



Build An Event Management System



NAAN MUDHALVAN PROJECT REPORT

Submitted by

DHARUNKUMAR S (611220205301)

JAYADHARANI A (611220205012)

JAYASHRI A S (611220205013)

PRIYADHARSHINI V (611220205026)

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ANNA UNIVERSITY::CHENNAI 600025

BONAFIDE CERTIFICATE

Certified that this the project report titled “**Build An Event Management System**” is the bonafide work of “**DHARUNKUMAR S (611220205301), JAYADHARANI A (611220205012), JAYASHRI A S (611220205013) ,PRIYADHARSHINI V (611220205026)**”who carried out the project work under my supervision.

SIGNATURE

Mr. R. AYYAPPAN. ME.,
ASSISTANT PROFESSOR
FACULTY MENTOR

Department of Information
Technology,
Knowledge Institute of Technology,
Kakapalayam,
Salem – 637504.

SIGNATURE

Mr. T. KARTHIKEYAN B. TECH, M.S(IT)., Ph.D.,
ASSISTANT PROFESSOR
SPOC FACULTY

Department of Computer Science
and Engineering,
Knowledge Institute of Technology,
Kakapalayam,
Salem – 637504.

SPOC

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HEAD OF THE DEPARTMENT

ACKNOWLEDGEMENT

At the outset, we express our heartfelt gratitude to god, who has been our strength to bring this project to light.

At this pleasing moment of having successfully completed our project, we wish to convey our sincere thanks and gratitude to our beloved president **Mr.C.BALAKRISHNAN**, who has provided all the facilities to us.

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LIST OF ABBREVIATION

CRM	Customer Relationship Management
ESP	Email Service Provider
UI	User Interface
UX	User Experience
OWD	Org - Wide Default
CTA	Call To Action
CSV	Comma - Separated Values
SLA	Service Level Agreement
API	Application Programming Interface
SaaS	Software as a Service
PaaS	Platform as a Service

CHAPTER-1

PROJECT SPECIFICATION

1.1 Project Goal

The primary goal of our project is to develop a comprehensive Event Management System on the Salesforce platform. This system will empower businesses to efficiently plan, organize, and manage a wide range of events, from corporate meetings and conferences to marketing campaigns and product launches. By leveraging the robust capabilities of Salesforce, our solution aims to streamline event planning and execution, enhance communication and collaboration among teams, and ultimately drive increased sales and revenue through more successful events. With a user-friendly interface and seamless integration into existing Salesforce workflows, our Event Management System will offer a holistic solution that enables organizations to create, track, and optimize events with ease.

In pursuit of our overarching goal, we have set specific objectives for the Event Management System on Salesforce. Firstly, we aim to provide a centralized platform that allows event planners to create, manage, and monitor events from start to finish. Secondly, our system will facilitate efficient communication and collaboration among team members, ensuring that everyone involved in an event has access to real-time information and updates. Thirdly, we intend to enhance attendee engagement and satisfaction by offering personalized experiences and easy registration processes. Furthermore, our system will enable detailed analytics and reporting to help organizations make data-driven decisions for optimizing future events. Ultimately, we aspire to help businesses drive sales and revenue growth by maximizing the impact of their events while minimizing the administrative burden associated with event management.

1.2 Project Scope

Our project focuses on the development and implementation of an Event Management System, a robust platform designed to transform the way organizations plan, execute, and evaluate events. This system is envisaged to cater to various event types, from large conferences to intimate gatherings. The project scope encompasses a wide range of features, functionalities, and integration capabilities to provide a comprehensive event management solution that meets the needs of both event organizers and attendees.

Within the project scope, the Event Management System will offer key functionalities such as event creation and management, attendee registration and ticketing, and seamless communication tools. Attendees will be able to access event-specific information, while organizers can efficiently manage speakers, sponsors, and customize event agendas. The system's analytics and reporting capabilities will empower users to make data-driven decisions, leading to more successful events and better engagement.

To enhance the utility of the system, it will be seamlessly integrated with Salesforce CRM. This integration will allow organizations to link event-related data to customer profiles and opportunities, enabling targeted marketing efforts. Additionally, the system will be designed with scalability and customization in mind, ensuring it can adapt to the unique needs of various organizations and event types.

While the project scope outlines a comprehensive set of features, it remains flexible and open to evolving requirements. User training and support will be provided to assist administrators and users in effectively utilizing the system. Regular communication with stakeholders and end-users will be maintained throughout the project's lifecycle to ensure that the system continues to align with their objectives and expectations. This project aims to deliver a versatile and user-friendly Event Management System that empowers organizations to optimize event experiences, drive sales and revenue, and establish a strong presence in the event management landscape.

1.3 Problem Statement Definition

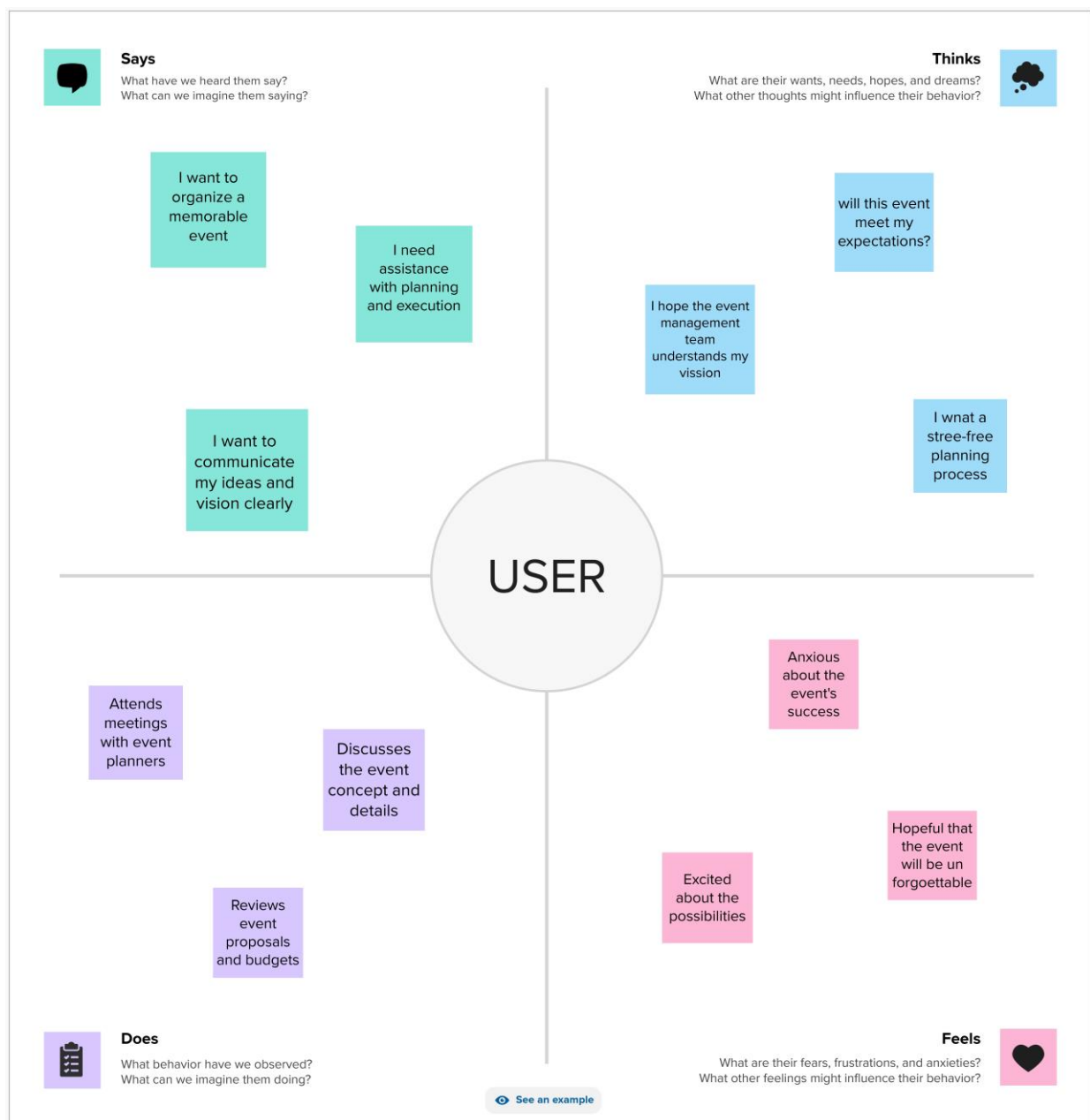
The project aim is to provide real-time knowledge for all the students who have basic knowledge of Salesforce and Looking for a real-time project. This project will also help those professionals who are in cross-technology and want to switch to Salesforce. With the help of this project they will gain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

Problem Statement(PS)	I am (Employee)	I'm trying to	But	Because	Which makes me feel
PS	Employee	I am trying to develop an event management system.	But I'm facing challenges because of the existing fragmented event planning processes.	Because I've noticed that organizations are facing significant challenges in event planning and execution.	Which makes me feel concerned is the lack of efficient tools and integration with Salesforce CRM.

1.4 Empathy Map Canvas

An empathy map is a simple, easy-to-digest visual that captures knowledge about a user's behavior and attitudes.

It is a useful tool to help teams better understand their users. Creating an effective solution requires understanding the true problem and the person who is experiencing it. The exercise of creating the map helps participants consider things from the user's perspective along with his or her goals and challenges.




1.5 Ideation & Brainstorming

Brainstorming provides a free and open environment that encourages everyone within a team to participate in the creative thinking process that leads to problem solving. Prioritizing volume over value, out-of-the-box ideas are welcome and built upon, and all participants are encouraged to collaborate, helping each other develop a rich amount of creative solutions.

Step-1: Team Gathering, Collaboration and Select the Problem Statement:


Template



Brainstorm & idea prioritization

Use this template in your own brainstorming sessions so your team can unleash their imagination and start shaping concepts even if you're not sitting in the same room.

10 minutes to prepare
 1 hour to collaborate
 2-8 people recommended



Before you collaborate

A little bit of preparation goes a long way with this session. Here's what you need to do to get going.

10 minutes

Team gathering

Define who should participate in the session and send an invite. Share relevant information or pre-work ahead.


Set the goal

Think about the problem you'll be focusing on solving in the brainstorming session.

Learn how to use the facilitation tools

Use the Facilitation Superpowers to run a happy and productive session.

[Open article](#)




Define your problem statement

Organizing events efficiently poses challenges in manual coordination, leading to potential errors and delays. A lack of a centralized system results in disjointed communication and difficulties in tracking attendee data. To address these issues, there is a need for a comprehensive event management system on Salesforce that streamlines processes and enhances overall event planning and execution.

PROBLEM


The current manual and fragmented processes for organizing events create challenges in coordination, communication, and data tracking. This inefficiency hampers the overall event planning and execution experience.



Key rules of brainstorming

To run a smooth and productive session

- Stay in topic.
- Defer judgment.
- Go for volume.
- Encourage wild ideas.
- Listen to others.
- If possible, be visual.



Need some inspiration?

See a limited version of this template as executed your work.

[Open example](#)

Step-2: Brainstorm, Idea Listing and Grouping:

2

Brainstorm

Write down any ideas that come to mind that address your problem statement.

10 minutes

TIP

You can select a sticky note and hit the pencil (switch to sketch) icon to start drawing!

Priyadharashni

Allow team members to submit ideas anonymously if needed.

Develop a comprehensive event management system on the Salesforce platform

Address the specific needs of event planning, organization, and attendee management

Prioritize features based on their impact on improving the event management process

Jayashri

Include Salesforce administrators, developers, event planners, and potential system users

Ensure representation from different departments involved in events.

Define the development and implementation plan.

Set up a virtual or physical space conducive to collaborative discussions.

Jayadharani

Utilize online collaboration tools if team members are remote.

Emphasize open-minded thinking for innovative solutions

Allocate a specific time for brainstorming to maintain focus.

Break down the session into phases if needed

Dharunkumar

Start with a quick review of existing event management challenges.

