

# BUILD AN EVENT MANAGEMENT SYSTEM USING SALESFORCE

TEAM ID -NM2023TMID17448

## 1. INTRODUCTION

### 1.1 OVERVIEW

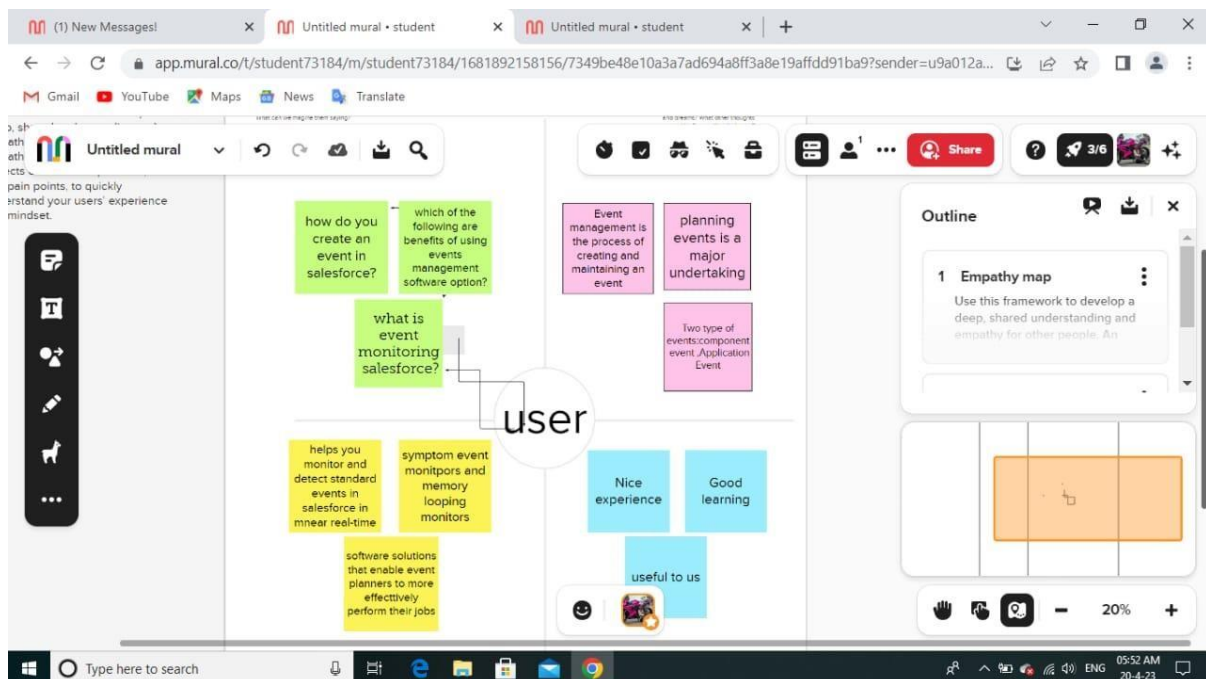
Event management as a career is a multifaceted activity. It involves management, creation, and development of events such as corporate conferences, wedding, festivities formal parties etc.

