MUTHURANGAM GOVT. ARTS COLLEGE (AUTONOMOUS), OTTERI ROAD, VELLORE – 02

Team ID :NM2023TMID06837

Team Size : 4

Team Leader : BHARATH K

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DINESH B

BUILD AN EVENT MANAGEMENT SYSTEM USING SALESFORCE

Project Based Experimental Learning Program

Build an Event Management System using Sales force

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

What we'll learn

- 1. Real Time Sales force Project
- 2. Object & Relationship in Sales force
- 3. Create Sales force Org:

Milestone 1 – Sales force?

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

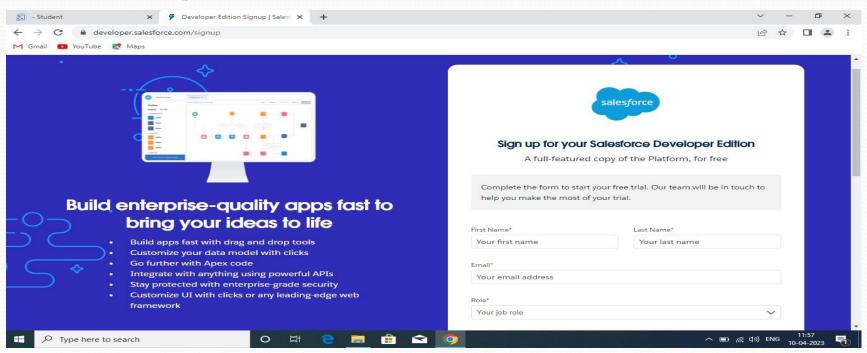
So what does that really mean? Well, before Sales force, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this: https://youtu.be/r9EX3lGde5k

Activity:

Creating a Sales force Developer Org:

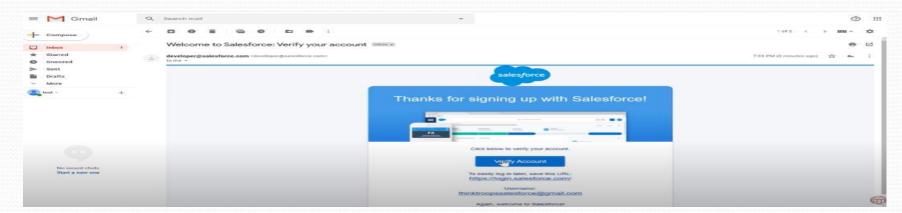
A Developer org has all the features and licenses you need to get started with Sales force.

1. Search Developer.salesforce.com

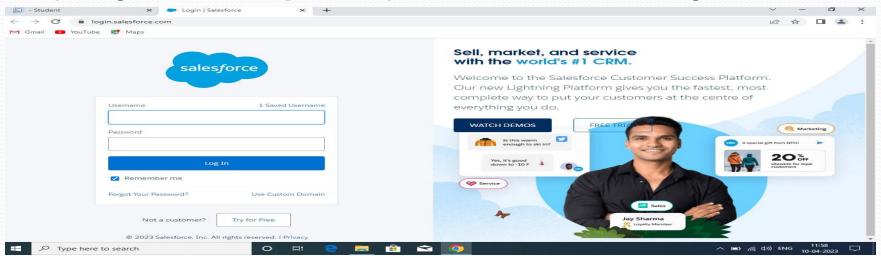


2.Enter the following details like First name, last name, Email, Role, Company, Country/Region, Postal code, and Username must be unique

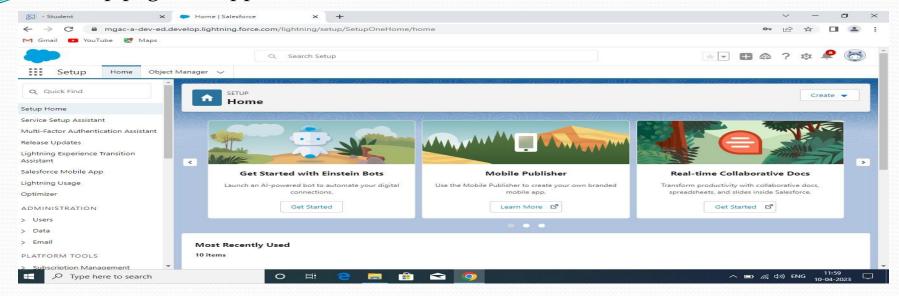
3. Click sign me up, after a few min you will reserve a mail sales force org and by using the verify account link you can create your new password.



