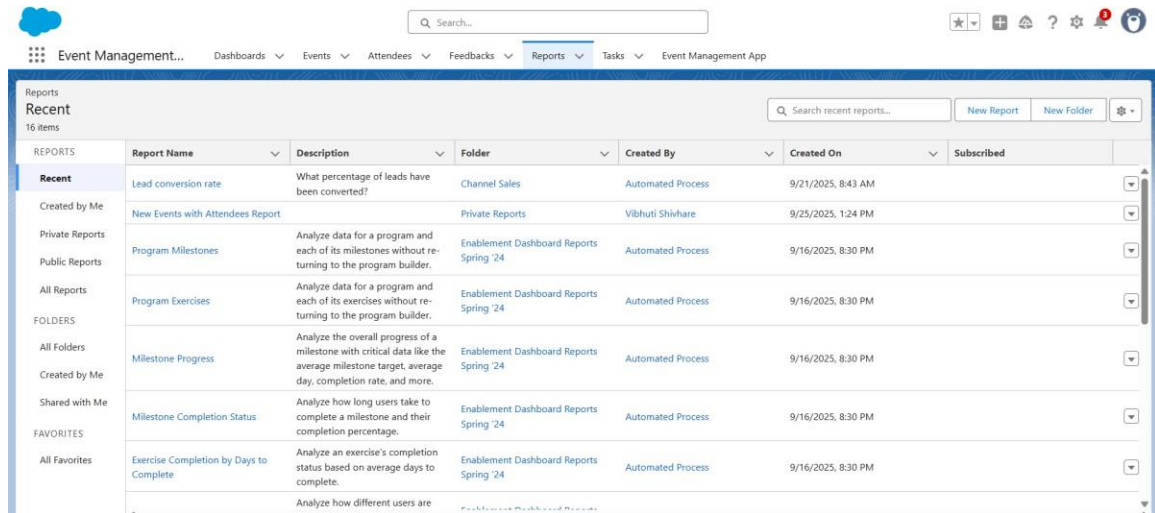
Purpose: Organize objects, components, or pages in a single app.

Steps:

- Go to App Manager → Edit App.
- Under Navigation Items, click Add Tab.
- Select Standard Object / Custom Object / Lightning Page.
- Save changes → Open app to verify tabs.

Notes:

- Control tab access using App Personalization Settings.
- Tabs can include Lightning Components, Visualforce Pages, or Reports.



## 🔗 Home Page Layouts

Purpose: Create dashboards or personalized home pages.

Steps:

- Go to Lightning App Builder → Home Page.
- Click New → Standard Home Page.
- Drag & drop components: Reports, Dashboards, Custom LWCs.
- Save → Activate → Assign to Profiles.

