Build an Event Management System using Salesforce

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

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.

Purpose:

The project aim is to provide real-time knowledge for all the students who have basic knowledge

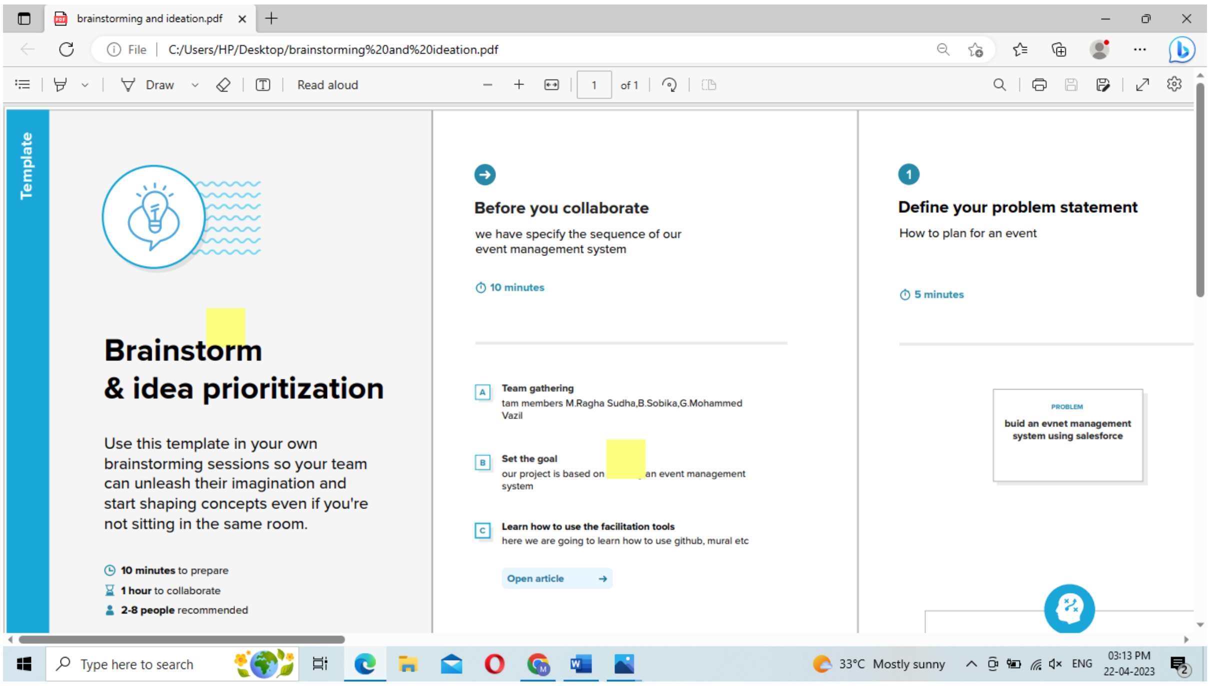
of Salesforce and Looking for a real-time project. This project will also help to those professionals who are in cross-technology and wanted to switch to Salesforce with the help of this project we gained knowledge and can be included into their resume as well.

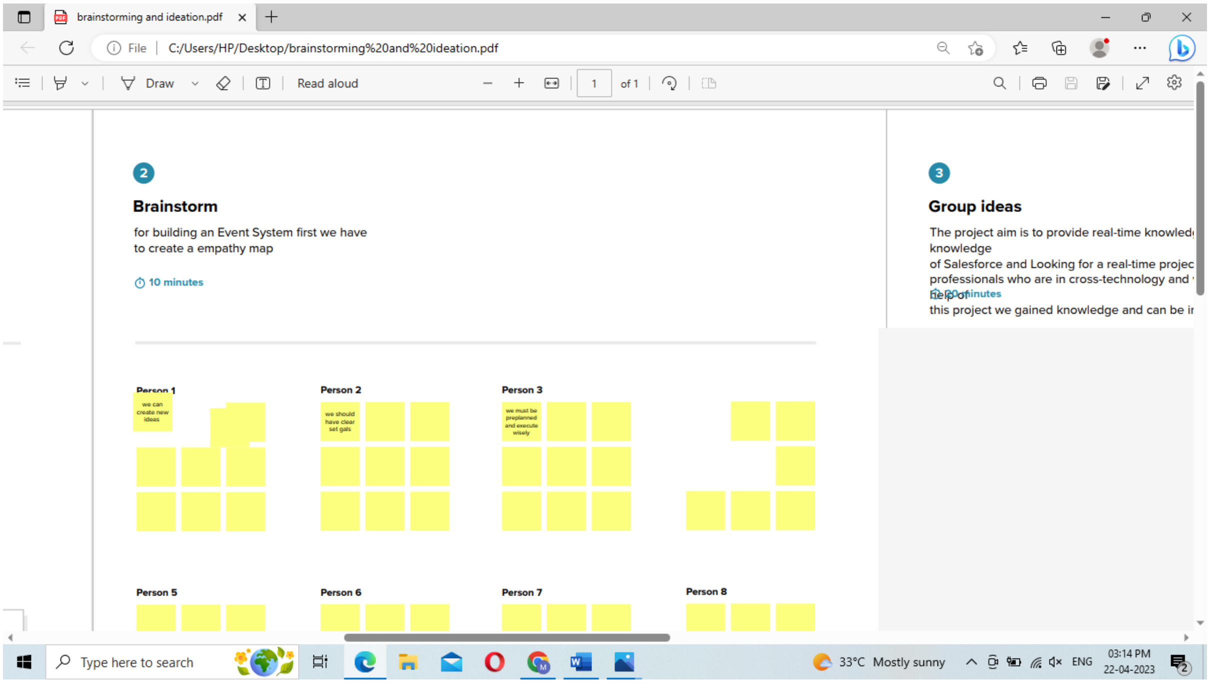
We learnt:

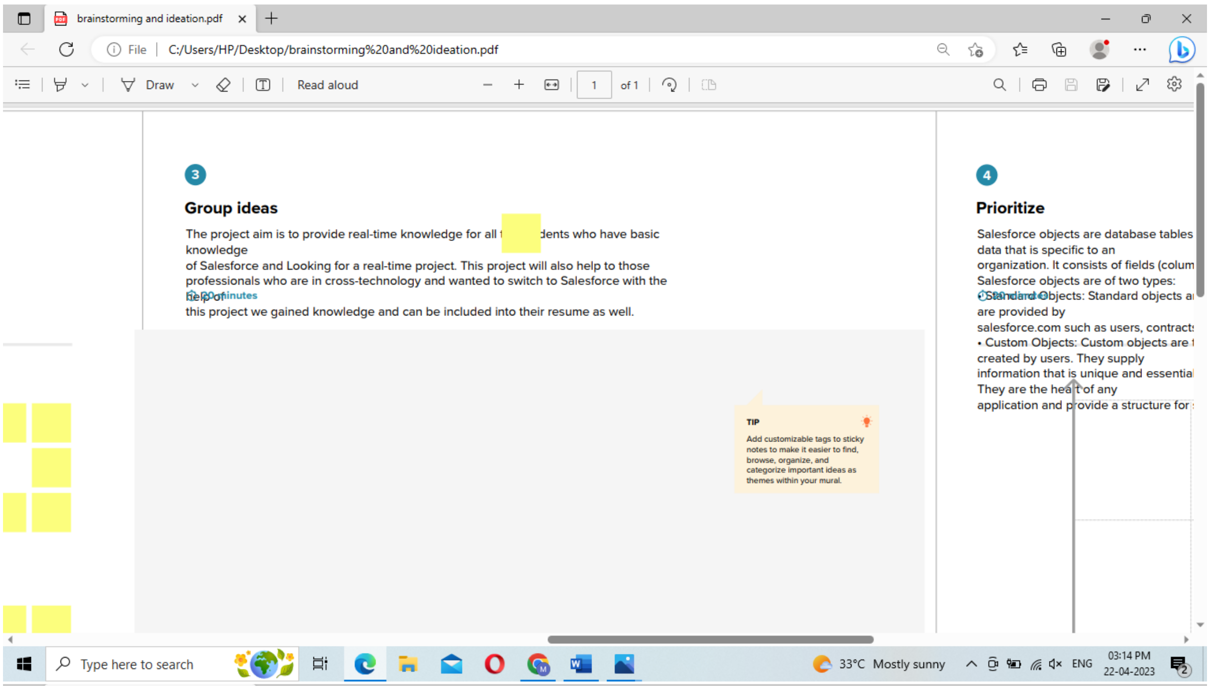
1. Real Time Salesforce Project
2. Object & Relationship in Salesforce
3. Create Salesforce Org

PROBLEM DEFINITION & DESIGN THINKING:

EMPATHY MAP:



