

BUILD AN EVENTMANAGEMENT SYSTEM USING SALESFORCE

1. INTRODUCTION:

1.1 Overview

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.

1.2 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 they will gain knowledge and can include into their resume as well.

What actually a person learn:

- Real Time Salesforce Project.
- Object & Relationship in Salesforce.
- Create Salesforce Org.

2. PROBLEM DEFINITION & DESIGN THINKING:

2.1 Empathy Map:

- Empathy maps are an efficient tool used by designers to not only understand user behavior, but also visually communicate those findings to colleagues, uniting the team under one shared understanding of the user. Originally invented by Dave Gray at Xplane, the empathy map was made in an attempt to limit miscommunication and misunderstanding about target audiences, including customers and users.
- Based on our understanding about the Empathy map, we created our team Empathy map and also attached the screenshot.



Empathy map

Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.

Share empathy feedback



Build empathy

The information you add here should be representative of the conversations and research you've done about your users.



2.2 Ideation & Brainstorming Map:

- **Ideation** is a creative process where designers generate ideas in sessions (e.g., brainstorming, worst possible idea). It is the third stage in the Design Thinking process. Participants gather with open minds to produce as many ideas as they can to address a problem statement in a facilitated, judgment-free environment.
- **Brainstorming** is a group problem-solving method that involves the spontaneous contribution of creative ideas and solutions. This technique requires intensive, freewheeling discussion in which every member of the group is encouraged to think aloud and suggest as many ideas as possible based on their diverse knowledge.
- Here we attached our team Ideation & Brainstorming Map below:



Brainstorm & Idea prioritization

Use this template in your own brainstorming sessions to help you brainstorm ideas, organize them, and prioritize them based on their potential impact and effort.

- 0 Choose a topic
- 1 Prioritize ideas
- 2 Develop a solution

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1 Before you collaborate

1. Identify a problem you are trying to solve. Write down the problem and the goal you want to achieve.

0 Choose

2 Now getting

2. Generate ideas. Write down as many ideas as you can think of. Don't worry about whether they are good or bad.

3 Let's go!

3. Evaluate ideas. Write down the pros and cons of each idea. Rank them based on their potential impact and effort.

4 Now let's do it!

4. Implement ideas. Write down the steps you need to take to implement your chosen idea. Assign tasks to team members.

0 Generate

1 Define your problem statement

1. Define your problem statement. Write down the problem and the goal you want to achieve.

0 Define



1 Brainstorm

1. Brainstorm ideas. Write down as many ideas as you can think of. Don't worry about whether they are good or bad.

0 Choose

IDEAS	PROS	CONS	SCORE
1. Idea 1	2. Pros	3. Cons	4. Score
2. Idea 2	5. Pros	6. Cons	7. Score
3. Idea 3	8. Pros	9. Cons	10. Score
4. Idea 4	11. Pros	12. Cons	13. Score
5. Idea 5	14. Pros	15. Cons	16. Score
6. Idea 6	17. Pros	18. Cons	19. Score
7. Idea 7	20. Pros	21. Cons	22. Score
8. Idea 8	23. Pros	24. Cons	25. Score
9. Idea 9	26. Pros	27. Cons	28. Score
10. Idea 10	29. Pros	30. Cons	31. Score

IDEAS	PROS	CONS	SCORE
1. Idea 1	2. Pros	3. Cons	4. Score
2. Idea 2	5. Pros	6. Cons	7. Score
3. Idea 3	8. Pros	9. Cons	10. Score
4. Idea 4	11. Pros	12. Cons	13. Score
5. Idea 5	14. Pros	15. Cons	16. Score
6. Idea 6	17. Pros	18. Cons	19. Score
7. Idea 7	20. Pros	21. Cons	22. Score
8. Idea 8	23. Pros	24. Cons	25. Score
9. Idea 9	26. Pros	27. Cons	28. Score
10. Idea 10	29. Pros	30. Cons	31. Score