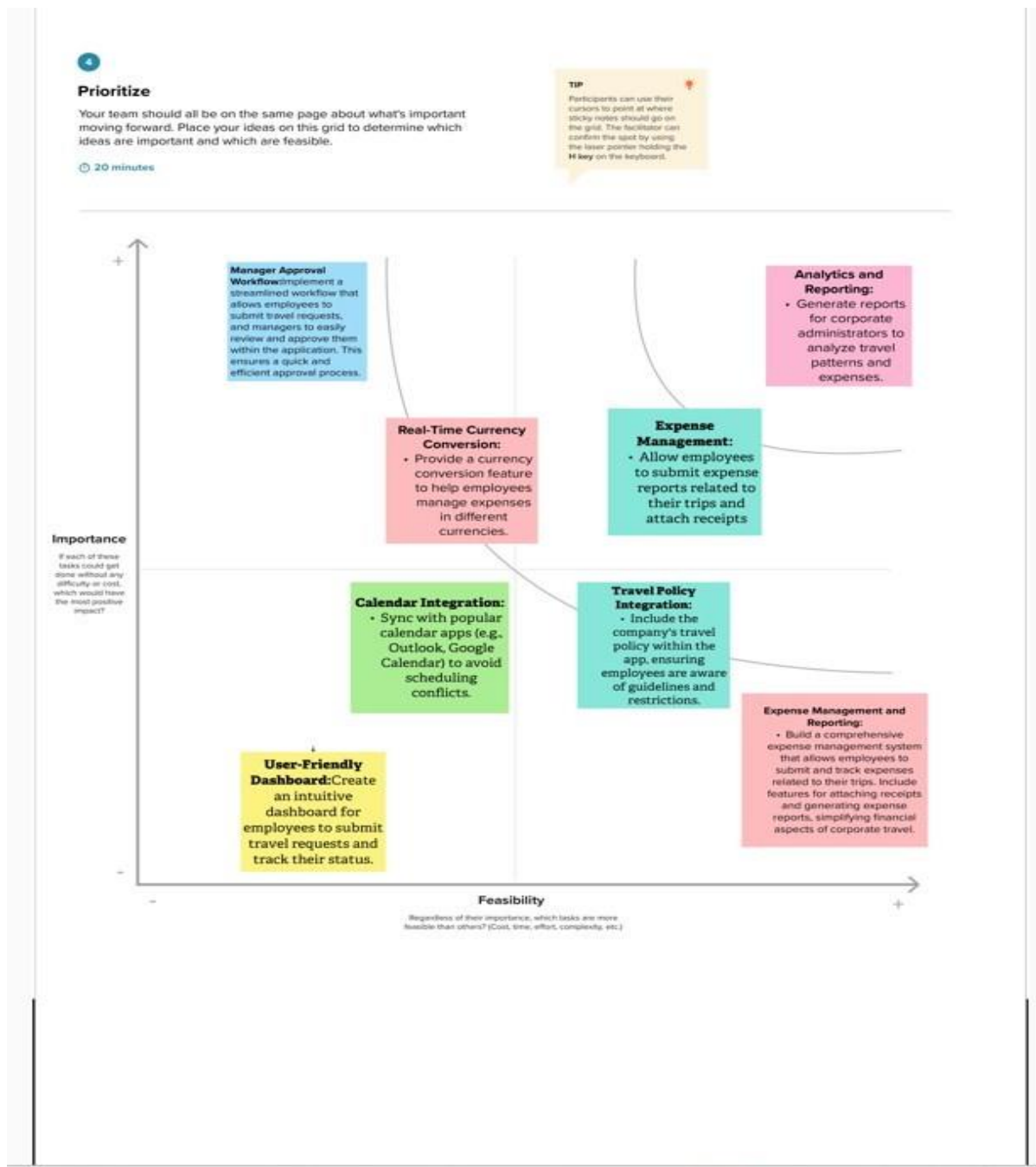
Discuss recent experiences and pain points in managing events.

Brainstorm features such as attendee registration, agenda management, venue tracking, and more.

Schedule regular check-ins to track progress and address any challenges.

→

Step-3: Idea Prioritization:



1.6 Proposed Solution

S. No	Parameter	Description
1.	Problem Statement (Problem to be solved)	The problem at hand is the inefficiency and fragmentation in event planning and execution within organizations. Currently, event management is often conducted using disparate tools and manual processes, leading to inefficiencies, increased workload, and a higher likelihood of errors. Additionally, the underutilization of Salesforce CRM for event-related activities poses a significant challenge, hindering the potential for targeted marketing efforts and a holistic view of customer interactions. Attendee engagement also suffers, as the lack of a unified system impedes seamless communication and access to event-related information. The absence of comprehensive analytics and reporting capabilities makes it difficult to derive meaningful insights from event data.
2.	Idea / Solution description	Our Event Management System is a comprehensive platform designed to streamline event planning, execution, and analysis. It provides a unified space for organizing various events, offering a user-friendly interface for event creation and attendee engagement. Leveraging seamless integration with Salesforce CRM, it enables targeted marketing efforts and data-driven decision-making. The system is highly adaptable and scalable to cater to diverse event types and organizational needs. Detailed analytics and reporting empower event organizers to optimize their strategies. Through user training and support, we ensure a smooth transition, ultimately enhancing event success and driving increased sales and revenue.

3.	Novelty / Uniqueness	The Event Management System stands out with its unique blend of features, delivering a novel approach to event planning and execution. Its innovation lies in its seamless integration with Salesforce CRM, allowing organizations to harness their customer data for personalized marketing and improved event outcomes. The system offers a highly adaptable and scalable solution, accommodating events of all sizes and types. Its emphasis on attendee engagement sets it apart, providing a dedicated portal for registration, access to materials, and real-time updates.
4.	Social Impact / Customer Satisfaction	The Event Management System has a dual impact, with a strong focus on social responsibility and customer satisfaction. It promotes environmental sustainability by reducing paper usage and streamlining resource allocation, contributing to a greener, more eco-friendly event management process. Simultaneously, the system prioritizes customer satisfaction by offering an intuitive user experience, data-driven decision-making, and robust user support, ensuring that both event organizers and attendees are delighted with their interactions, ultimately resulting in more successful and enjoyable events.

1.7 Functional & Technical Requirements

1.7.1 Functional Requirements

FR No.	Functional Requirement (Epic)	Sub Requirement (Story / Sub-Task)
FR-1	Event Creation and Management	<p>Users should be able to create different types of events with details such as event name, date, time, location, agenda, and event type.</p> <p>The system should support the ability to edit, clone, or delete events</p>
FR-2	Registration and Ticketing	<p>Attendees should be able to register for events through a user-friendly interface.</p> <p>The system should support various registration options, including early bird pricing, discounts and group registrations.</p> <p>Attendees should receive confirmations and tickets via email upon registration.</p>
FR-3	Speaker and Sponsor Management	<p>Event organizers should have tools to manage speakers and sponsors, including profiles, contact information, and session scheduling.</p> <p>The system should allow for speaker and sponsor information to be displayed on event pages.</p>
FR-4	Attendee Engagement	<p>Attendees should have access to event-related content, including agendas, speaker profiles, session materials, and interactive features.</p> <p>The system should facilitate attendee communication, such as sending event updates, reminders, and feedback collection.</p>

FR-5	User Roles and Permissions	<p>The system should support different user roles with varying permissions, such as admin, event planner, attendee, speaker, and sponsor.</p> <p>Admins should be able to configure user access and permissions.</p>
FR-6	Scalability and Customization	<p>The system should be designed to handle a growing number of events and attendees.</p> <p>Customization options should be available to tailor the system to the unique needs of different organizations and event types.</p>
FR-7	User Training and Support	<p>The system should provide user training resources, documentation, and support to assist administrators and users in effectively utilizing the platform.</p>

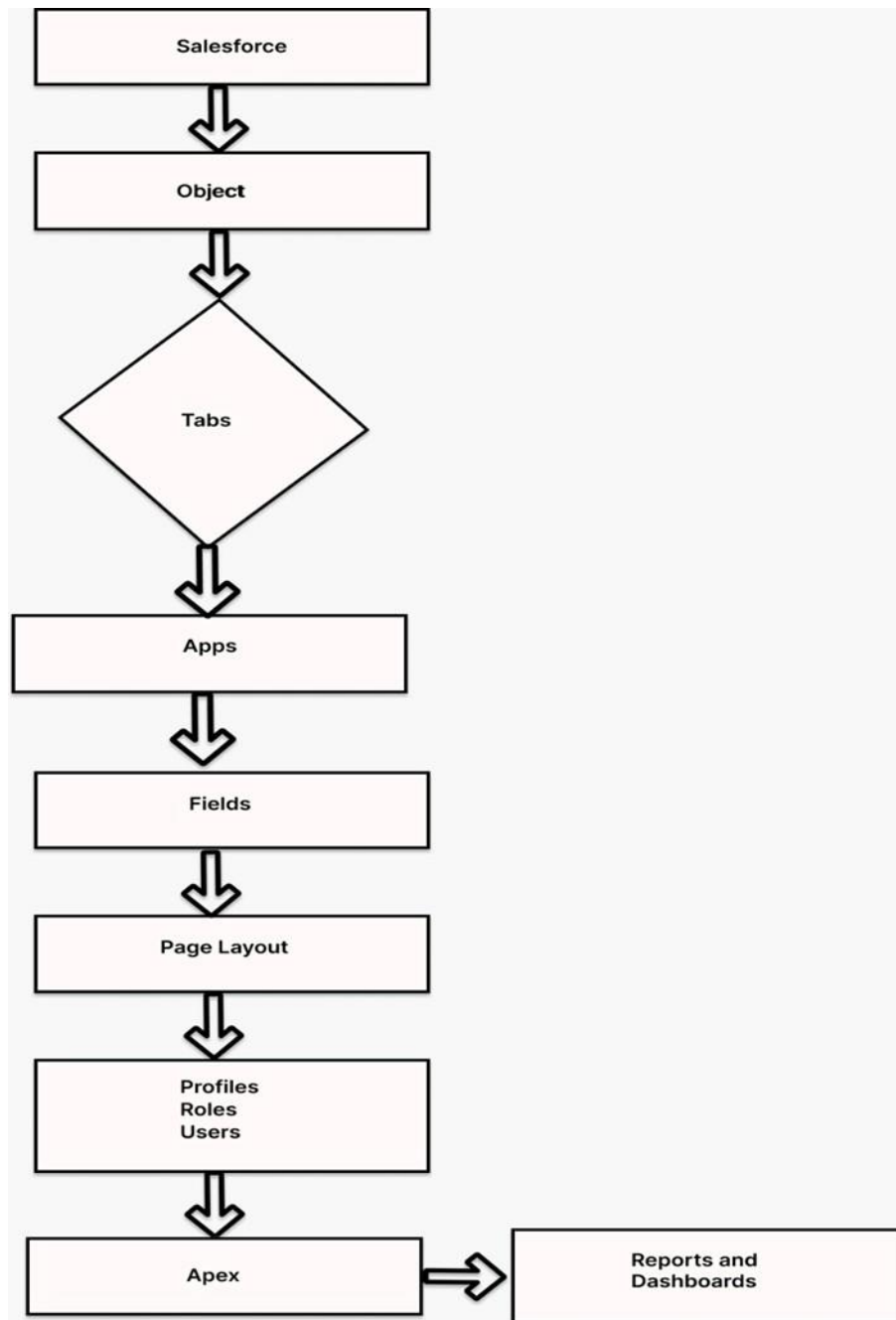
1.7.2 Technical Requirements

TR No.	Technical Requirement	Description
TR-1	Platform Compatibility	The system should be compatible with major web browsers (e.g., Chrome, Firefox, Safari) and support both desktop and mobile devices.
TR-2	Database Management	<p>An efficient database management system should be in place to store and retrieve event data.</p> <p>Data should be organized logically for easy retrieval and reporting.</p>
TR-3	Security Measures	<p>Robust security measures should be implemented to protect sensitive user data, payment information, and event-related content.</p> <p>User authentication and authorization protocols should be in place.</p>
TR-4	Backup and Disaster Recovery	Regular data backups and a disaster recovery plan should be in place to prevent data loss and ensure system availability.
TR-5	Performance Optimization:	<p>The system should be optimized for performance, with fast load times and minimal downtime.</p> <p>Caching mechanisms and content delivery networks (CDNs) can be used for performance improvement.</p>

1.8 Project Road Map

1.8.1 Data Flow Diagram

A Data Flow Diagram (DFD) is a traditional visual representation of the information flows within a system. A neat and clear DFD can depict the right amount of the system requirement graphically. It shows how data enters and leaves the system, what changes the information, and where data is stored.