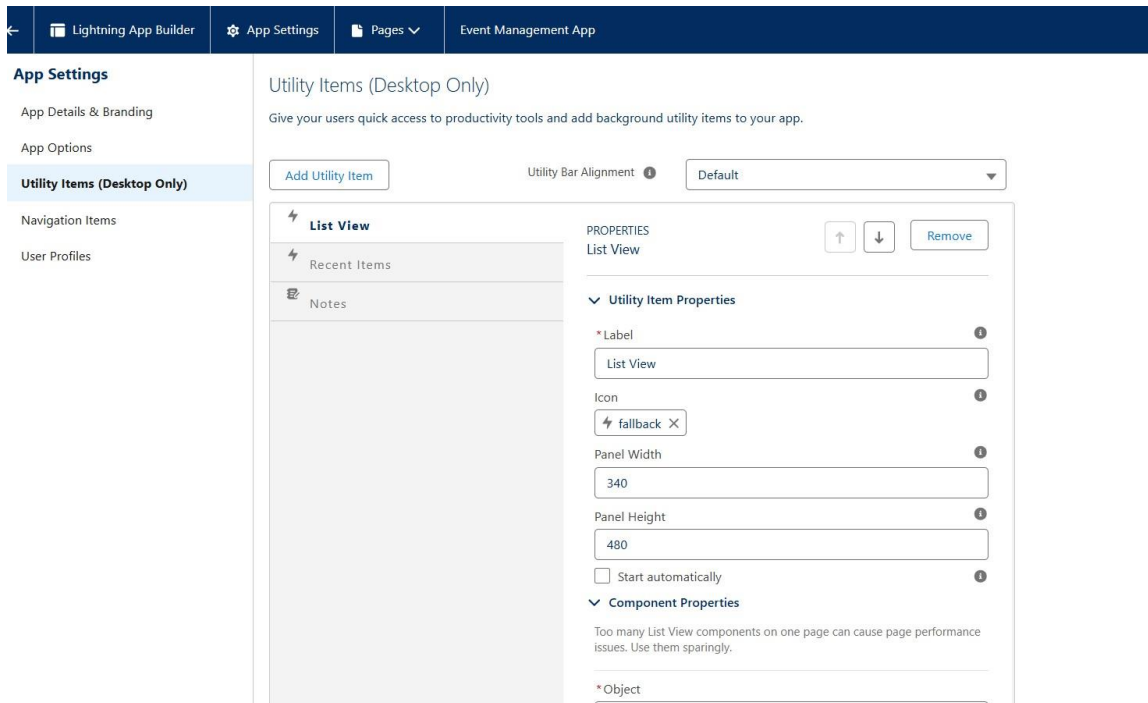
## 🔗 Utility Bar

Purpose: Quick access to tools at the bottom of the app.

Steps:

- Open App Manager → Edit App → Utility Bar.
- Click Add Utility Item.
- Choose component (e.g., Notes, Custom LWC, Flows).
- Configure Label, Icon, Size.

- Save & verify in app.



## ⚡ Lightning Web Components (LWC)

Purpose: Build reusable, responsive UI components.

Structure:

- .js → Component logic
- .html → Template
- .js-meta.xml → Metadata

Steps:

- Open VS Code → SFDX project → Create LWC.
- Implement logic & styling.
- Deploy using SFDX: Deploy.

Notes:

- LWCs can be used in App Builder, Record Pages, Tabs, or Utility Bar.

## 🔗 Apex with LWC

Purpose: Fetch or manipulate Salesforce data using Apex.

Steps:

- Write @AuraEnabled Apex methods.
- Call methods in LWC using Wire Adapter (reactive) or Imperative Call (on user action).
- Handle responses & errors in LWC JS.

## 🔗 Events in LWC

Purpose: Handle component communication.

Types:

- Custom Events → Child → Parent
- Lightning Message Service → Cross-component communication
- Standard DOM events → Click, Change, Input

Steps:

- Create & dispatch CustomEvent in child component.
- Listen in parent with on<eventname> attribute.

## 🔌 Wire Adapters

Purpose: Retrieve Salesforce data reactively.

Examples:

- @wire(getRecord, { recordId, fields })
- @wire(getObjectInfo, { objectApiName })

Notes:

- Wire automatically updates UI when data changes.
- Mostly for read-only operations.

## ? Imperative Apex Calls

Purpose: Call Apex methods on-demand.

Steps:

- Import Apex method in LWC JS.
- Call method inside a function (e.g., button click).
- Handle Promise: myApexMethod({ param1: value }).then(result => { /\* handle result \*/ }).catch(error => { /\* handle error \*/ });

Notes:

- Good for user-triggered actions.

- Gives explicit control over when the call happens.

## ✓ Best Practices

Keep LWCs modular and reusable.

Always handle errors in Apex calls.

Use Profiles / Permission Sets to control access.

Test Home Page and Record Page layouts for multiple profiles.

Deploy using Change Sets or SFDX for version control.

### **I mainly Concentrated on**

- **Lightning App Builder**
- **Record Pages**
- **Tabs**
- **Home Page Layouts**
- **Utility Bar**

# Phase 7: Integration & External Access

## 1. Named Credentials

- Simplifies authentication when making callouts to external systems.
- Stores URL, authentication type, and credentials securely in Salesforce.

## 2. External Services

- Allows Salesforce to integrate external APIs declaratively.
- Generates Apex actions automatically from an API schema (OpenAPI/Swagger).

## 3. Web Services (REST/SOAP)

- REST API enables interaction with Salesforce using standard HTTP methods (GET, POST, PUT, DELETE).
- SOAP API allows structured XML-based communication with Salesforce for integrations.