1 Group ideas

1. Group ideas. Write down the ideas and group them based on their potential impact and effort.

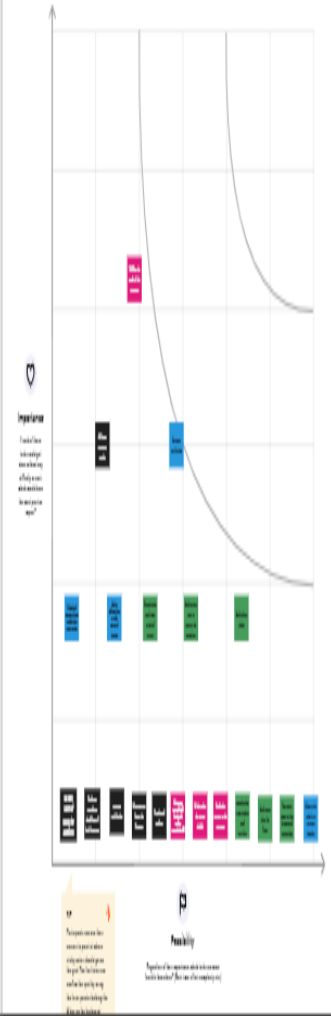
0 Choose



1 Prioritize

1. Prioritize ideas. Write down the ideas and rank them based on their potential impact and effort.

0 Choose



Report a bug

Feedback

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3. RESULT

3.1 Data Model:

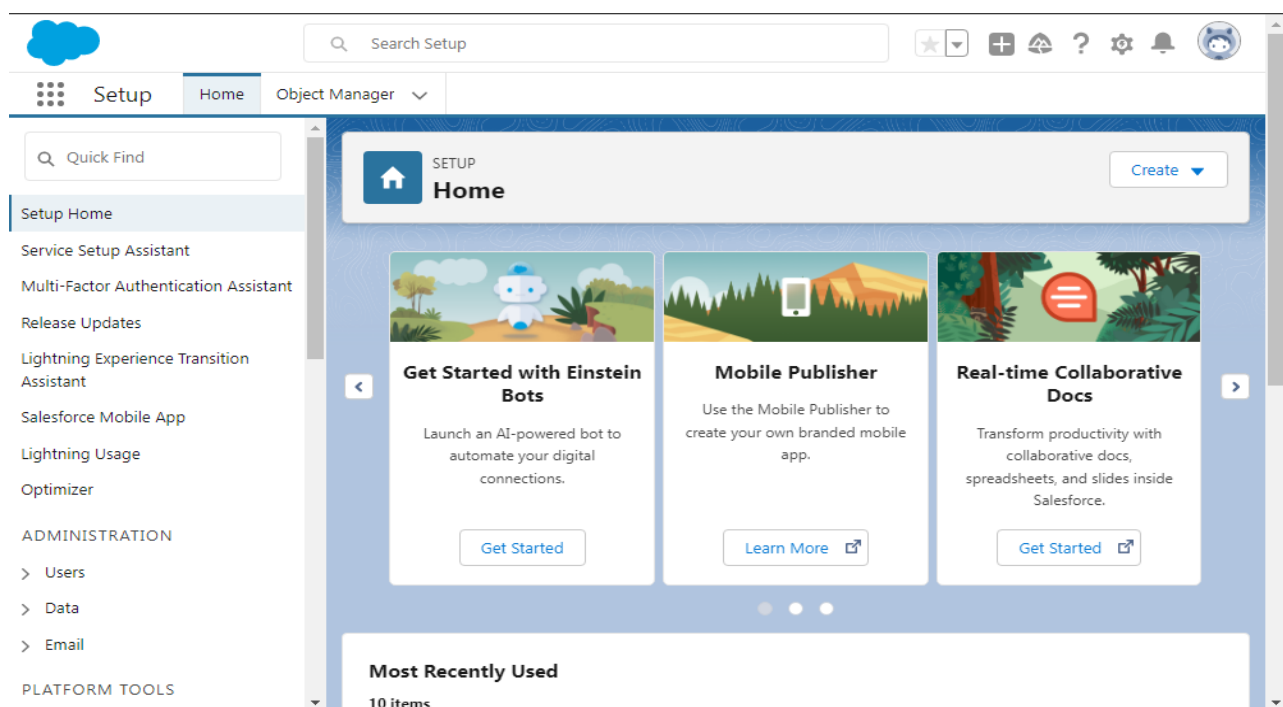
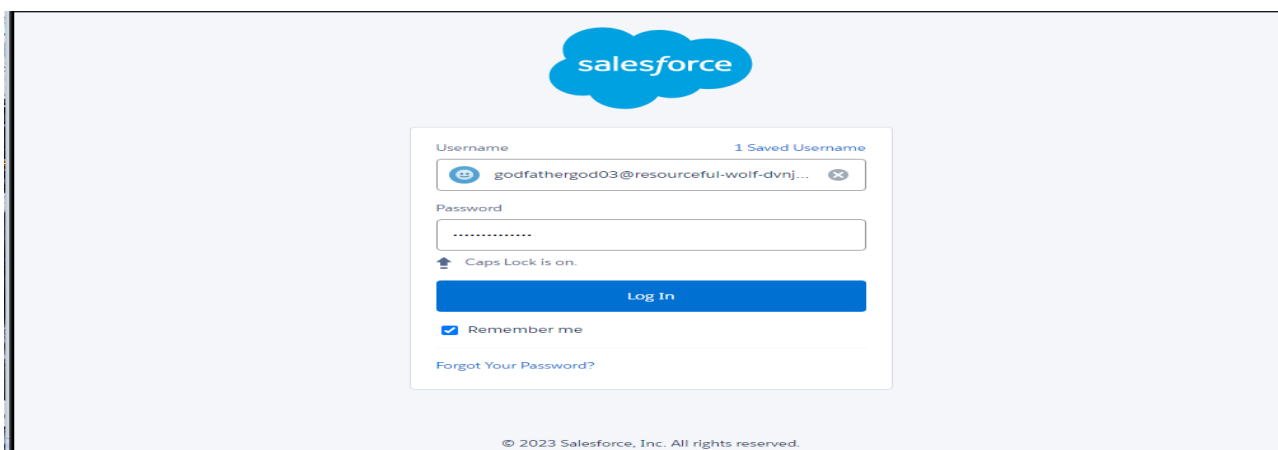
OBJECT NAME	FIELDS IN THE OBJECT	
EVENT	FIELD LABEL	DATA TYPE
	EVENT	TEXT
	START DATE	DATE/TIME
	END DATE	DATE/TIME
	EVENT NAME	MASTER - DETAIL
ATTENDEES	FIELD LABEL	DATA TYPE
	ID	AUTO NUMBER
	PHONE	PHONE
	EMAIL	EMAIL
STUDENT	FIELD LABEL	DATA TYPE
	TICKETS	PICKLIST
SPEAKERS	FIELD LABEL	DATA TYPE
	BIO	TEXT AREA
	E- MAIL	EMAIL
	EVENT NAME	LOOK – UP
VENDERS	FIELD LABEL	DATA TYPE
	E-MAIL	EMAIL
	PHONE	PHONE
	SERVICE PROVIDER	TEXT
	EVENT NAME	LOOK - UP

