

INTRODUCTION

1.1 OVERVIEW

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.

1.2 PURPOSE

The sole purpose of any event is that a group of people will convene in one particular place for one particular purpose at a given time. Now that could be various purposes such as a wedding, a business networking function, a church gathering, etc. All of which is to come together to explore that purpose.

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.

PROBLEM DEFINITION AND DESIGN THINKING

2.1 EMPATHY MAP



2.2 IDEATION AND BRAIN STORMING MAP

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!

Person 1

we work for extra time

we should assign extra workers

Person 2

We assign distinct workers for distinct works

We should have perfect tool for doing works

Person 3

We should assign well workers for doing works

Person 4

We should assign youngsters for doing great works

Person 5

Person 6

Person 7

Person 8

RESULT

3.1 DATA MODEL

Object name	Fields in the object	
Obj 1		
	Field label	Data type
	Event name	Text(80)
	Attendee name	Text(80)
Obj 2		
	Field label	Data type
	Vendor name	Text(80)
	Speaker name	Text(80)

3.2 ACTIVITY AND SCREENSHOT

- **Creating objects:**

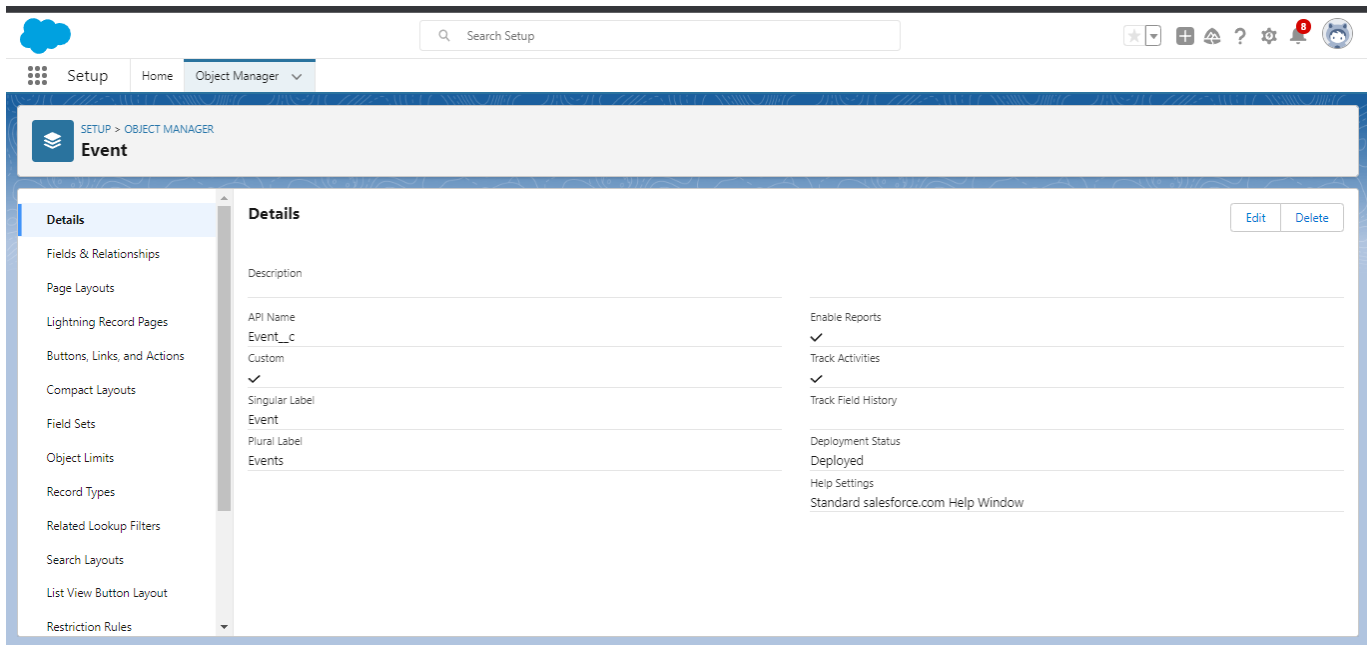
Salesforce objects are database tables that permit you to store data that is specific to an organization. It consists of fields (columns) and records (rows).