1.8.2 Technical Architecture

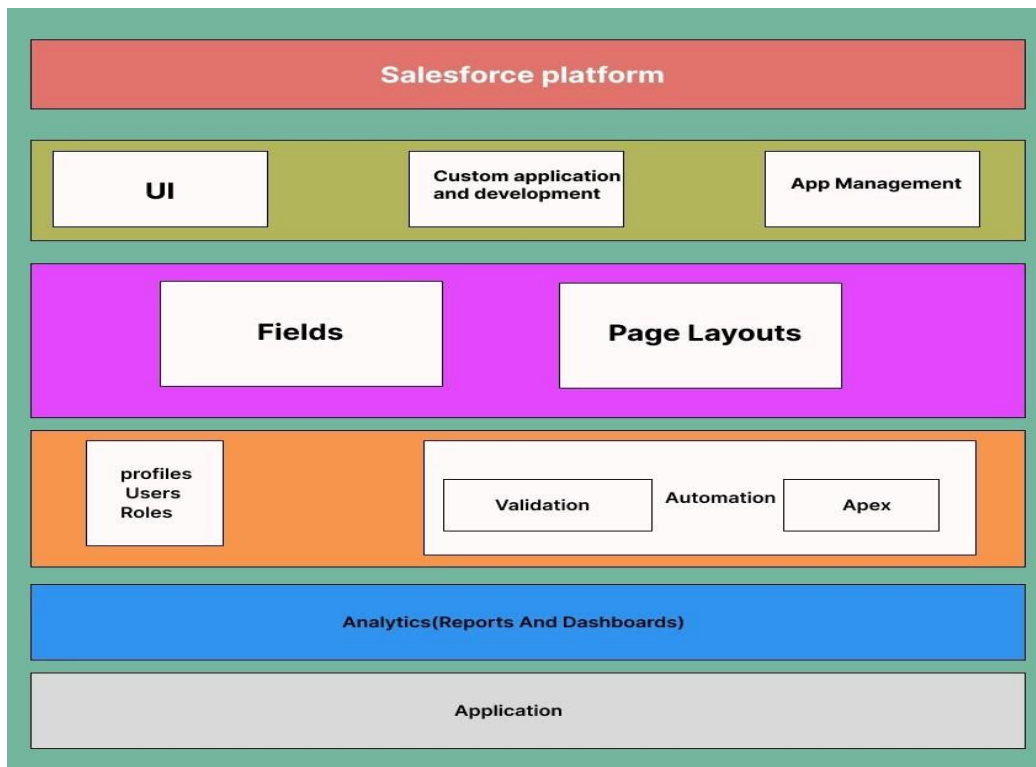


TABLE-1: Component and Technologies:

S.No	Component	Description	Technology
1.	User Interface	<p>Lightning Components: Use Salesforce Lightning components to design the user interface for employees, managers, and administrators.</p> <p>Custom Pages: Create custom Visualforce pages for more tailored and complex UI elements</p>	Salesforce
2.	Data Model	<p>Custom Objects: Define custom objects in Salesforce to represent entities like travel requests, expenses, and approvals.</p> <p>Master-Detail and Lookup Relationships: Establish relationships between objects to maintain data integrity.</p> <p>Custom Fields: Create custom fields to capture specific information, such as travel dates, expenses, and approval status.</p>	Salesforce

3.	Workflow Automation	<p>Approval Processes: Implement Salesforce Approval Processes to automate and streamline the travel request approval workflow.</p> <p>Process Builder and Flows: Use Process Builder and Flows to automate routine tasks and send notifications.</p>	Salesforce
4.	Reporting and Analytics	<p>Custom Reports: Create custom reports to track travel request status, expenses, and other relevant metrics.</p>	Salesforce
5.	Security	<p>Role-Based Access Control (RBAC): Configure RBAC to control who can access and modify data.</p> <p>Data Encryption: Encrypt sensitive data both in transit and at rest.</p> <p>Audit Trails: Maintain audit trails to log user activities for security and compliance purposes.</p>	Salesforce
6.	Salesforce Development	<p>Apex: Use Salesforce's proprietary programming language, Apex, for server-side logic and data manipulation.</p> <p>Visualforce: Develop custom user interfaces with Visualforce pages and components.</p> <p>Lightning Web Components: Create modern, component-based UIs using Lightning Web Components for a more responsive and dynamic user experience</p>	Salesforce

Table-2: Application Characteristics:

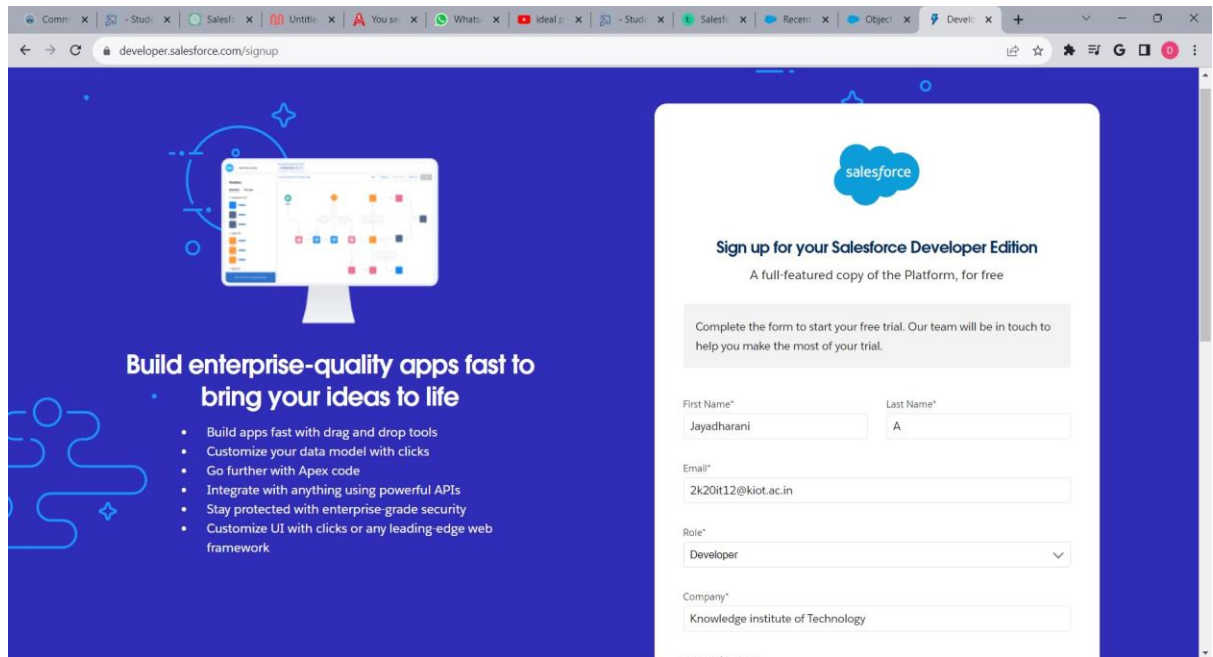
S. No	Characteristics	Description	Technology
1.	Responsive Design	Implement responsive design to adapt to various screen sizes, ensuring a consistent and visually pleasing user experience.	salesforce
2.	Accessibility	Ensure that the application is accessible via multiple devices and browsers, catering to users on desktops, tablets, and mobile devices. This accessibility is crucial for users who need to make or approve travel requests while on the go.	salesforce
3.	User-friendly	The application should have an intuitive and user-friendly interface to make it easy for employees, managers, and administrators to navigate and use the system without extensive training.	Salesforce
4.	Scalability	The application should be able to scale with the growing number of users and data, accommodating increasing demands without significant performance degradation.	salesforce
5.	Performance	Ensure the application's performance meets or exceeds user expectations, with rapid response times for actions such as submitting requests or generating reports.	salesforce
6.	Reporting and Analytics	Enable users to generate custom reports and access analytics tools to gain insights into travel patterns, expenses, and approval efficiency.	salesforce

CHAPTER-2

PREPARATION DATA MODELING

2.1 Salesforce Developer Org

In Salesforce, a Developer Sign Up or Developer Edition is a special type of Salesforce environment that is primarily used for development, testing, and learning purposes



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First Name* Last Name*

Jayadharani A

Email*

2k20t12@kiot.ac.in

Role*

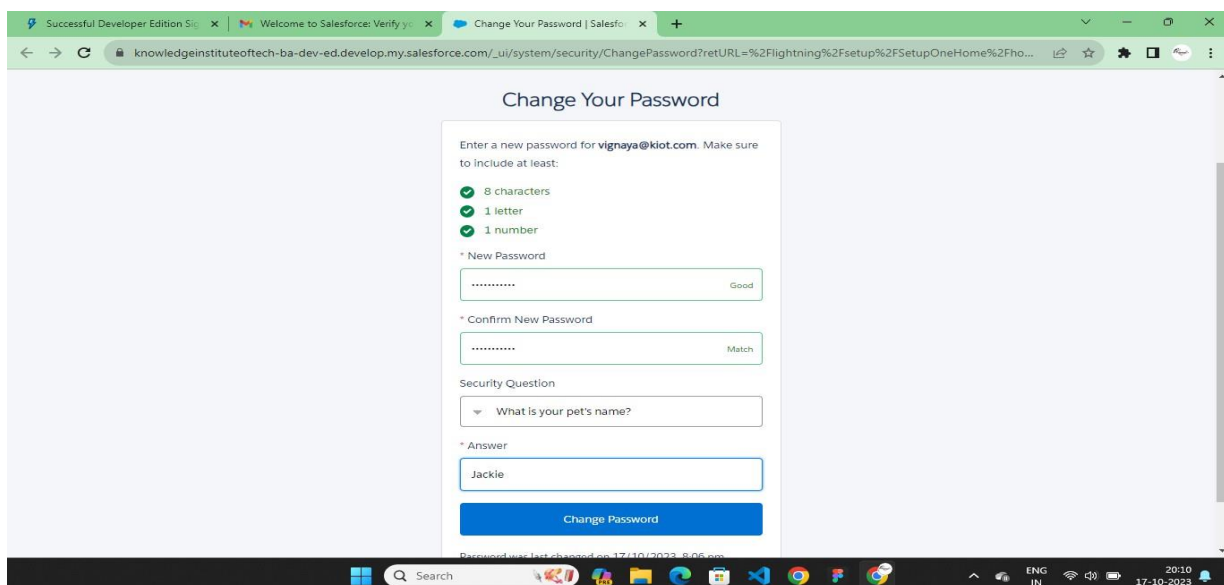
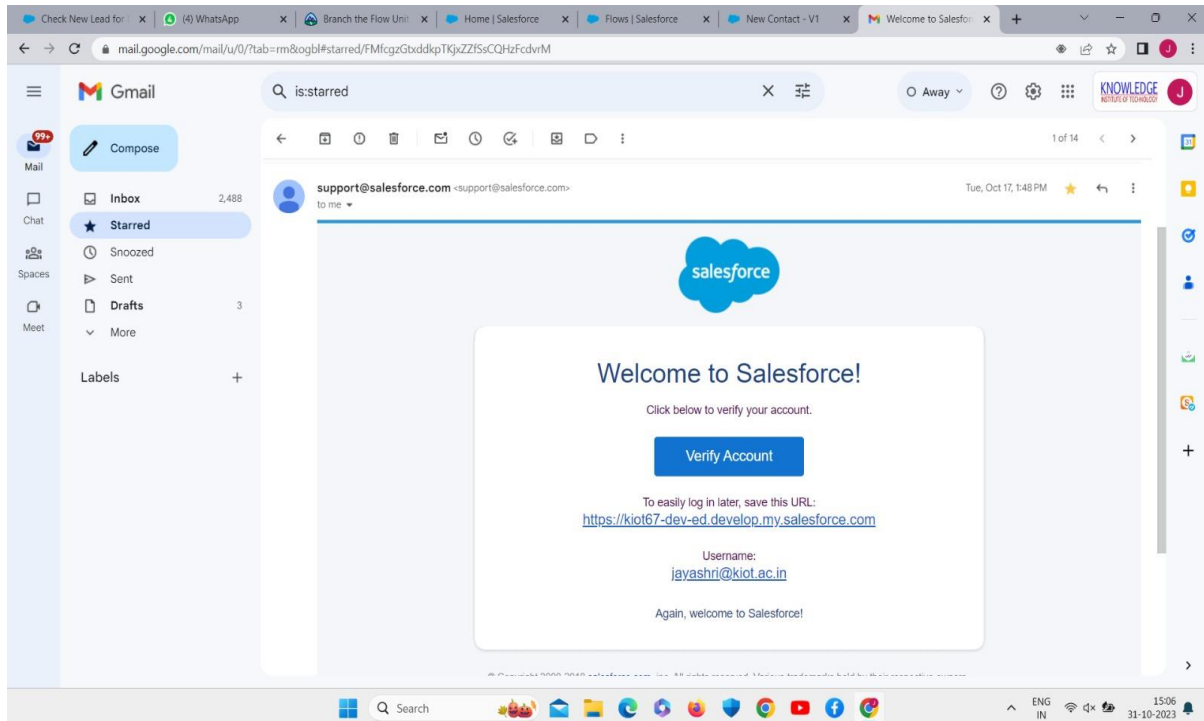
Developer

Company*

Knowledge institute of Technology

Account Activation

Activation tracks information about devices from which users have verified their identity.