3.2 Activity & Screenshots:

Activity 1: Creation of Salesforce Org.

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

1. Search <https://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 <https://login.salesforce.com/>
6. By using username and password you can into the salesforce org.



Activity 2: Creation Of Objects.

i. Event 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: Event
- c. Plural Label: Events
- d. Record Name: Event Name
- e. Check the Allow Reports checkbox
- f. Check the Allow Search checkbox
- g. Click Save.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes a search bar and various utility icons. The left sidebar shows the 'Setup' menu with 'Object Manager' selected. The main content area is titled 'Event' and shows the 'Custom Object Definition' page. The page includes a 'Details' sidebar with links to 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', and 'Related Lookup Filters'. The main form area is titled 'Edit Custom Object Event' and contains the following fields:

- Label:** Event (Example: Account)
- Plural Label:** Events (Example: Accounts)
- Starts with vowel sound:** ☐
- Object Name:** Event (Example: Account)
- Description:** (Empty text area)

Buttons for 'Save', 'Save & New', and 'Cancel' are located at the top right of the form. A red exclamation mark icon indicates required information.

ii. Attendees:

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.

The screenshot shows the Salesforce Setup interface. At the top, there's a search bar labeled "Search Setup" and a navigation bar with tabs for Setup, Home, and Object Manager. The Object Manager tab is selected, and the "Attendee" object is chosen. The left sidebar shows a list of configuration options under the "Details" section: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled "Edit Custom Object Attendee" and contains a "Custom Object Definition Edit" form. The form includes a "Custom Object Information" section with the following fields: Label (Attendee), Plural Label (Attendees), Starts with vowel sound (unchecked), Object Name (Attendee), and Description. A note states: "The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates." Another note states: "The Object Name is used when referencing the object via the API." Buttons for Save, Save & New, and Cancel are at the top right of the form.

iii. Speaker:

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.

The screenshot shows the Salesforce Setup interface for the "Speaker" custom object. The navigation bar and sidebar are identical to the previous screenshot. The main content area is titled "Edit Custom Object Speaker" and contains a "Custom Object Definition Edit" form. The form includes a "Custom Object Information" section with the following fields: Label (Speaker), Plural Label (Speakers), Starts with vowel sound (unchecked), Object Name (Speaker), and Description. A note states: "The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates." Another note states: "The Object Name is used when referencing the object via the API." Buttons for Save, Save & New, and Cancel are at the top right of the form.

iv. Vendor:

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.

The screenshot shows the Salesforce Setup interface. At the top, there's a search bar labeled 'Search Setup' and a navigation bar with 'Setup', 'Home', and 'Object Manager'. The 'Object Manager' tab is selected. Below the navigation bar, the breadcrumb trail is 'SETUP > OBJECT MANAGER' and the object name 'Vendor' is displayed. On the left, a sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The 'Details' section is active. The main content area is titled 'Edit Custom Object Vendor' and contains the 'Custom Object Definition Edit' form. This form includes a 'Custom Object Information' section with the following fields: 'Label' (Vendor), 'Plural Label' (Vendors), 'Starts with vowel sound' (unchecked), and 'Object Name' (Vendor). Each field has an 'Example' value: 'Account' for Label and Object Name, and 'Accounts' for Plural Label. A red exclamation mark icon indicates required information. At the bottom of the form is a 'Description' field.

Activity 3: Creation of Tab:

i. Creation Of Event 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.