Salesforce objects are of two types:

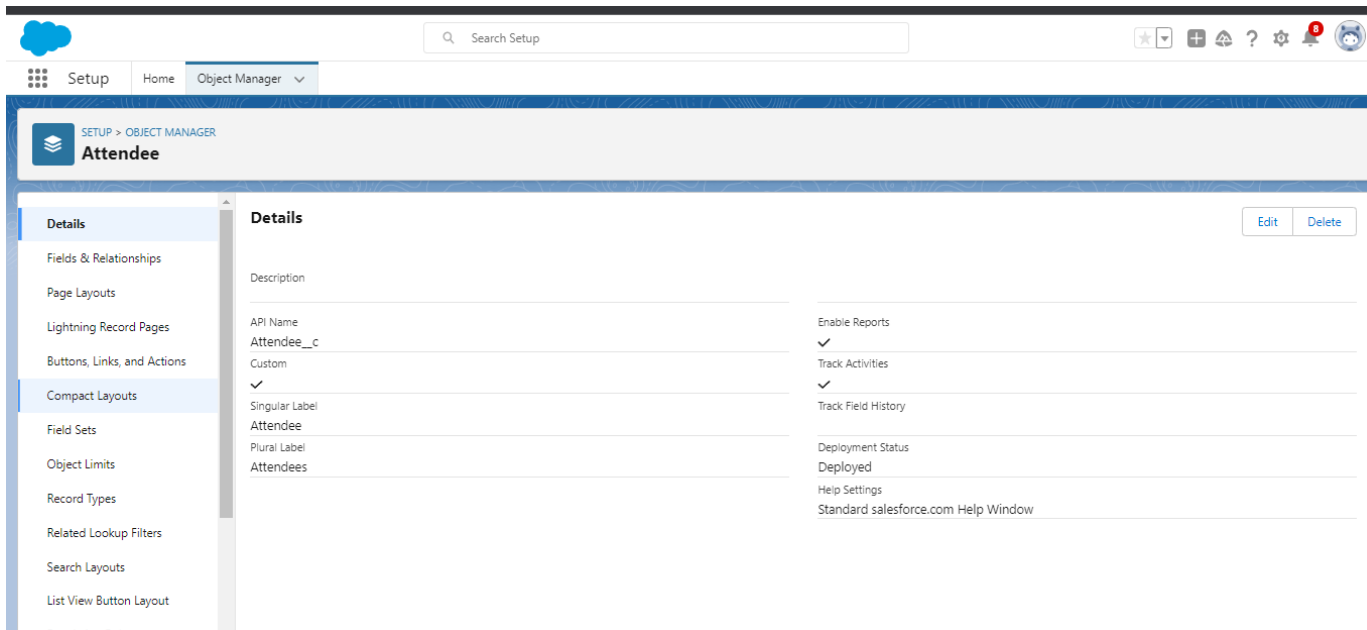
- **Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
- **Custom Objects:** Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

The screenshots are pasted below:

Object for Event:



Object for Attendee:



Object for Speaker:

The screenshot shows the Salesforce Setup interface for the 'Speaker' object. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The left sidebar shows the 'Setup' menu with 'Object Manager' selected. The main content area displays the 'Details' for the 'Speaker' object, including fields, relationships, and settings.

Setup > OBJECT MANAGER
Speaker

Details (Edit Delete)

Description

API Name: Speaker__c
Custom: ✓
Singular Label: Speaker
Plural Label: Speakers

Enable Reports: ✓
Track Activities: ✓
Track Field History: ✓
Deployment Status: Deployed
Help Settings: Standard salesforce.com Help Window

Object for Vendor:

The screenshot shows the Salesforce Setup interface for the 'Vendor' object. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The left sidebar shows the 'Setup' menu with 'Object Manager' selected. The main content area displays the 'Details' for the 'Vendor' object, including fields, relationships, and settings.

Setup > OBJECT MANAGER
Vendor

Details (Edit Delete)

Description

API Name: Vendor__c
Custom: ✓
Singular Label: Vendor
Plural Label: Vendors

Enable Reports: ✓
Track Activities: ✓
Track Field History: ✓
Deployment Status: Deployed
Help Settings: Standard salesforce.com Help Window

- **Creating Tabs:**

Tabs in Salesforce help users view the information at a glance. It displays the data of objects and other web content in the application.

There are mainly 4 types of tabs:

Standard Object Tabs:

Standard object tabs display data related to standard objects.

Custom Object Tabs:

Custom object tabs display data related to custom objects. These tabs look and function just like standard tabs.

Web Tabs:

Web Tabs display any external Web-based application or Web page in a Salesforce tab.