## 4. Callouts

- Outbound requests from Salesforce to external systems using HTTP.
- Can be synchronous (immediate response) or asynchronous (future method or queueable).

## 5. Platform Events

- Enables event-driven architecture within Salesforce for real-time updates.
- Subscribers receive notifications asynchronously when an event occurs.

## 6. Change Data Capture

- Tracks changes (create, update, delete, undelete) in Salesforce records.
- Pushes changes to external systems in near real-time via events.

## 7. Salesforce Connect

- Allows access to external data in real-time without storing it in Salesforce.
- Uses external objects and OData protocol to integrate external databases.

## 8. API Limits

- Salesforce enforces limits on API calls per 24-hour period.
- Helps prevent excessive load and ensures fair usage of resources.

## 9. OAuth & Authentication

- OAuth 2.0 enables secure token-based authentication for external apps.
- Supports user delegation and integration without exposing credentials.

## 10. Remote Site Settings

- Whitelist external URLs to allow Salesforce callouts.
- Ensures security by preventing unauthorized external requests.

**This Phase is not needed in my project**



# Phase 8: Data Management & Deployment

---

This phase covers Salesforce data management and deployment strategies. The primary focus is on using the Data Import Wizard, while other tools are briefly explained for awareness.

## **Data Import Wizard**

**Purpose:** Import data into Salesforce using a guided interface.

### **Steps:**

1. Go to **Setup** → **Data Import Wizard**.
2. Select the object (e.g., Accounts, Contacts).
3. Upload CSV file with proper headers.
4. Map CSV fields to Salesforce fields.
5. Click **Start Import** → Monitor progress.

### **Notes:**

- Supports standard and custom objects.
- Suitable for small to medium volume imports.

Setup

Home

Object Manager

Great job

Choose data

Edit mapping

Start import

Review & Start Import

Help for this page

Review your import information and click Start Import.

Your selections:

Your import **will include**:

Your import **will not include**:

Events

Add new records

Event\_Import\_No\_EndDate.csv

Mapped fields

4

Unmapped fields

0

Cancel

Previous

Start Import

SETUP

Bulk Data Load Jobs

view the details of a bulk data load job.

Back to List: Bulk Data Load Jobs

Bulk Data Load Job Detail

Reload

Job ID	750gK00000Dq26H	Job Type	Bulk V1	Status	Closed
Submitted By	Vibhuti Shrivhare	Operation	Insert	Total Processing Time (ms)	113
Start Time	9/25/2025, 8:55 PM PST	Queued Batches	0	API Active Processing Time (ms)	63
End Time	9/25/2025, 8:55 PM PST	In Progress Batches	0	Apex Processing Time (ms)	1
Time to Complete (hh:mm:ss)	00:08	Completed Batches	1		
Object	Event	Failed Batches	0		
External ID Field		Progress	100%		
Content Type	CSV	Records Processed	15		
Concurrency Mode	Parallel	Records Failed	0		
API Version	64.0	Retries	0		

Reload

## Data Loader

**Purpose:** Bulk data import/export tool for large volumes.

### Quick Points:

- Download, install, and login with Salesforce credentials.

- Operations: Insert, Update, Upsert, Delete, Export.
  - Supports large data volumes (millions of records).
  - Requires API access and CSV mapping.
- 

## 🔍 Duplicate Rules

**Purpose:** Prevent duplicate records in Salesforce.

**Quick Points:**

- Create rules via **Setup → Duplicate Management → Duplicate Rules**.
  - Define object, matching criteria, and actions (Alert, Block).
  - Use **Matching Rules** for custom logic.
  - Helps maintain clean, high-quality data.
- 

## 💾 Data Export & Backup

**Purpose:** Backup Salesforce data regularly.

**Quick Points:**

- Go to **Setup → Data Export** and select objects.
  - Schedule exports weekly or monthly.
  - Download CSV ZIP files and store securely.
  - Automation possible via third-party tools.
- 

## 🔄 Change Sets

**Purpose:** Deploy metadata changes between orgs.

**Quick Points:**

- Use **Outbound Change Sets** to add components.
- Upload to target org → Deploy via **Inbound Change Sets**.
- Validate before activation.