ii. Creation Of Attendee Tab

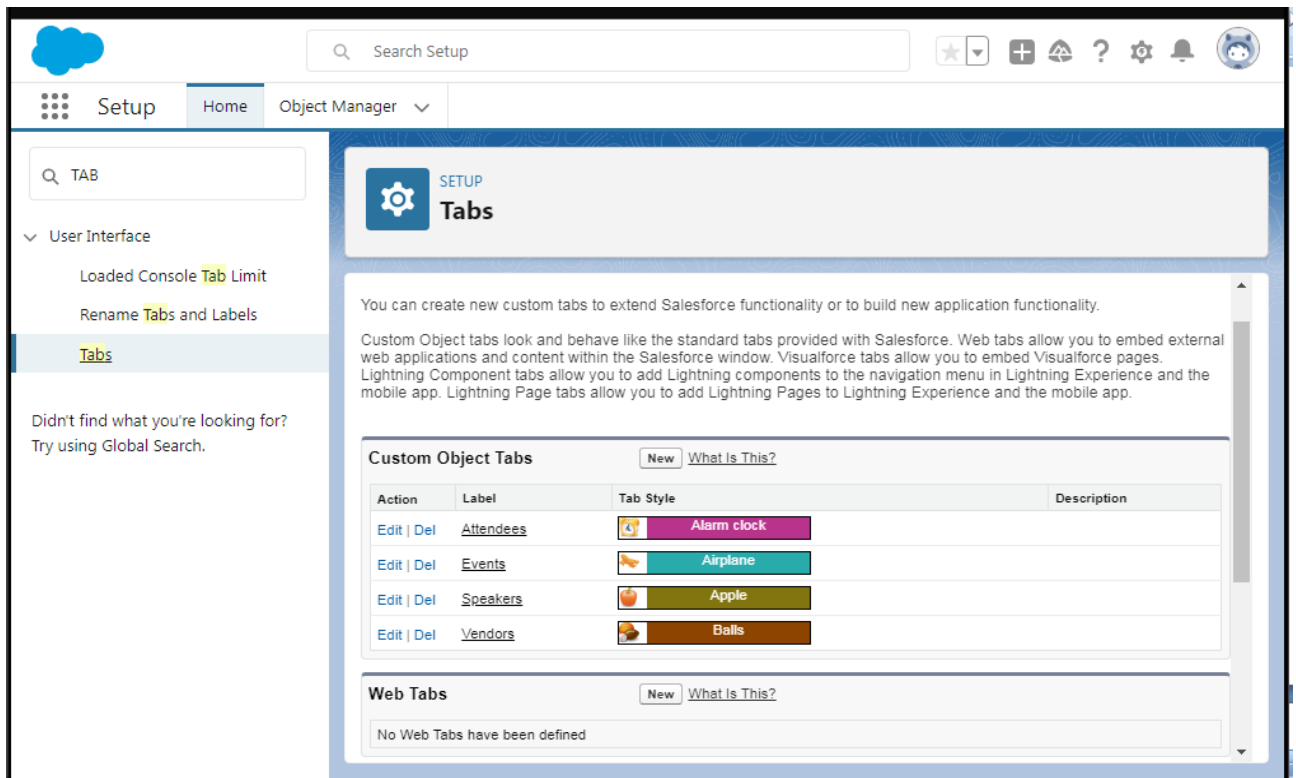
1. Click on Home tab, enter Tabs in Quick Find and select Tabs.
2. Under custom object tabs, click New.
3. For Object, select Attendee.
4. For Tab Style, select any icon.
5. Leave all defaults as is. Click Next, Next, and Save.

iii. Creation Of Speaker 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.

iv. Creation Of Vendor 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.