### 1.2 Purpose

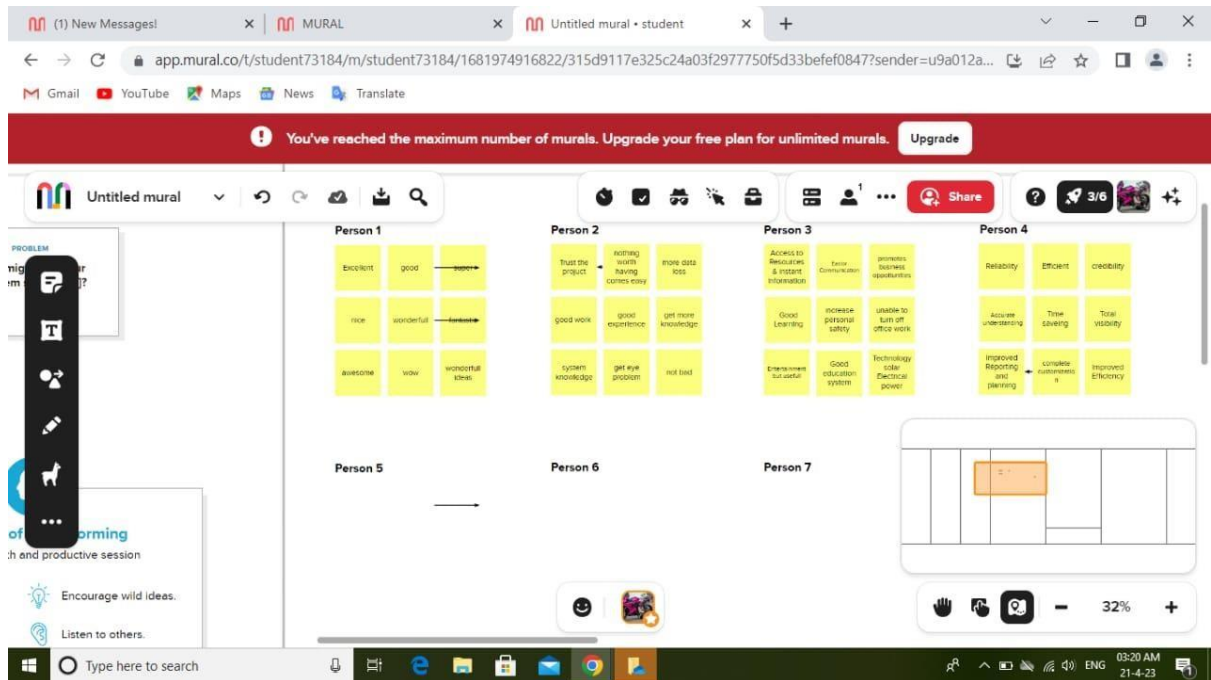
It involves a lot of research about the brand, target audience and the concept of the event before planning the actual event.

## 2. Problem Definition & Design Thinking

### 2.1 Empathy Map



## 2.2 Ideation & brainstorming



## 3. RESULT

### 3.1 Data Model

| Object name | Fields in the Object            |  |
|-------------|---------------------------------|--|
| Events      | Fields lable                    | Data type                                  |
|             | City<br>Start Date              | Text<br>Date/time                          |
| Attendees   | Field lable                     | Data type                                  |
|             | Id<br>Phone<br>Email<br>Tickets | Auto number<br>Phone<br>Emil<br>Picklist   |
| Speakers    | Field lable                     | Data type                                  |
|             | Bio<br>E-mail<br>Event name     | Text area<br>Email<br>Look-up relationship |

|         |                                     |                        |
|---------|-------------------------------------|------------------------|
| Vendors |                                     |                        |
|         | Field lable                         | Data type              |
|         | E-mail<br>Phone<br>Service Provider | Email<br>Phone<br>Text |

### 3.2 Activity & Screenshot

#### Activity 1:

Creation of Object for Event Management:

The screenshot shows the Salesforce Setup interface for creating a custom object. The browser address bar displays the URL: `thiruagovindhasamygovernme5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115i0000026OCr/edit?address=%2F0115i0000026OCr%...`. The page title is "event | Salesforce". The left sidebar shows the navigation menu with "Object Manager" selected. The main content area is titled "Edit Custom Object event" and contains the "Custom Object Definition Edit" form. The form includes the following fields and options:

- Custom Object Information:**
  - Label:** event (Example: Account)
  - Plural Label:** events (Example: Accounts)
  - Starts with vowel sound:** ☐
  - The Object Name is used when referencing the object via the API:**
    - Object Name:** event (Example: Account)
    - Description:** (Empty text area)
  - Context-sensitive help setting:**
    - ☒ Open the standard Salesforce.com Help & Training window
    - ☐ Open a window using a Visualforce page
  - Content Name:** --None--
- Enter Record Name Label and Format:**
  - 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:** event Name (Example: Account Name)
  - Data Type:** Text

The bottom of the screen shows the Windows taskbar with the search bar and system tray icons. The system clock indicates 11:57 AM on 18-Apr-23.