Visualforce Tabs:

Visualforce Tabs display data from a Visualforce page.

The Screenshots are pasted below:

Tab for Events:

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION (Users, Data, Email), and PLATFORM TOOLS (Subscription Management, Apps, Feature Settings). The main content area is titled 'SETUP Tabs' and shows the configuration for a custom object tab named 'Events'. The 'Tab Label' is 'Events' and the 'Tab Style' is 'Camera'. The 'Object' is 'Event' and the 'Description' is 'Below is the information for the custom tab. Click Edit to change the custom tab.' The 'Created By' is 'Gurumoorthy R.' on 06/04/2023 at 9:17 am, and the 'Modified By' is 'Gurumoorthy R.' on 06/04/2023 at 9:17 am. There are 'Edit' and 'Delete' buttons next to the 'Custom Tab Definition Detail' section.

Tab Label	Events	Tab Style	Camera
Object	Event	Splash Page Custom Link	
Description	Below is the information for the custom tab. Click Edit to change the custom tab.		
Created By	Gurumoorthy R. 06/04/2023, 9:17 am		
Modified By	Gurumoorthy R. 06/04/2023, 9:17 am		

Tab for Attendees:

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Addons Store, AliExpress, Booking.com, Facebook, Google, YouTube, Gmail, YouTube, Maps, News, Translate, Apps, and a search bar. The main content area is titled 'SETUP Tabs' and shows the configuration for a custom object tab named 'Attendees'. The 'Tab Label' is 'Attendees' and the 'Tab Style' is 'People'. The 'Object' is 'Attendee' and the 'Description' is 'Below is the information for the custom tab. Click Edit to change the custom tab.' The 'Created By' is 'Gurumoorthy R.' on 21/03/2023 at 8:04 am, and the 'Modified By' is 'Gurumoorthy R.' on 21/03/2023 at 8:04 am. There are 'Edit' and 'Delete' buttons next to the 'Custom Tab Definition Detail' section.

Tab Label	Attendees	Tab Style	People
Object	Attendee	Splash Page Custom Link	
Description	Below is the information for the custom tab. Click Edit to change the custom tab.		
Created By	Gurumoorthy R. 21/03/2023, 8:04 am		
Modified By	Gurumoorthy R. 21/03/2023, 8:04 am		

Tab for Speakers:

tab

User Interface

Loaded Console Tab Limit

Rename Tabs and Labels

Tabs

Didn't find what you're looking for?

Try using Global Search.

Search Setup

SetupHomeObject Manager

SETUP
Tabs

Custom Object Tab
Speakers

Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail

EditDelete

Tab Label	Speakers	Tab Style	Whistle
Object	Speaker	Splash Page Custom Link	
Description			
Created By	Gurumoorthy R. 21/03/2023, 8:06 am	Modified By	Gurumoorthy R. 21/03/2023, 8:06 am

Tab for Vendors:

tab

User Interface

Loaded Console Tab Limit

Rename Tabs and Labels

Tabs

Didn't find what you're looking for?

Try using Global Search.

Search Setup

SetupHomeObject Manager

SETUP
Tabs

Custom Object Tab
Vendors

Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail

EditDelete

Tab Label	Vendors	Tab Style	Bulls
Object	Vendor	Splash Page Custom Link	
Description			
Created By	Gurumoorthy R. 21/03/2023, 8:07 am	Modified By	Gurumoorthy R. 21/03/2023, 8:07 am

- **Creating Application:**

Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs.

There are 2 types of Salesforce applications:

- **Standard apps:** these apps come with every occurrence of Salesforce as default. Community, Call Center, Content, Sales, Marketing, Salesforce Chatter, Site.com, and App Launcher are included in these apps. The description, logo, and label of a standard app cannot be altered.

- **Custom apps:** these apps are created according to the needs of a company. They can be made by putting custom and standard tabs together. Logos for custom apps can be changed.

The screenshot pasted below:

The screenshot shows the 'App Settings' page in the Lightning App Builder. The 'App Details & Branding' section is active. The 'App Details' section includes fields for 'App Name' (Event Management), 'Developer Name' (Event), and 'Description' (Enter a description...). The 'App Branding' section includes an 'Image' field with an 'Upload' button and a 'Primary Color Hex Value' field with the value '#0070D2'. There is also an 'Org Theme Options' checkbox and an 'App Launcher Preview' showing the app icon and name.