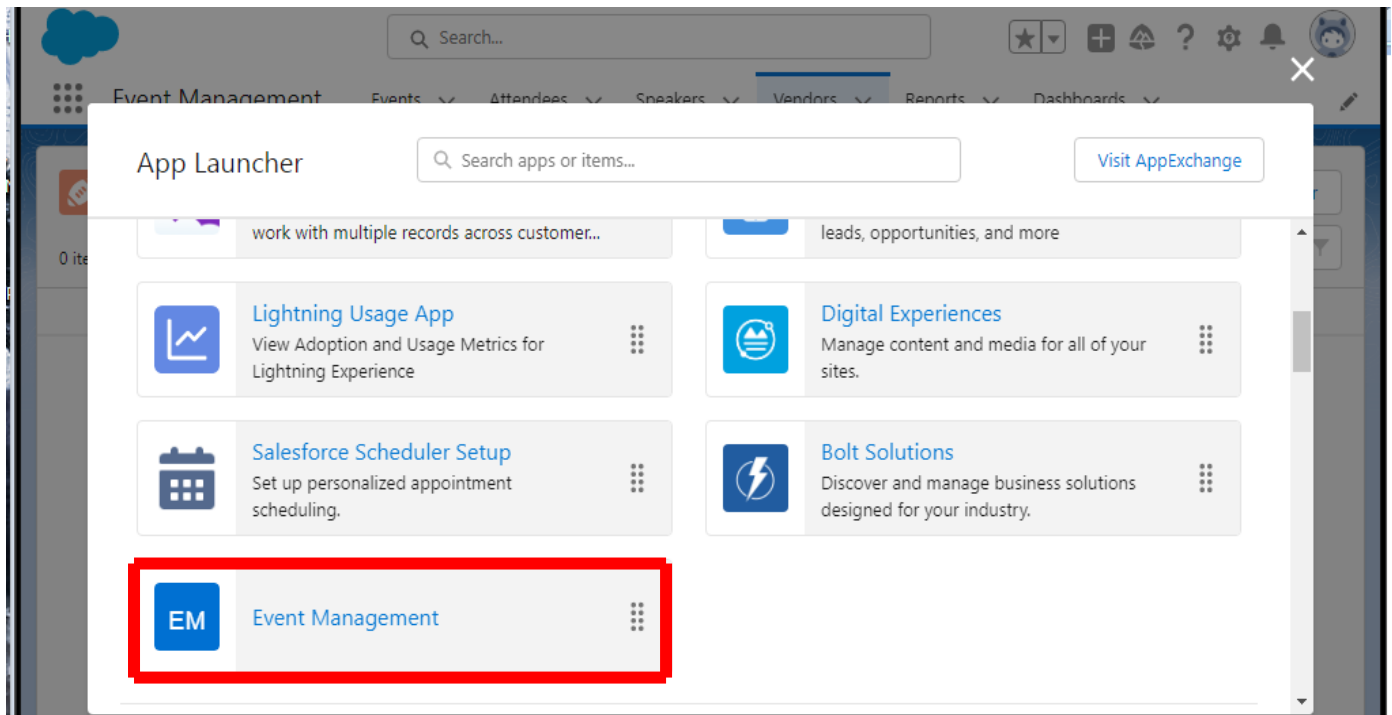
Activity 4: App Creation

i. Creation Of Event Management Construction App

1. From Setup, enter App Manager in the Quick Find and select App Manager.
2. Click New Lightning App. Enter Event Management as the App Name, then click Next
3. Under App Options, leave the default selections and click Next.
4. Under Utility Items, leave as is and click Next.
5. From Available Items, select Events, Attendees, speakers, vendors, Reports, and Dashboards and move them to Selected Items. Click Next.
6. From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.
7. 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.



Activity 5: Creation of Field:

i. Field For Event Object

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Event.
4. Select Fields & Relationships from the left navigation, and click New

Now we're ready to make a custom field. Let's do this!

5. Select the Text as the Data Type, then click Next.
6. For Field Label, enter City.
7. Click Next, Next, then Save & New.

Now let's create the other fields and we must choose the data types of the fields carefully. Let's have a look at it.

Let's see this,

1. Select the Date/time as the Data Type, then click Next.
2. For Field Label, enter Start Date.
3. Check the required check box.
4. Click Next, Next, then Save & New.
5. Similarly create a End Date field also

SETUP > OBJECT MANAGER

Event

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
City	City__c	Text(30)		
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)		✓
Start Date	Start_Date__c	Date/Time		

ii. Field For Attendee

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:
 - a. Premium
 - b. Gold
 - c. Silver
15. Click Next, Next, then Save & New

The screenshot shows the Salesforce Setup interface, specifically the Object Manager for the 'Attendee' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Fields & Relationships' and shows a list of 7 fields, sorted by Field Label. The fields are: Attendee Name (Text(80), Indexed), Created By (Lookup(User)), Email (Email), Event Name (Master-Detail(Event), Indexed), Id (Auto Number), Last Modified By (Lookup(User)), and Phone (Phone). The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. There are also buttons for 'New', 'Deleted Fields', 'Field Dependencies', and '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 Name	Event_Name__c	Master-Detail(Event)		✓
Id	Id__c	Auto Number		
Last Modified By	LastModifiedById	Lookup(User)		
Phone	Phone__c	Phone		

Creation of 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.

iii. Field For Speaker

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.

SETUP > OBJECT MANAGER

Speaker

Details

Fields & Relationships

7 Items, Sorted by Field Label

Q Quick Find

New Deleted Fields Field Dependencies Set History Tracking

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

https://puratchithalaivardmrgrove5-dev-ed.develop.lightning.force.com/one/app#/setup/ObjectManager/0112w000003QGSJH/FieldsAndRelationships/view

iv. Field For Vendor

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.

Setup > Object Manager

Vendor

Details

Fields & Relationships
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)		
Email	Email__c	Email		
Event Name	Event_Name__c	Lookup(Event)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓
Phone	Phone__c	Phone		
Service Provider	Service_Provider__c	Text(30)		

<https://puratchithalaivardmqrrove5-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/01I2w000003QGSW/FieldsAndRelationships/view>