- Works only between connected orgs (sandbox → production).
- 

## 📦 Unmanaged vs Managed Packages

**Purpose:** Package metadata for reuse or distribution.

**Quick Points:**

- **Unmanaged Package:** One-time deployment, code editable.
  - **Managed Package:** Controlled distribution, code protected.
  - Useful for deploying or sharing apps.
  - Managed packages needed for AppExchange distribution.
- 

## 🔧 ANT Migration Tool

**Purpose:** Command-line tool for metadata deployment/retrieval.

**Quick Points:**

- Requires **build.xml** and **package.xml** for metadata selection.
  - Commands: retrieve, deploy.
  - Monitor logs for errors/success.
  - Useful in CI/CD pipelines.
- 

## 🖥️ VS Code & SFDX

**Purpose:** Salesforce development and deployment using VS Code and CLI.

**Quick Points:**

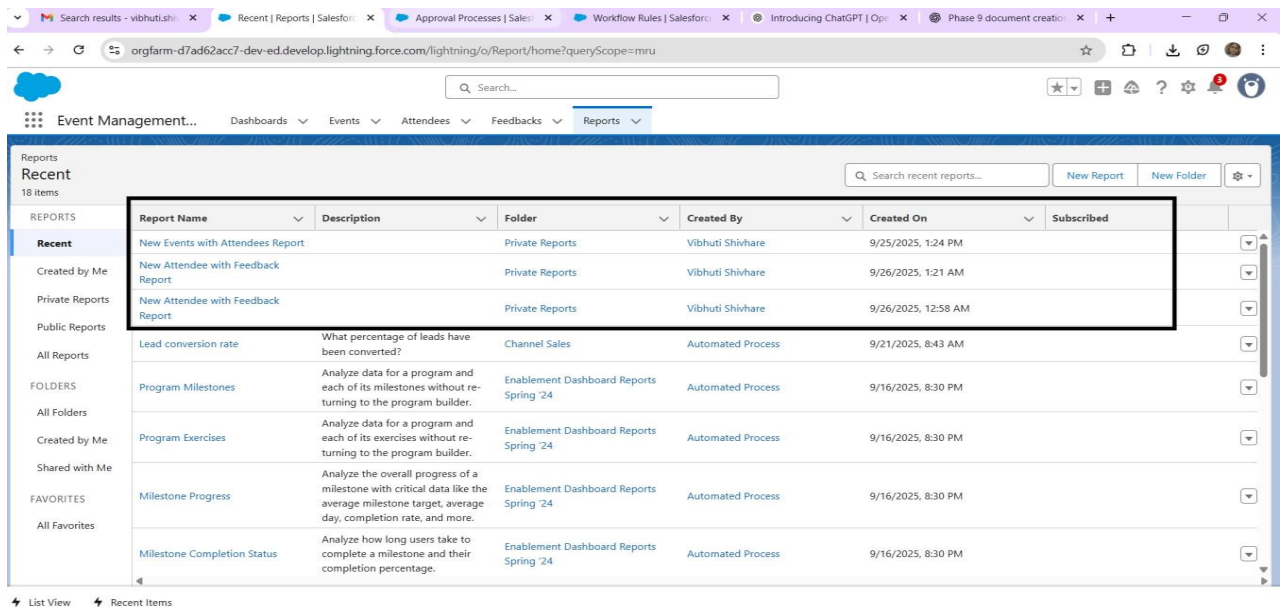
- Install **VS Code + Salesforce Extension Pack**.
  - Authenticate orgs via SFDX CLI.
  - Retrieve/deploy metadata using SFDX commands.
  - Supports Lightning Web Components, Apex, and version control.
- 

**I MAINLY CONCENTRATED ON DATA IMPORT WIZARD**

# Phase 9 – Reporting, Dashboards

## Step 1: Create a Report

- Go to App Launcher (grid icon) → Search “Reports”.
- Click “New Report”.
- Select the report type (example: Opportunities, Leads, or your custom object).
- Choose report format: Tabular, Summary, Matrix, or Joined.
- Add filters, fields, and grouping as needed.
- Save & Run the report.