- 4. Click save.
- 5. Search login.salesforce.com
- 6. By using username and password you can into the sales force org



The setup page will appear as below.



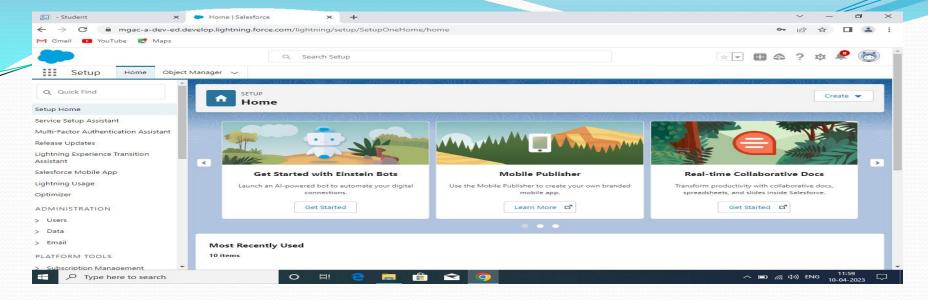
Milestone 2 – Object:

Activity 1:

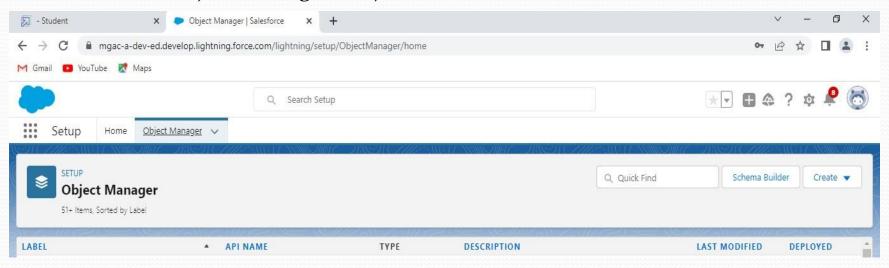
Creation of Objects for Event Management:

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

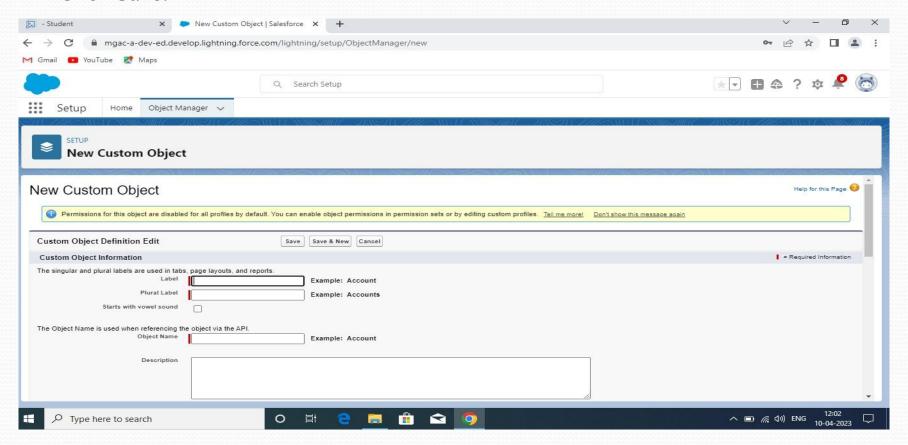


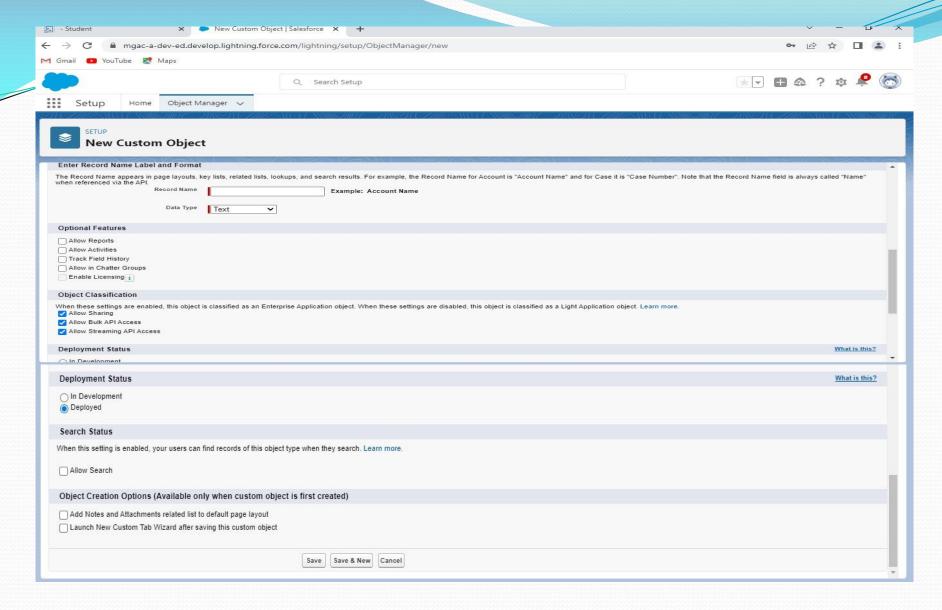
2. Click on the object manager tab just beside the home tab.



3. After the above steps, have a look on the extreme right you will find a Create Drop down 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.





• Above Event object steps are same for this Attendees, Speaker and Vendors object

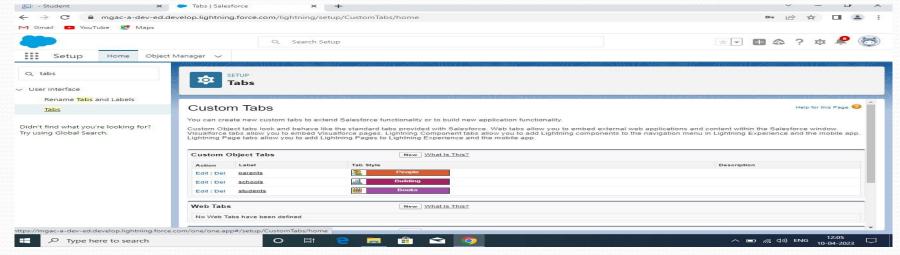
Milestone 3 - Tab:

Activity 1:

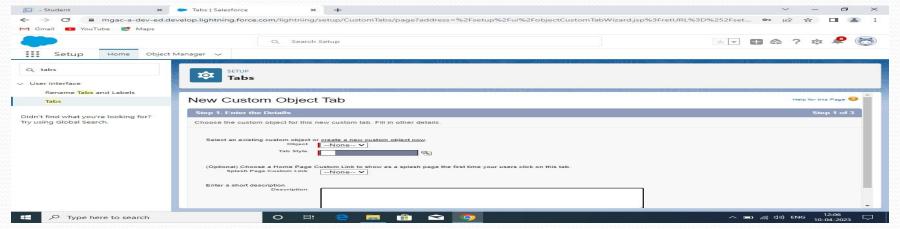
Creation of Event tab:

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.



