

PROJECT REPORT TEMPLATE

Build a event management system using salesforce

1. Introduction

1.1 Overview

- (i) Event Management is the process of creating and maintaining an event.
- (ii) This process spans from the very beginning of planning all the way to post – event strategizing.
- (iii) At the start, an event manager makes planning decisions, such as the time, location, and theme of their event.
- (iv) During the event, event managers oversee the event live and make sure things run smoothly.
- (v) After an event, event managers are tasked with reviewing event data, submitting KPI and ROI findings, and staying and the ball for any post-event offerings.
- (vi) All different branches of planning go into event management, including various types of sourcing, designing, regulation, checks, and on-site management.
- (vii) 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.
- (viii) Really, any event that requires considerable planning and execution is event management.

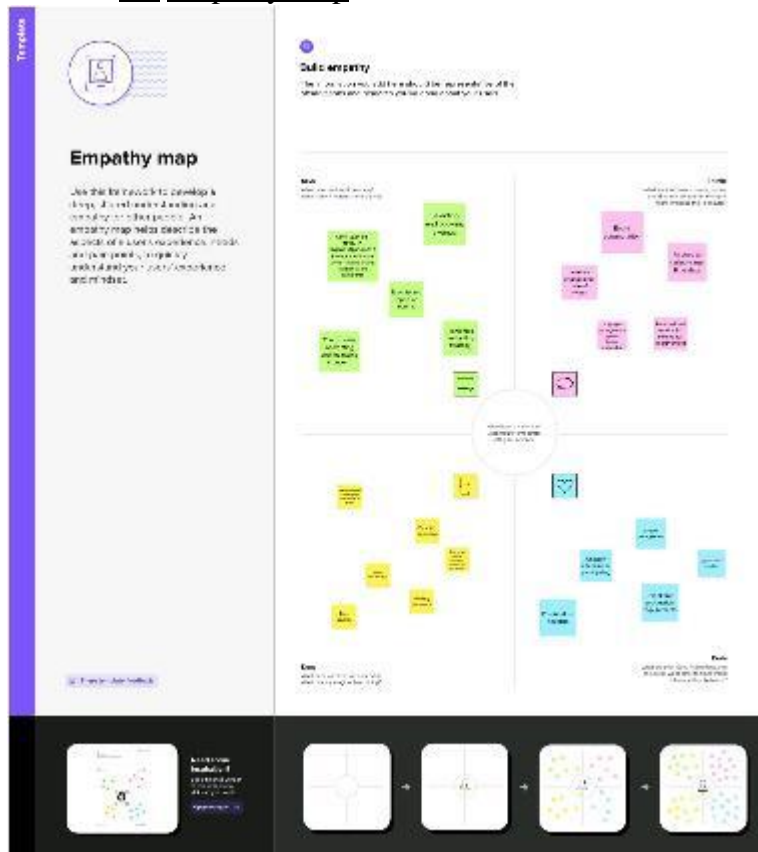
1.2 Purpose

- (i) Purpose to manage events throughout their lifecycle is the purpose of event management.
- (ii) This lifecycle of activities to detect events, make sense of them and determine the appropriate control action, which is coordinated by the event management process.
- (iii) Promotion of new products or services.
- (iv) Achieving the desired exposure and brand awareness.
- (v) Attracting more prospects and clients from exhibitions and trade shows.
- (vi) Improving brand positioning through professional events and conferences.
- (vii) Creative solutions to drive the highest level of satisfaction from the guests.
- (viii) Handling all permissions, permits, insurance and security concerns.
- (ix) Saving valuable time, efforts and money when hiring experience event managers.

- (x) Reducing the possibility of any incidents that harm the professional atmosphere.