The screenshot shows the Salesforce Reports interface. The left sidebar contains navigation options: Reports (18 items), Recent, Created by Me, Private Reports, Public Reports, All Reports, FOLDERS, All Folders, Created by Me, Shared with Me, FAVORITES, and All Favorites. The main content area displays a table of reports with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. A black box highlights the first three rows of the table.

Report Name	Description	Folder	Created By	Created On	Subscribed
New Events with Attendees Report		Private Reports	Vibhuti Shivhare	9/25/2025, 1:24 PM	
New Attendee with Feedback Report		Private Reports	Vibhuti Shivhare	9/26/2025, 1:21 AM	
New Attendee with Feedback Report		Private Reports	Vibhuti Shivhare	9/26/2025, 12:58 AM	
Lead conversion rate	What percentage of leads have been converted?	Channel Sales	Automated Process	9/21/2025, 8:43 AM	
Program Milestones	Analyze data for a program and each of its milestones without returning to the program builder.	Enablement Dashboard Reports Spring '24	Automated Process	9/16/2025, 8:30 PM	
Program Exercises	Analyze data for a program and each of its exercises without returning to the program builder.	Enablement Dashboard Reports Spring '24	Automated Process	9/16/2025, 8:30 PM	
Milestone Progress	Analyze the overall progress of a milestone with critical data like the average milestone target, average day, completion rate, and more.	Enablement Dashboard Reports Spring '24	Automated Process	9/16/2025, 8:30 PM	
Milestone Completion Status	Analyze how long users take to complete a milestone and their completion percentage.	Enablement Dashboard Reports Spring '24	Automated Process	9/16/2025, 8:30 PM	

## Step 2: Create a Custom Report Type (if needed)

- Go to Setup → “Report Types” in Quick Find.
- Click “New Custom Report Type”.
- Select the primary object.
- Define related objects and field relationships.
- Save and deploy.

Search results - vibhuti.shi x Recent | Reports | Salesforce x Approval Processes | Sales x Workflow Rules | Salesforce x Introducing ChatGPT | Op x Phase 9 document creatio x +

orgfarm-d7ad62acc7-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mr

Event Management... Dashboards v Events v Attendees v Feedbacks v Reports v

Reports

Recent

18 items

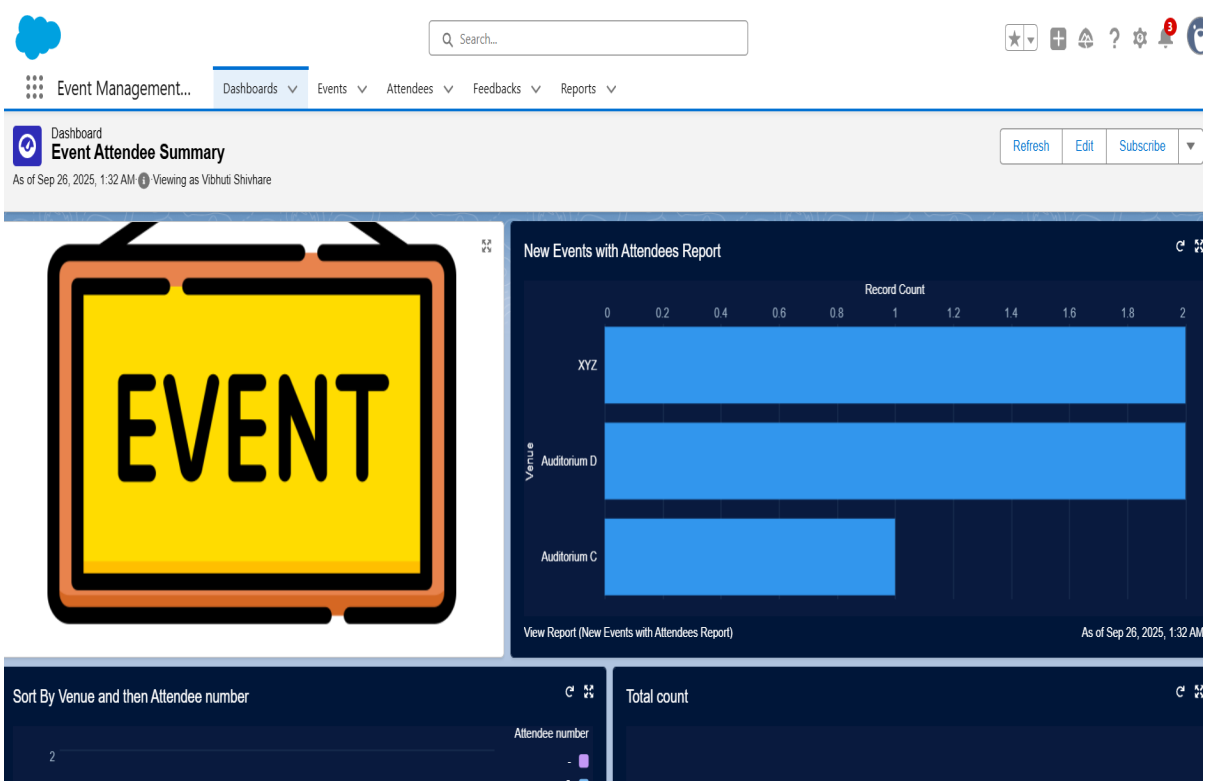
Q Search recent reports... New Report New Folder