#### Activity 2:

Creation of the Attendees Object:

Object Manager | Salesforce

thiruagovindhasamygovernme5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/page?address=%2F01%2Fe%3FappLayout%3Dsetup%2...

Service Setup Home Object Manager

### Object Manager

#### New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more](#) [Don't show this message again](#)

Custom Object Definition Edit Save Save & New Cancel

**Custom Object Information** Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label:  Example: Account

Plural Label:  Example: Accounts

Starts with vowel sound: ☐

The Object Name is used when referencing the object via the API.

Object Name:  Example: Account

Description:

Context-Sensitive Help Setting: ☒ Open the standard Salesforce.com Help & Training window ☐ Open a window using a Visualforce page

Content Name:

**Enter Record Name Label and Format**

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:  Example: Account Name

Data Type:

Optional Features

Activate Windows  
Go to Settings to activate Windows.

### Activity 3:

Creation of the Speaker Object:

Object Manager | Salesforce

thiruagovindhasamygovernme5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/page?address=%2F01%2Fe%3FappLayout%3Dsetup%2...

Service Setup Home Object Manager

### Object Manager

#### New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more](#) [Don't show this message again](#)

Custom Object Definition Edit Save Save & New Cancel

**Custom Object Information** Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label:  Example: Account

Plural Label:  Example: Accounts

Starts with vowel sound: ☐

The Object Name is used when referencing the object via the API.

Object Name:  Example: Account

Description:

Context-Sensitive Help Setting: ☒ Open the standard Salesforce.com Help & Training window ☐ Open a window using a Visualforce page

Content Name:

**Enter Record Name Label and Format**

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:  Example: Account Name

Data Type:

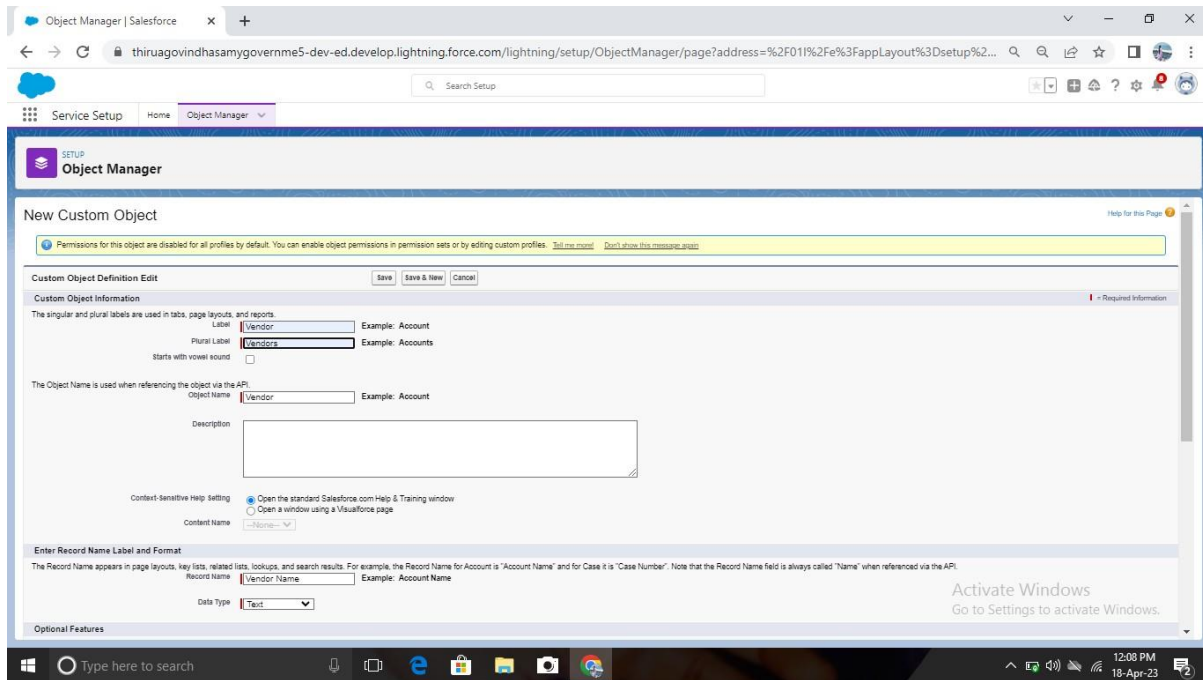
Optional Features

☒ Allow Reports

Activate Windows  
Go to Settings to activate Windows.

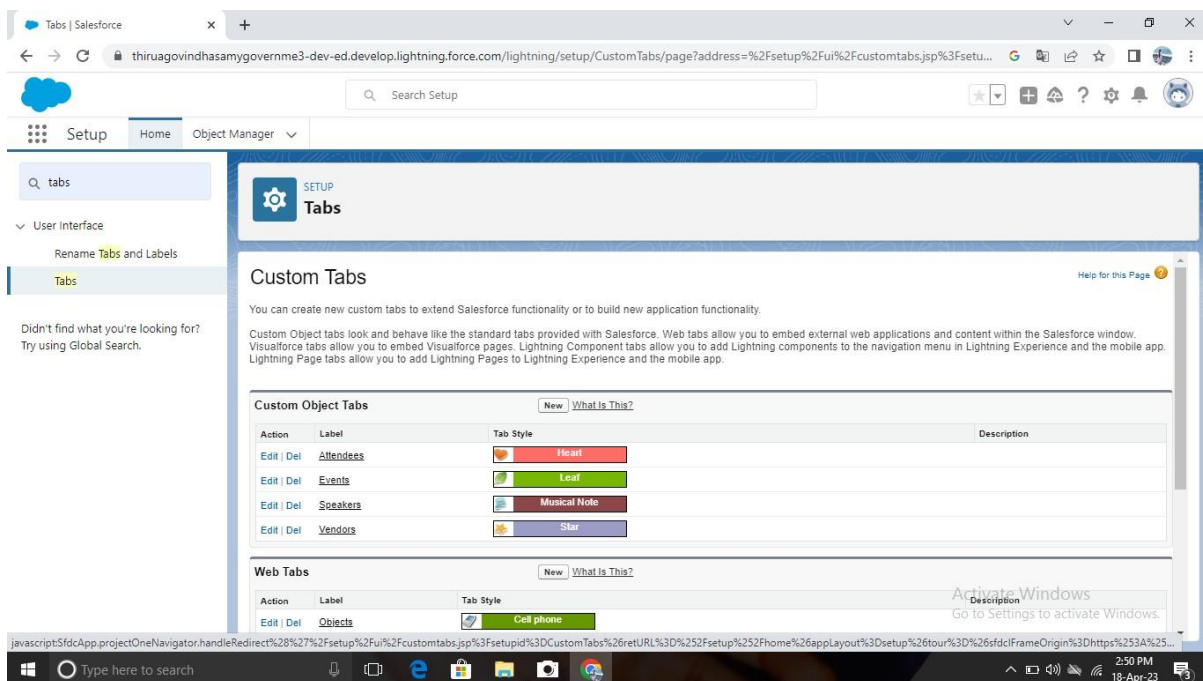
### Activity 4:

Creation of the Vendors Object:



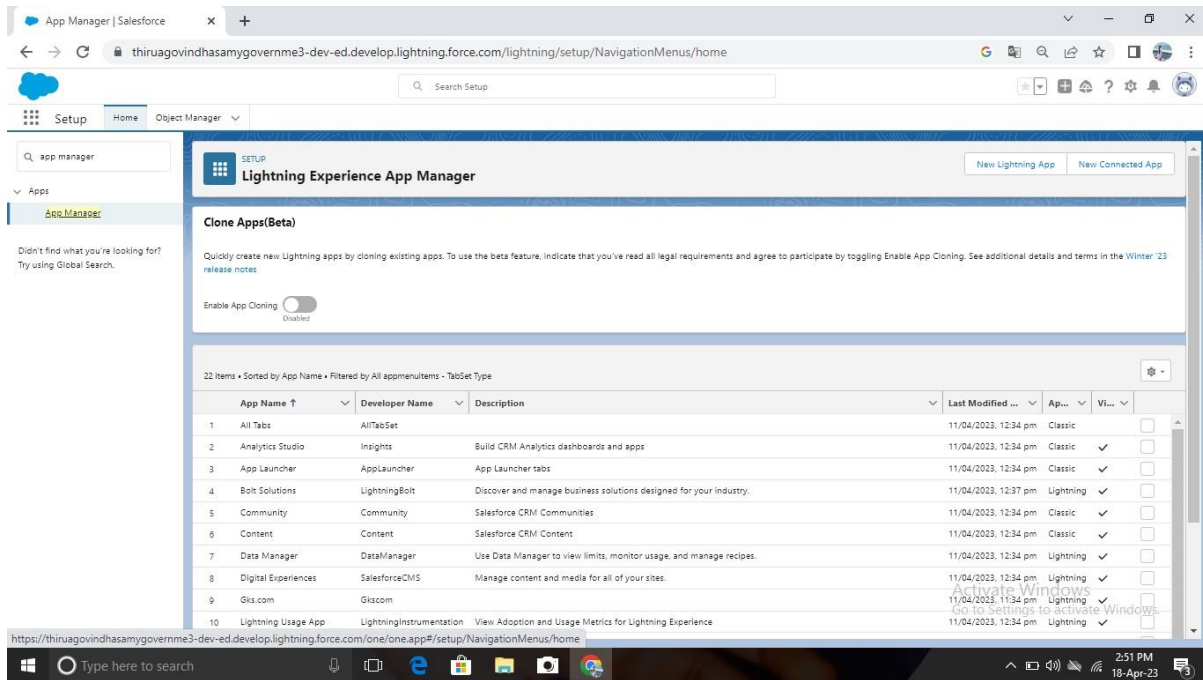
## Tabs

### Creation of Tabs:



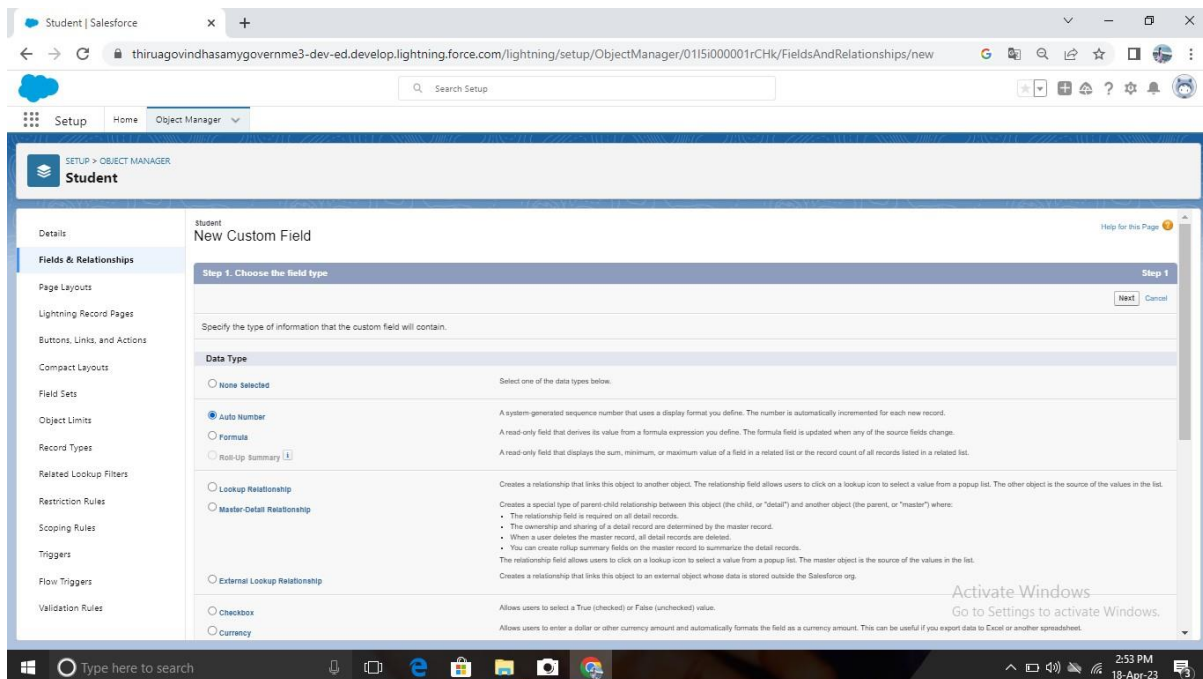