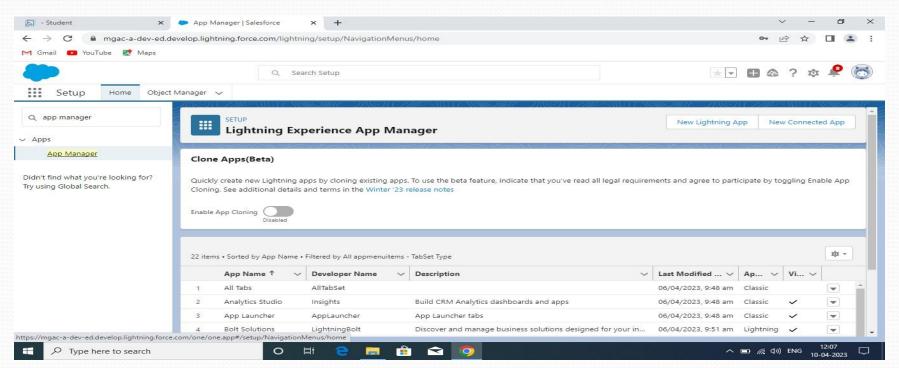
- 3. For Object, select Event.
- 4. For Tab Style, select any icon.
- 5. Leave all defaults as is. Click Next, Next, and Save.
- Above Event Tab steps are same for this Attendee, Speakers and Vendor tab

Milestone 3 – Application :

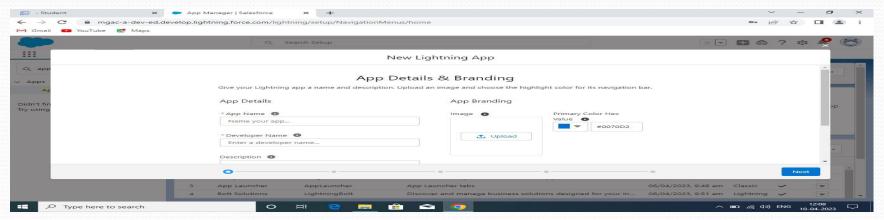
Activity

Create the Event Management Construction app

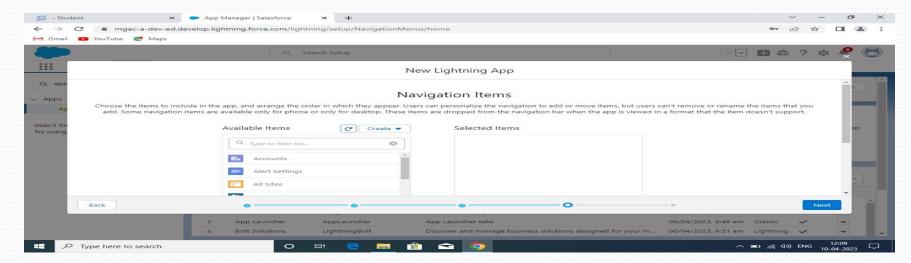
• From Setup, enter App Manager in the Quick Find and select App Manager.



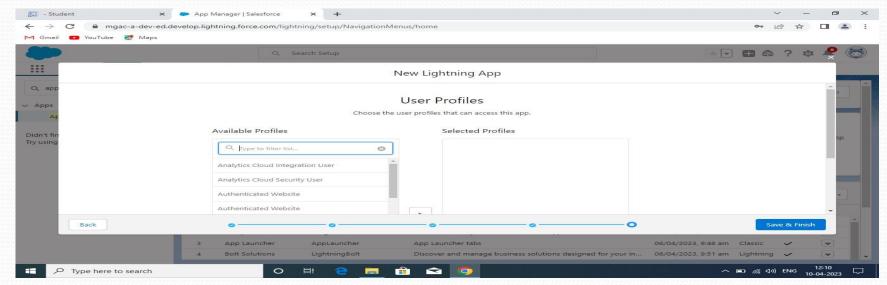
 Click New Lightning App. Enter Event Management as the App Name, then click Next



- 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.