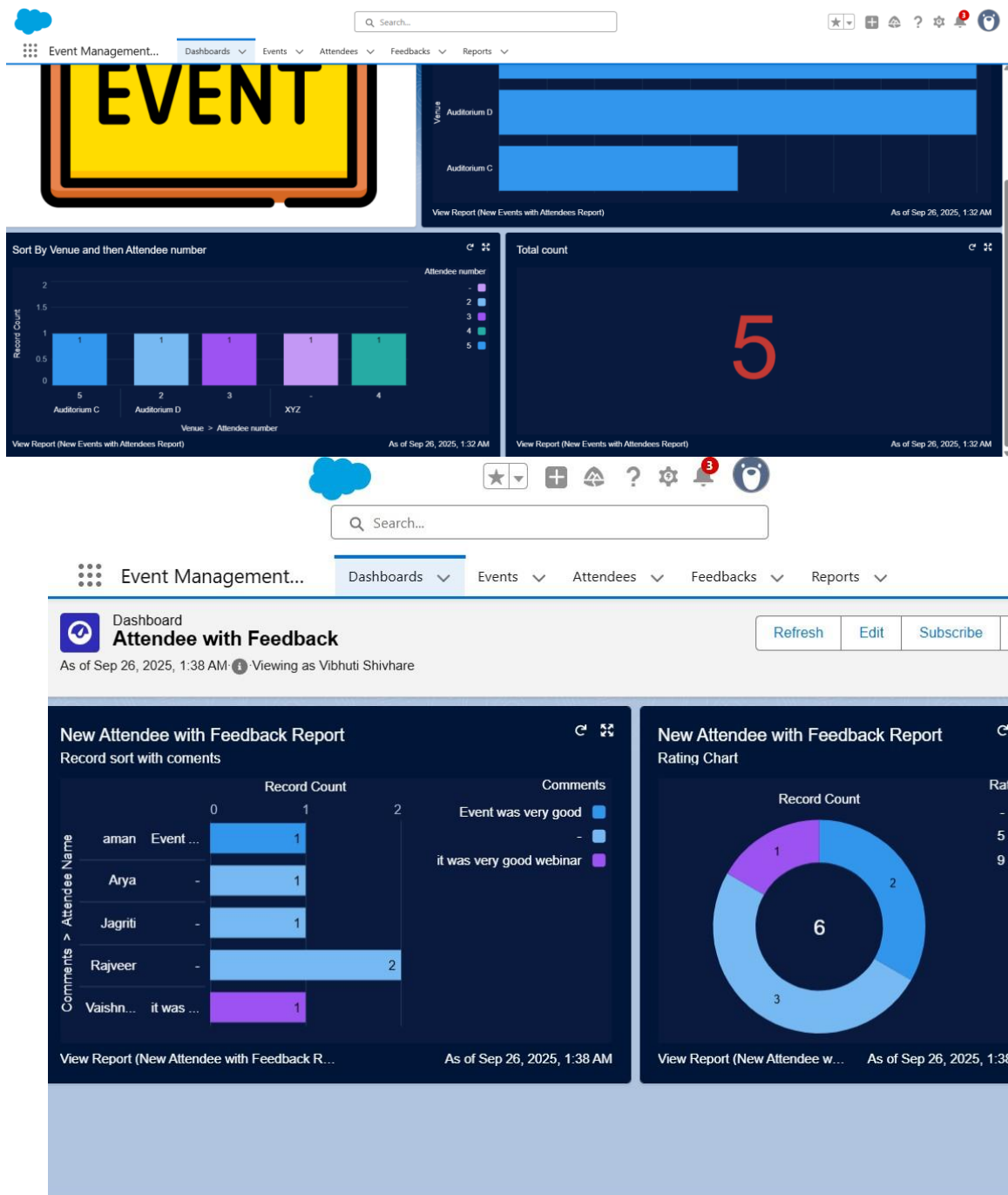
REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Events with Attendees Report		Private Reports	Vibhuti Shivhare	9/25/2025, 1:24 PM	
Created by Me	New Attendee with Feedback Report		Private Reports	Vibhuti Shivhare	9/26/2025, 1:21 AM	
Private Reports	New Attendee with Feedback Report		Private Reports	Vibhuti Shivhare	9/26/2025, 12:58 AM	
Public Reports	Lead conversion rate	What percentage of leads have been converted?	Channel Sales	Automated Process	9/21/2025, 8:43 AM	
All Reports	Program Milestones	Analyze data for a program and each of its milestones without returning to the program builder.	Enablement Dashboard Reports Spring '24	Automated Process	9/16/2025, 8:30 PM	
FOLDERS	Program Exercises	Analyze data for a program and each of its exercises without returning to the program builder.	Enablement Dashboard Reports Spring '24	Automated Process	9/16/2025, 8:30 PM	
All Folders	Milestone Progress	Analyze the overall progress of a milestone with critical data like the average milestone target, average day, completion rate, and more.	Enablement Dashboard Reports Spring '24	Automated Process	9/16/2025, 8:30 PM	
Created by Me	Milestone Completion Status	Analyze how long users take to complete a milestone and their completion percentage.	Enablement Dashboard Reports Spring '24	Automated Process	9/16/2025, 8:30 PM	
Shared with Me						
FAVORITES						
All Favorites						