- **Creating Fields:**

Fields in Salesforce represents what the columns represent in relational databases. It can store data values which are required for a particular object in a record.

There are 2 types of fields in salesforce:

- **Standard fields:** There are four standard fields in every custom object that are Created By, Last Modified By, Owner, and the field created at the time of the creation of an object. These fields cannot be deleted or edited and they are always required. For standard objects, the fields which are present by default in them and cannot be deleted from standard objects are standard fields.

- **Custom fields:** The Custom fields which are added by the administrator/developer to meet the business requirements of any organization. They may or may not be required.

The screenshots are listed below:

Field for Event:

The screenshot shows the Salesforce Setup interface. At the top, there's a search bar labeled "Search Setup". Below it, the navigation menu includes "Setup", "Home", and "Object Manager". The "Object Manager" tab is selected, showing a breadcrumb "SETUP > OBJECT MANAGER" and the title "Event".

On the left sidebar, under "Fields & Relationships", the "Details" section is active. The main content area displays the "Field" configuration for "Event Name". It includes a text input field for the "Record Name" (containing "Event Name" with an example "Account Name") and a dropdown for "Data Type" (set to "Text"). "Save" and "Cancel" buttons are at the bottom of the form.

Below the form, a "Recent Accounts" table is shown:

Account Name	City
Acme	New York
Global Media	Toronto
salesforce.com	San Francisco

Field for Attendee:

Cloud

Search Setup

SetupHomeObject Manager

Attendee

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

Restriction Rules

Field Attendee Name

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name

Attendee Name

Example: Account Name

Data Type

Text

SaveCancel

Recent Accounts

Account Name	City
Acme	New York
Global Media	Toronto
salesforce.com	San Francisco

Field for Speaker:

Cloud

Search Setup

SetupHomeObject 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

Restriction Rules

Field Speaker Name

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name

Speaker Name

Example: Account Name

Data Type

Text

SaveCancel

Recent Accounts

Account Name	City
Acme	New York
Global Media	Toronto
salesforce.com	San Francisco

Field for Vendor:

The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Salesforce logo, a search bar labeled 'Search Setup', and various utility icons. The left sidebar contains a 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', 'Search Layouts', 'List View Button Layout', and 'Restriction Rules'. The main content area is titled 'Vendor Name' and shows the configuration for the 'Record Name' field. The 'Record Name' is set to 'Vendor Name' with an example of 'Account Name'. The 'Data Type' is set to 'Text'. A 'Recent Accounts' table is displayed on the right, showing columns for 'Account Name' and 'City' with rows for 'Acme', 'Global Media', and 'salesforce.com'. The table data is as follows:

Account Name	City
Acme	New York
Global Media	Toronto
salesforce.com	San Francisco

- creating profiles:

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges.

A profile can be assigned to many users, but user can be assigned single profile at a time.

The Screenshots are pasted below:

User profile:

Setup

Home

Object Manager

Q Search Setup

Star

Plus

Help

Settings

Notifications

Avatar

Q profil

Users

Profiles

Didn't find what you're looking for?

Try using Global Search.

SETUP

Profiles

Profile

Standard User

Help for this Page

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

View Users

Name	Standard User	Custom Profile	<input type="checkbox"/>
User License	Salesforce	Created By	Gurumoorthy R. 10/03/2023, 1:46 pm
Modified By	Gurumoorthy R. 22/03/2023, 12:25 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	Order Product	Order Product Layout

Profile for System Administrator:

Setup

Home

Object Manager

Q Search Setup

Star

Plus

Help

Settings

Notifications

Avatar

Q profil

Users

Profiles

Didn't find what you're looking for?

Try using Global Search.

SETUP

Profiles

Profile

System Administrator

Help for this Page

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

View Users

Name	System Administrator	Custom Profile	<input type="checkbox"/>
User License	Salesforce	Created By	Gurumoorthy R. 10/03/2023, 1:46 pm
Modified By	Gurumoorthy R. 22/03/2023, 12:25 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	Order Product	Order Product Layout

javascriptsrcUp(%27%2F00e2w000005KQDe%3Fisdtp%3Dp1%27);

- **Creating User:**

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

The Screenshot pasted below:

Creating User:

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with 'Users' highlighted. The main content area is titled 'All Users' and includes a table of existing users. The table has columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. The following table represents the data shown in the screenshot:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d2w00000rje@ead.mowvxyvymnb0@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Gurta, Sanjay	sanj	gurumoorthy040611@gmail.com		✓	Event User Profile
<input type="checkbox"/> Edit	R. Gurumoorthy	GR	guru@governmentartscollege.com		✓	System Administrator
<input type="checkbox"/> Edit	User Integration	inteq	integration@00d2w00000rje@ead.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightsecurity@00d2w00000rje@ead.com		✓	Analytics Cloud Security User

- **Creating permission Set:**

A permission set is a collection of settings and permissions that give users access to various tools and functions.