2 Problem Definition & Design Thinking

2.1 Empathy Map



2.2 Ideation and Brainstorming Map



3 Result

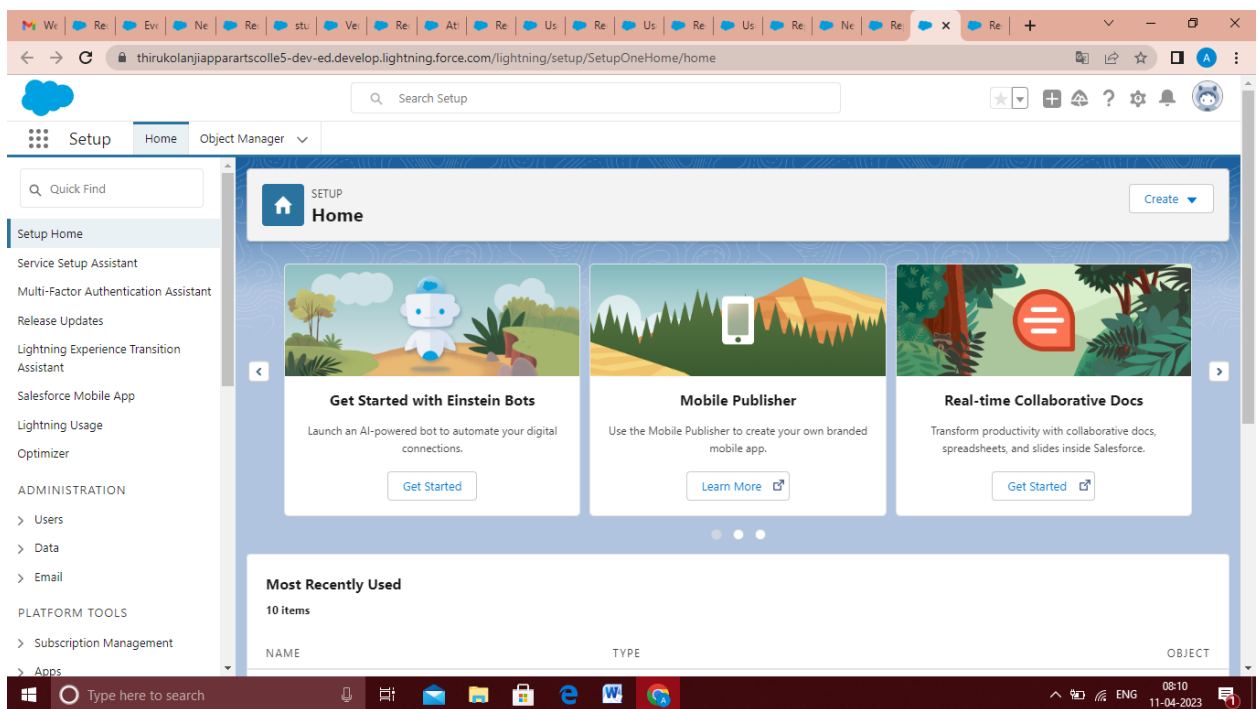
3.1 Data Model

<u>Object Name</u>	<u>Fields in the object</u>	
<u>Event</u>	Field label	Data type
	City	Text
	Start Date	Date/Time
	Event Name	Master-detail relationship
	End Date	Date/Time
<u>Attendee</u>	Field label	Data type
	Id	Auto Number
	Phone	Phone
	Email	Email
<u>Speakers</u>	Field label	Data type
	Bio	Text Area

	e-mail	Email
<u>Vendors</u>	Field label	Data type
	e-mail	Email
	Phone	Phone
	Service Provider	Text
	Event name	Look-up Relationship
<u>Student</u>	Field label	Data type
	Tickets	Picklist

3.2 Activity and Screenshot

Milestone 1:



Milestone 2:- Object

Activity 1:

thirukolanjiapparartscolle5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003Xayc/Details/view

Search Setup

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Event

Details

Fields & Relationships

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

Details

Description

API Name

Event__c

Custom

✓

Singular Label

Event

Plural Label

Events

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Edit

Delete

Type here to search

03:34

11-04-2023

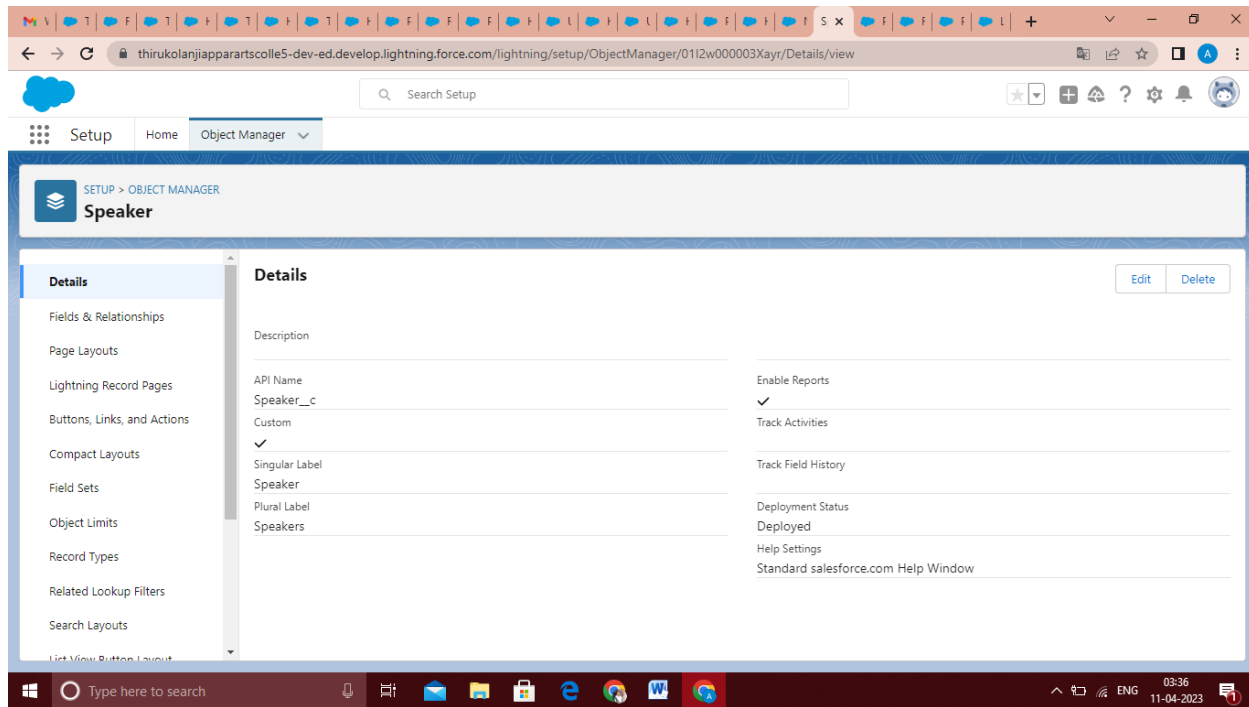
Activity 2:

The screenshot shows the Salesforce Setup interface for the 'Attendee' object. The browser address bar displays the URL: `thirukolaniapparartscolle5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003Xaym/Details/view`. The Salesforce navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Attendee' and shows the 'Details' tab selected in the left sidebar. The details are organized into two columns:

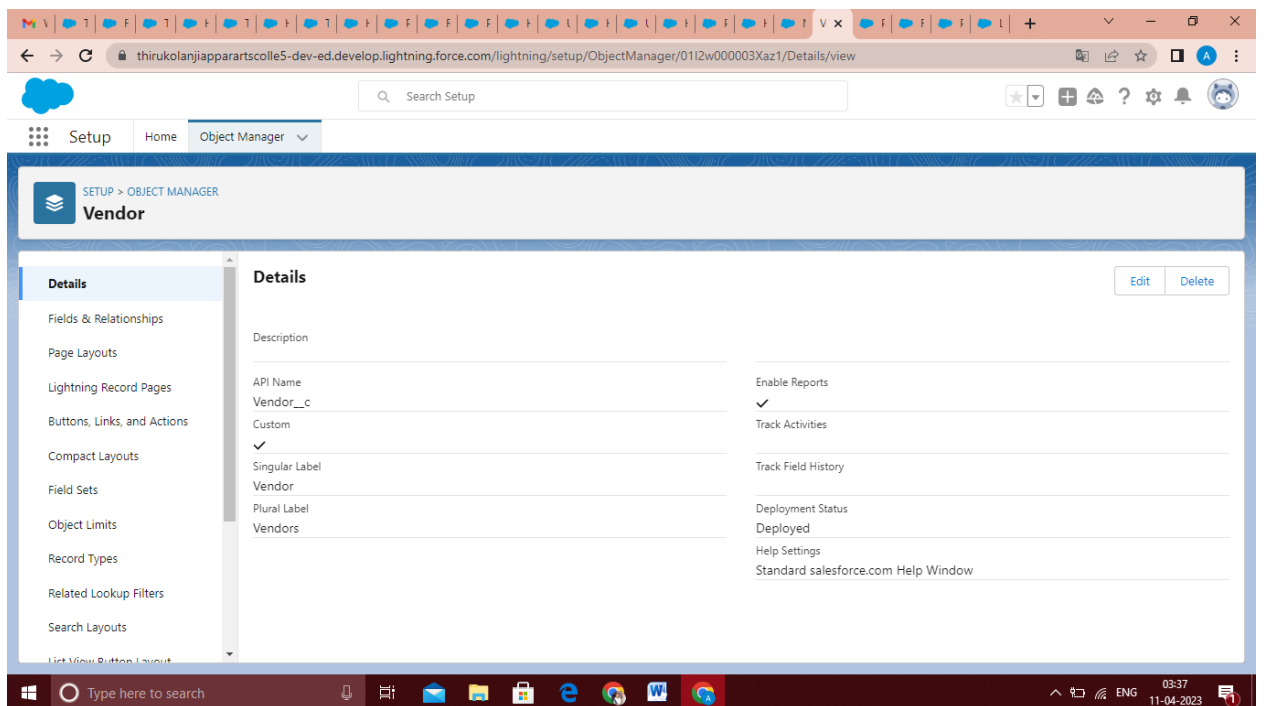
Details	
Description	
API Name	Attendee__c
Custom	✓
Singular Label	Attendee
Plural Label	Attendees
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

The bottom of the image shows the Windows taskbar with the search bar and various application icons. The system clock indicates the time is 02:17 on 11-04-2023.

Activity 3:



Activity 4:



Milestone 3:- Tab

Activity 1: Creation of Event Tab

The screenshot shows the Salesforce interface for a custom tab named 'Events'. The browser address bar displays the URL: `thirukolanjiapparartscolle5-dev-ed.develop.my.salesforce.com/01r2w000000WPZJ?setupid=CustomTabs`. The Salesforce header includes the logo, a search bar, and navigation links like 'Switch to Lightning Experience', 'AARTHI R', 'Setup', 'Help', and 'Content'. The left sidebar contains navigation options: Home, Chatter, Libraries, Content, Subscriptions, Events, Attendees, Speakers, and Vendors. Below the sidebar, there's a 'Quick Find / Search...' bar and a 'Lightning Experience Transition Assistant' section with a 'Get Started' button. The main content area is titled 'Custom Object Tab Events' and includes a 'Help for this Page' link. Below the title, it says 'Below is the information for the custom tab. Click Edit to change the custom tab.' The 'Custom Tab Definition Detail' section shows the following information:

Tab Label	Events	Tab Style	Airplane
Object	Event	Splash Page Custom Link	
Description			
Created By	AARTHI R, 03/04/2023, 7:20 pm	Modified By	AARTHI R, 03/04/2023, 7:20 pm

The Windows taskbar at the bottom shows the search bar and several application icons.