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Draw
Read aloud
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of 1
3
Group ideas
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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 we gained knowledge and can be included into their resume as well.
20 minutes
TIP
Add customizable tags to sticky notes to make it easier to find, browse, organize, and categorize important ideas as themes within your mural.
4
Prioritize
Salesforce objects are database tables
data that is specific to an
organization. It consists of fields (colum
Salesforce objects are of two types:
• Standard Objects: Standard objects a
are provided by
salesforce.com such as users, contract
• Custom Objects: Custom objects are
created by users. They supply
information that is unique and essentia
They are the heart of any
application and provide a structure for
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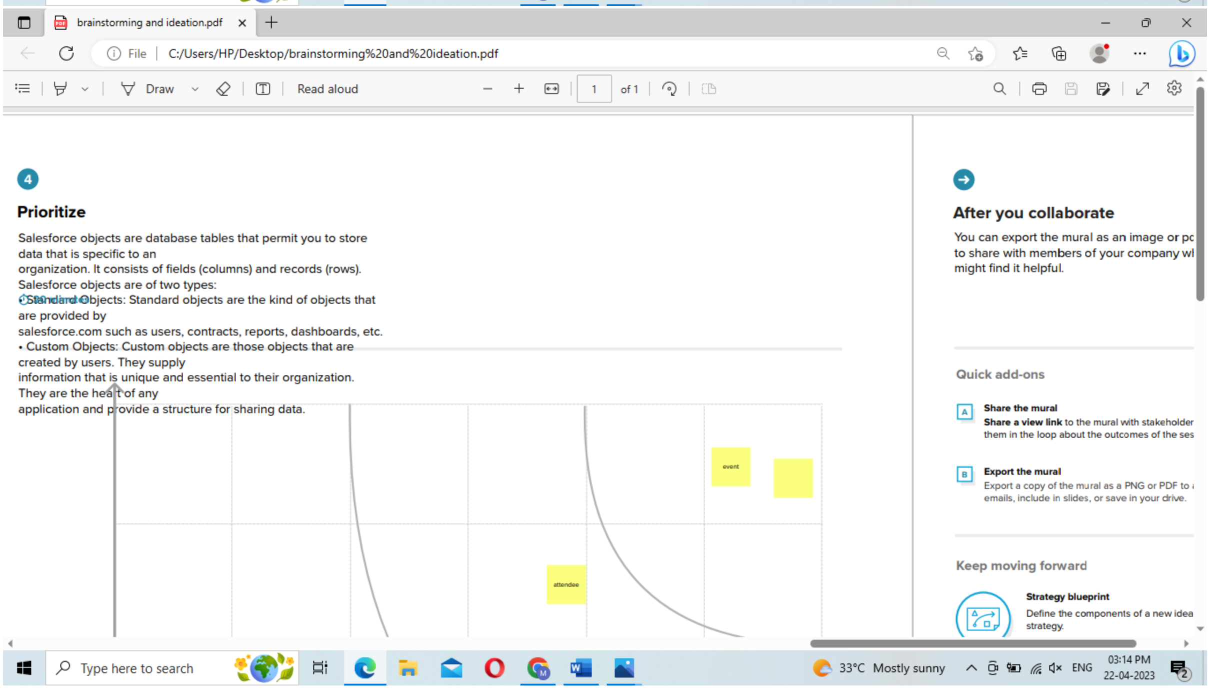
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Read aloud
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4
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They are the heart of any
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event
attendee
After you collaborate
You can export the mural as an image or pd
to share with members of your company wh
might find it helpful.
Quick add-ons
A
Share the mural
Share a view link to the mural with stakeholder
them in the loop about the outcomes of the ses
B
Export the mural
Export a copy of the mural as a PNG or PDF to
emails, include in slides, or save in your drive.
Keep moving forward
Strategy blueprint
Define the components of a new idea
strategy.
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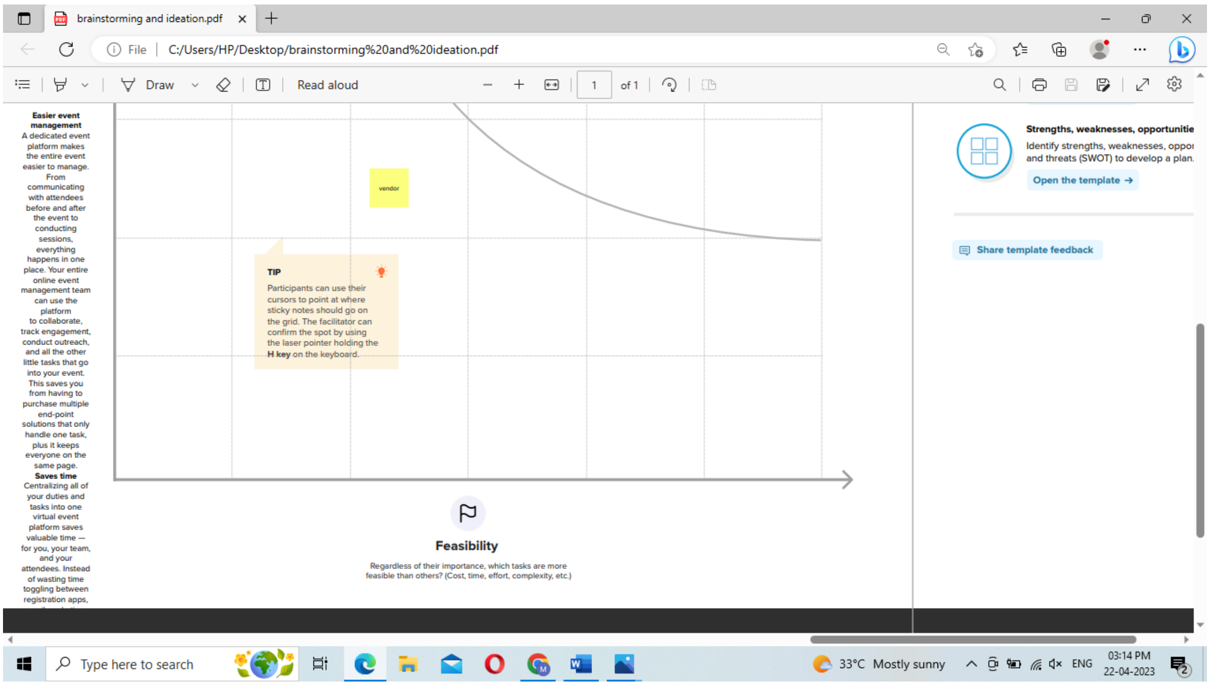
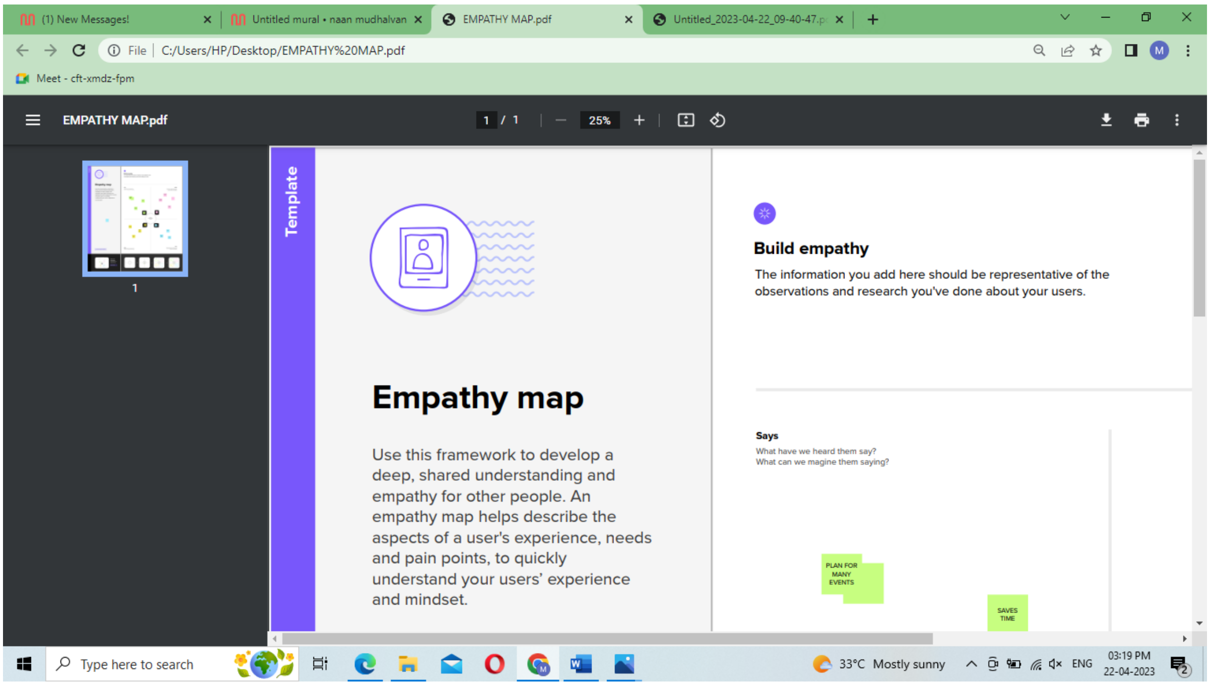
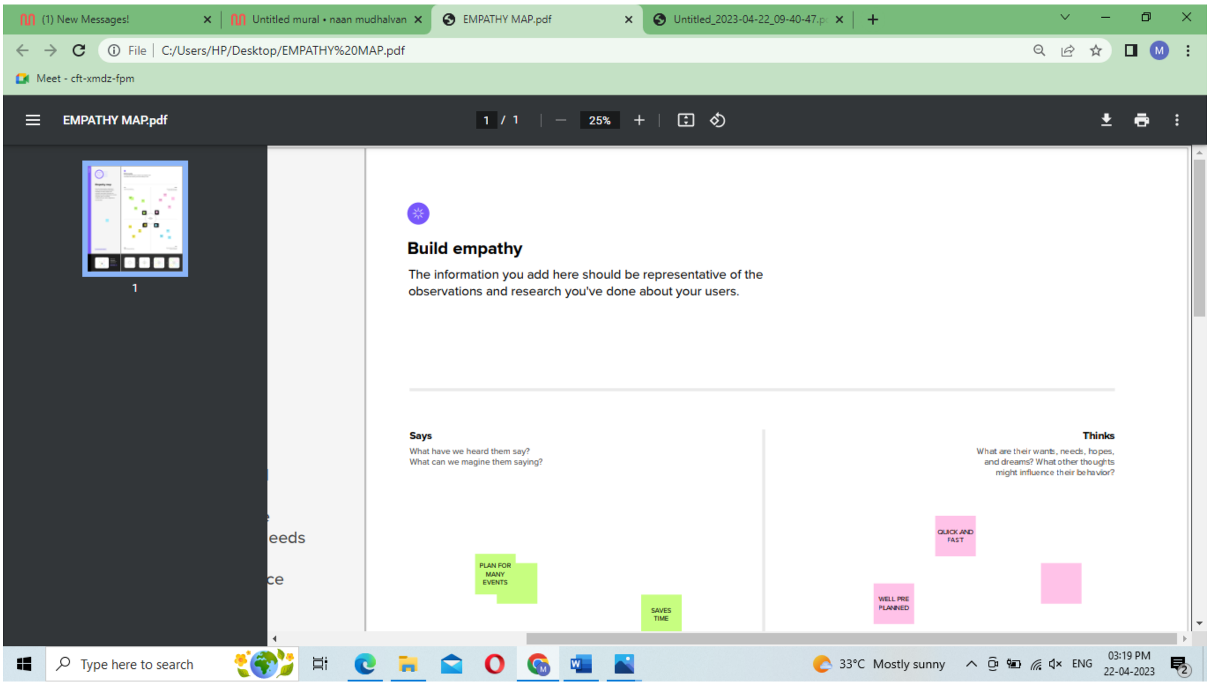


IDEATION AND BRAINSTORMING MAP:




EMPATHY MAP.pdf
Build empathy
The information you add here should be representative of the observations and research you've done about your users.
Says
What have we heard them say?
What can we magine them saying?
Thinks
What are their wants, needs, hopes, and dreams? What other thoughts might influence their behavior?
QUICK AND FAST
PLAN FOR MANY EVENTS
SAVES TIME
WELL PRE PLANNED
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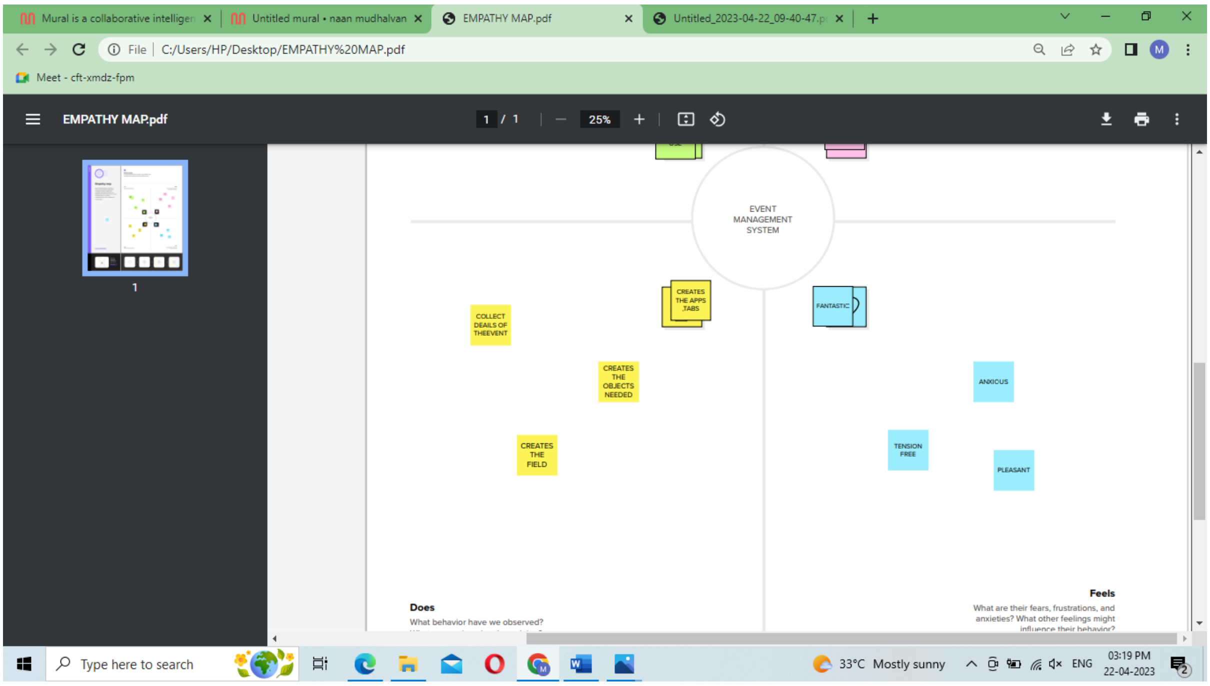
EMPATHY MAP.pdf
EVENT MANAGEMENT SYSTEM
CREATES THE APPS ,TABS
FANTASTIC
COLLECT DEALS OF THEEVENT
CREATES THE OBJECTS NEEDED
ANXIOUS
CREATES THE FIELD
TENSION FREE
PLEASANT
Does
What behavior have we observed?
Feels
What are their fears, frustrations, and anxieties? What other feelings might influence their behavior?
Type here to search
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RESULT:

<table>
<tr><th>OBJECT NAME</th><th>FIELDS IN THE OBJECT</th></tr>
<tr><td>EVENT</td><td>
<table>
<tr><th>FIELD LABEL</th><th>DATA TYPE</th></tr>
<tr><td>CITY</td><td>TEXT</td></tr>
<tr><td>EVENT NAME</td><td>MASTER-DETAILED RELATIONSHIP</td></tr>
<tr><td>EVENT NAME</td><td>LOOK -UP RELATIONSHIP</td></tr>
</table>
</td></tr>
<tr><td>ATTENDEE</td><td>
<table>
<tr><th>FIELD LABEL</th><th>DATA TYPE</th></tr>
<tr><td>ID</td><td>AUTONUMBER</td></tr>
<tr><td>PHONE</td><td>PHONE</td></tr>
<tr><td>EMAIL</td><td>EMAIL</td></tr>
<tr><td>TICKETS</td><td>PICKLIST</td></tr>
</table>
</td></tr>
<tr><td>SPEAKER</td><td>
<table>
<tr><th>FIELD LABEL</th><th>DATA TYPE</th></tr>
<tr><td>BIO</td><td>TEXT AREA</td></tr>
<tr><td>EMAIL</td><td>EMAIL</td></tr>
</table>
</td></tr>
<tr><td>VENDOR</td><td>
<table>
<tr><th>FIELD LABEL</th><th>DATA TYPE</th></tr>
<tr><td>EMAIL</td><td>EMAIL</td></tr>
<tr><td>PHONE</td><td>PHONE</td></tr>
<tr><td>SERVICE PROVIDER</td><td>TEXT</td></tr>
<tr><td>EVENT NAME</td><td>LOOK-UP RELATIONSHIP</td></tr>
</table>
</td></tr>
</table>

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/r9EX3lGde5k

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

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 salesforce org and by using the verify

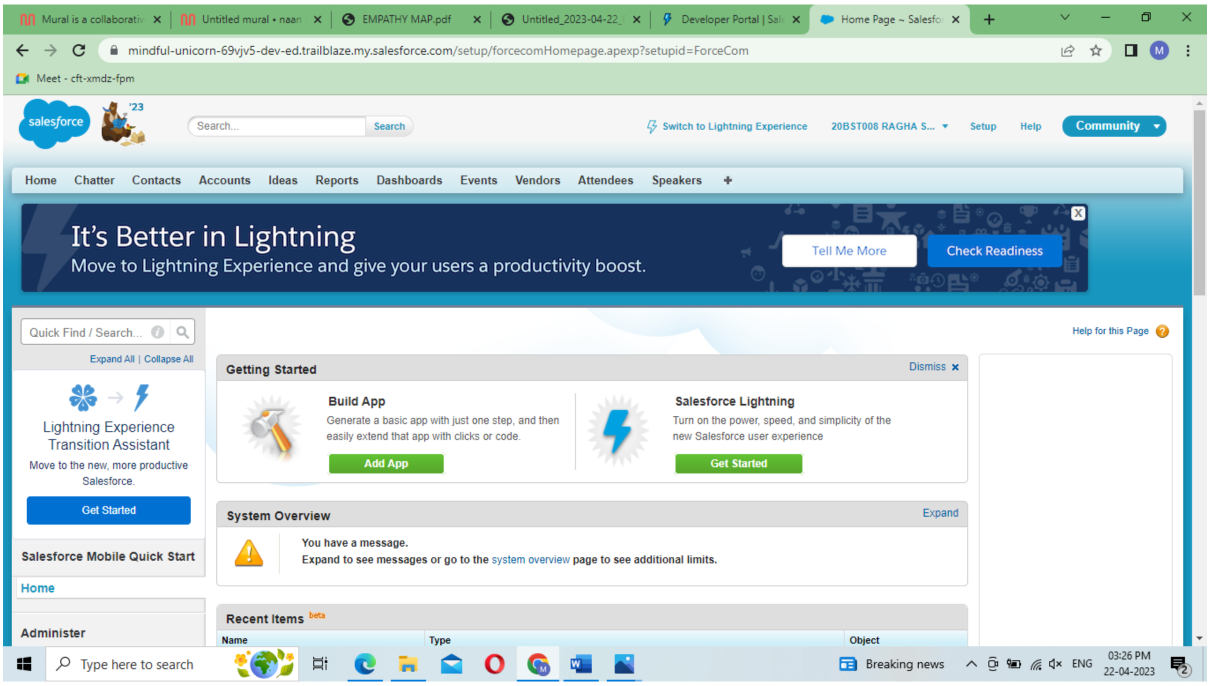
account link you can create your new password.

4. Click save.

5. Search login.salesforce.com

6. By using username and password you can into 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

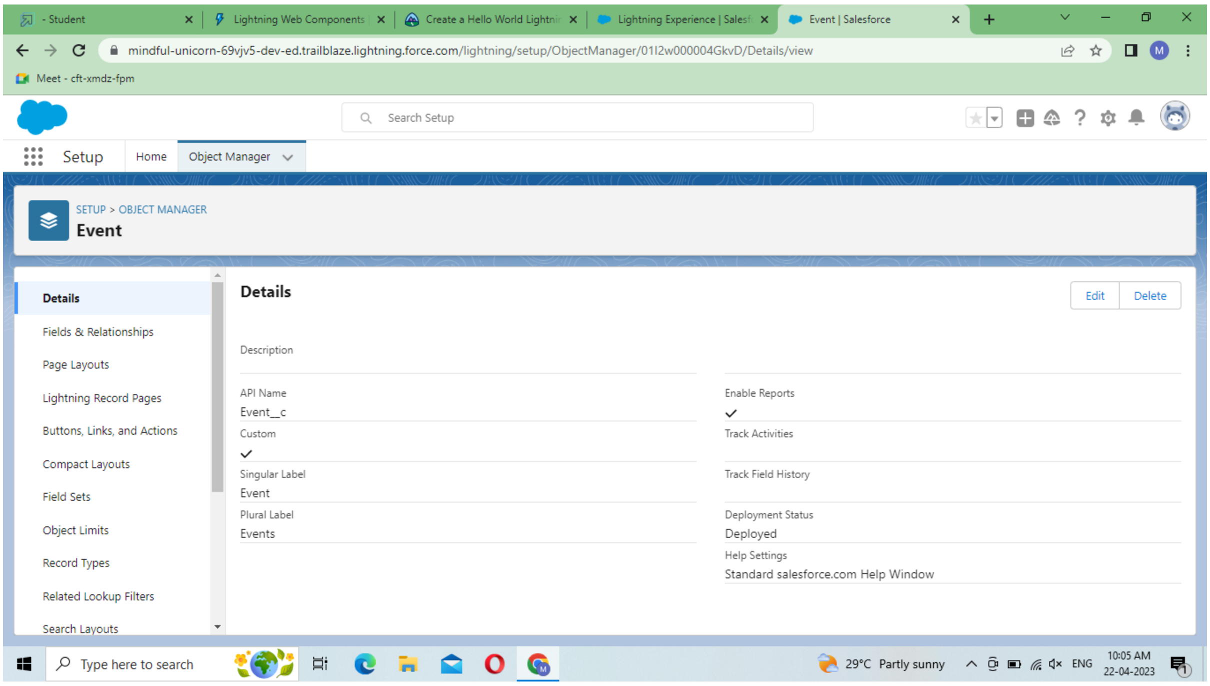
● Plural Label: Events

● Record Name: Event Name

● Check the Allow Reports checkbox

● Check the Allow Search checkbox

● Click Save.