Permission sets extend users' functional access without changing their profiles. Create permission sets to grant access among logical groupings of users, regardless of their primary job function. For example, let's say you have several users who must delete and transfer leads. You can create a permission set based on the tasks that these users must perform and include the permission set within permission set groups based on job functions.

The screenshot pasted below:

Permission set:

The screenshot displays the Salesforce Setup interface for managing Permission Sets. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'Permission Sets' and shows the configuration for a specific permission set named 'Event Permits and Save'.

Permission Set Overview

Field	Value
Description	Event Permits and Save
License	
API Name	Event_Permits_and_Save
Namespace Prefix	
Session Activation Required	<input type="checkbox"/>
Created By	Gurumoorthy R.
Created Date	31/03/2023, 7:56 am
Last Modified By	Gurumoorthy R.
Last Modified Date	31/03/2023, 7:56 am

Apps

- Assigned Apps**
Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**
Settings that specify which connected apps are visible in the app menu
- Object Settings**
Permissions to access objects and fields, and settings such as tab availability
- App Permissions**
Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**
Permissions to execute Apex classes
- Visualforce Page Access**
Permissions to execute Visualforce pages

- **Creating report:**

Reports in Salesforce is a list of records that meet a particular criterion which gives an answer to a particular question. These records are displayed as a table that can be filtered or grouped based on any field.

There are 4 types of report formats in Salesforce:

- 1. Tabular Reports:**

This is the most basic report format. It just displays the row of records in a table with a grand total. While easy to set up they can't be used to create groups of data or charts and also cannot be used in Dashboards. They are mainly used to generate a simple list or a list with a grand total.

- 2. Summary Reports:**

It is the most commonly used type of report. It allows grouping of rows of data, view subtotal, and create charts.

- 3. Matrix Report:**

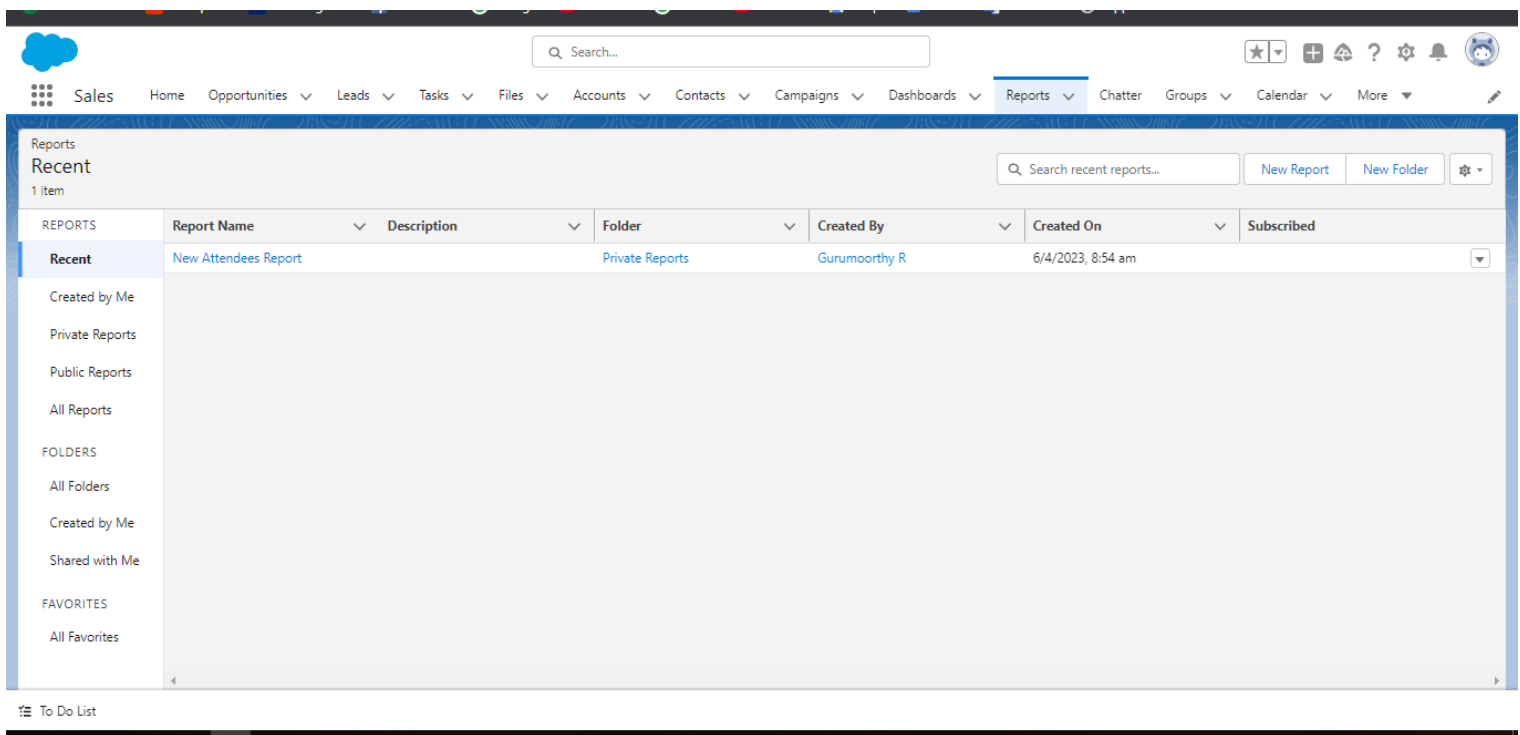
It is the most complex report format. Matrix report summarizes information in a grid format. It allows records to be grouped by both columns and rows. It can also be used to generate dashboards. Charts can be added to this type of report.