Activity 6: Profile

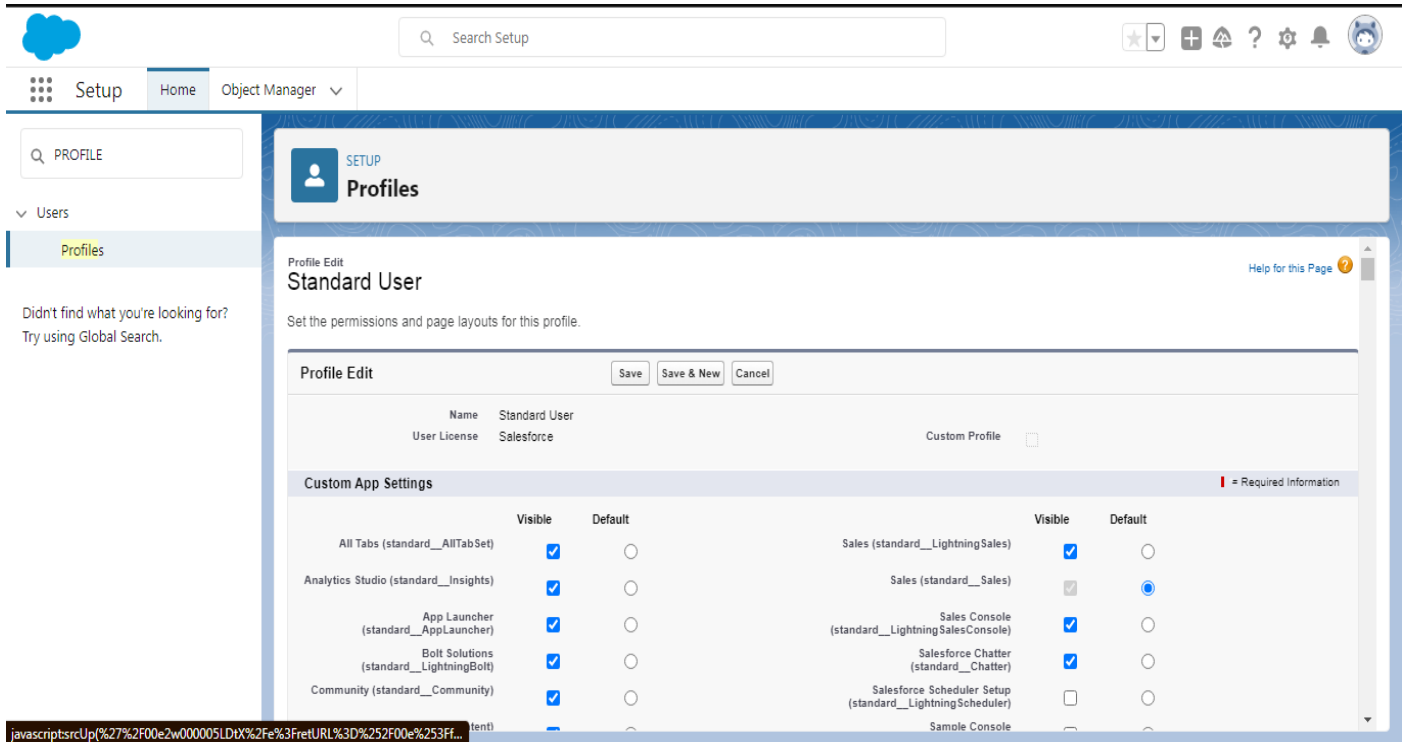
i. Creation Of Profile

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.

ii. Creation Of Profile With Name 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.



The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'PROFILE' and a list of items including 'Users' and 'Profiles'. The main content area is titled 'Profiles' and shows the 'Standard User' profile being edited. The 'Profile Edit' section includes fields for 'Name' (Standard User), 'User License' (Salesforce), and 'Custom Profile' (unchecked). Below this is the 'Custom App Settings' table, which lists various Salesforce applications and their visibility and default status for the profile.

App	Visible	Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>	<input type="radio"/>
Community (standard__Community)	<input checked="" type="checkbox"/>	<input type="radio"/>
Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="radio"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>	<input type="radio"/>
Samole Console	<input type="checkbox"/>	<input type="radio"/>

Activity 7: User

i. Creation Of 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

Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: **All Users** | [Edit](#) | [Create New View](#)

Action	Full Name ↑	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty.00d2w0000rk5mhea1.3t1bzcag2c2@chatter.salesforce.com		✓	Chatter Free User
Edit	Gud Sanjay	sani	sanjaygudra03@thesmartbridge.com		✓	Event User Profile
Edit	Prakasam, Siva	SPrak	godfatherpood03@gmail.com		✓	System Administrator
Edit	User Integration	integ	integration@00d2w0000rk5mhea1.com		✓	Analytics Cloud Integration User
Edit	User Security	sec	insightsecurity@00d2w0000rk5mhea1.com		✓	Analytics Cloud Security User

Activity 8: Permission Set

i. Creating Permission Set

From setup search “permission sets” in quick find and select permission set then click on New

1. Enter label as: Event Permits and Save.
2. After saving the permission click on the Manage assignment.
3. Now click on the Add Assignment.
4. Now select the users and click on save.

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](#)

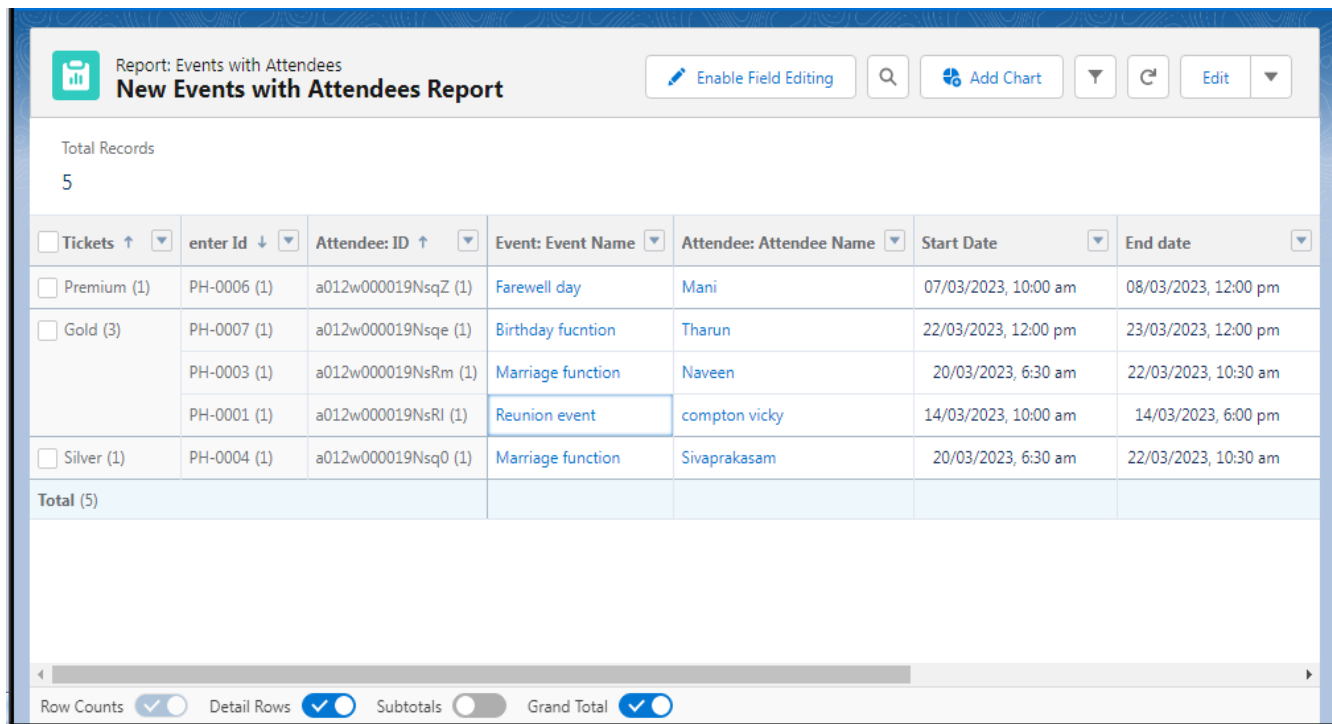
All Permission Sets | [Edit](#) | [Delete](#) | [Create New View](#)