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

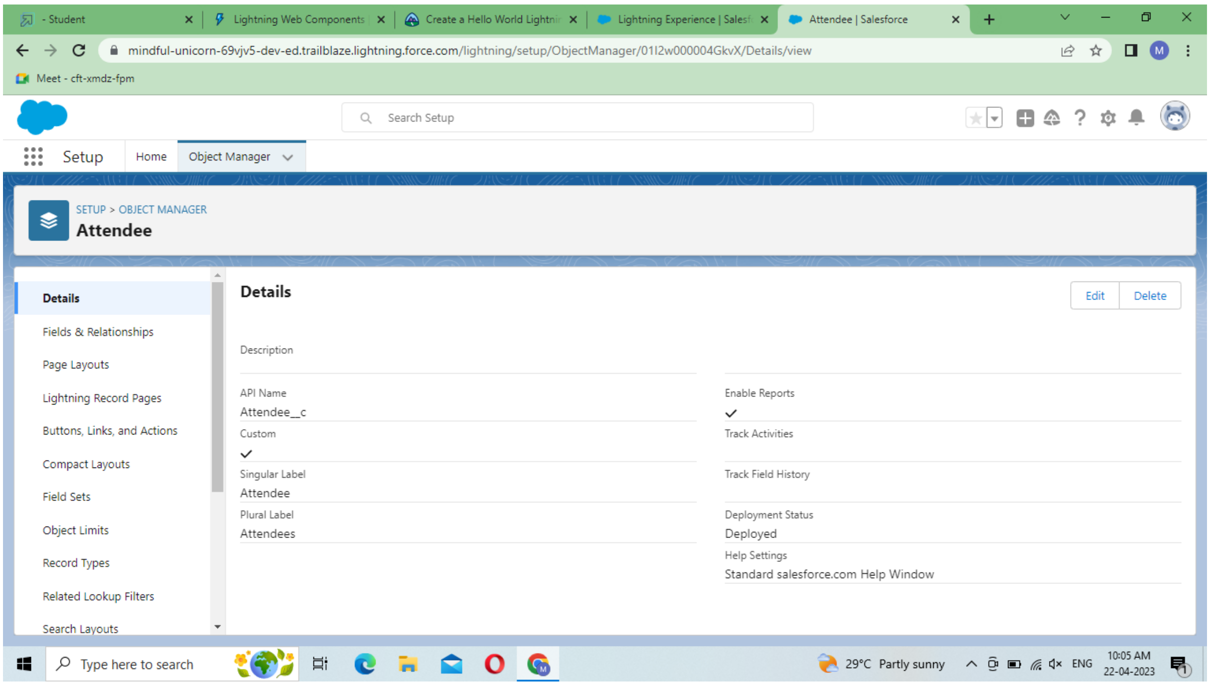
c. Plural Label: Attendees

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

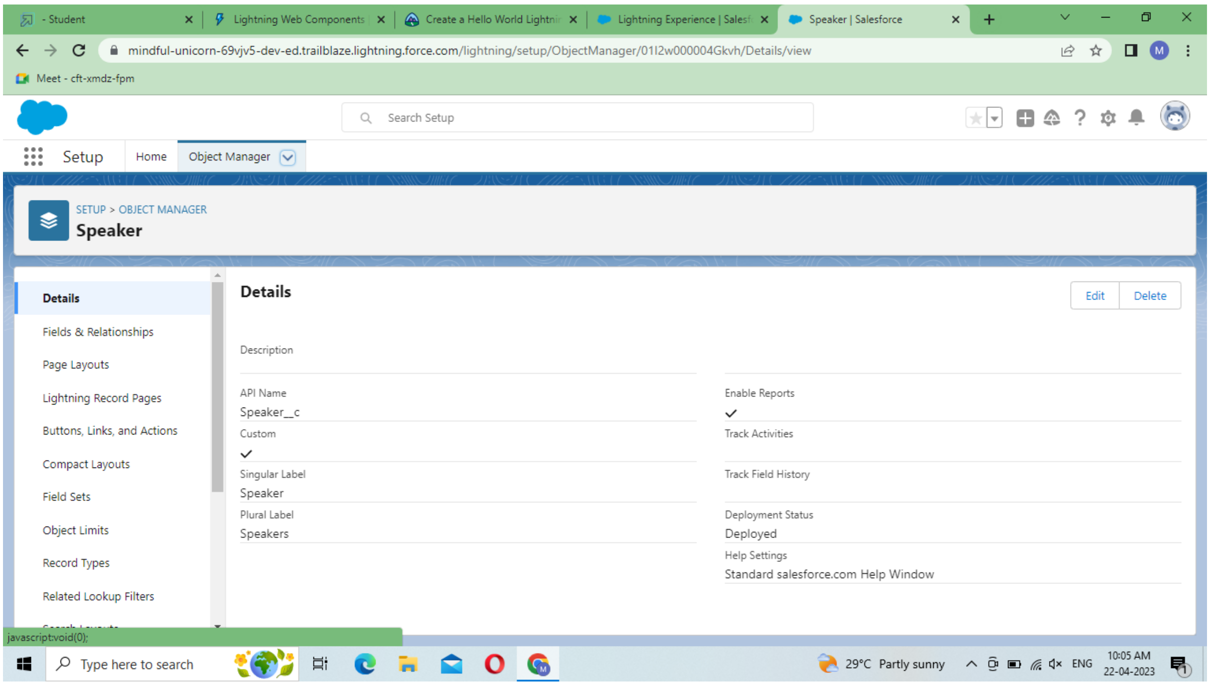
c. Plural Label: Speakers

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

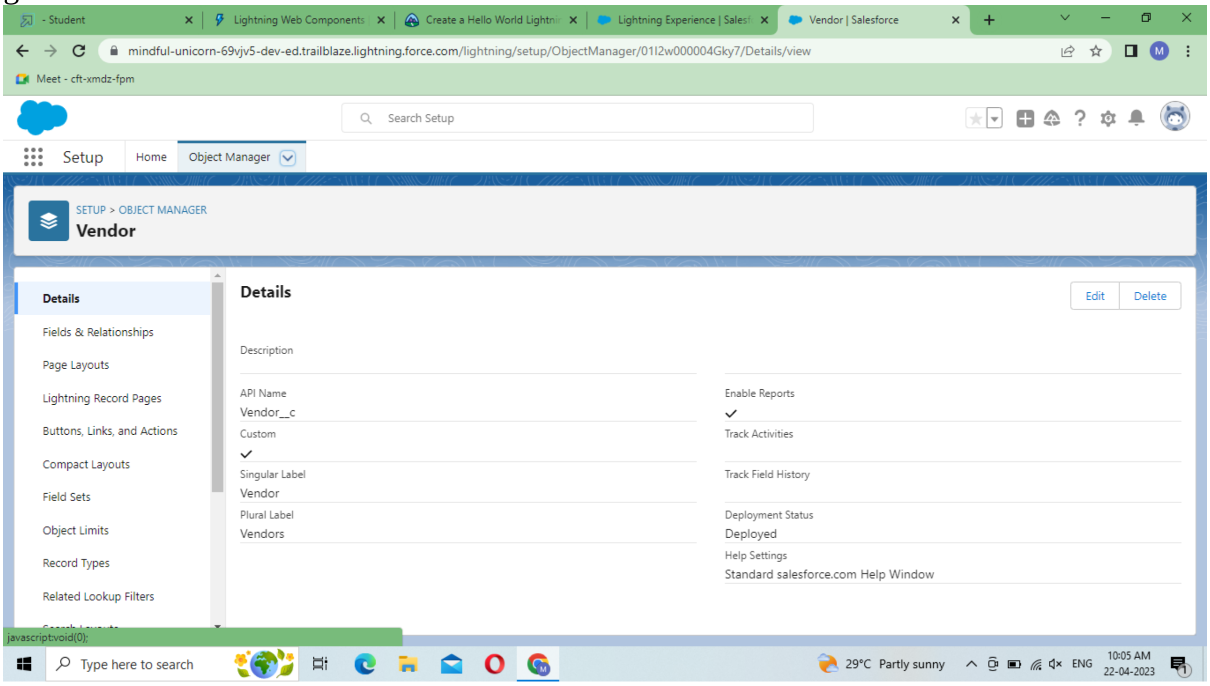
c. Plural Label: Vendors

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:

Visualforce Tabs display data from a Visualforce Page.

NOTE: we wont be dealing with web tabs and visualforce tabs later.

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.

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:

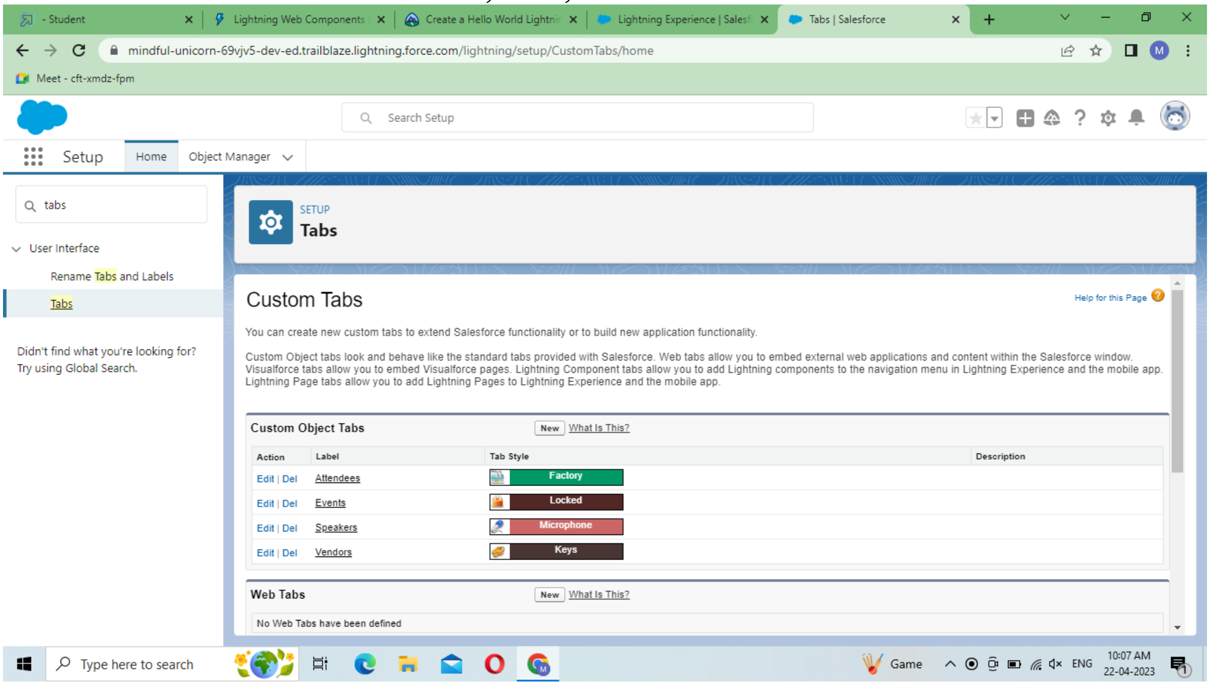
Creation of Vendor tab:

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.

● 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, andDashboards and move them to Selected Items. Click Next.

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

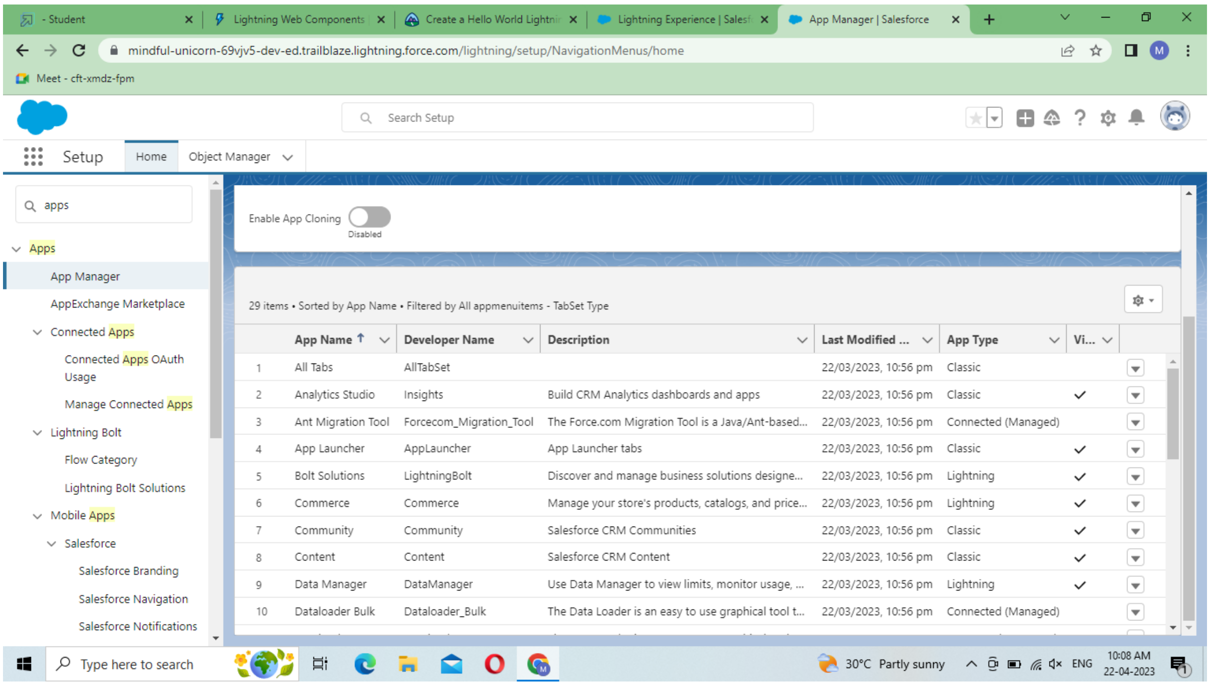
● To verify your changes, click the App Launcher, type School Management and select the School Management app.

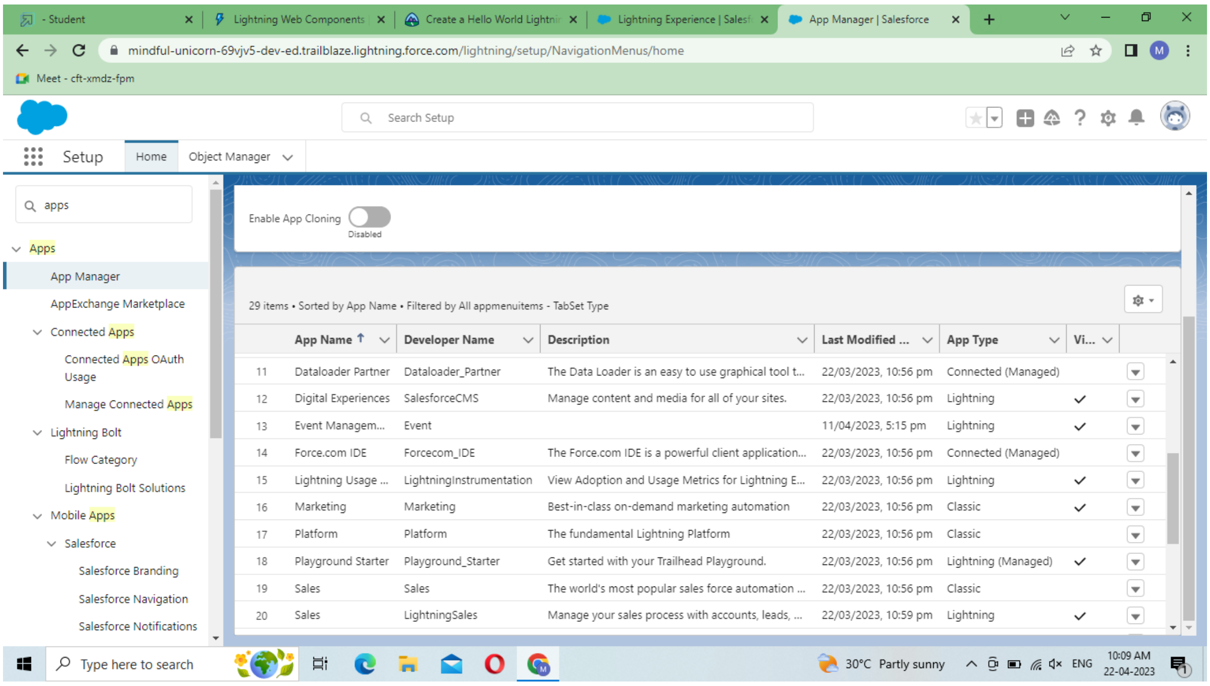
Note:

1. App Launcher-Displays available apps.

2. App Name-Displays the current selected app.

3. Navigation menu-Displays the tabs available inside the app.

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11 Dataloader Partner Dataloader_Partner The Data Loader is an easy to use graphical tool t... 22/03/2023, 10:56 pm Connected (Managed)
12 Digital Experiences SalesforceCMS Manage content and media for all of your sites. 22/03/2023, 10:56 pm Lightning
13 Event Managem... Event 11/04/2023, 5:15 pm Lightning
14 Force.com IDE Forcecom_IDE The Force.com IDE is a powerful client application... 22/03/2023, 10:56 pm Connected (Managed)
15 Lightning Usage ... LightningInstrumentation View Adoption and Usage Metrics for Lightning E... 22/03/2023, 10:56 pm Lightning
16 Marketing Marketing Best-in-class on-demand marketing automation 22/03/2023, 10:56 pm Classic
17 Platform Platform The fundamental Lightning Platform 22/03/2023, 10:56 pm Classic
18 Playground Starter Playground_Starter Get started with your Trailhead Playground. 22/03/2023, 10:56 pm Lightning (Managed)
19 Sales Sales The world's most popular sales force automation ... 22/03/2023, 10:56 pm Classic
20 Sales LightningSales Manage your sales process with accounts, leads, ... 22/03/2023, 10:59 pm Lightning
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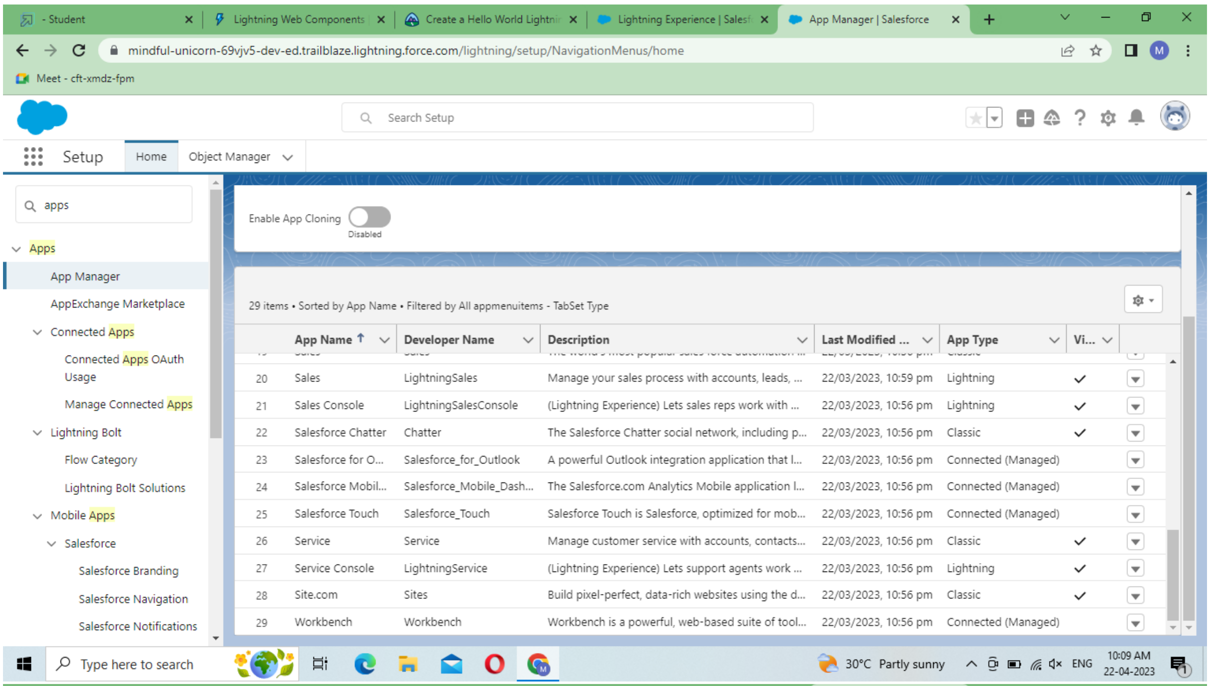
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Mobile Apps
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20 Sales LightningSales Manage your sales process with accounts, leads, ... 22/03/2023, 10:59 pm Lightning
21 Sales Console LightningSalesConsole (Lightning Experience) Lets sales reps work with ... 22/03/2023, 10:56 pm Lightning
22 Salesforce Chatter Chatter The Salesforce Chatter social network, including p... 22/03/2023, 10:56 pm Classic
23 Salesforce for O... Salesforce_for_Outlook A powerful Outlook integration application that I... 22/03/2023, 10:56 pm Connected (Managed)
24 Salesforce Mobil... Salesforce_Mobile_Dash... The Salesforce.com Analytics Mobile application I... 22/03/2023, 10:56 pm Connected (Managed)
25 Salesforce Touch Salesforce_Touch Salesforce Touch is Salesforce, optimized for mob... 22/03/2023, 10:56 pm Connected (Managed)
26 Service Service Manage customer service with accounts, contacts... 22/03/2023, 10:56 pm Classic
27 Service Console LightningService (Lightning Experience) Lets support agents work ... 22/03/2023, 10:56 pm Lightning
28 Site.com Sites Build pixel-perfect, data-rich websites using the d... 22/03/2023, 10:56 pm Classic
29 Workbench Workbench Workbench is a powerful, web-based suite of tool... 22/03/2023, 10:56 pm Connected (Managed)
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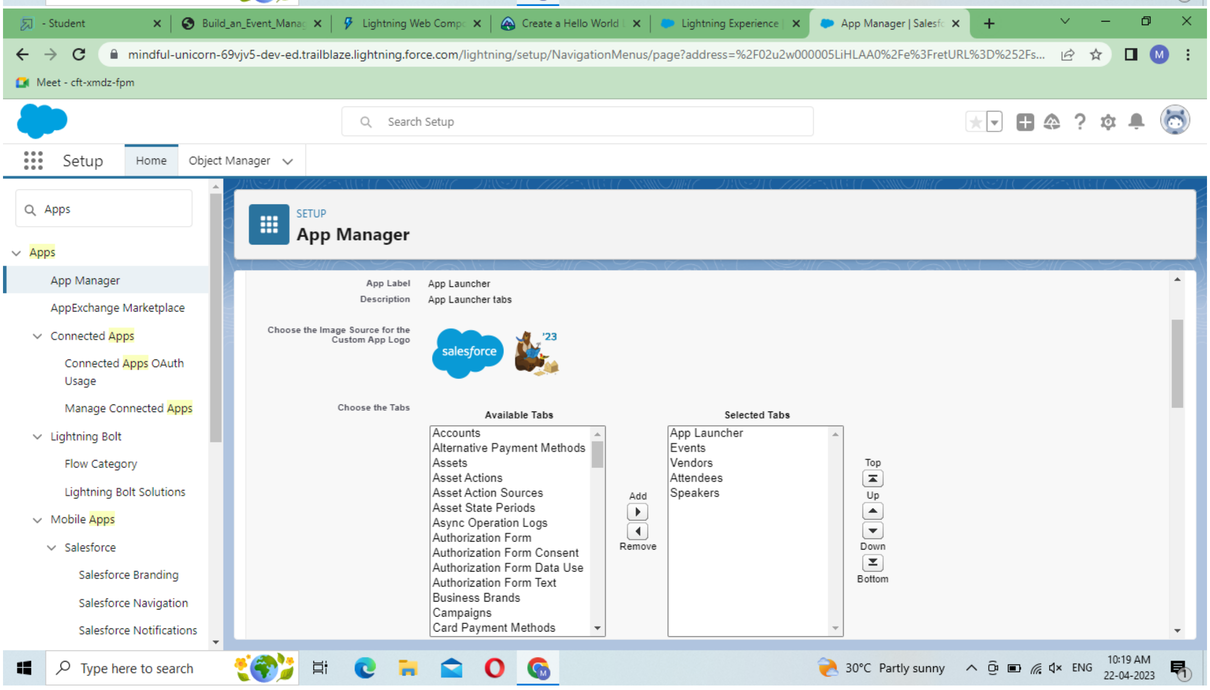
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Create a Hello World
Lightning Experience
App Manager | Salesf
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Mobile Apps
Salesforce
Salesforce Branding
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Accounts
Alternative Payment Methods
Assets
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Asset Action Sources
Asset State Periods
Async Operation Logs
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Authorization Form Consent
Authorization Form Data Use
Authorization Form Text
Business Brands
Campaigns
Card Payment Methods
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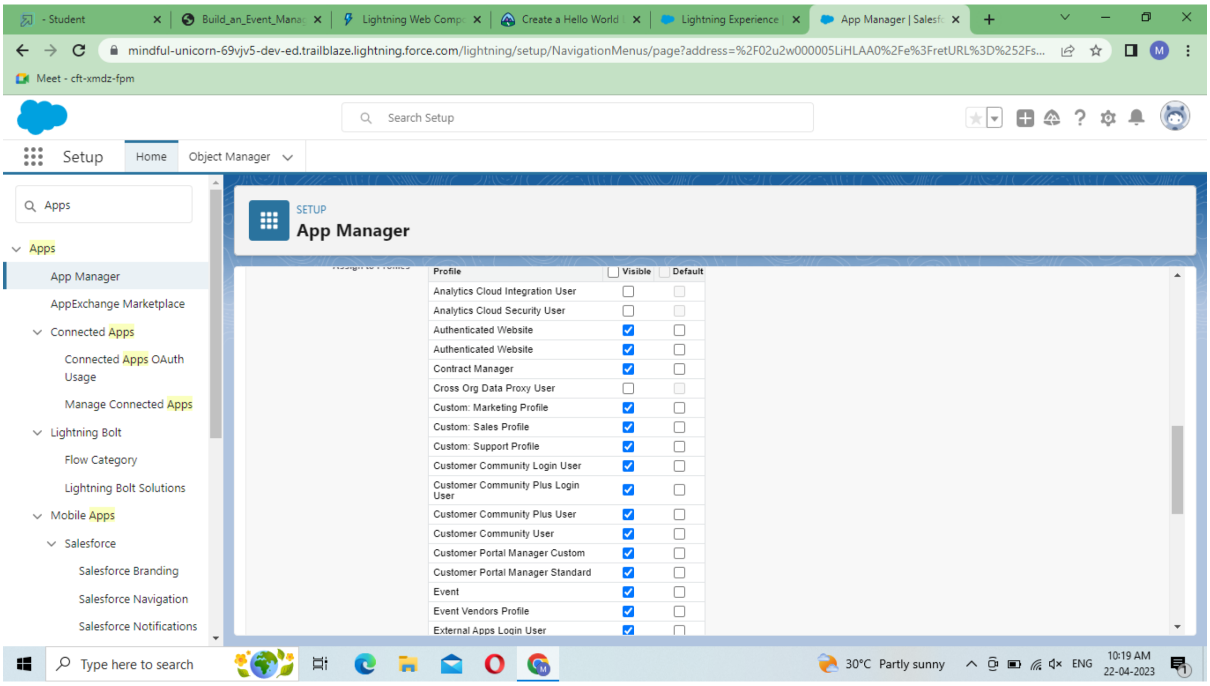
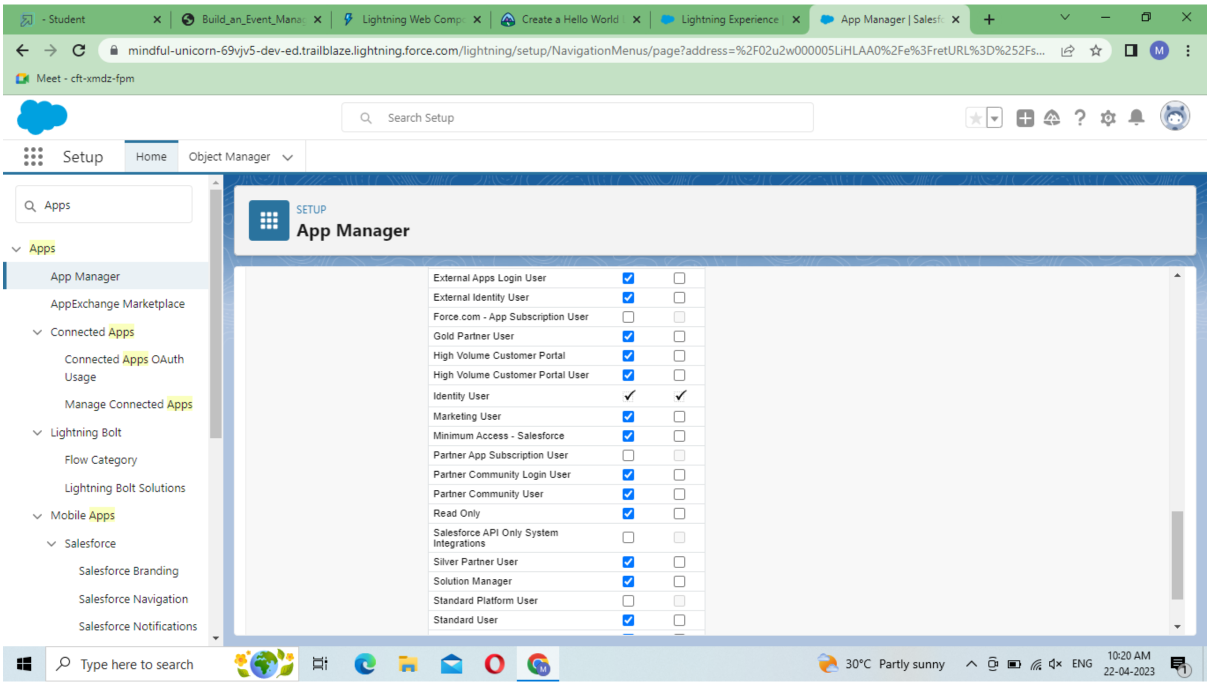




Milestone 4 – Fields:

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.
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.