4. Joined Reports:

These types of reports let us create different views of data from multiple report types. The data is joined reports are organized in blocks. Each block acts as a sub report with its own fields, columns, sorting, and filtering. They are used to group and show data from multiple report types in different views.

The Screenshot pasted below:

Report :



The screenshot displays the Salesforce Reports interface. At the top, there is a navigation bar with various tabs including Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports (selected), Chatter, Groups, Calendar, and More. A search bar is located in the top right corner. Below the navigation bar, the 'Reports' section is active, showing a list of reports. The left sidebar contains a 'Recent' section with a search bar and buttons for 'New Report' and 'New Folder'. The main content area shows a table of reports with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. The first report listed is 'New Attendees Report' under the 'Private Reports' folder, created by 'Gurumoorthy R' on '6/4/2023, 8:54 am'. The bottom of the interface shows a 'To Do List' icon.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Attendees Report		Private Reports	Gurumoorthy R	6/4/2023, 8:54 am	

TRAILHEAD PROFILE PUBLIC URL

Team lead – <https://trailblazer.me/id/guru0406>

Team Member 1 – <https://trailblazer.me/id/dinek28>

Team Member 2 – <https://trailblazer.me/id/shang13>

Team Member 3 – <https://trailblazer.me/id/vnallathambi2>

ADVANTAGES AND DISADVANTAGES

ADVANTAGES

- As per the idea, we assign extra workers for doing works in short period of time.
- Youngsters always energetic and they are good working.
- If we paid workers their salary as contract, it will be the fewer amounts than daily day salary.
- By these ideas, it will improve our image to our customers and then it tends to book our agency next time.
- It tends to our publicity about our services.

DISADVANTAGES

- We had to paid more money for workers.
- If there are many workers, there may be a chance of cheating in their works.
- If there are many workers, there may be a chance of workers failing to learn their works.
- We should provide facilities for workers.
- We should consider customer's mentality and we should handle it by the way of it.

APPLICATIONS

Event management is the application of project management to the creation and development of small and/or large-scale personal or corporate events such as festivals, conferences, ceremonies, weddings, formal parties, concerts, or conventions.

CONCLUSION

Event Management System is user friendly and cost effective system, it is customized with activities related to event management life-cycle.

How you manage corporate events can either boost or damage a business's reputation and client base. Staging

events, whether small get-togethers with sponsors or employees or thousand-person launch events, allow a company to promote its brand and make new relationships.

FUTURE SCOPE

The scope of event management as a career in India is vast. It's a thriving industry and is home to a million people. So, if you have a knack for creativity and want to redesign the perceptions of society, the event management industry is all for you.

Event management as a career is a multifaceted activity. 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 the concept of the event before planning the actual event.