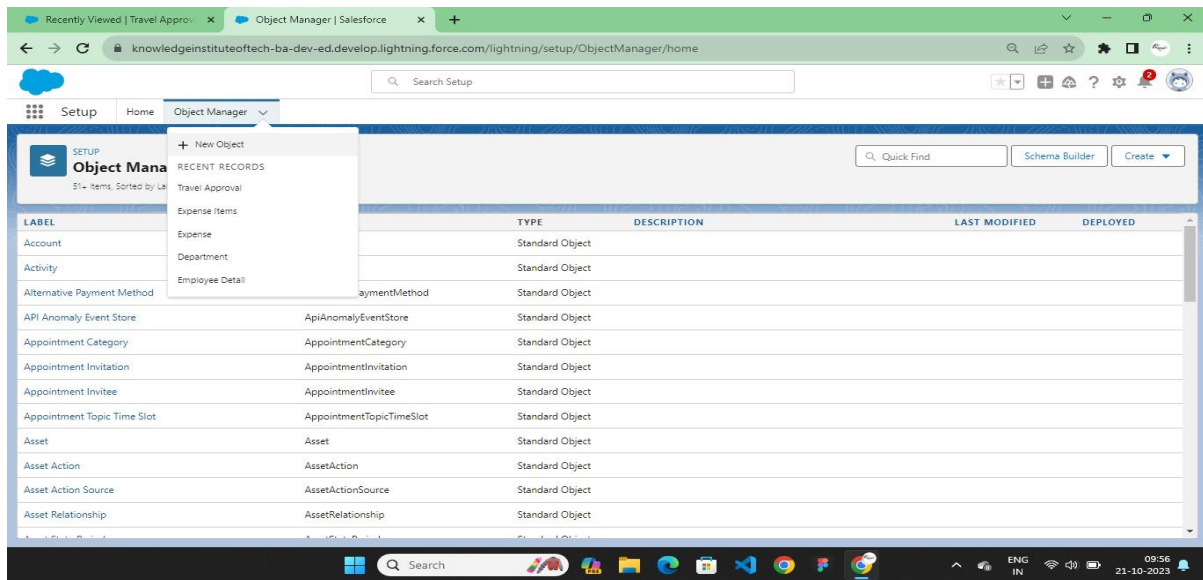
2.2 Custom Object Creation & Tabs

Custom Object Creation

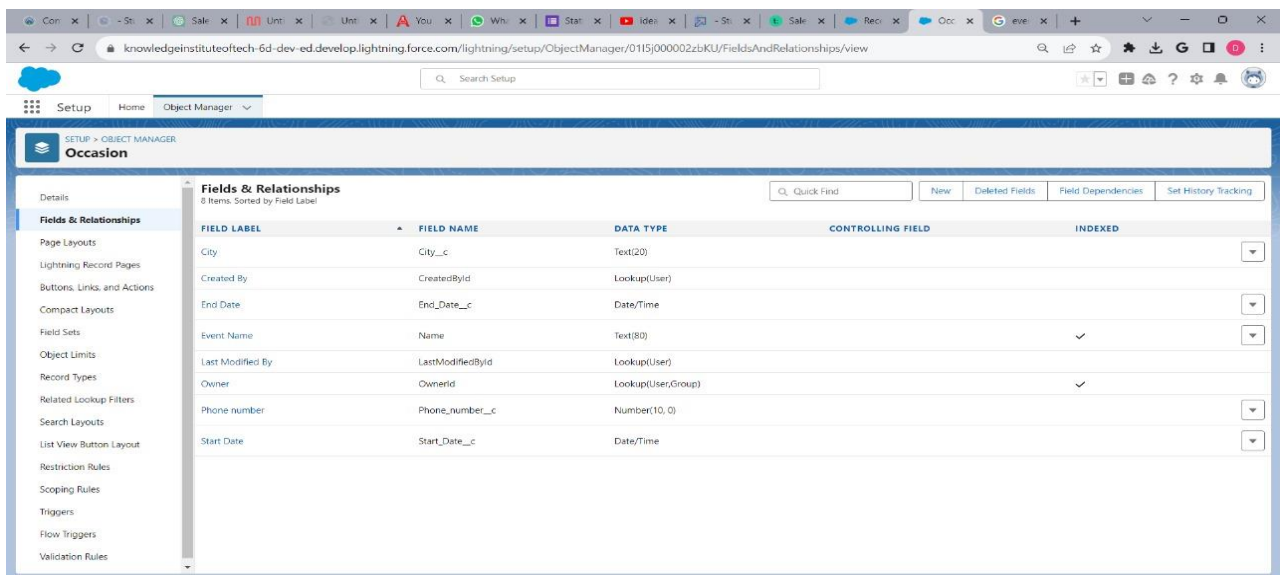
Objects are containers for your information, but they also give you special functionality.

Custom objects are create to store information that's specific to your company or industry.

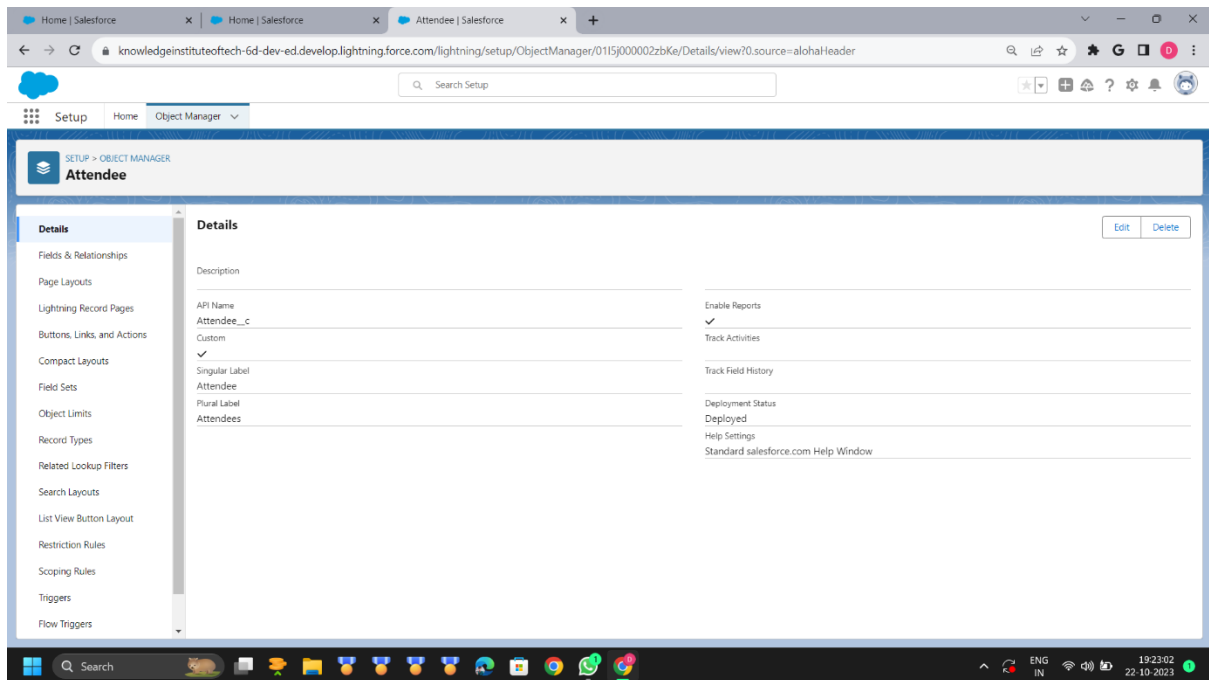
Custom Objects in Event Management System:



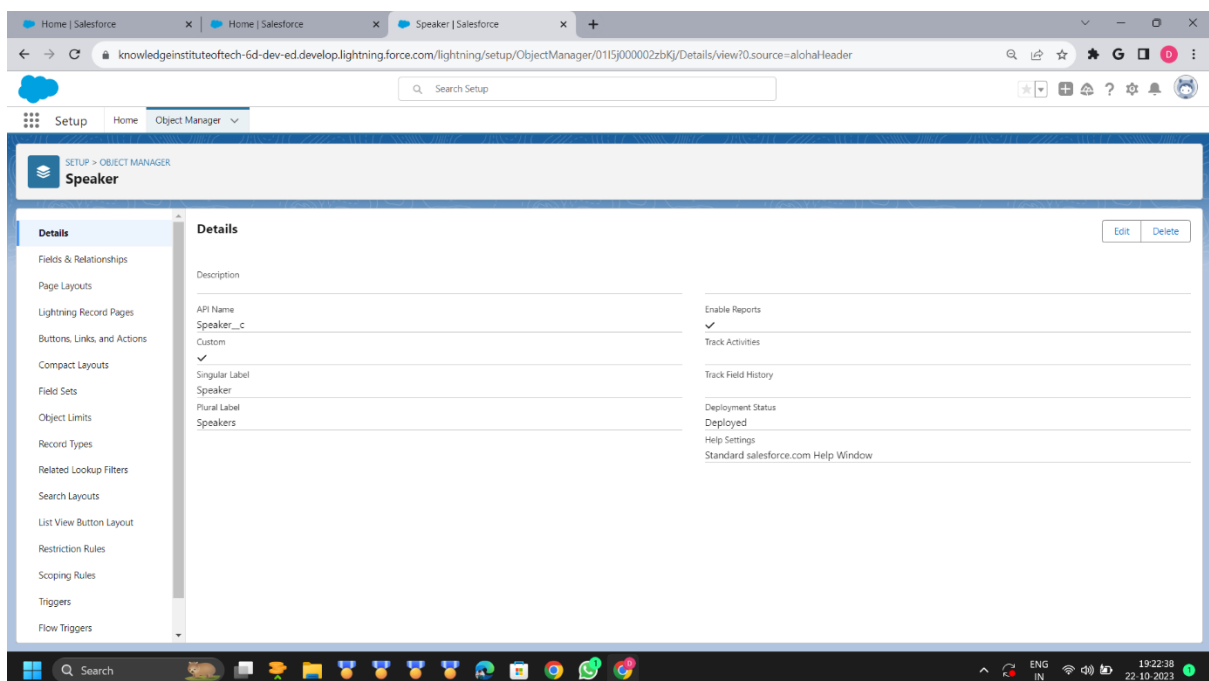
Fields in Occasion Object



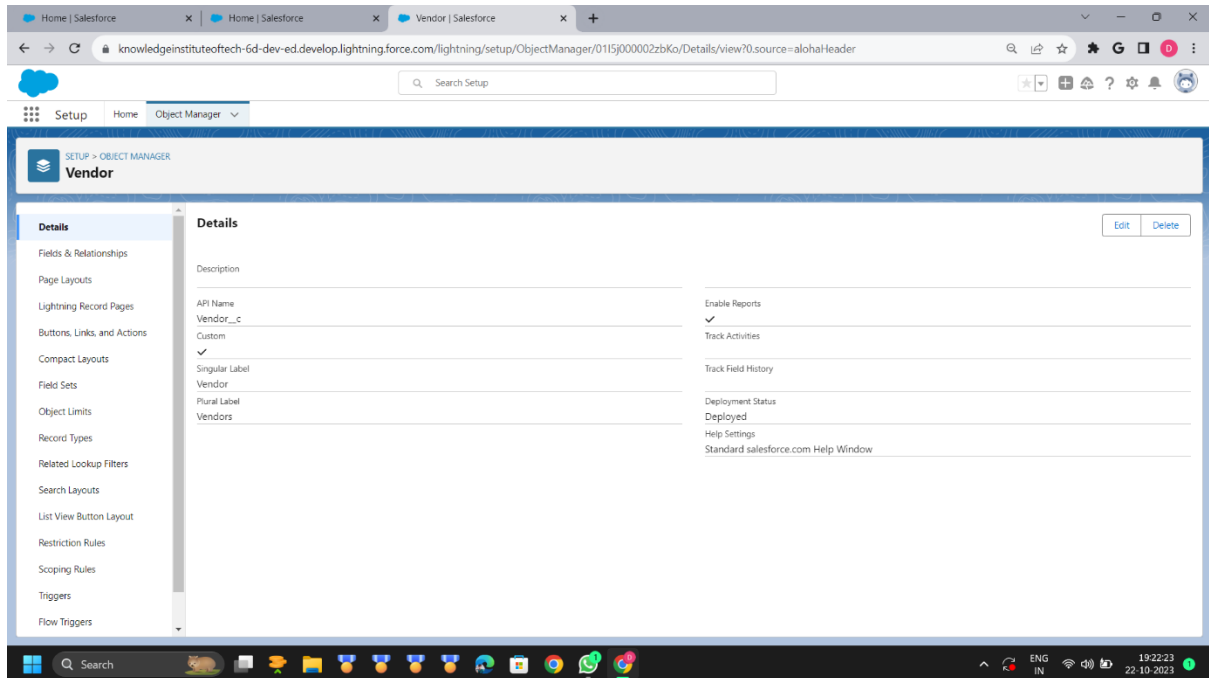
Fields in Attendee object



Fields in Speaker Object

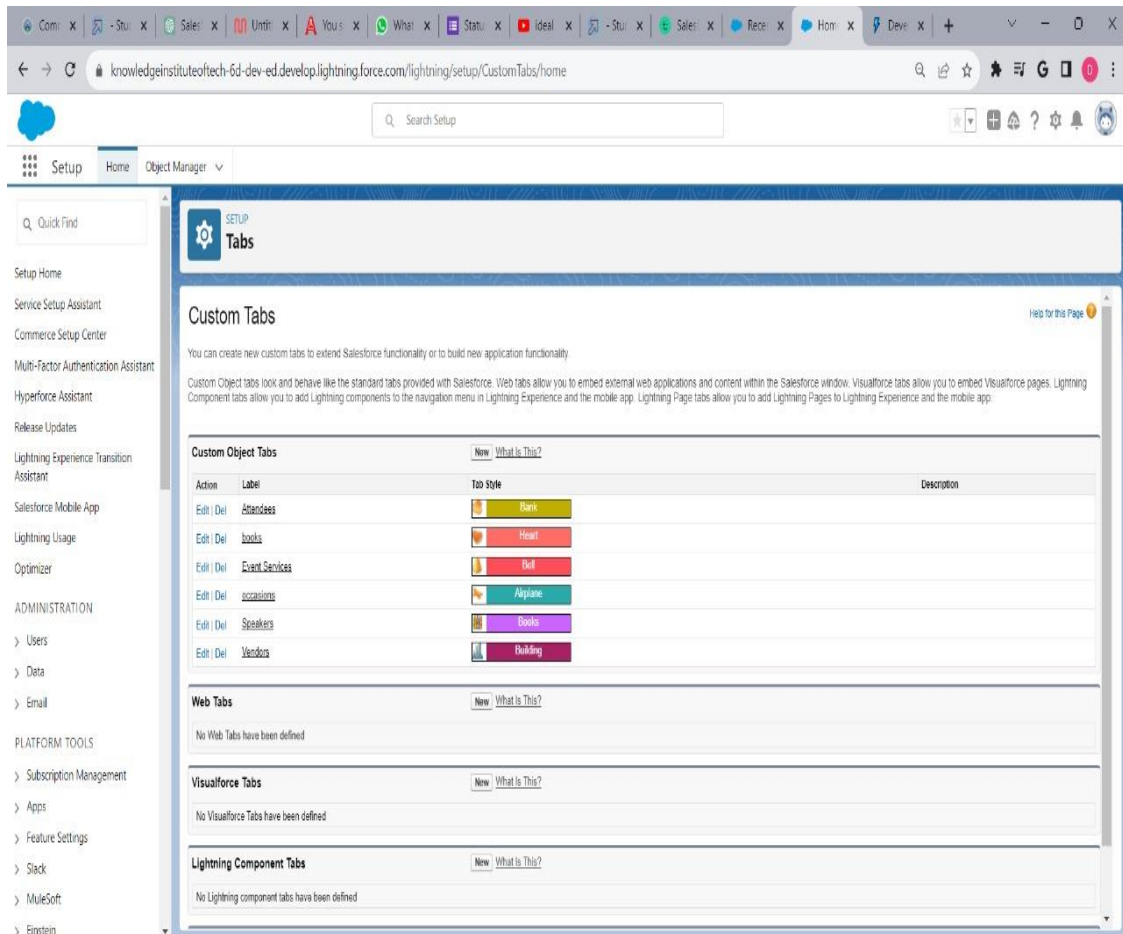


Fields in Vendor Object



Tabs

Salesforce Tabs are like the menu options in a software application. They allow you to access specific functions, objects, or data.

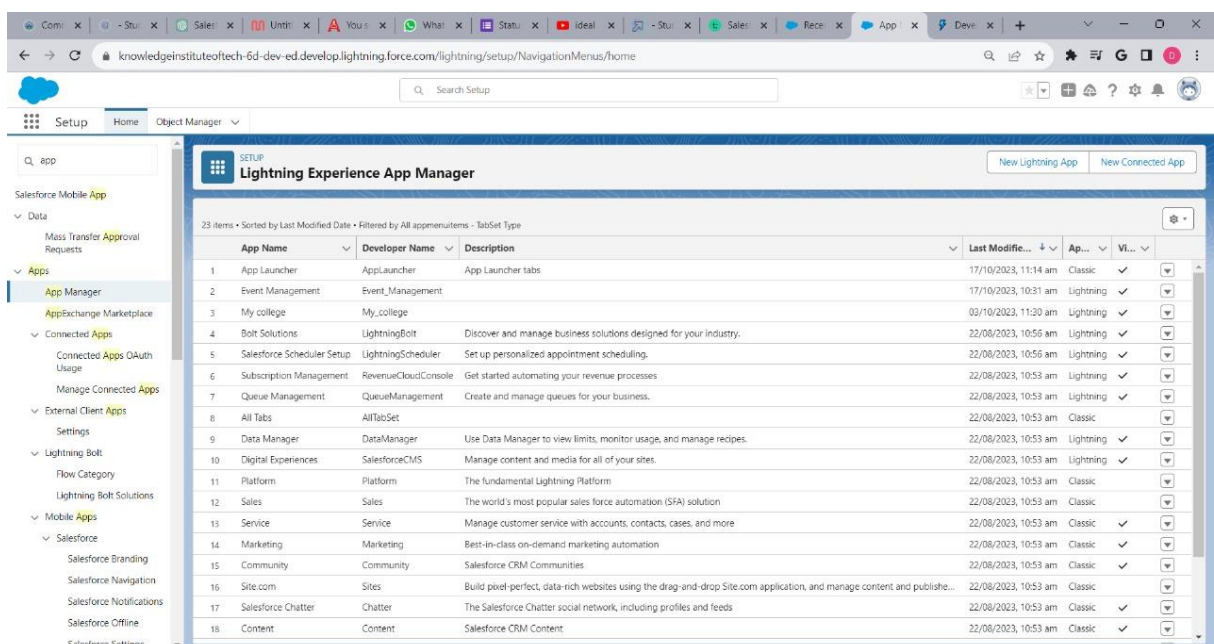


2.3 Lightning App

The Lightning App Builder is a point-and-click tool that makes it easy to create custom pages for the Salesforce mobile app and Lightning Experience, giving your users what they need all in one place.

Create a Travel Approval Lightning App

- Build a Lightning app, add tabs, and customize page layouts.
- Create custom objects and fields for the app.
- Define relationships between objects.
- Import data and test the app.



2.4 Relationship between Objects

Master-Detail Relationship

A master-detail relationship defines the relationship between the parent and the child. The master table defines the parent relation and the detail defines the child relation.

The screenshot shows the Salesforce Setup page for the 'Vendor Name' custom field. 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, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules. The main content area is titled 'Event Service Custom Field Vendor Name' and includes a 'Back to Event Service' link. Below the title are tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' section displays the following details:

Field Label	Vendor Name	Object Name	Event Service
Field Name	Vendor_Name	Data Type	Master-Detail
API Name	Vendor_Name__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Dhanu Kumar, 17/10/2023, 12:39 pm	Modified By	Dhanu Kumar, 17/10/2023, 12:39 pm

The 'Master-Detail Options' section shows:

Related To	Vendor	Child Relationship Name	Event Services
Related List Label	Event Services		
Sharing Setting	Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.		
Replicable Master Detail	<input type="checkbox"/>		

The 'Lookup Filter' section indicates 'No lookup filters defined.' The 'Validation Rules' section indicates 'No validation rules defined.'

The screenshot shows the Salesforce Setup page for the 'Event Name' custom field. 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, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules. The main content area is titled 'Event Service Custom Field Event Name' and includes a 'Back to Event Service' link. Below the title are tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' section displays the following details:

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Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Dhanu Kumar, 17/10/2023, 12:39 pm	Modified By	Dhanu Kumar, 17/10/2023, 12:39 pm

The 'Master-Detail Options' section shows:

Related To	Occasion	Child Relationship Name	Event Services
Related List Label	Event Services		
Sharing Setting	Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.		
Replicable Master Detail	<input type="checkbox"/>		

The 'Lookup Filter' section indicates 'No lookup filters defined.' The 'Validation Rules' section indicates 'No validation rules defined.'

Look up Relationship

Lookup Relationship in Salesforce relates two objects together but does not affect deletion (cascade delete functionality) or security.

The screenshot shows the Salesforce Setup interface for the 'Occasion' object. The 'Fields & Relationships' section is active, displaying a table of fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. There are 8 items listed, sorted by Field Label.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Text(20)		
Created By	CreatedById	Lookup(User)		
End Date	End_Date__c	Date/Time		
Event Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone number	Phone_number__c	Number(10, 0)		
Start Date	Start_Date__c	Date/Time		

The screenshot shows the Salesforce Setup interface for the 'Event Service' object. The 'Fields & Relationships' section is active, displaying a table of fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. There are 5 items listed, sorted by Field Label.

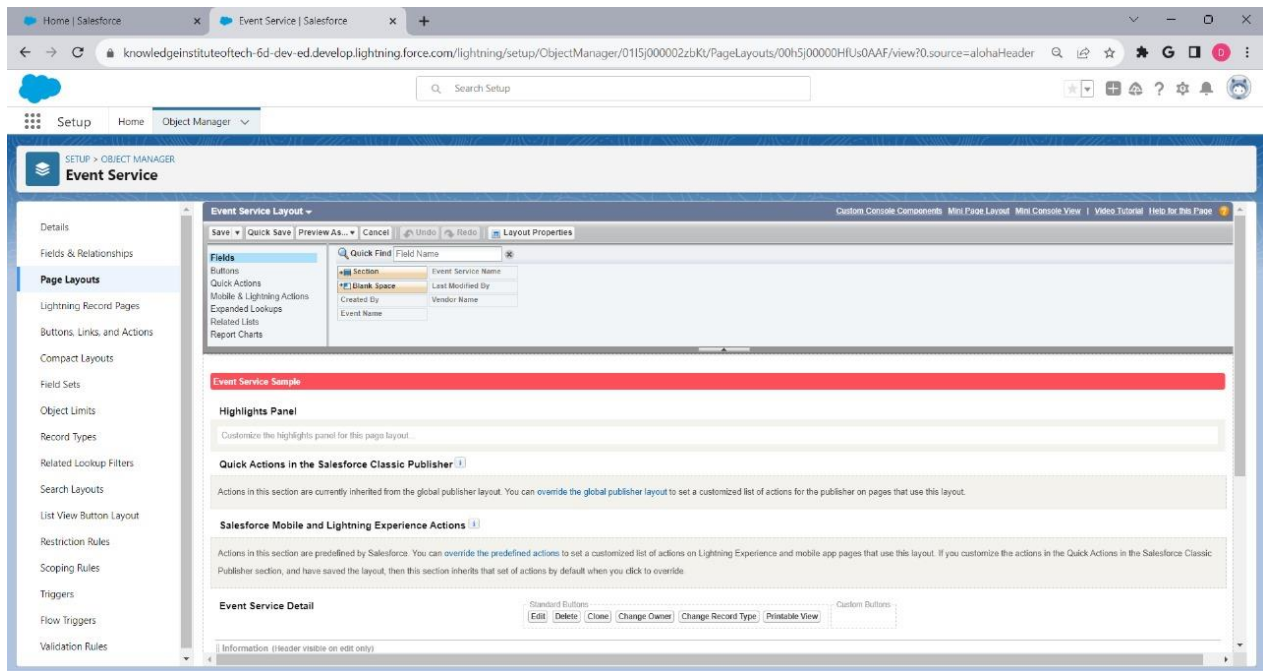
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Event Name	Event_Name__c	Master-Detail(Occasion)		✓
Event Service Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Vendor Name	Vendor_Name__c	Master-Detail(Vendor)		✓

2.5 Customize User Interface

Customize your app's page layouts, compact layouts, and actions.

Page Layout

A page layout determines the fields, sections, related lists, and buttons that appear when users view or edit a record. You can modify an object's default page layout or create a custom page layout.