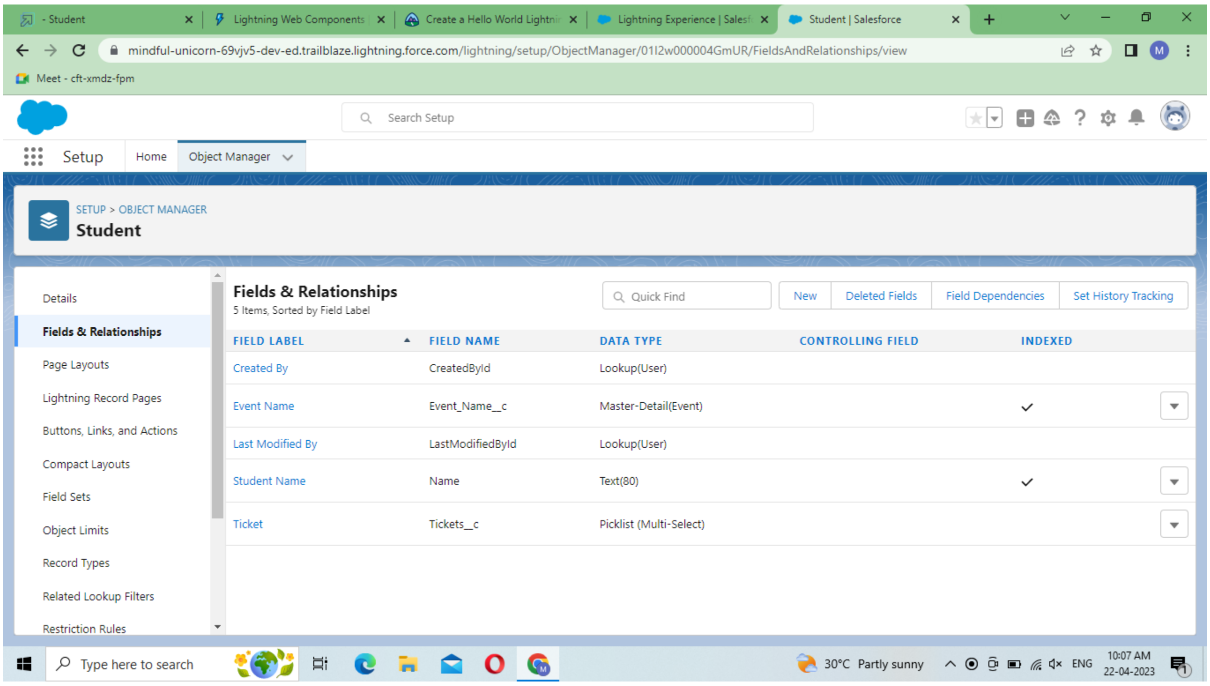
13. Select Look-up Relationship as the Data Type and click Next.

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.

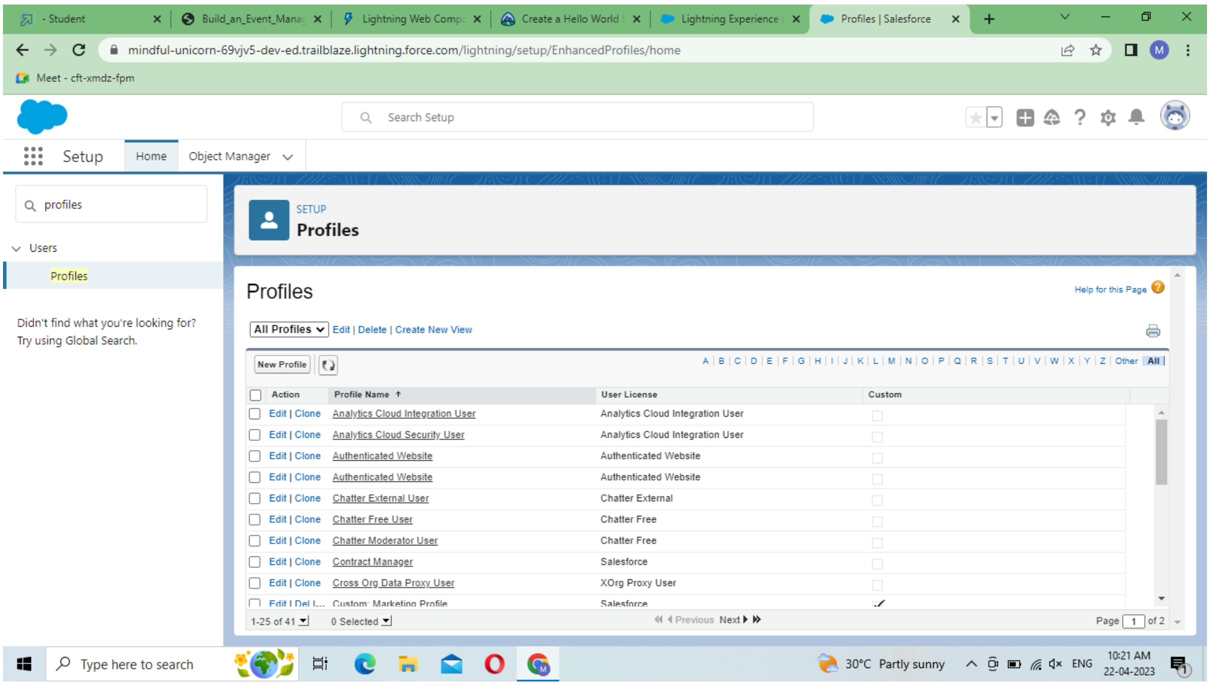
3. Click Clone.

4. For Profile Name, enter Event user profile.

5. Click Save.

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

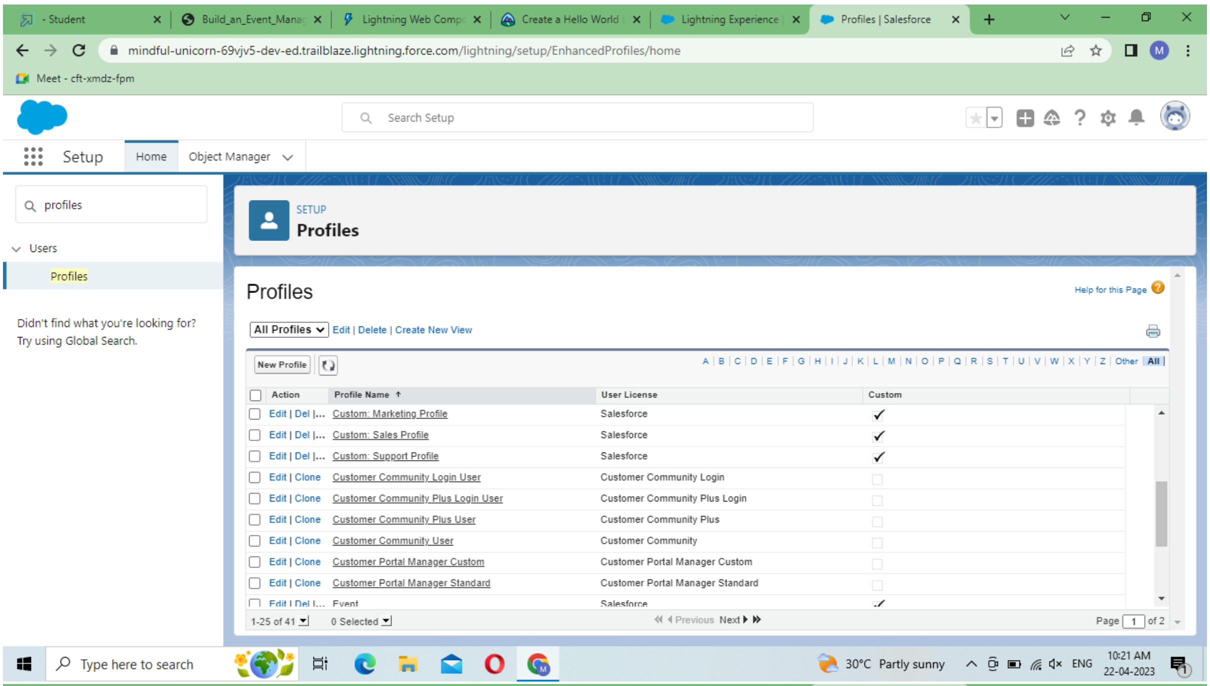
7. Scroll down to Custom Object Permissions and Give view all access permissions to the Attendees, speakers and vendors.

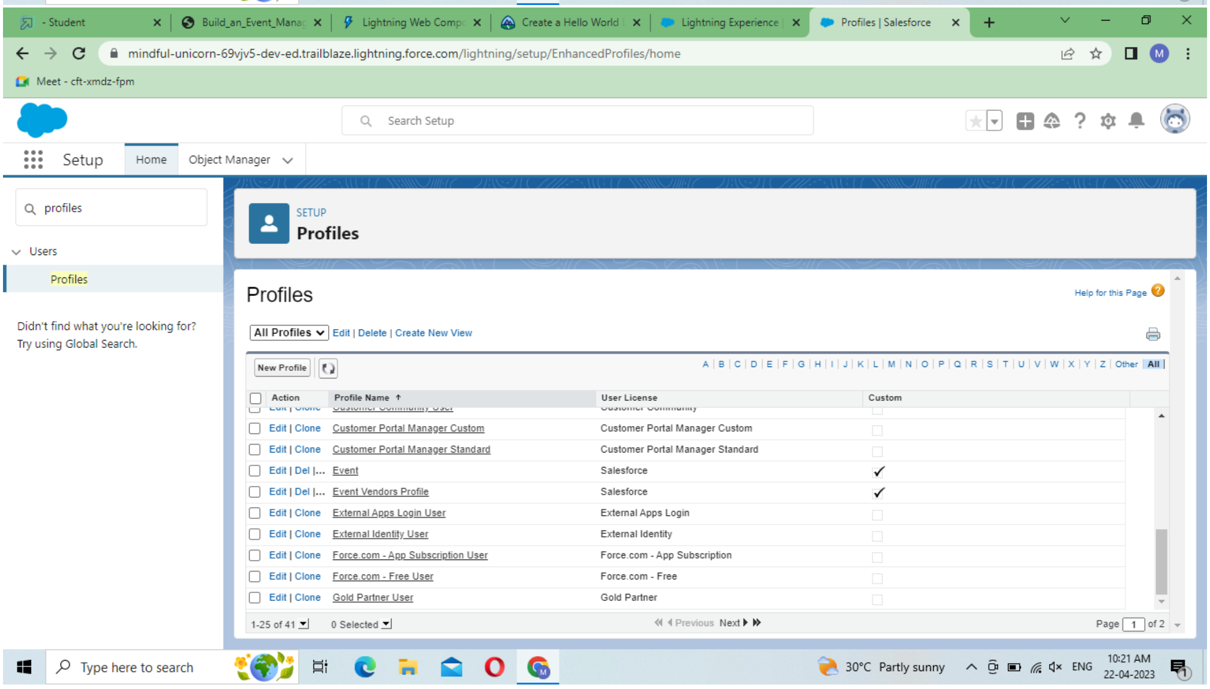


Activity 2:

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.





Milestone 6 – User:

What is a user?

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales

reps, managers, and IT specialists, who need access to the company's records. Every user in

Salesforce has a user account. The user account identifies the user, and the user account

settings determine what features and records the user can access.