## Application

### Create the Event Management Construction app:



## Fields

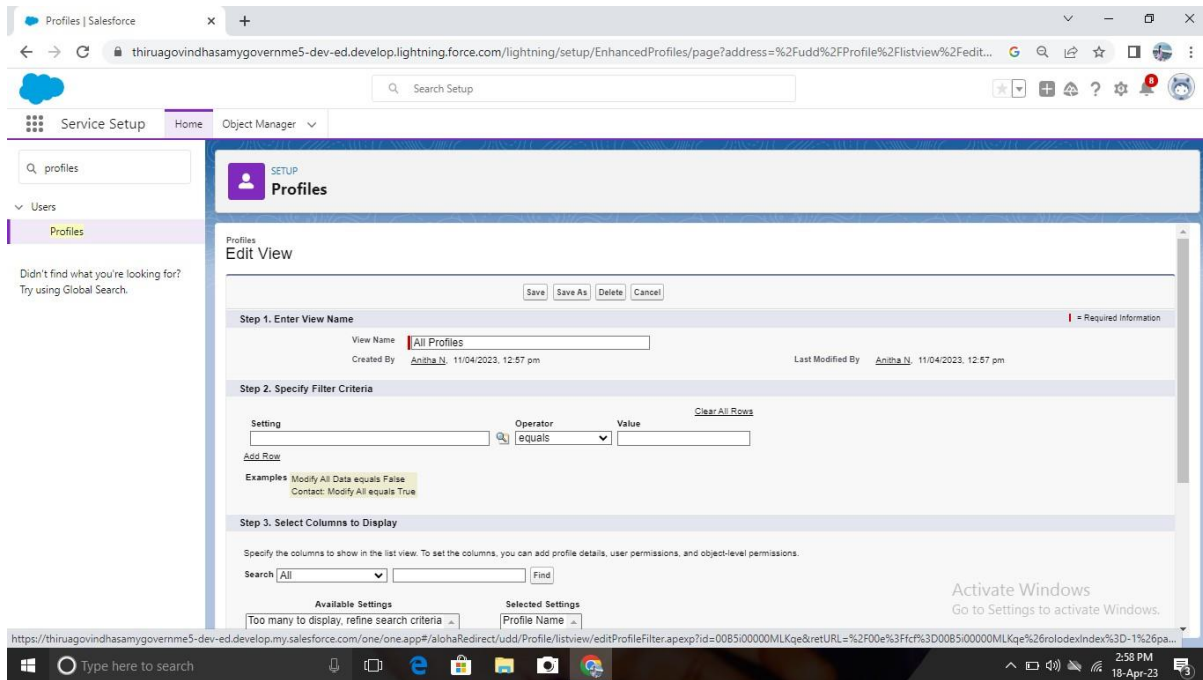
### Creation of fields:



## Profile

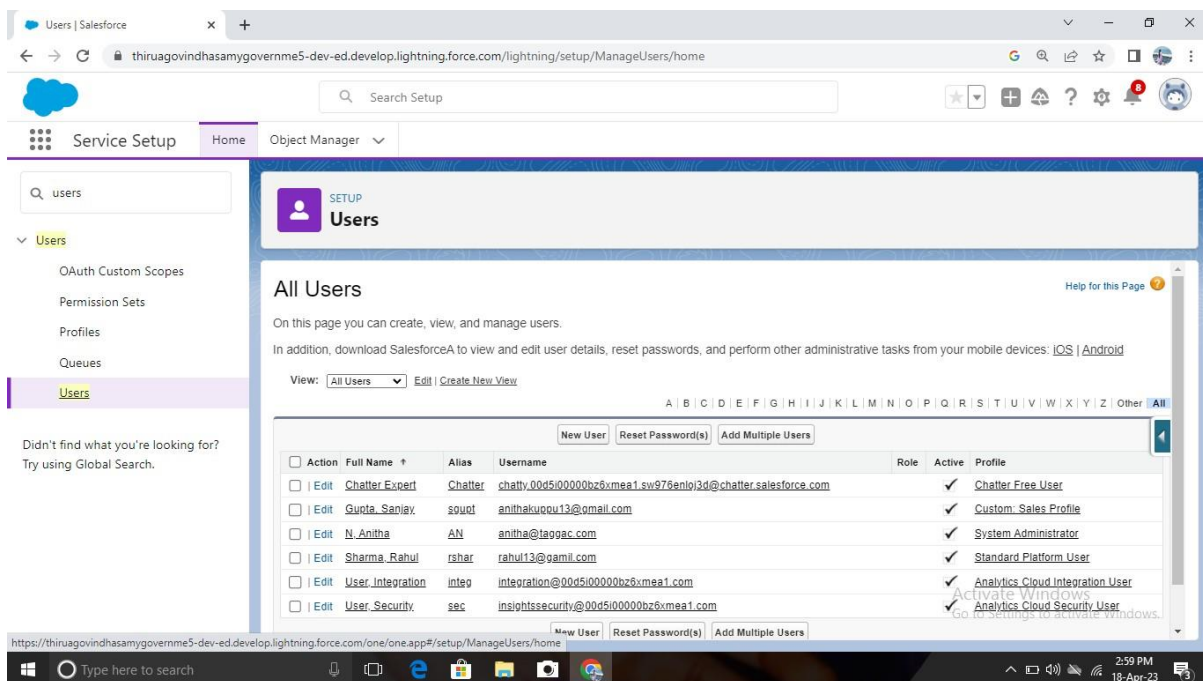
### Creation of profile:





## User

### Creating a user:



## Permission Sets

### Creating a Permission Sets:

Permission Sets | Salesforce

thiruagovindhasamygoverme5-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2Flistview%2FeditP...

Service Setup Home Object Manager

permission sets

Users

Permission Sets

Didn't find what you're looking for? Try using Global Search.

SETUP

### Permission Sets

Permission Sets Edit View

Save Save As Delete Cancel

Step 1. Enter View Name

View Name: All Permission Sets

Created By: Anitha N. 11/04/2023, 12:57 pm

Last Modified By: Anitha N. 11/04/2023, 12:57 pm

Step 2. Specify Filter Criteria

Setting Operator Value

Setting Operator Value

Operator: equals

Value

Clear All Rows

Add Row

Examples

- Modify All Data equals False
- Contact: Modify All equals True

Activate Windows

Go to Settings to activate Windows.

https://thiruagovindhasamygoverme5-dev-ed.develop.my.salesforce.com/one/app#/alohaRedirect/udd/PermissionSet/listview/editPermissionSetFilter.apexp?tid=D08500000MLKqD8retURL=%2F0PS%3Fct%3D008500000MLKqD%26rolodexInd...