CHAPTER-3

USERS & DATA SECURITY

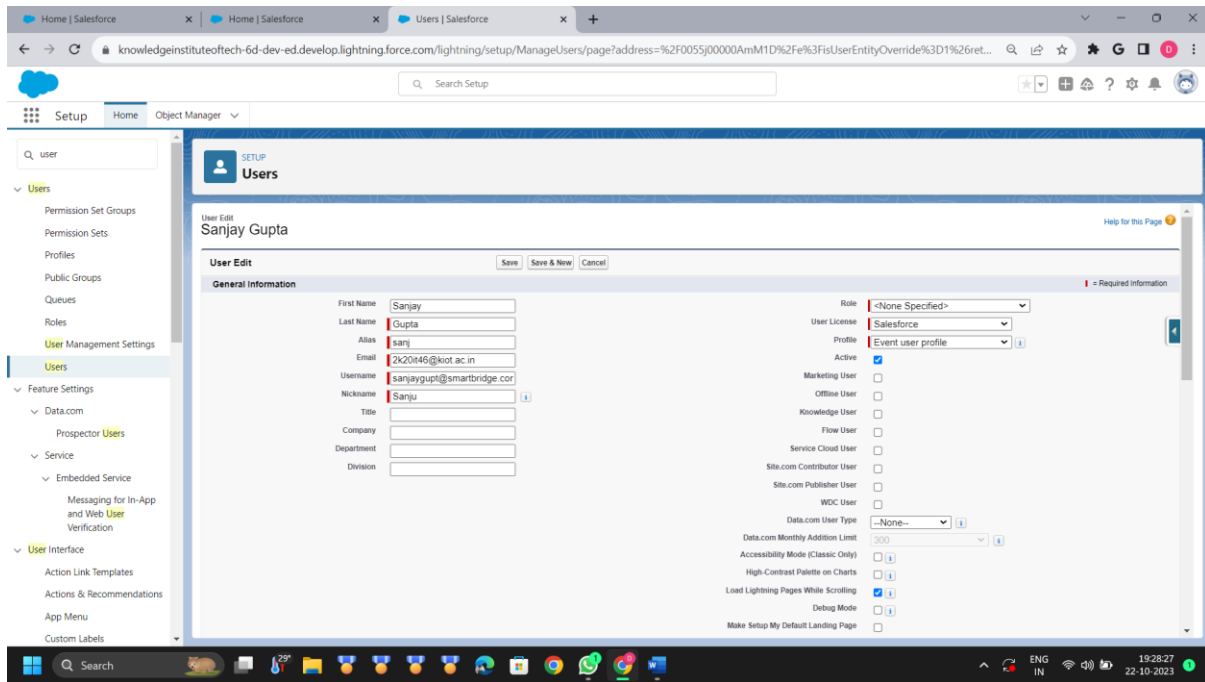
3.1 User Creation & Setup Approvals

Users can initiate the registration process by providing their basic information, such as name, email, and contact details.

The screenshot shows the Salesforce 'User Edit' page for a user named Rahul Sharma. The page is divided into two main sections: 'General Information' and 'Role'. The 'General Information' section contains fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The 'Role' section contains fields for Role, User License, Profile, Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type, Data.com Monthly Addition Limit, Accessibility Mode (Classic Only), High Contrast Palette on Charts, Load Lightning Pages While Scrolling, Debug Mode, and Make Setup My Default Landing Page. The 'Role' dropdown is set to '<None Specified>'. The 'User License' dropdown is set to 'Salesforce Platform'. The 'Profile' dropdown is set to 'Standard Platform User'. The 'Active' checkbox is checked. The 'Marketing User' checkbox is unchecked. The 'Offline User' checkbox is unchecked. The 'Knowledge User' checkbox is unchecked. The 'Flow User' checkbox is unchecked. The 'Service Cloud User' checkbox is unchecked. The 'Site.com Contributor User' checkbox is unchecked. The 'Site.com Publisher User' checkbox is unchecked. The 'WDC User' checkbox is unchecked. The 'Data.com User Type' dropdown is set to '--None--'. The 'Data.com Monthly Addition Limit' is set to 300. The 'Accessibility Mode (Classic Only)' checkbox is unchecked. The 'High Contrast Palette on Charts' checkbox is unchecked. The 'Load Lightning Pages While Scrolling' checkbox is checked. The 'Debug Mode' checkbox is unchecked. The 'Make Setup My Default Landing Page' checkbox is unchecked.

The screenshot shows the Salesforce 'All Users' page. The page displays a list of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The list includes users such as Chatter Expert, Gunda Sanjay, s.Dharun Kumar, s.Dharun Kumar, Sharma_Rahul, User_Integration, and User_Security. The 'Active' column shows checkboxes for each user, and the 'Profile' column shows the assigned profile for each user.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	chatter	chatter_004500000cimsua3@salesforce.com	Chatter Free User	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	Gunda Sanjay	santj	santjyund@smarbridge.com	Event user profile	<input checked="" type="checkbox"/>	Event user profile
<input type="checkbox"/> Edit	s.Dharun Kumar	Da	dharun811@kist.com	System Administrator	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	s.Dharun Kumar	dharunsa	dharunsa07@gmail.com	Salesforce API Only System Integrations	<input checked="" type="checkbox"/>	Salesforce API Only System Integrations
<input type="checkbox"/> Edit	Sharma_Rahul	Rahua	rahua@thesmarbridge.com	Standard Platform User	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	User_Integration	Intag	Integration@004500000cimsua3.com	Analytics Cloud Integration User	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	Intag	Intag@004500000cimsua3.com	Analytics Cloud Security User	<input checked="" type="checkbox"/>	Analytics Cloud Security User

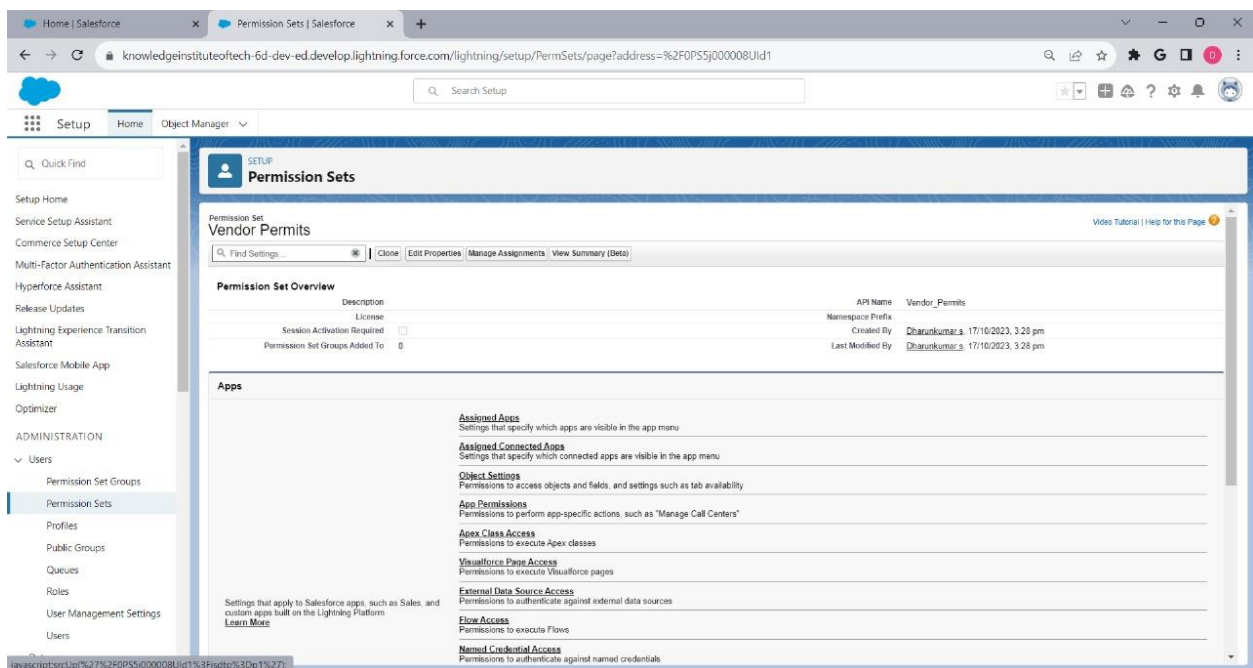


CHAPTER-4

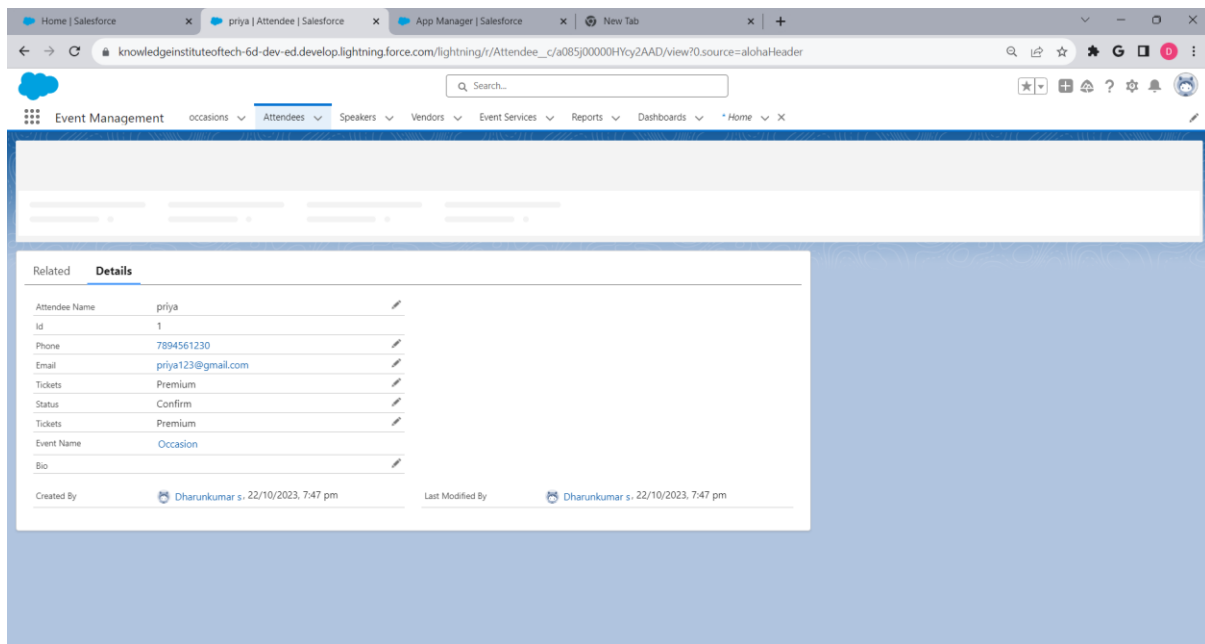
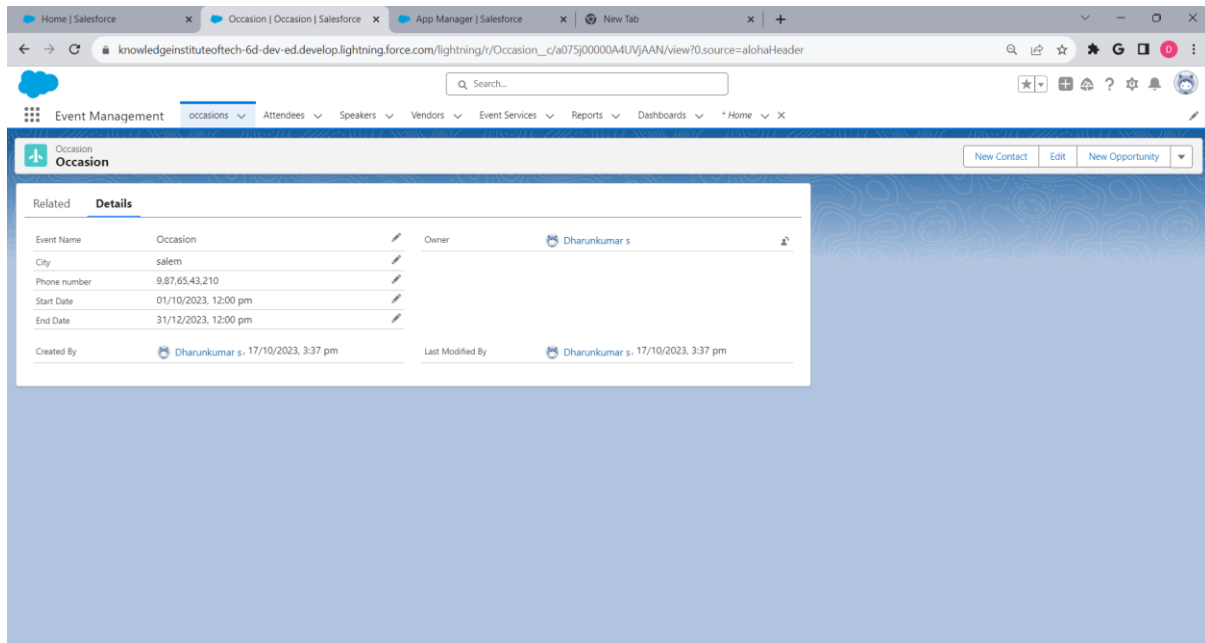
AUTOMATION