List View Recent Items

### Step 3: Create a Dashboard

- Go to App Launcher → Search “Dashboards”.
- Click “New Dashboard”.
- Enter Name, Folder, Description.
- Add a new component (Chart, Table, Metric, Gauge).
- Select the source report for each component.
- Adjust layout and size.
- Save and view dashboard.





## Step 4: Enable Dynamic Dashboards

- Open the dashboard you created.
- Click “Edit”.
- Under “View Dashboard As” select “Run as Logged-In User” (Dynamic) or choose a specific user (Static).
- Save.



### **Step 5: Configure Sharing Settings**

- Go to Setup → “Sharing Settings”.
- Set Organization-Wide Defaults (OWD) for each object.
- Configure Role Hierarchy (Setup → “Roles”) to allow upward data access.
- Create Sharing Rules for wider access beyond OWD.
- Use Manual Sharing for individual records if needed.

### **Step 6: Apply Field-Level Security (FLS)**

- Go to Setup → Object Manager → Select Object → Fields & Relationships.
- Click the field you want to secure.
- Click “Set Field-Level Security”.
- Select which profiles/permission sets can see or edit the field.
- Save.

### **Step 7: Adjust Session Settings**

- Go to Setup → “Session Settings”.
- Set Session Timeout (e.g. 30 minutes).
- Enable/disable “Force Logout on Session Timeout”.
- Save.

### **Step 8: Configure Login IP Ranges**

- Go to Setup → “Profiles”.
- Select the profile you want to secure.
- Scroll to “Login IP Ranges” → Click “New”.
- Enter allowed IP ranges.
- Save.

### **Step 9: Review Audit Trail**

- Go to Setup → “View Setup Audit Trail” in Quick Find.
- Review who made changes, what was changed, and when.
- Export if needed for compliance/security reviews.

### **Purpose of Phase 9**

- Gain accurate insights with Reports and Dashboards.
- Provide role-based and user-based visibility with Dynamic Dashboards and Sharing Settings.

Protect sensitive data with Field-Level Security and IP restrictions.

Monitor configuration changes with Audit Trail.