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: Sanj

• Email: provide your personal email id for future reference

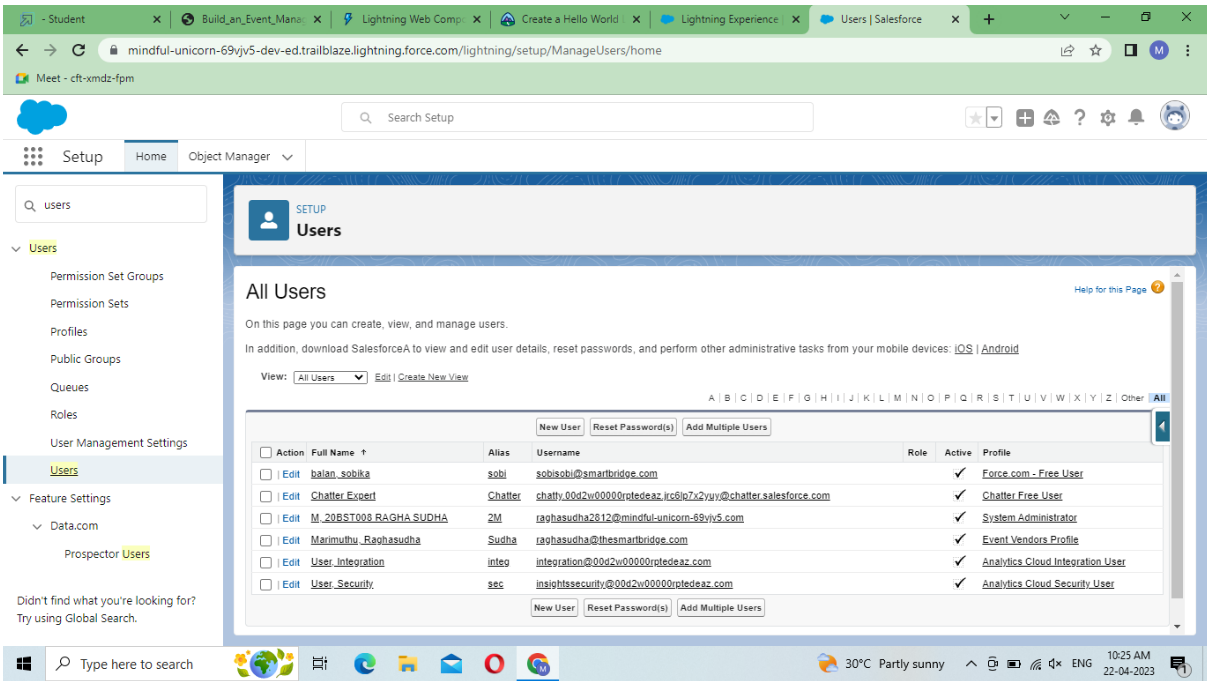
• Username: sanjaygupta@thesmartbridge.com

• 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: Rahus

• Email: provide your personal email id for future reference

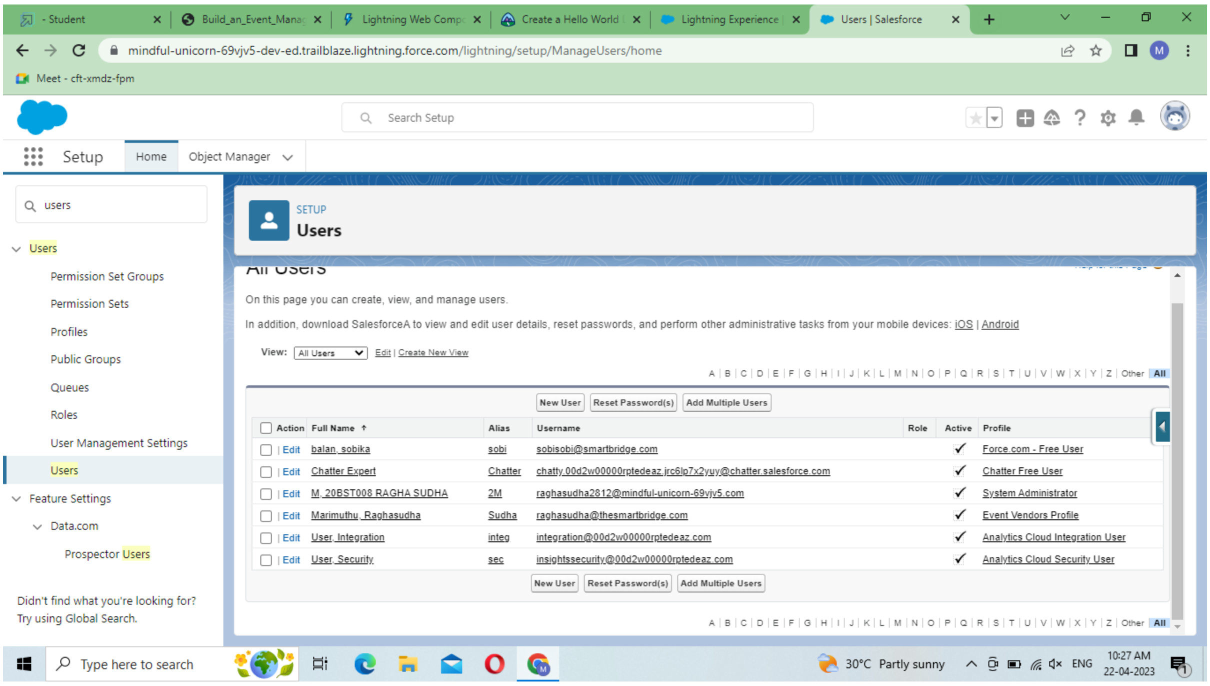
• Username: rahulsharma@thesmartbridge.com

• 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

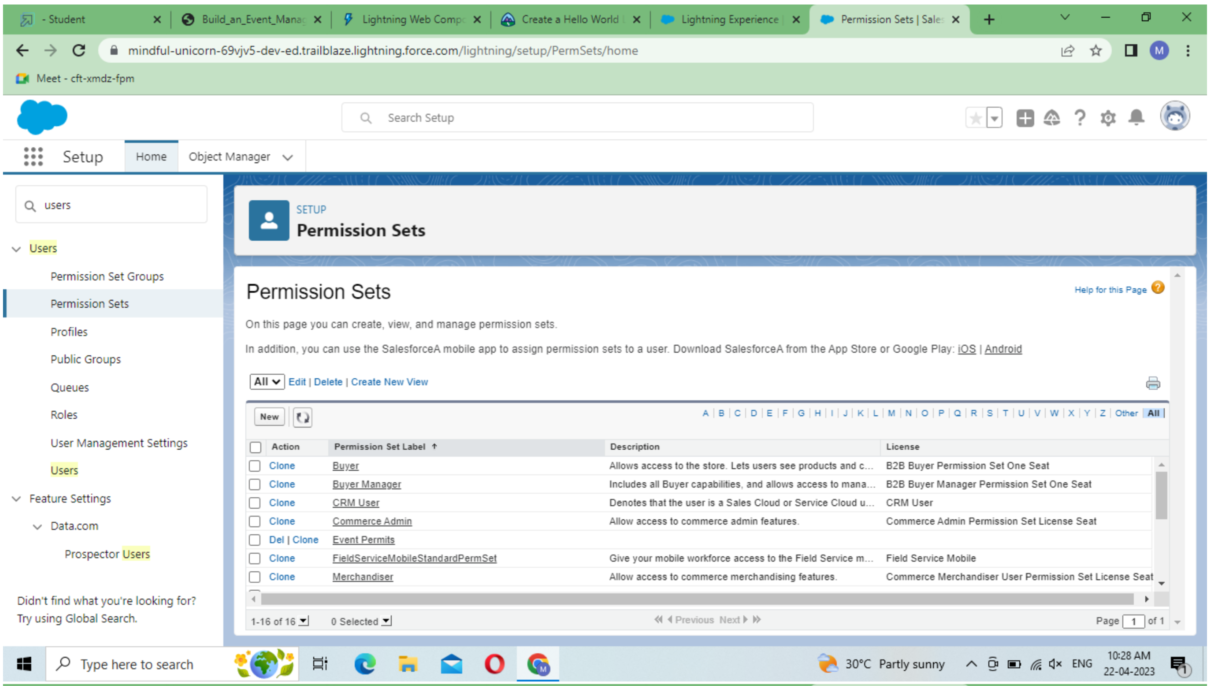
on New

• 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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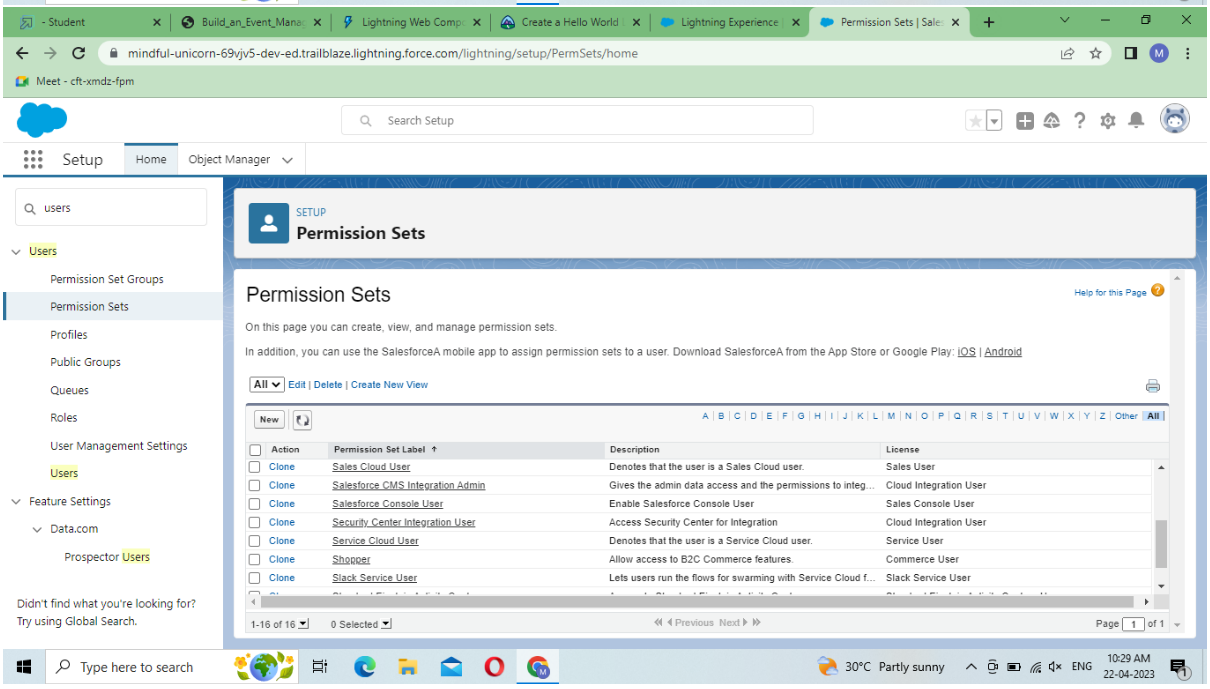
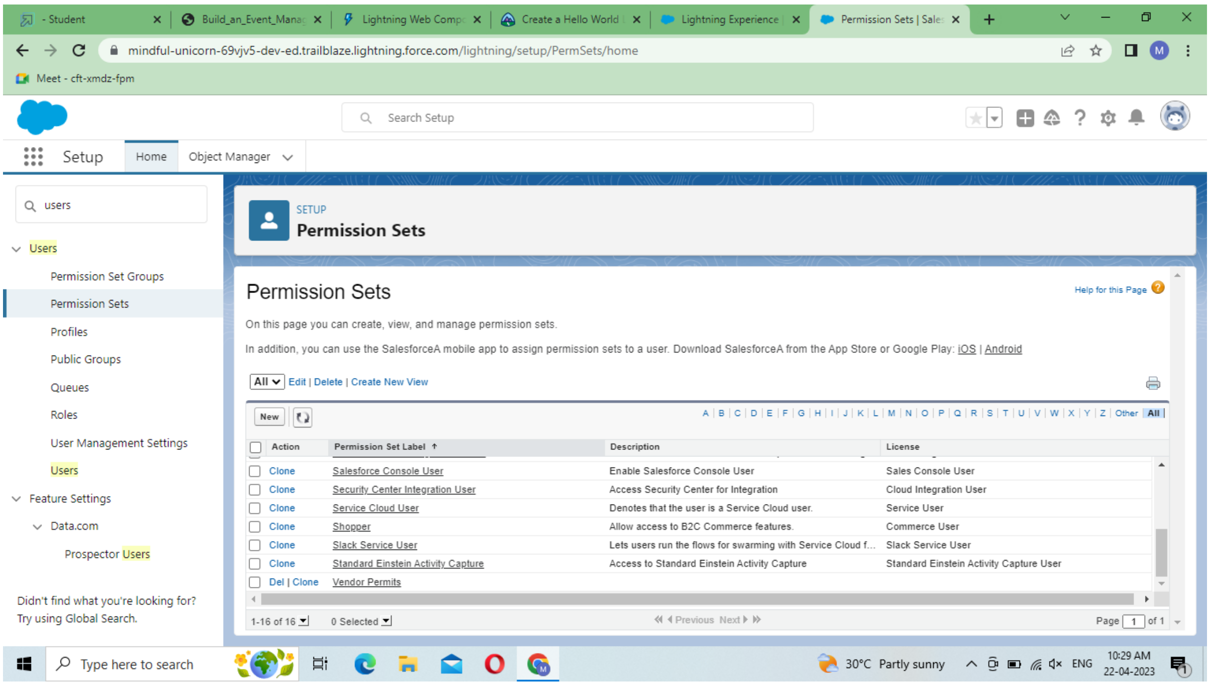
Setup
Home
Object Manager
users
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Didn't find what you're looking for? Try using Global Search.
SETUP
Permission Sets
Permission Sets
On this page you can create, view, and manage permission sets.
In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: iOS | Android
Action | Permission Set Label | Description | License
Clone | Buyer | Allows access to the store. Lets users see products and c... | B2B Buyer Permission Set One Seat
Clone | Buyer Manager | Includes all Buyer capabilities, and allows access to mana... | B2B Buyer Manager Permission Set One Seat
Clone | CRM User | Denotes that the user is a Sales Cloud or Service Cloud u... | CRM User
Clone | Commerce Admin | Allow access to commerce admin features. | Commerce Admin Permission Set License Seat
Del | Clone | Event Permits
Clone | FieldServiceMobileStandardPermSet | Give your mobile workforce access to the Field Service m... | Field Service Mobile
Clone | Merchandiser | Allow access to commerce merchandising features. | Commerce Merchandiser User Permission Set License Seat
1-16 of 16
0 Selected
Page 1 of 1
30°C Partly sunny
10:28 AM
22-04-2023