Action	Permission Set Label ↑	Description	License
Del Clone	Event Permits		
Del Clone	Experience Profile Manager		Salesforce

Activity 9: Reports

i. 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.



Report: Events with Attendees
New Events with Attendees Report

Total Records: 5

Tickets	enter Id	Attendee: ID	Event: Event Name	Attendee: Attendee Name	Start Date	End date
Premium (1)	PH-0006 (1)	a012w000019NsQZ (1)	Farewell day	Mani	07/03/2023, 10:00 am	08/03/2023, 12:00 pm
Gold (3)	PH-0007 (1)	a012w000019NsQe (1)	Birthday fuction	Tharun	22/03/2023, 12:00 pm	23/03/2023, 12:00 pm
	PH-0003 (1)	a012w000019NsRm (1)	Marriage function	Naveen	20/03/2023, 6:30 am	22/03/2023, 10:30 am
	PH-0001 (1)	a012w000019NsRI (1)	Reunion event	compton vicky	14/03/2023, 10:00 am	14/03/2023, 6:00 pm
Silver (1)	PH-0004 (1)	a012w000019NsQ0 (1)	Marriage function	Sivaprakasam	20/03/2023, 6:30 am	22/03/2023, 10:30 am
Total (5)						

Row Counts: ☒ Detail Rows: ☒ Subtotals: ☐ Grand Total: ☒

4. TRAILHEAD PROFILE PUBLIC URL

- ◆ Team Lead (N.Gopi) – <https://trailblazer.me/id/gromen>
- ◆ Team Member 1 (S.Tharun) – <https://trailblazer.me/id/tharuntst>
- ◆ Team Member 2 (G.Sivaprakasam) – <https://trailblazer.me/id/sprakasam5>
- ◆ Team Member 3 (R.Prabu) – <https://trailblazer.me/id/pprabu4>

5. ADVANTAGES & DISADVANTAGES

Advantages:

- ❖ Accelerating the detection and Response to incidents.
- ❖ Time and Money saving automation capabilities.
- ❖ More effective decision and action making via automated report distribution.
- ❖ Display a greater level of professionalism.
- ❖ Increase Engagement rate at events.
- ❖ Access to valuable real-time data.
- ❖ Personalized reports for continuous improvement.

- ❖ Multiple reports for monitoring the success of event.
- ❖ Measure Return on investments.
- ❖ Best accounting support.

Disadvantages:

- ❖ It requires unconventional working hours.
- ❖ Experience requirements.
- ❖ High stress.
- ❖ Low starting salaries.
- ❖ Client demands.
- ❖ Travel requirements.
- ❖ It don't adapt well to changing business needs circumstances.
- ❖ It is difficult to compile and consolidate information.

6. APPLICATIONS

➤ Track Event data Real Time:

Using one platform, you can monitor your attendance list, payment modes, tickets sold, responses to queries, and more. When you consolidate all those data into one single view, your decisions will become more informed and have a more substantial impact.

➤ Comprehensive And In-Depth Analysis With Cross Filtering Data:

Quickly generate data results and get all the information that you need - from attendee count, revenues raised, registration behavior, event expenses, and more.

➤ Acting as Integrated platform:

It is an integrated platform in which multiple objects (Event, Attendee, Speakers, Vender) are integrated with in one application say "Event Management" in such a manner that is capable of visiting their performance at single place.

➤ Suitable for all type of Companies:

One of the essential applications of Event management is, "it is not Size Sensitive" Which means that the event management with CRM is well suitable for any events in huge as well as small company events.

➤ As effective tool in customer Satisfaction:

By the implementation of Event management system using the simply designed platforms like salesforce, the planned events achieves targeted customer Satisfaction and lead to the enormous growth of Business.