4.1 Permission Set

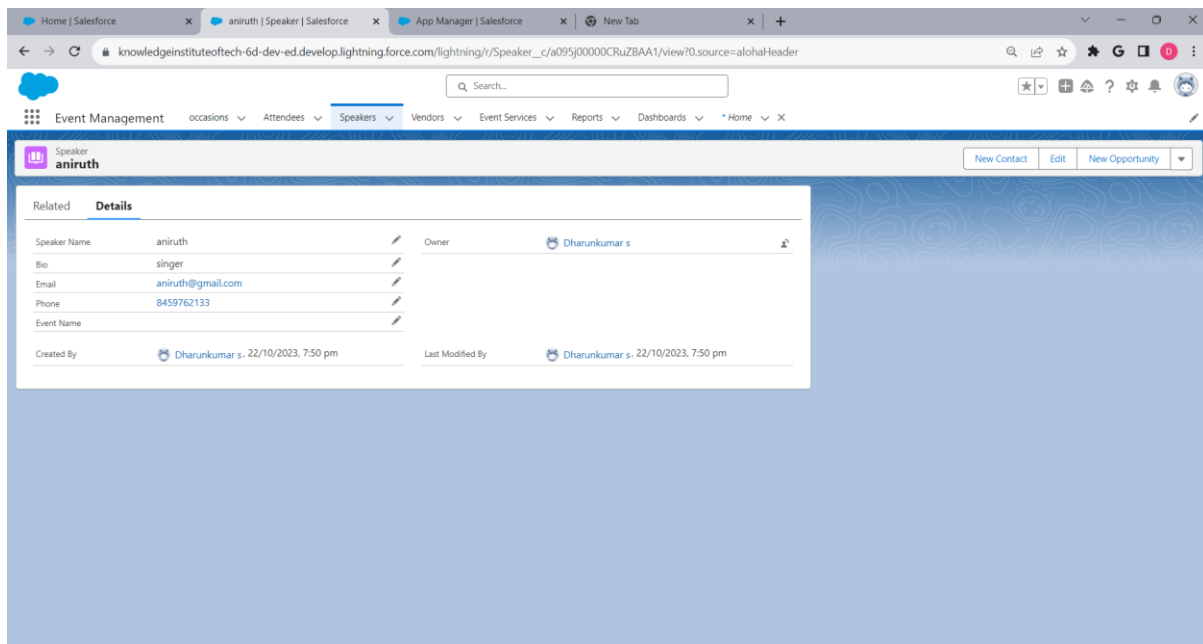
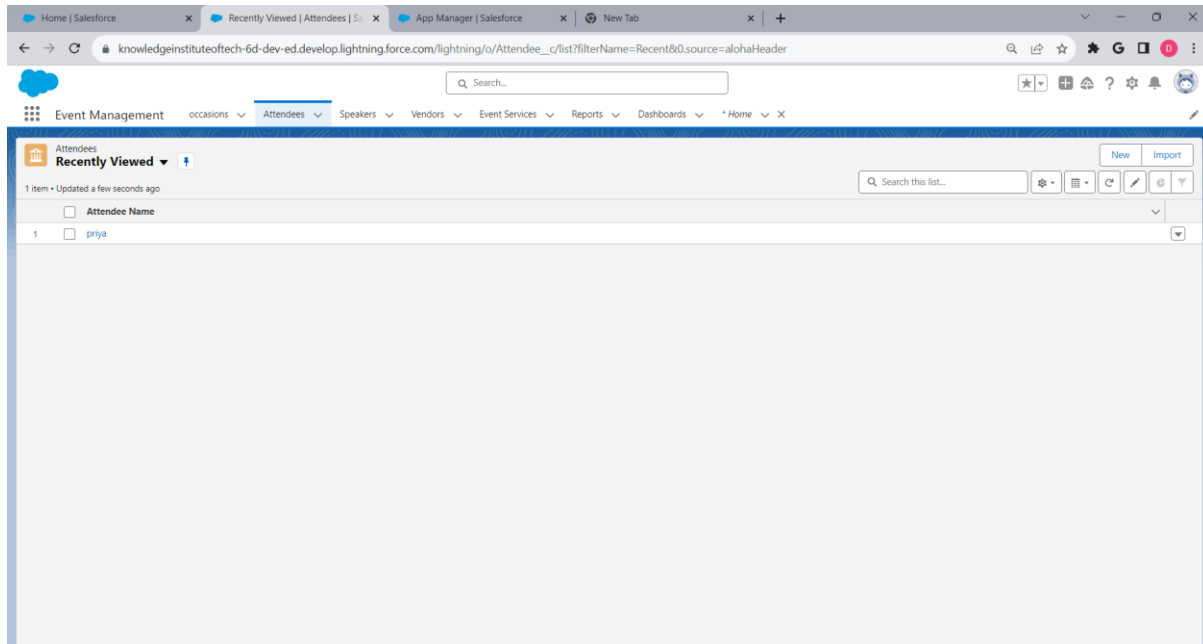
The last business rule functionality to implement before testing your application is a rule to set the Out-of-State checkbox field on the Travel Approval object if out-of-state travel has been chosen. Salesforce offers workflow capabilities that provide a declarative, drag-and-drop design environment to build our business process logic.



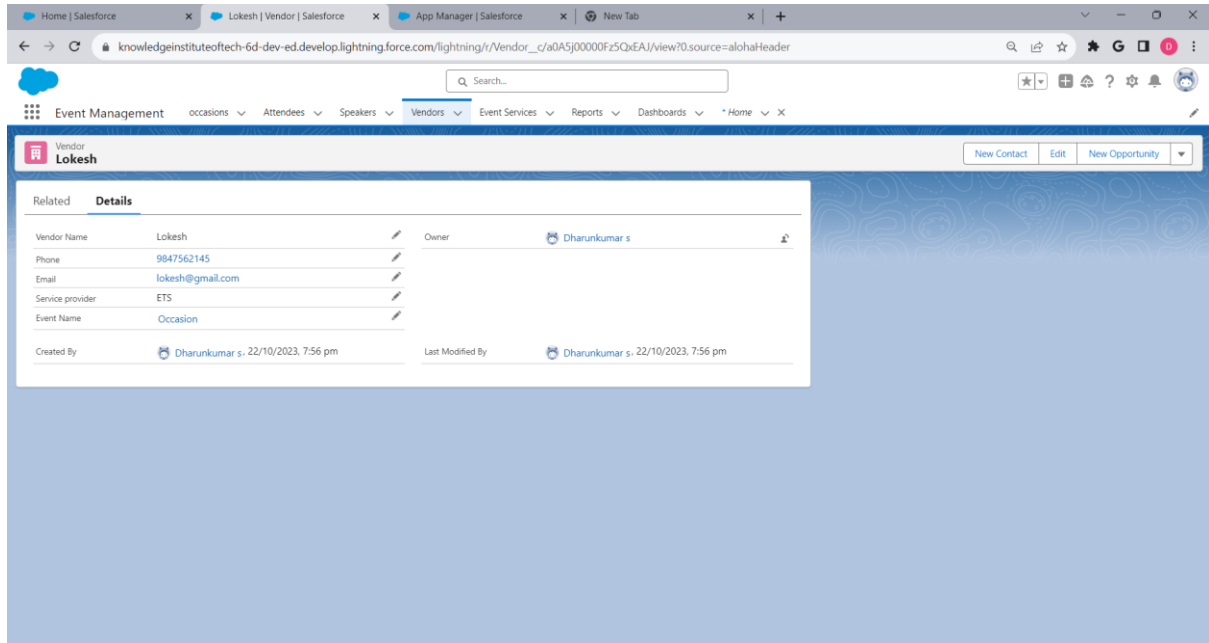
Final Views



Build An Event Management System

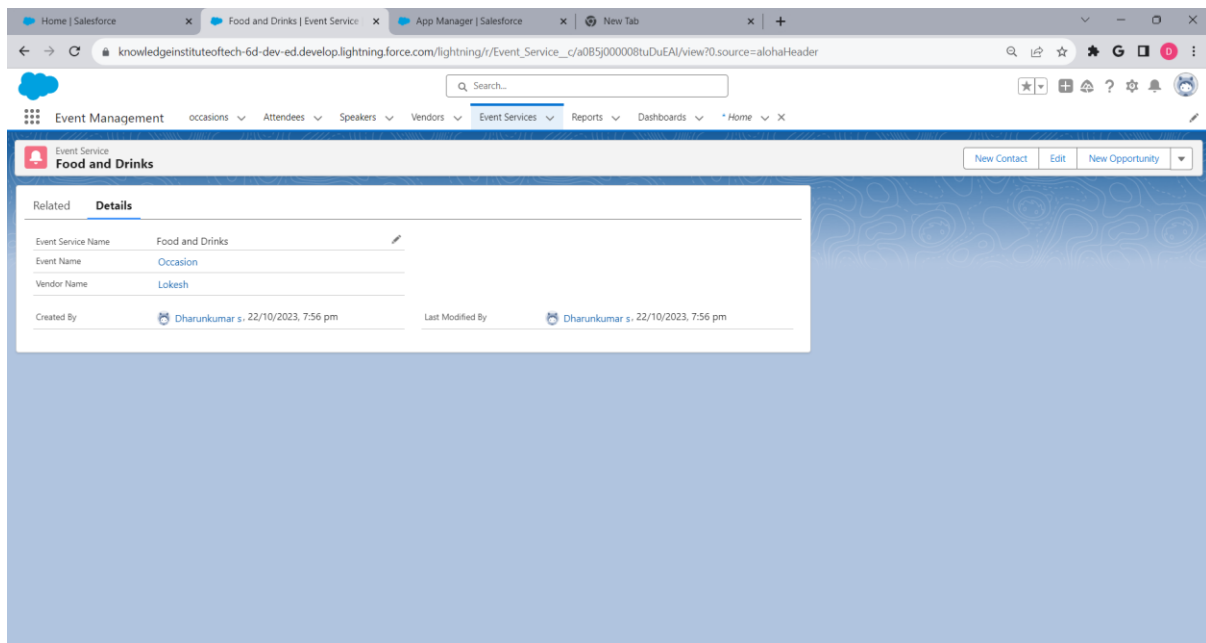


Build An Event Management System



This screenshot shows the Salesforce interface for a Vendor record named 'Lokesh'. The browser tabs include 'Home | Salesforce', 'Lokesh | Vendor | Salesforce', 'App Manager | Salesforce', and 'New Tab'. The URL is 'knowledgeinstituteoftech-6d-dev-ed.develop.lightning.force.com/lightning/r/Vendor__c/a0A5j00000Fz5QxEAJ/view?source=alohaHeader'. The navigation bar shows 'Event Management' with sub-menus for 'occasions', 'Attendees', 'Speakers', 'Vendors', 'Event Services', 'Reports', and 'Dashboards'. The 'Vendors' menu is selected. The record header shows 'Vendor Lokesh' with buttons for 'New Contact', 'Edit', and 'New Opportunity'. The 'Details' tab is active, displaying a table of fields: Vendor Name (Lokesh), Phone (9847562145), Email (lokesht@gmail.com), Service provider (ETS), Event Name (Occasion), Created By (Dharunkumar s. 22/10/2023, 7:56 pm), and Last Modified By (Dharunkumar s. 22/10/2023, 7:56 pm). Each field has an edit icon.

Related Details	
Vendor Name	Lokesh
Phone	9847562145
Email	lokesht@gmail.com
Service provider	ETS
Event Name	Occasion
Created By	Dharunkumar s. 22/10/2023, 7:56 pm
Last Modified By	Dharunkumar s. 22/10/2023, 7:56 pm



This screenshot shows the Salesforce interface for an Event Service record named 'Food and Drinks'. The browser tabs include 'Home | Salesforce', 'Food and Drinks | Event Service', 'App Manager | Salesforce', and 'New Tab'. The URL is 'knowledgeinstituteoftech-6d-dev-ed.develop.lightning.force.com/lightning/r/Event_Service__c/a0B5j000008tuDuEAJ/view?source=alohaHeader'. The navigation bar shows 'Event Management' with sub-menus for 'occasions', 'Attendees', 'Speakers', 'Vendors', 'Event Services', 'Reports', and 'Dashboards'. The 'Event Services' menu is selected. The record header shows 'Event Service Food and Drinks' with buttons for 'New Contact', 'Edit', and 'New Opportunity'. The 'Details' tab is active, displaying a table of fields: Event Service Name (Food and Drinks), Event Name (Occasion), Vendor Name (Lokesh), Created By (Dharunkumar s. 22/10/2023, 7:56 pm), and Last Modified By (Dharunkumar s. 22/10/2023, 7:56 pm). Each field has an edit icon.

Related Details	
Event Service Name	Food and Drinks
Event Name	Occasion
Vendor Name	Lokesh
Created By	Dharunkumar s. 22/10/2023, 7:56 pm
Last Modified By	Dharunkumar s. 22/10/2023, 7:56 pm

Home | Salesforce

New occasions with Attendees | App Manager | Salesforce | New Tab

knowledgeinstituteoftech-6d-dev-ed.develop.lightning.force.com/lightning/r/Report/0005j000009cOsFEAE/view?queryScope=userFolders

Search...

Event Management occasions Attendees Speakers Vendors Event Services Reports Dashboards Home

Report: occasions with Attendees

New occasions with Attendees Report

Enable Field Editing

Q

Add Chart

▼

↻

Edit

▼

Total Records
1

	Occasion: Event Name	Attendee: Attendee Name
1	Occasion	priya

Waiting for knowledgeinstituteoftech-6d-dev-ed.develop.lightning.force.com...