mindful-unicorn-69vjv5-dev-ed.trailblaze.lightning.force.com/lightning/setup/PermSets/home
SETUP
Permission Sets
Permission Sets
On this page you can create, view, and manage permission sets.
In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: iOS | Android
Action | Permission Set Label | Description | License
Clone | Sales Cloud User | Denotes that the user is a Sales Cloud user. | Sales User
Clone | Salesforce CMS Integration Admin | Gives the admin data access and the permissions to integ... | Cloud Integration User
Clone | Salesforce Console User | Enable Salesforce Console User | Sales Console User
Clone | Security Center Integration User | Access Security Center for Integration | Cloud Integration User
Clone | Service Cloud User | Denotes that the user is a Service Cloud user. | Service User
Clone | Shopper | Allow access to B2C Commerce features. | Commerce User
Clone | Slack Service User | Lets users run the flows for swarming with Service Cloud f... | Slack Service User
1-16 of 16
0 Selected
Page 1 of 1
30°C Partly sunny
10:29 AM
22-04-2023



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

is 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.

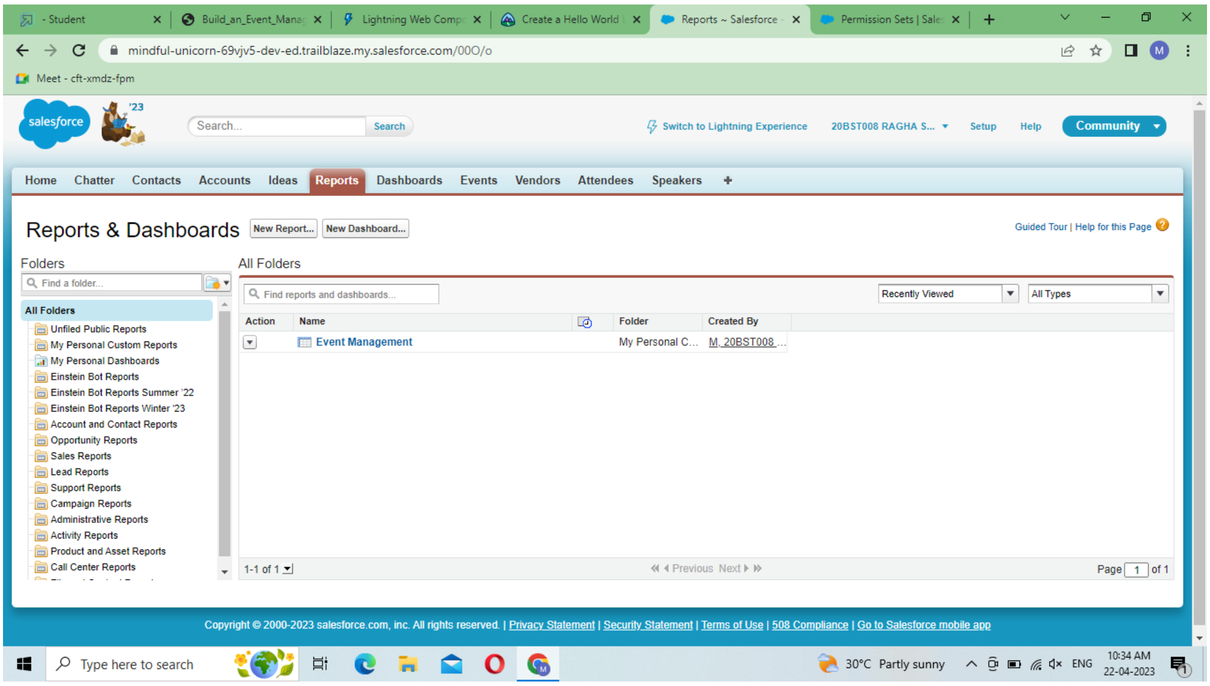
Activity

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



4.TRAILHEAD PROFILE PUBLIC URL:

Team Lead: https://trailblazer.me/id/rasu2812

Team Member 1: https://trailblazer.me/id/sobika20bst011

Team Member 2: https://trailblazer.me/id/gmohamedvazil20bst040

ADVANTAGES AND DISADVANTAGES OF EVENT MANAGEMENT SYSTEM:

ADVANTAGES:

VARIETY

You might find yourself working on conferences, sporting events, celebrity parties, charity fundraisers, fashion shows, product launches, conventions, gala dinners, shop openings, or film premieres—to name just a few.

VARIED PACE

There are often slow and steady periods in the early planning stages or in between events, followed by intense periods of high activity and adrenalin rushes. That’s another reason I never get bored; you know there’s always a high point on the horizon and, if you’re lucky, the pace will slack off again immediately after to allow you to recover.

MEETING INTERESTING PEOPLE

From clients to guests, suppliers to performers, and speakers and consultants; you’ll meet a wide range of people, dip into their world, and often be taught things you didn’t know or hadn’t experienced before.

TEAM WORK

Many professions talk about working as part of a team, but there aren’t that many jobs where the entire team covers each other’s backs with such frequency. Team work plays a huge part in events, which in itself is extremely rewarding and can make it a really fun environment to work in—plus you have other people to lean on who’ll help to support you. Everyone pulls together at an event to make it happen.

EXPERIENCING NEW THINGS

Whether it’s travelling abroad, tasting fine foods and wines, coming into contact with famous people or getting to go to places, venues, and events that you would never usually get to see, there are always new things to experience.

NO FORMAL EDUCATION NECESSARY

It’s a profession where you can become very successful without any formal education, training or certification.

SHORT CONTRACT WORK AVAILABLE

It’s possible to be a self-employed freelancer and work for short periods on a specific event, then take longer periods off in between—meaning you can juggle it with other priorities such as family or other work.

GOOD JOB PROSPECTS

It’s still a relatively new and fast- growing industry so the need for event planners is expected to remain high for some time.

OWN BUSINESS POTENTIAL

It's a profession where it's relatively easy to work your way up to starting your own business.

IT'S FUN

Despite all the cons, it's still a really fun and satisfying profession to work it.

DISADVANTAGES:

LONG / ANTI-SOCIAL HOURS

Weekend and evening work is frequent, often in addition to regular office hours—plus there are lots of events over holiday periods.

STRESSFUL WORK

There is a lot of pressure for things to go right, under a strict time frame, and within budget. Combine that with the fact that it's a live experience, which you only get one shot at, and that makes for very stressful work. Not everyone can handle that sort of pressure.

TIRING WORK

15 hours days are common, most of which is spent on your feet running around doing physical things; fetching, lifting and carrying, and you often have to snatch meals on the go—if you're lucky!

TRAVEL

Repeatedly being away from home, living out of a suitcase and only ever seeing the inside of the airport and a hotel ballroom can take all the fun out of travelling with work. It can also be hard to balance with family, pets, or relationships.

DEALING WITH DIFFICULT PEOPLE

Guests (and some clients!) can be demanding, unreasonable, rude and obnoxious—and you'll be on the front line taking all the stress, insults and abuse while smiling sweetly and saying 'no problem, let me take care of that for you' when actually you'll wish you had a voodoo doll to hand.

RECESSION-AFFECTED JOB

When the economy is down, events are one of the first things to be cut so planners get laid off and it can be difficult to find work.

PERIODS OF UNEMPLOYMENT

If you're working as a freelance event planner there can be periods of unemployment in between contracts. While freelance jobs might appear to pay more, often that pay has to last longer.

CROWDED JOB MARKET

As the events industry has grown, with universities churning out more and more event management graduates, competition for jobs has increased massively in recent years.

EXPERIENCE REQUIRED

Although you can get away without formal education, training or certification, you absolutely must have experience in order to become an event planner. That often means starting at the very bottom and working your way up by doing unpaid work

APPLICATIONS OF EVENT MANAGEMENT:

Easier event management

A dedicated event platform makes the entire event easier to manage. From communicating with attendees before and after the event to conducting sessions, everything happens in one place. Your entire online event management team can use the platform to collaborate, track engagement, conduct outreach, and all the other little tasks that go into your event. This saves you from having to purchase multiple end-point solutions that only handle one task, plus it keeps everyone on the same page.

Saves time

Centralizing all of your duties and tasks into one virtual event platform saves valuable time — for you, your team, and your attendees. Instead of wasting time toggling between registration apps, email marketing, and conferencing tools, your entire event takes place within the event software. Plus, you save even more time since you don’t have to vet multiple solutions for every phase of your event.

Cut costs

Managing an event budget and tracking revenue vs expenses can be tricky without the right software. To maximize your event ROI, using a central platform can help you track every dollar in and out. Compare registration with expenditures and visually track your spending so you can influence your ROI as you go.

Increase engagement

Audience engagement matters — before, during, and after your event. Dedicated event planning software includes audience engagement tools for every phase of your event. Send automated emails to attendees immediately upon registration and continue to get them excited leading up to the event.

During your meeting or conference, use interactive tools to collect questions, poll answers, or shout-outs. From asking questions in real-time to participating in workshops, an engaged audience is more likely to take something away from your event.

And after the event is over, your event management software can keep the conversation going. By tracking and analysing attendee engagement, you can customize your outreach to maximize responses.

And, as an added bonus, seeing how your audience engaged before, during, and after your event can help you improve and build on your next one.

Analyse and improve

Speaking of improvement, event planning software helps you decide where to make changes to your events based on data, not hunches. It analyses audience behaviours and engagement metrics in real-time and at scale. This way, you can continue adding value to future events in ways that matter to your audience.

Automate your event

Event planners wear many hats, and it usually takes an entire team of event professionals to pull off an event of any size. So, when you can automate some tasks, it reduces the demand on your team without sacrificing the outcome of your event.

For example, you can send automatic emails confirming registration as well as announcements leading up to the event. All registration data can be automatically uploaded into your CRM, reducing data entry time and the potential for errors in the data.

Freeing up your event staff's time with automation allows every team member to give more attention to creativity and functionality rather than mundane tasks that don't add to the impact of the event.

Display a greater level of professionalism

The image you present throughout your event matters to your audience. Every time they engage with your event messages, sessions, speakers, or branding, they're forming opinions about your expertise. You want to put your best foot forward, and professional event software can help.

Using a dedicated event platform shows you're invested in the total event experience. It creates a consistent, predictable experience for your attendees and your event management team. Plus, it allows your human staff to provide even more touchpoints with attendees because they're not having to spend time managing as many details behind the scenes.

Take a holistic approach to event management

Bringing all of the moving parts of an event under the same umbrella — HR, accounting, registration, execution, and marketing — consolidated all of your event tasks. This makes it easier to delegate tasks to your team, outsource certain parts of your event to other vendors, and improve productivity throughout the planning process.

Technology has made many parts of event management easier and more streamlined. And in the era of hybrid and virtual events, using purpose-built tools for these event styles can help you maximize your event's potential.

Conclusion:

Planning an event can be a complicated task. There are people to invite, ideal venues to locate and coordinate, and the event itself needs to be organized to run successfully.

Without event management software, the event planner is on their own to coordinate and plan all of the details. They also have to relay the message to all of the relevant parties in order to make the event run smoothly.

However, with event management software, all of the hard work can be done for you!

Simplify the process of event management by implementing a software that can easily handle the complexities.

This can be best done when build our event management system using salesforce. By doing the project on Building an Event Management system using Salesforce we have learnt many new things. It was really interesting and useful for our future in many ways.