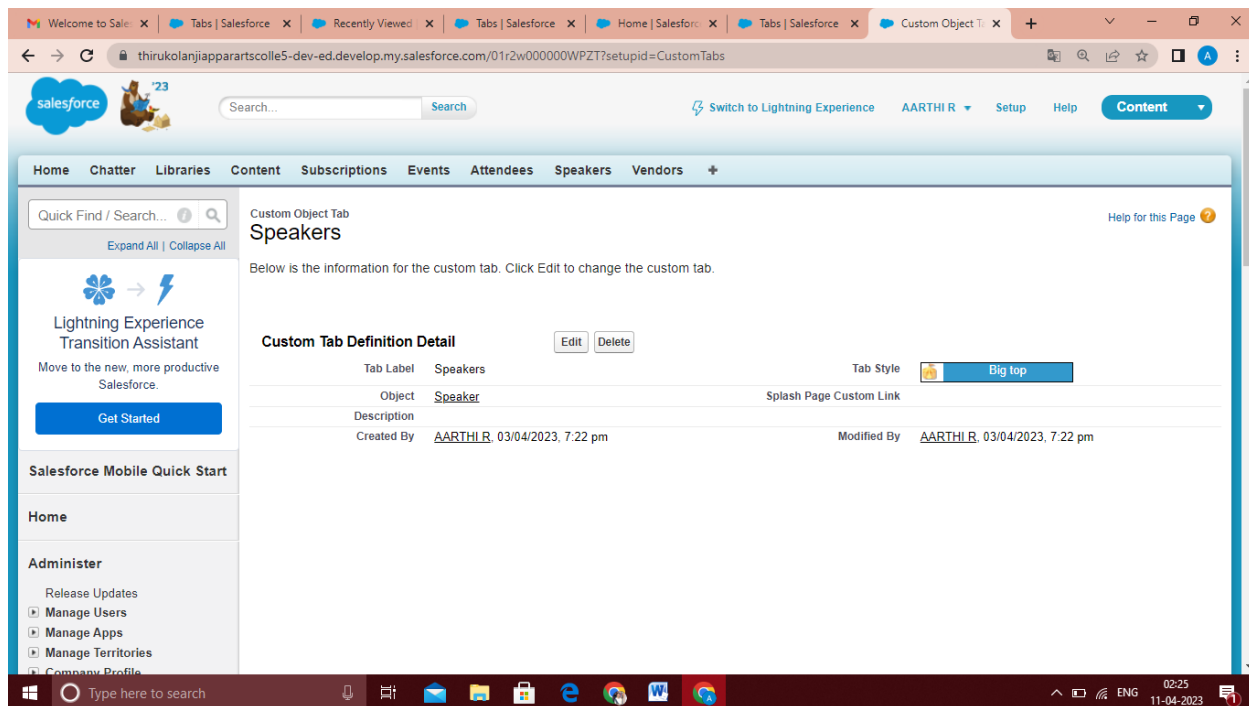
Activity 2: Creation of Attendee Tab

The screenshot shows the Salesforce interface for a custom tab named 'Attendees'. The browser address bar displays the URL: `thirukolanjiapparartscolle5-dev-ed.develop.my.salesforce.com/01r2w000000WPZO?setupid=CustomTabs`. The Salesforce header is similar to the previous screenshot. The left sidebar is the same. The main content area is titled 'Custom Object Tab Attendees' and includes a 'Help for this Page' link. Below the title, it says 'Below is the information for the custom tab. Click Edit to change the custom tab.' The 'Custom Tab Definition Detail' section shows the following information:

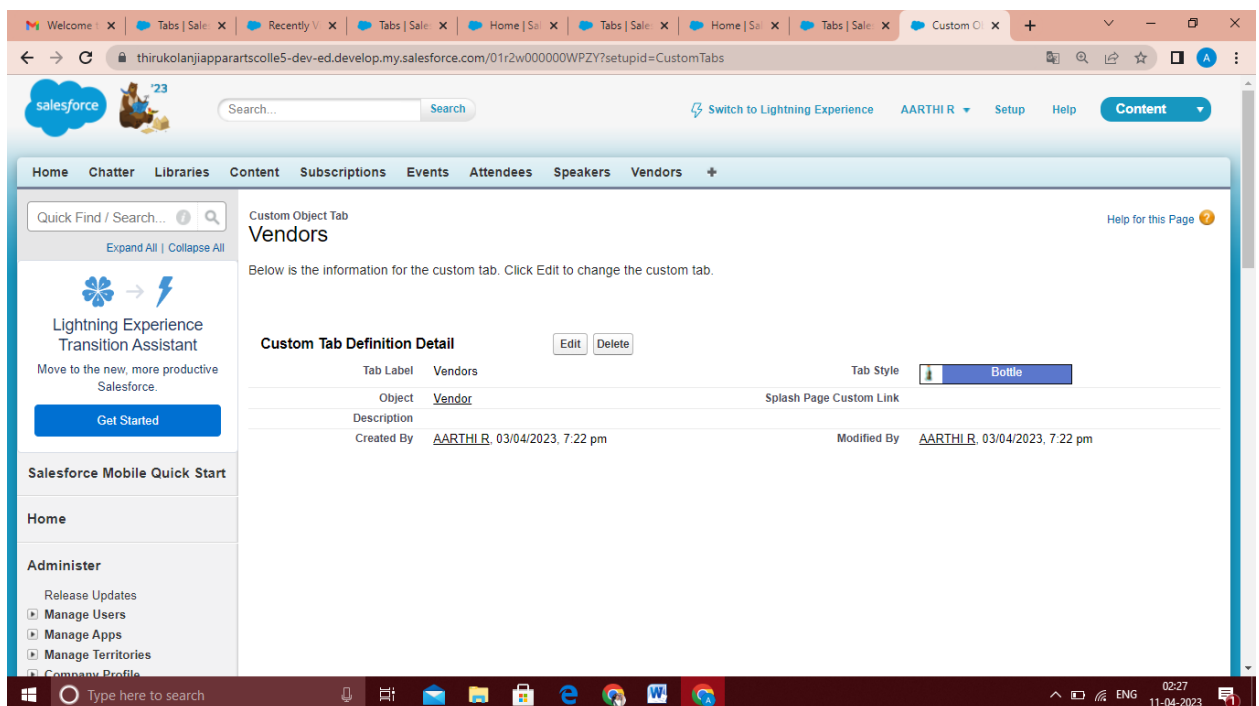
Tab Label	Attendees	Tab Style	Balls
Object	Attendee	Splash Page Custom Link	
Description			
Created By	AARTHI R, 03/04/2023, 7:21 pm	Modified By	AARTHI R, 03/04/2023, 7:21 pm