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



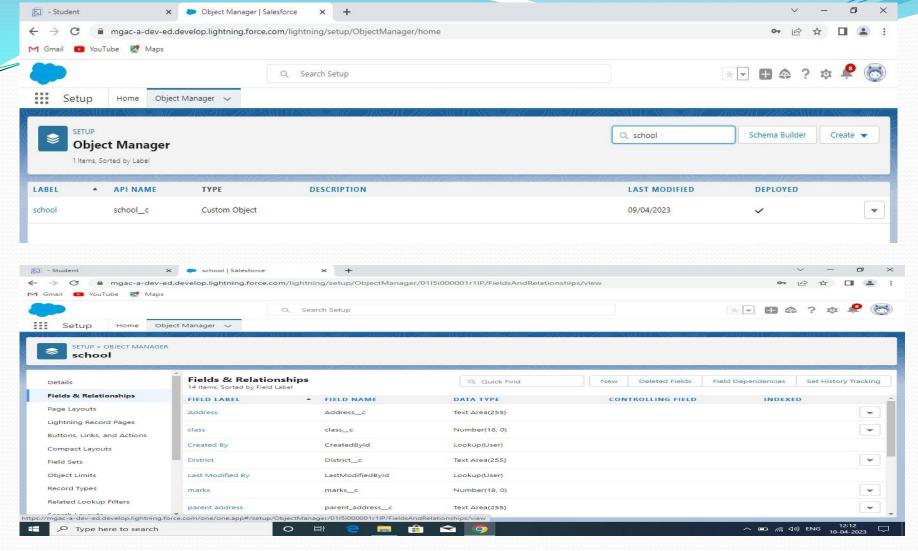
• To verify your changes, click the App Launcher, type School Management and select the School Management app.

Milestone 4 – Fields:

Activity 1:

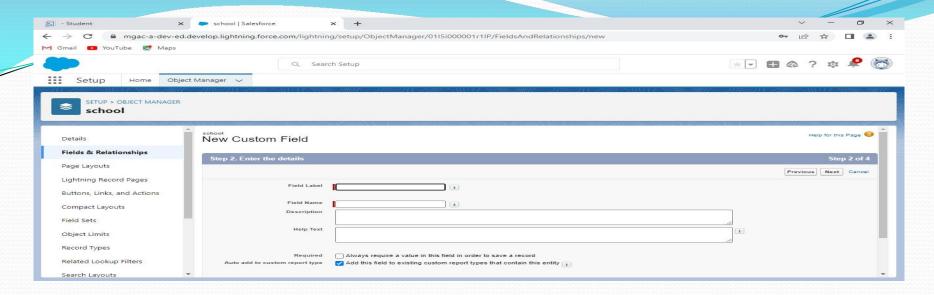
Creation of fields for the Event objects:

- 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 data type.

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 Pick list 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:

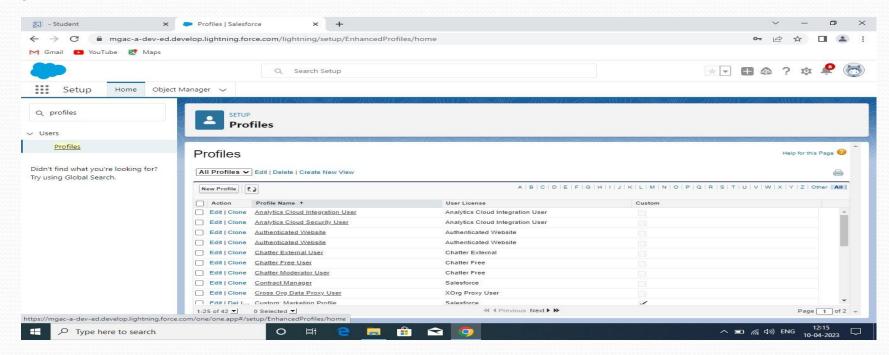
- 1. Select the Email as the Data Type, then click Next.
- 2. For Field Label, e-mail.
- 3. Click Next, Next, then Save & New.
- 4. Select the phone as the Data Type, then click Next.
- 5. For Field Label, Phone.
- 6. Click Next, Next, then Save & New.
- 7. Select the Email as the Data Type, then click 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:

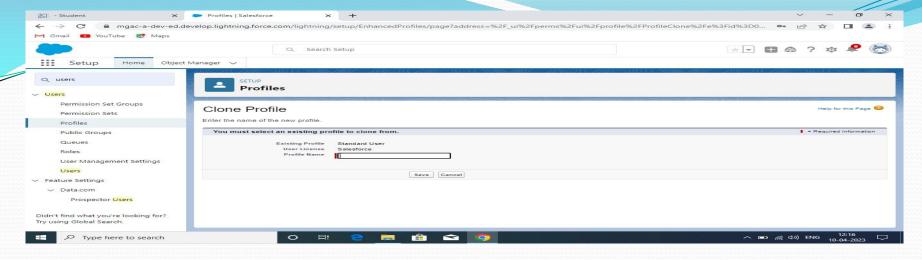
Activity 1:

Creation on profile:

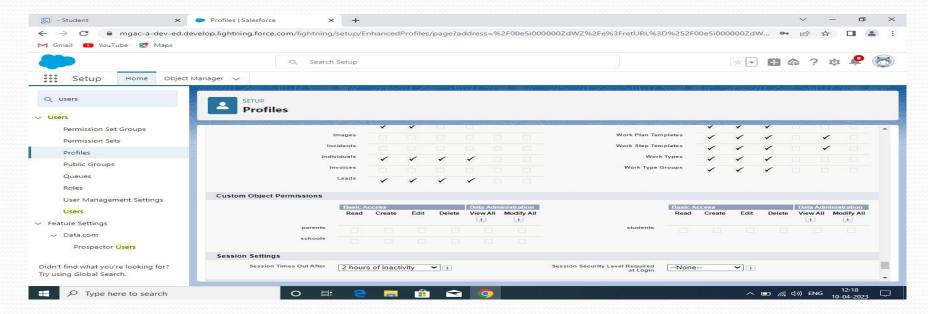
- 1. From Setup enter Profiles in the Quick Find box, and select Profiles.
- 2. From the list of profiles, find Standard User.
- 3. Click Clone.



- 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:

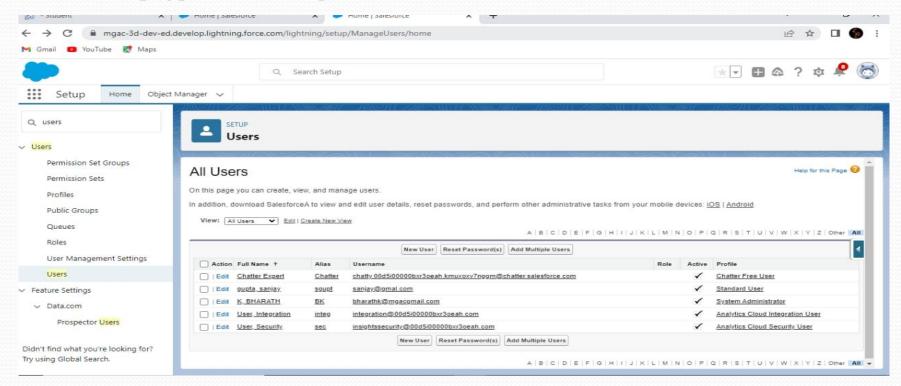
Create a profile with the profile name as "Event vendors profile". Above steps are same for this.