7. CONCLUSION

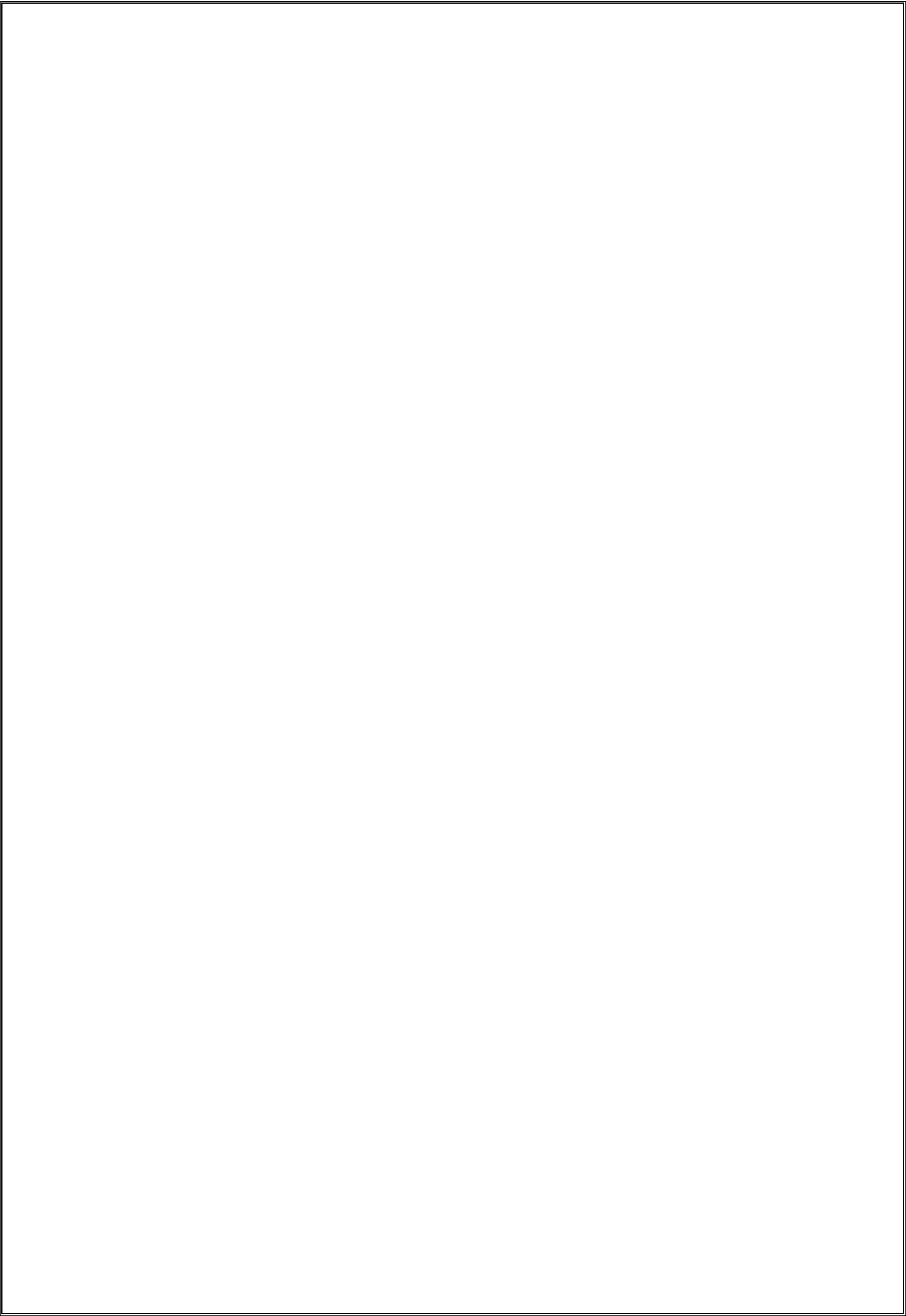
Although now we are in the essential part of the whole project and it is a right place for sharing the reviews about the entire project. For managing a perfect event it is necessary to plan the events and assign each event to the individual persons. However it notable point that before planning any event, it requires a trusted platform to secure the planned events. From the entire project it clear that the salesforce has an extraordinary data protection and has simple architecture.

Since salesforce is easy to access only with the salesforce org and objects are simply created with lightning experience. Also the related tabs and fields for the object also crated just like drop and down. There is also an option to relate one object to the another object through "Master – Detail" and "Look – up " relationship. After successful creation of above things the exclusive App is build for our desired event. In that application we can assign any event to any person or to group of people and also we are able to check their status on particular events. An ultimate thing is, we can collect the entire report history of the events and aos

we can filter the required topics from the entire data to specific one. However this entire project is completed easily and learned lot of things and finally saleforce is an nice and trusted platform for creation of this whole project.

8. FUTURE SCOPE

- ✓ Creation of some more objects.
- ✓ Customize the interface as per wish.
- ✓ Creating more number of groups and assign individual task.
- ✓ Customizing the permissions given to users.
- ✓ Creating more related objects using field & relationship.
- ✓ Customized app for each and every events separately.



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