The Windows taskbar at the bottom shows the search bar and several application icons.

Activity 3: Creation of Speaker Tab

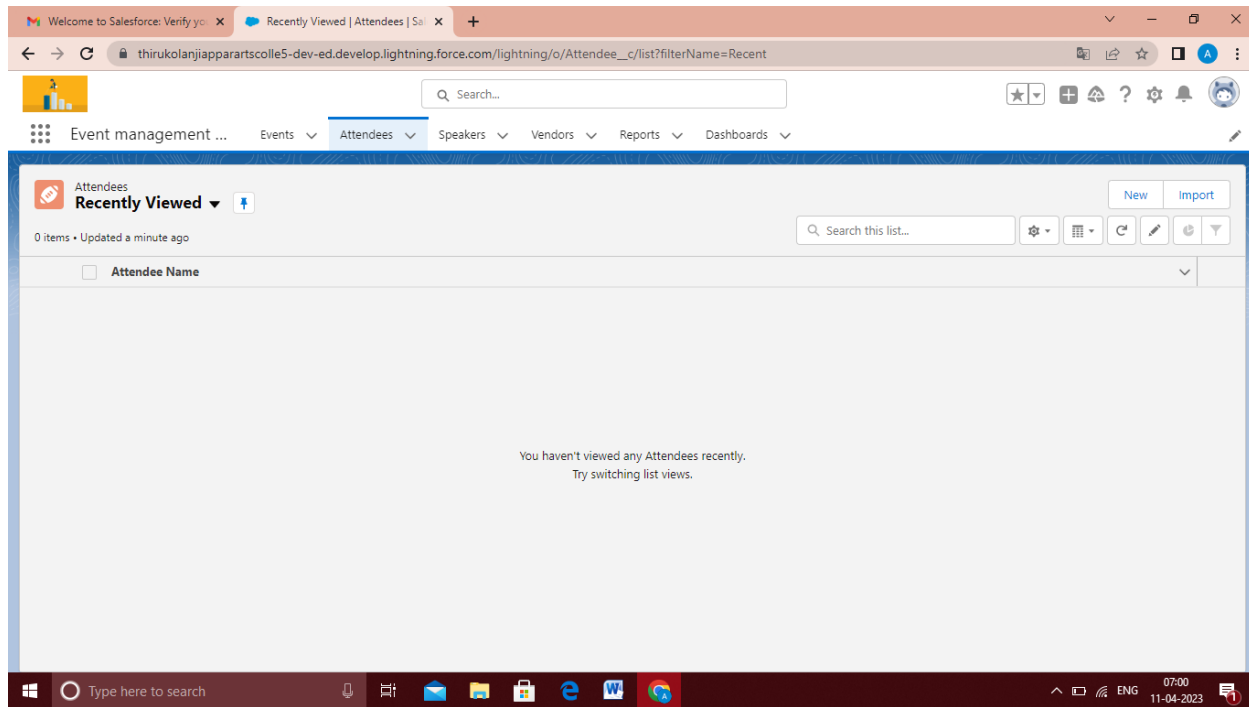


Activity 4: Creation of Vendor Tab



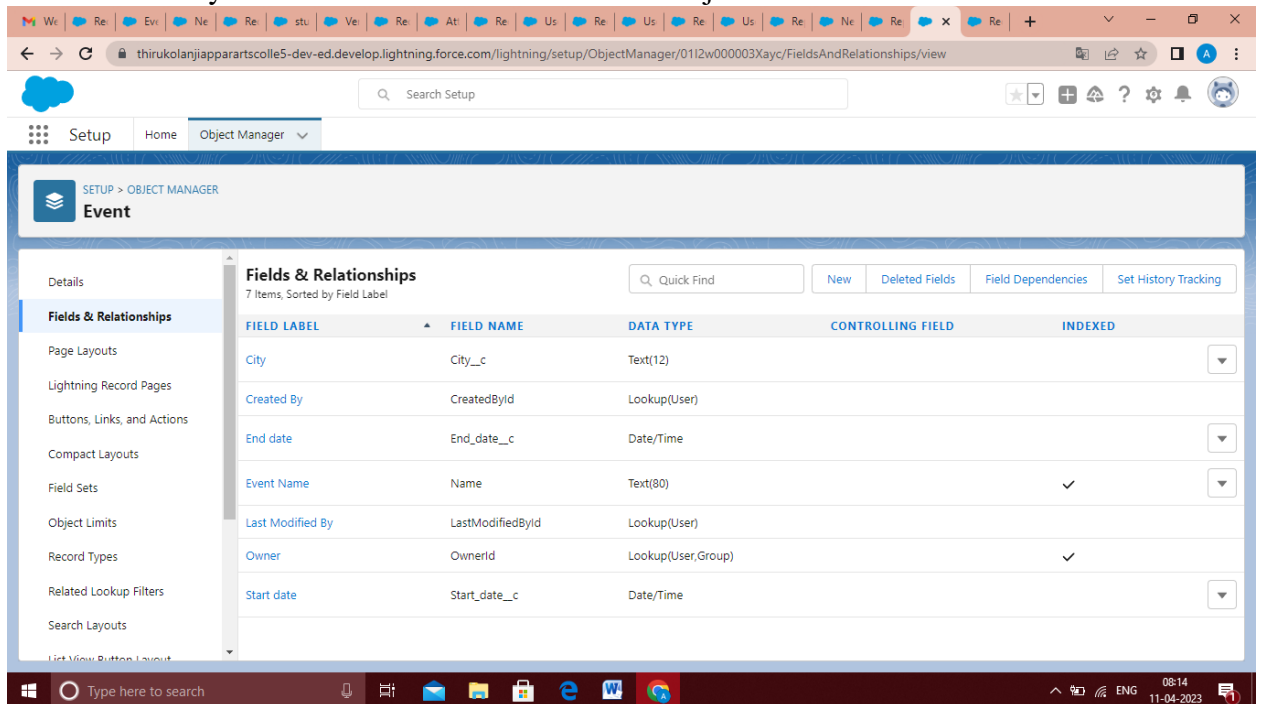
Milestone 3 :- Application

Activity: Create the event management construction App



Milestone 4:- Fields

Activity 1: Creation of Fields for the event objects



Activity 2: Creation of Fields for the Attendee objects

thirukolanjapparartscolle5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003Xaym/FieldsAndRelationships/view

Setup Home Object Manager

Attendee

Details

Fields & Relationships
7 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Attendee Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Event	Event__c	Master-Detail(Event)		✓
Id	Id__c	Auto Number		
Last Modified By	LastModifiedById	Lookup(User)		
Phone	Phone__c	Phone		

Type here to search

08:28 11-04-2023

thirukolanjapparartscolle5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003XnKg/FieldsAndRelationships/view

Setup Home Object Manager

student name

Details

Fields & Relationships
5 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
student name Name	Name	Text(80)		✓
Tickets	Tickets__c	Picklist		

Type here to search

08:29 11-04-2023

Activity 3: Creation of Fields for the Speaker objects

thirukolanjiapparartscolle5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003Xayr/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Speaker

Details
Fields & Relationships
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

7 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Bio	Bio__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
e-mail	e_mail__c	Email		
Event	Event__c	Lookup(Event)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Speaker Name	Name	Text(80)		✓

Type here to search 08:26 11-04-2023

Activity 4: Creation of Fields for the Vendor objects

thirukolanjiapparartscolle5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003Xaz1/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Vendor

Details
Fields & Relationships