Milestone 6 – User:

Activity 1:

Creating a User:

From setup type "users" in quick find and select users, then click **New User**



First Name: Sanjay

· Last Name: Gupta

· Alias: Sanjay

• Email: provide your personal email id for future reference

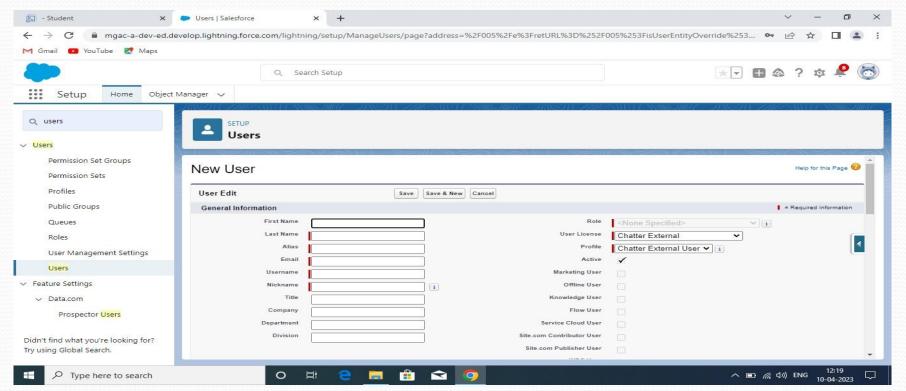
• Username: sanjaygupta@thesmartbridge.com

• Nickname: San

• Role: leave it as default

• User License: Sales force

• Profile: Event User Profile

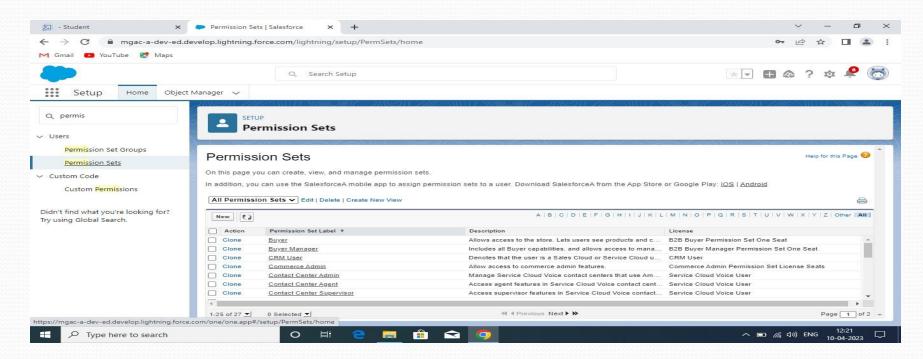


Milestone 7 – Permission sets :

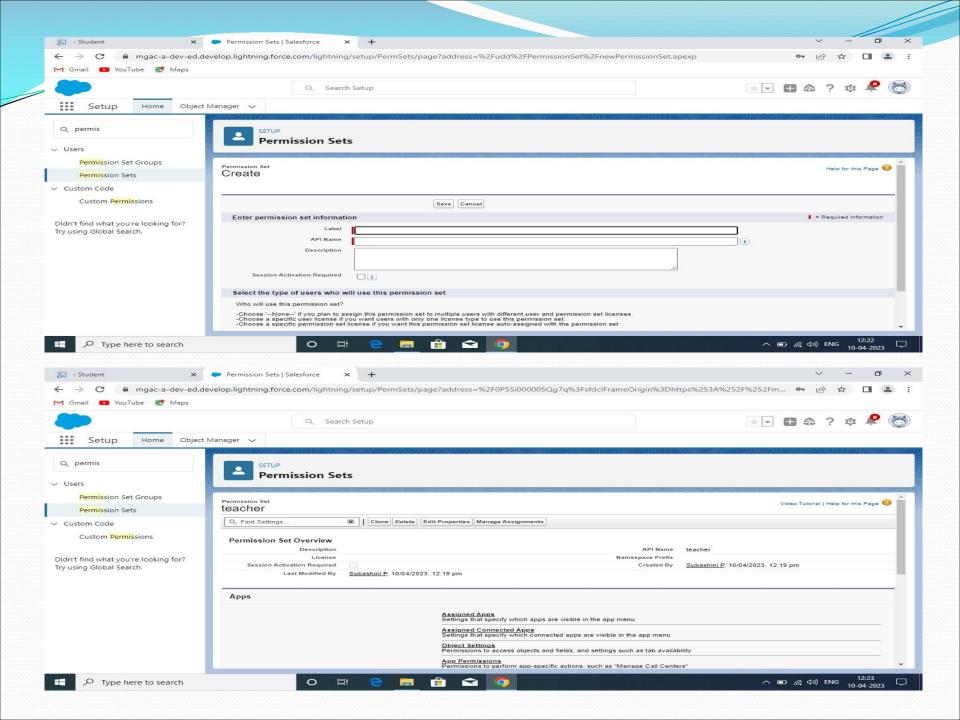
Activity 1:

Creating a Permission Set:

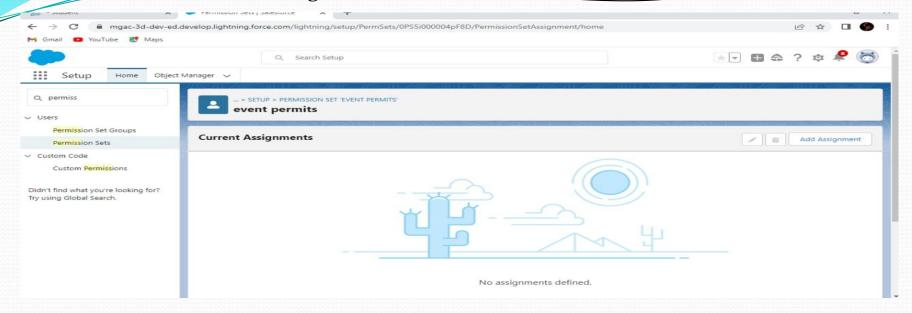
• From setup search "permission sets" in quick find and select **permission set** then click on **New**



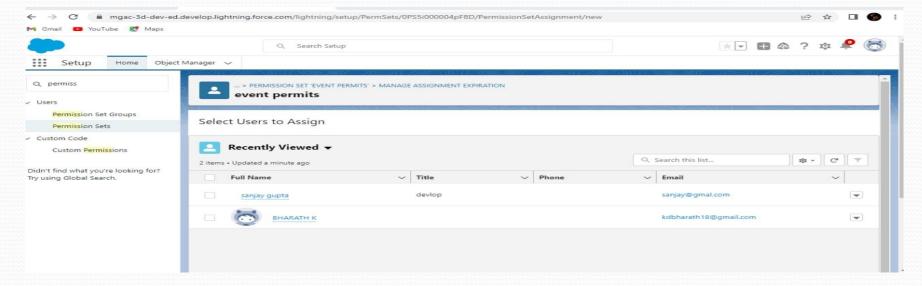
- Enter label as: Event Permits and Save
- After saving the permission click on the Manage assignment



Now click on the Add Assignment



• Now select the users and click on save



Activity 2:

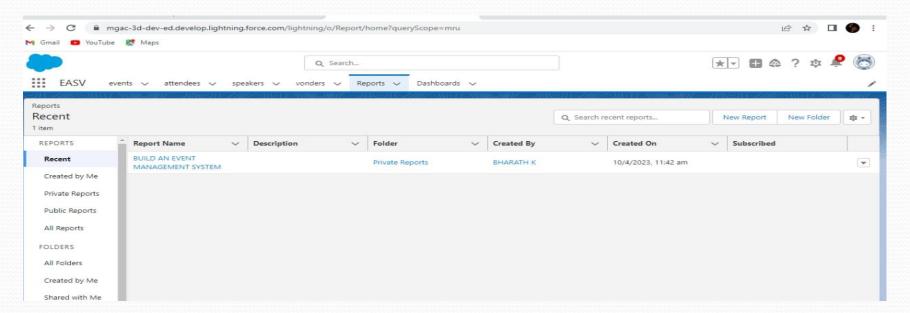
- From setup search "permission sets" in quick find and select permission set then click on New
- Enter label as: Vendor Permits and Save.
- After saving the permission click on the Manage assignment
- Now click on the Add Assignment
- Now select the users and click on save

Milestone 8 - Reports:

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