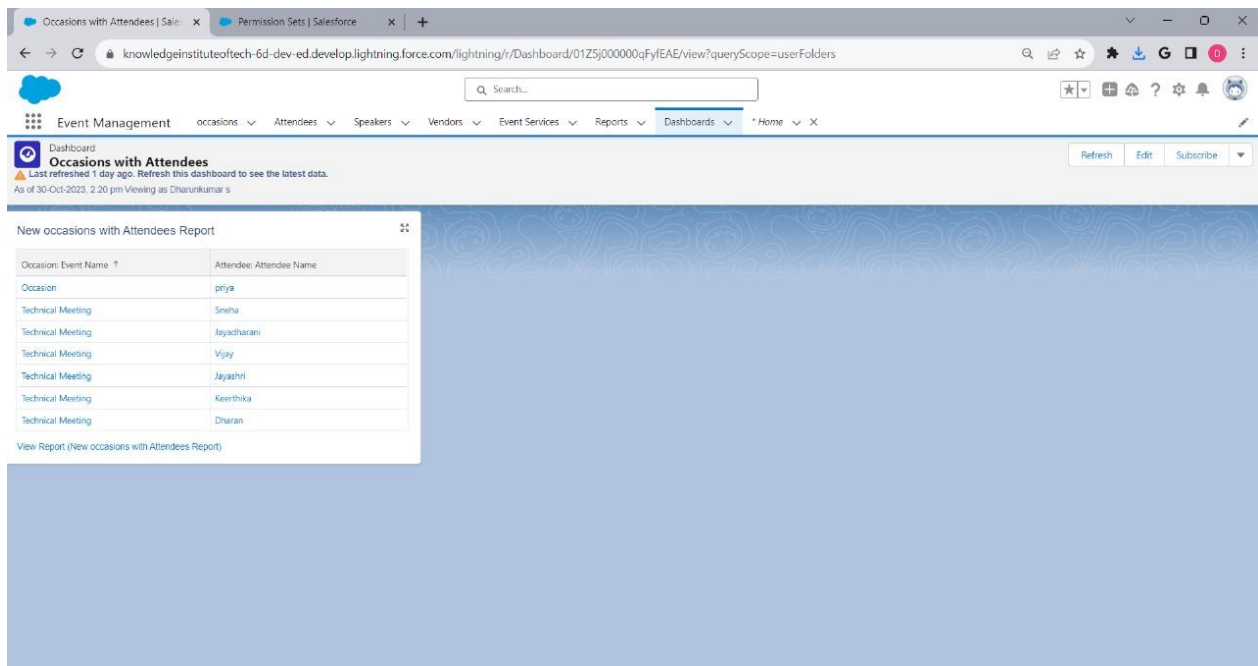
CHAPTER-5

REPORTS & DASHBOARD

5.1 Reports

A Salesforce report is a list of data generated based on filter criteria. Salesforce Reports helped us predict trends and gives us the advantage to increase profits.

The report builder provides a drag-and-drop interface to easily build and customize your reports.

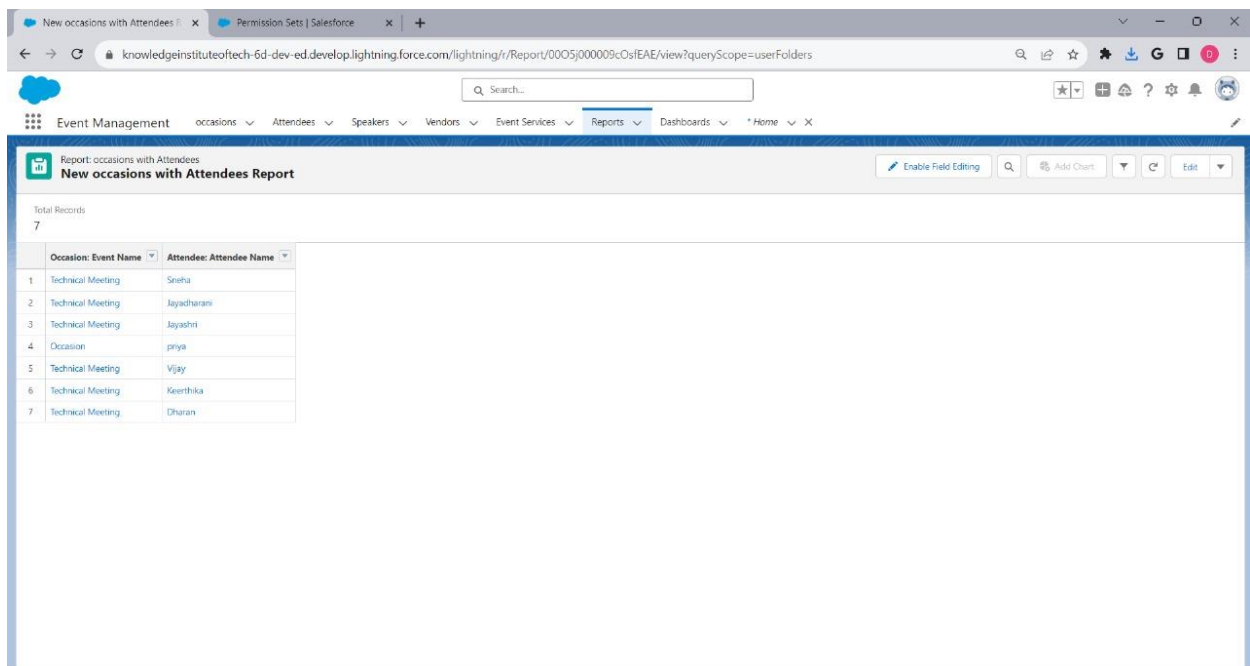
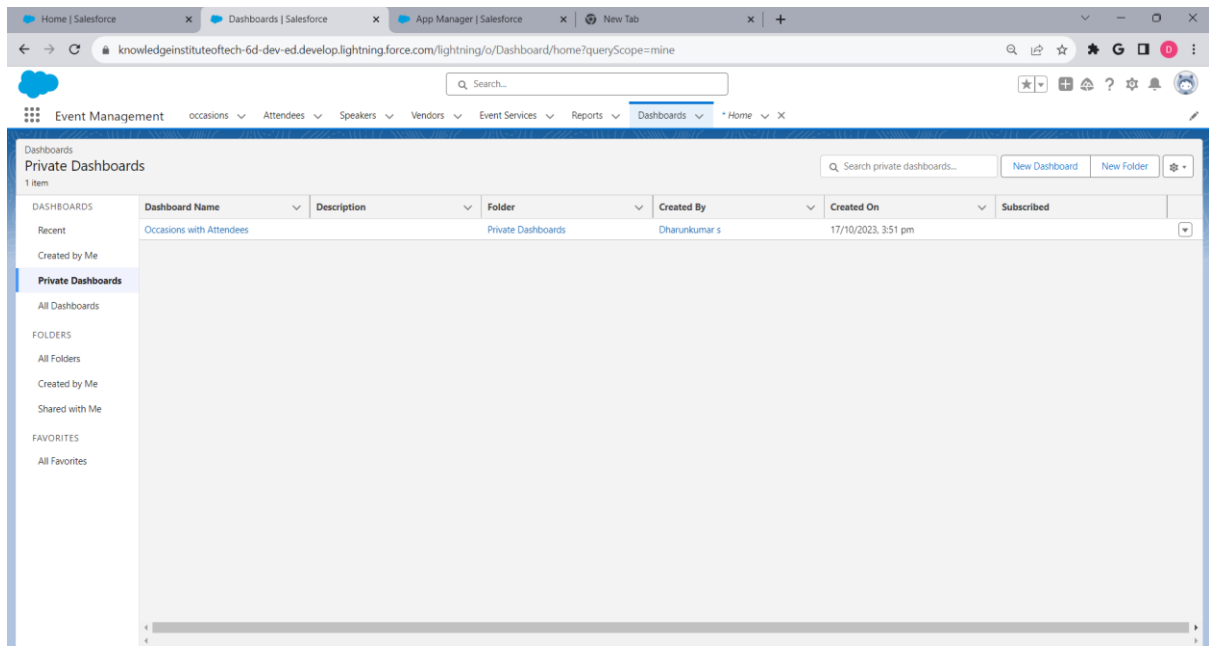


The screenshot shows a Salesforce dashboard interface. At the top, there are browser tabs for 'Occasions with Attendees | Salesforce' and 'Permission Sets | Salesforce'. The address bar shows the URL: `knowledgeinstituteoftech-6d-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01Z5j000000qFyFAE/view?queryScope=userFolders`. The dashboard header includes a search bar and navigation links for 'Event Management', 'occasions', 'Attendees', 'Speakers', 'Vendors', 'Event Services', 'Reports', and 'Dashboards'. The main content area displays a report titled 'New occasions with Attendees Report' with a table of data.

Occasion: Event Name ↑	Attendee: Attendee Name
Occasion	pritya
Technical Meeting	Sneha
Technical Meeting	Jayadharani
Technical Meeting	Vijay
Technical Meeting	Jayashri
Technical Meeting	Keerthika
Technical Meeting	Dharan

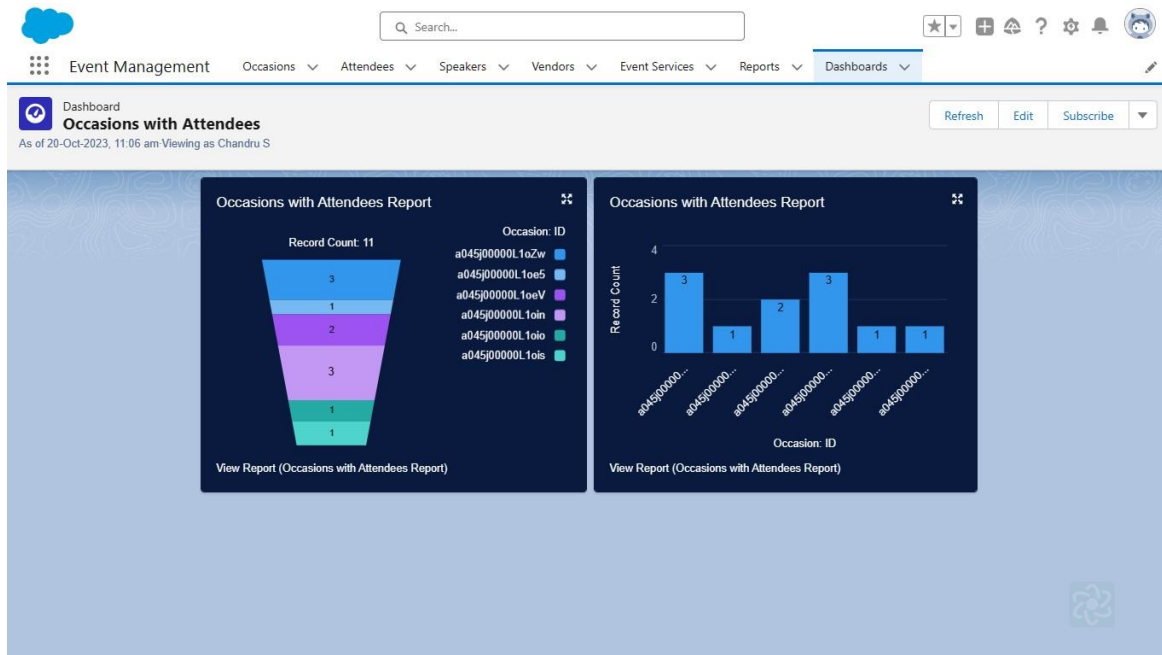
Below the table, there is a link that says 'View Report (New occasions with Attendees Report)'.

Build An Event Management System



5.2 Dashboard

A dashboard provides an interactive visual display of key metrics and trends. Multiple dashboard components can be shown together on a single dashboard layout, creating rich visual displays of multiple reports that have a common theme.



CHAPTER-6

CONCLUSION

In conclusion, the Event Management System represents a dynamic and comprehensive solution to the complex challenges faced by organizations in planning, executing, and analyzing events. With a unique emphasis on Salesforce integration, user-centric design, and customizable features, the system has the potential to redefine the event management landscape. It offers organizations a unified platform to streamline event management, enhance attendee engagement, and provide actionable insights for data-driven decision-making.

The system's scalability, security, and user support resources ensure that it meets the evolving needs of diverse organizations, from small meetings to large-scale conferences. It strives to create a positive social impact by promoting inclusivity and sustainability through digital event management.

In essence, the Event Management System has the potential to revolutionize the way organizations approach event planning and execution. It's not just a solution but a catalyst for improved event success, higher customer satisfaction, and a more sustainable and inclusive event management ecosystem. By bridging the gap between event management and Salesforce CRM, it unlocks new opportunities for organizations to thrive in the competitive event landscape.

CHAPTER-7 PROJECT DEMONSTRATION

Github:

<https://github.com/2k20it26it26/Naanmudhalvan-Salesforce-NM2023TMID02253-Kiot>

Demo Link:

<https://drive.google.com/file/d/1ls6FkJFvkF1YTfgcZ44AvI3QOqIiMo7/view?usp=sharing>