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

8 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
e-mail	e_mail__c	Email		
Event	Event__c	Lookup(Event)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		
Service provider	Service_provider__c	Text(12)		
Vendor Name	Name	Text(80)		✓

Type here to search 08:24 11-04-2023

Milestone 5:- Profile

Activity 1: Creation on event user profile

Profile
Event user profile
« Back to List: Profiles

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges](#) | [Enabled Apex Class Access](#) | [Enabled Visualforce Page Access](#) | [Enabled External Data Source Access](#) | [Enabled Named Credential Access](#) | [Enabled Custom Metadata Type Access](#) | [Enabled Custom Setting Definitions Access](#) | [Enabled Flow Access](#) | [Enabled Service Presence Status Access](#) | [Enabled Custom Permissions](#)

Profile Detail [Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name	Event user profile		
User License	Salesforce	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	AARTHI R.	08/04/2023, 12:56 pm	Modified By: AARTHI R. 08/04/2023, 12:57 pm

Page Layouts

Standard Object Layouts			
Global	Global Layout [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
Home Page Layout	DE Default [View Assignment]	Opportunity	Opportunity Layout [View Assignment]
Account	Account Layout [View Assignment]	Opportunity Product	Opportunity Product Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Order	Order Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Order Product	Order Product Layout [View Assignment]

Activity 2: Creation on event vendors profile

Profile
Event vendors profile
« Back to List: Profiles

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges](#) | [Enabled Apex Class Access](#) | [Enabled Visualforce Page Access](#) | [Enabled External Data Source Access](#) | [Enabled Named Credential Access](#) | [Enabled Custom Metadata Type Access](#) | [Enabled Custom Setting Definitions Access](#) | [Enabled Flow Access](#) | [Enabled Service Presence Status Access](#) | [Enabled Custom Permissions](#)