Type here to search

3:00 PM 18-Apr-23

## Reports

### Creating a Report:

Report Builder | Salesforce

thiruagovindhasamygoverme5-dev-ed.develop.lightning.force.com/one/app#eyJjb21wb25lbnREZWMYOllyZXhvcnRzOnJlcG9ydEJ1aWxkZXIiLCJ...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar People Cases Forecasts More

REPORT

New Accounts Report Accounts

Save & Run Save Close Run

Previewing a limited number of records. Run the report to see everything.

Update Preview Automatically

Outline Filters

Groups

GROUP ROWS

Add group...

Columns

Add column...

Last Activity

Account Owner

Account Name

Billing State/Province

Type

Rating

Last Modified Date

|    | Last Activity | Account Owner | Account Name                        | Billing State/Province | Type               | Rating | Last Modified Date |
|----|---------------|---------------|-------------------------------------|------------------------|--------------------|--------|--------------------|
| 1  | -             | Anitha N      | GenePoint                           | CA                     | Customer - Channel | Cold   | 11/04/2023         |
| 2  | -             | Anitha N      | United Oil & Gas, UK                | UK                     | Customer - Direct  | -      | 11/04/2023         |
| 3  | -             | Anitha N      | United Oil & Gas, Singapore         | Singapore              | Customer - Direct  | -      | 11/04/2023         |
| 4  | -             | Anitha N      | Edge Communications                 | TX                     | Customer - Direct  | Hot    | 11/04/2023         |
| 5  | -             | Anitha N      | Burlington Textiles Corp of America | NC                     | Customer - Direct  | Warm   | 11/04/2023         |
| 6  | -             | Anitha N      | Pyramid Construction Inc.           | -                      | Customer - Channel | -      | 11/04/2023         |
| 7  | -             | Anitha N      | Dickenson plc                       | KS                     | Customer - Channel | -      | 11/04/2023         |
| 8  | -             | Anitha N      | Grand Hotels & Resorts Ltd          | IL                     | Customer - Direct  | Warm   | 11/04/2023         |
| 9  | -             | Anitha N      | Express Logistics and Transport     | OR                     | Customer - Channel | Cold   | 11/04/2023         |
| 10 | -             | Anitha N      | University of Arizona               | AZ                     | Customer - Direct  | Warm   | 11/04/2023         |
| 11 | -             | Anitha N      | United Oil & Gas Corp.              | NY                     | Customer - Direct  | Hot    | 11/04/2023         |
| 12 | -             | Anitha N      | sForce                              | CA                     | -                  | -      | 11/04/2023         |

Activate Windows

Go to Settings to activate Windows.

To Do List

Type here to search

3:05 PM 18-Apr-23



#### **4. Trailhead Profile Public URL**

Team Leader - - <https://trailblazer.me/id/mhari238>

Team Member 1 - <https://trailblazer.me/id/sarimuthu>

Team Member 2 - <https://trailblazer.me/id/ssenthil51>

Team Member 3 - <https://trailblazer.me/id/nirma216>

#### **5. ADVANTAGES & DISADVANTAGE**

Advantages:

- Gives you creative ideas
- Ability to work on different events
- Time away from family and friends.

Disadvantage :

- Difficult to handle work manually
- Time consuming process
- More human power required.

#### **6. APPLICATION**

These apps come with every occurrence of Salesforce as default. Community Call Centre Content, Sales, Marketing, Salesforce chatter, Site.com and App Launcher.

#### **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. SolutionDot always keep your objects and goals on top priority while developing any plan of work.

#### **8. FUTURE SCOPE**

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