Profile Detail [Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name	Event vendors profile		
User License	Salesforce	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	AARTHI R.	08/04/2023, 1:02 pm	Modified By: AARTHI R. 08/04/2023, 1:03 pm

Page Layouts

Standard Object Layouts			
Global	Global Layout [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
Home Page Layout	DE Default [View Assignment]	Opportunity	Opportunity Layout [View Assignment]
Account	Account Layout [View Assignment]	Opportunity Product	Opportunity Product Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Order	Order Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Order Product	Order Product Layout [View Assignment]

Milestone 6:- User

Activity 1: Creating a User with username as Sanjay Gupta

The screenshot shows the Salesforce User Detail page for a user named sanjay Gupta. The page is viewed in a web browser with the URL thirukolaniapparartscolle5-dev-ed.develop.my.salesforce.com/0052w00000Gwwld?noredirect=1&isUserEntityOverride=1. The left sidebar contains navigation links for 'Lightning Experience Transition Assistant', 'Salesforce Mobile Quick Start', 'Home', and 'Administer' (with sub-links for Release Updates, Manage Users, Users, Mass Email Users, Roles, Permission Sets, Permission Set Groups, User Management Settings, Profiles, and Public Groups). The main content area shows the user's details in a table format.

User Detail		Role
Name	sanjay Gupta	Salesforce
Alias	sanj	User License
Email	aaarthirajadurai8@gmail.com	Profile
Username	aaarthirajadurai8@gmail.com	Active
Nickname	User1680940965584673032	Marketing User
Title		Offline User
Company		Knowledge User
Department		Flow User
Division		Service Cloud User
Address		Site.com Contributor User
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User
Locale	English (India)	WDC User
Language	English	Mobile Push Registrations
Delegated Approver		Data.com User Type
Manager		Accessibility Mode (Classic Only)
Receive Approval Request Emails	Only if I am an approver	Debug Mode
Federation ID		High-Contrast Palette on Charts
App Registration: One-Time		Load Lightning Pages While

Activity 2: Creating a User with username as Rahul Sharma

The screenshot shows the Salesforce User Detail page for a user named Rahul Sharma. The page is viewed in a web browser with the URL thirukolaniapparartscolle5-dev-ed.develop.my.salesforce.com/0052w00000Gwz1v?noredirect=1&isUserEntityOverride=1. The left sidebar contains navigation links for 'Lightning Experience Transition Assistant', 'Salesforce Mobile Quick Start', 'Home', and 'Administer' (with sub-links for Release Updates, Manage Users, Users, Mass Email Users, Roles, Permission Sets, Permission Set Groups, User Management Settings, Profiles, and Public Groups). The main content area shows the user's details in a table format.

User Detail		Role
Name	Rahul Sharma	Salesforce Platform
Alias	rsha	User License
Email	aaarthirajadurai8@gmail.com	Profile
Username	durai8@gmail.com	Active
Nickname	User16812240968429875195	Marketing User
Title		Offline User
Company		Knowledge User
Department		Flow User
Division		Service Cloud User
Address		Site.com Contributor User
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User
Locale	English (India)	WDC User
Language	English	Mobile Push Registrations
Delegated Approver		Data.com User Type
Manager		Accessibility Mode (Classic Only)
Receive Approval Request Emails	Only if I am an approver	Debug Mode
Federation ID		High-Contrast Palette on Charts
App Registration: One-Time		Load Lightning Pages While

Milestone 7:- Permission Sets

Activity 1:

The screenshot shows the Salesforce Lightning Experience interface. The top navigation bar includes 'Home', 'Chatter', 'Libraries', 'Content', 'Subscriptions', 'Events', 'Attendees', 'Speakers', and 'Vendors'. The left sidebar contains a search bar, 'Lightning Experience Transition Assistant', 'Salesforce Mobile Quick Start', and an 'Administer' section with options like 'Release Updates', 'Manage Users', 'Users', and 'Mass Email Users'. The main content area is titled 'Event permits' and includes a 'Find Settings...' search bar, 'Clone', 'Edit Properties', and 'Manage Assignments' buttons. Below this is the 'Permission Set Overview' table:

Description	API Name	Event_permits
License	Namespace Prefix	
Session Activation Required	Created By	AARTHIR, 08/04/2023, 1:39 pm
Last Modified By	AARTHIR, 08/04/2023, 1:39 pm	

Below the overview is the 'Apps' section, which is currently loading. It lists various settings that apply to Salesforce apps, including 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings', 'App Permissions', and 'Apex Class Access'.

Activity 2:

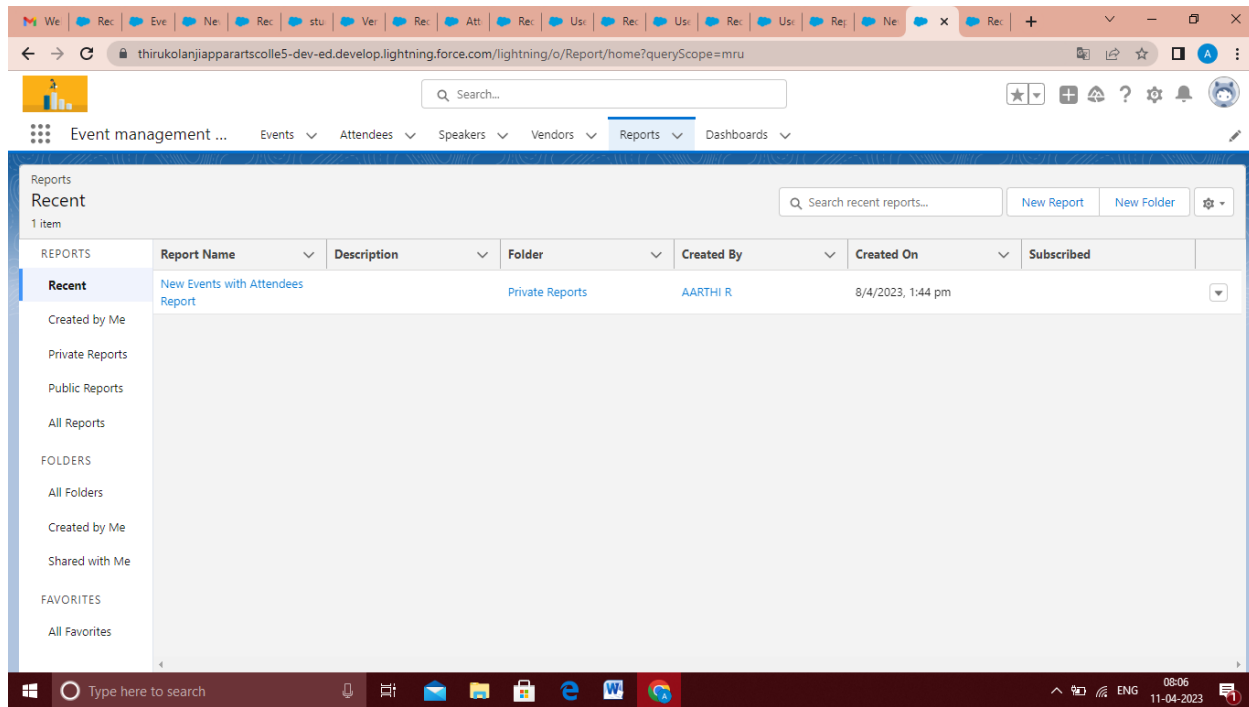
The screenshot shows the Salesforce Lightning Experience interface with the 'Vendor permits' permission set configuration page. The layout is similar to the previous screenshot, but the main content area is titled 'Vendor permits'. The 'Permission Set Overview' table is as follows:

Description	API Name	Vendor_permits
License	Namespace Prefix	
Session Activation Required	Created By	AARTHIR, 08/04/2023, 1:41 pm
Last Modified By	AARTHIR, 08/04/2023, 1:41 pm	

The 'Apps' section below the overview lists settings for various Salesforce apps, including 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings', 'App Permissions', and 'Apex Class Access'.

Milestone 8:- Reports

Creating a Report:



4 Trailhead Profile Public URL

TEAM LEAD: AARTHI.R

<https://trailblazer.me/id/arajadurai4>

TEAM MEMBER 1: RAJALAKSHMI.N

<http://trailblazer.me/id/rbarath4>

TEAM MEMBER 2: ABIRAMI.M

<https://trailblazer.me/id/mmabirami>

TEAM MEMBER 3: ABARNA.E

<https://trailblazer.me/id/aabar20>

TEAM MEMBER 4: AJAY KUMAR.M

<https://trailblazer.me/id/akumar8265>

5 Advantages and Disadvantages

List of Advantages

- ✓ Gaining more experience for your business internal public relation and marketing teams collaborating with professional event planning companies.

- ✓ Reducing the possibility of any incidence that harm the professional atmosphere.
- ✓ It is too easy to focus on the details of the event and forget that the intension is to achieve your objectives.
- ✓ An event management company will help with this.
- ✓ The company will tell you about other things you may not have thought of which could enhance the experience.

List of Disadvantages

- ✓ They will do a risk analysis, create plans and implement procedures.
- ✓ You need to pay them in addition to other event costs.
- ✓ The event Management come any does not know anything about your company unless you tell them.
- ✓ Like many other creative fields, this profession demands long hours of hard works it is not a 9-5 job.
- ✓ Candidates should be able to work at off hours and under pressure to meet the expectations of the clients.
- ✓ This profession requires extra amount of responsibilities.

6 Applications

- Event management provides multiple opportunities to meet and interact with celebrities like actors, actresses, politicians and similar high-profile people.
- This profession provides opportunities for free travel.
- Event Management is a personally rewarding career as it provides job satisfaction.
- It is one of rare professions that requires minimum educations qualification to start a career.
- It involves a lot of research about the brand, target audience and the concept of the event before planning the actual event.

7 Conclusion

Event Management system is user friendly and cost-effective system, it is customized with activities related to event management life-cycle. It provides a new edge to management industry. Solution Dot always keep your objectives and goals on top priority while developing any plan of work.

8 Future scope

- Event Management is the process of planning various types of events.
- It involves management, creation and development of events such as corporate conferences, wedding, festivities, formal parties etc.

- It involves a lot of research about the brand, target audience and concept of the event before planning the actual event.
- The event industry manages different sizes of events including Olympics to many even small birthday parties etc.
- The process of planning small or large size events is called event planning.