EVENT MANAGEMENT SYSTEM USING SALESFORCE

SALESFORCE NAAN MUDHALVAN

PROJECT REPORT

Submitted By

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in partial fulfilment for the award of the

degree of

BACHELOR OF ENGINEERING

in

COMPUTER SCIENCE AND BUSINESS SYSTEMS

KNOWLEDGE INSTITUTE OF TECHNOLOGY,

SALEM-637504

BONAFIDE CERTIFICATE

Certified that this project report titled **"EVENT MANAGEMENT SYSTEM USING SALESFORCE"** is the Bonafide work of **"LOGESHWARAN M (611220244021), LOGITH J (611220244022) , JOEL ABI PRANESH S (611220244016) , JANA R(611220244013), SACHIN M(611220244033)"** who carried out the project work under my supervision.

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ACKNOWLEDGEMENT

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

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

We would like to convey our sincere thanks to our beloved Principal **Dr. PSS. Srinivasan,** for forwarding us to do our project and offering adequate duration in completing our project.

We express our sincere thanks to our Head of the Department **Dr. M. Ramkumar,** Department of Computer Science and Business Systems for fostering the excellent academic climate in the Department.

We express our pronounced sense of thanks with deepest respect and gratitude to our Faculty Mentor **Mr. B. Venkata ramanen,** Department of Computer Science and Engineering for their valuable and precious guidance and for having amicable relation.

With deep sense of gratitude, we extend our earnest and sincere thanks to our SPOC **Mr. T. Karthikeyan,** Assistant Professor, Department of Computer Science and Engineering for his guidance and encouragement during this project.

We would also like express our thanks to all the faculty members of our Department, friends and students who helped us directly and indirectly in all aspects of the project work to get completed successfully.

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1.INTRODUCTION

Salesforce, a leading cloud-based Customer Relationship Management (CRM) platform, is a pivotal tool for organizations to manage customer data, optimize sales processes, and elevate customer interactions. Its multifaceted features include Sales Cloud, which enhances sales management through lead tracking, opportunity management, and seamless email integration. Service Cloud focuses on exceptional customer support, featuring case management, knowledge base development, and multi-channel support. Marketing Cloud empowers businesses with marketing automation, email campaigns, social media engagement, and in-depth analytics. Salesforce's hallmark is its customizability, allowing businesses to tailor the platform to meet specific requirements, while robust integration capabilities facilitate seamless connections with other business applications.

The platform equips businesses with powerful reporting and analytics tools, enabling data-driven decisions and insightful, customized reports and dashboards. Salesforce ensures mobile accessibility, enabling users to stay connected and productive while on the move. A paramount emphasis on data security and compliance guarantees data protection and privacy. Whether you're a small start-up or a large enterprise, Salesforce offers scalability to accommodate your evolving needs.

Through Salesforce, organizations foster improved customer relationships, increased sales efficiency, and superior customer support. It empowers businesses to make data-driven decisions, streamline operations, and create impactful, targeted marketing campaigns. This introduction encapsulates Salesforce's capabilities and benefits, offering a concise overview for your project document, allowing for a better understanding of how the platform can contribute to your specific project goals.

2.PROJECT SPECIFICATIONS

2.1 Project Goal

The goal of this project is to 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.

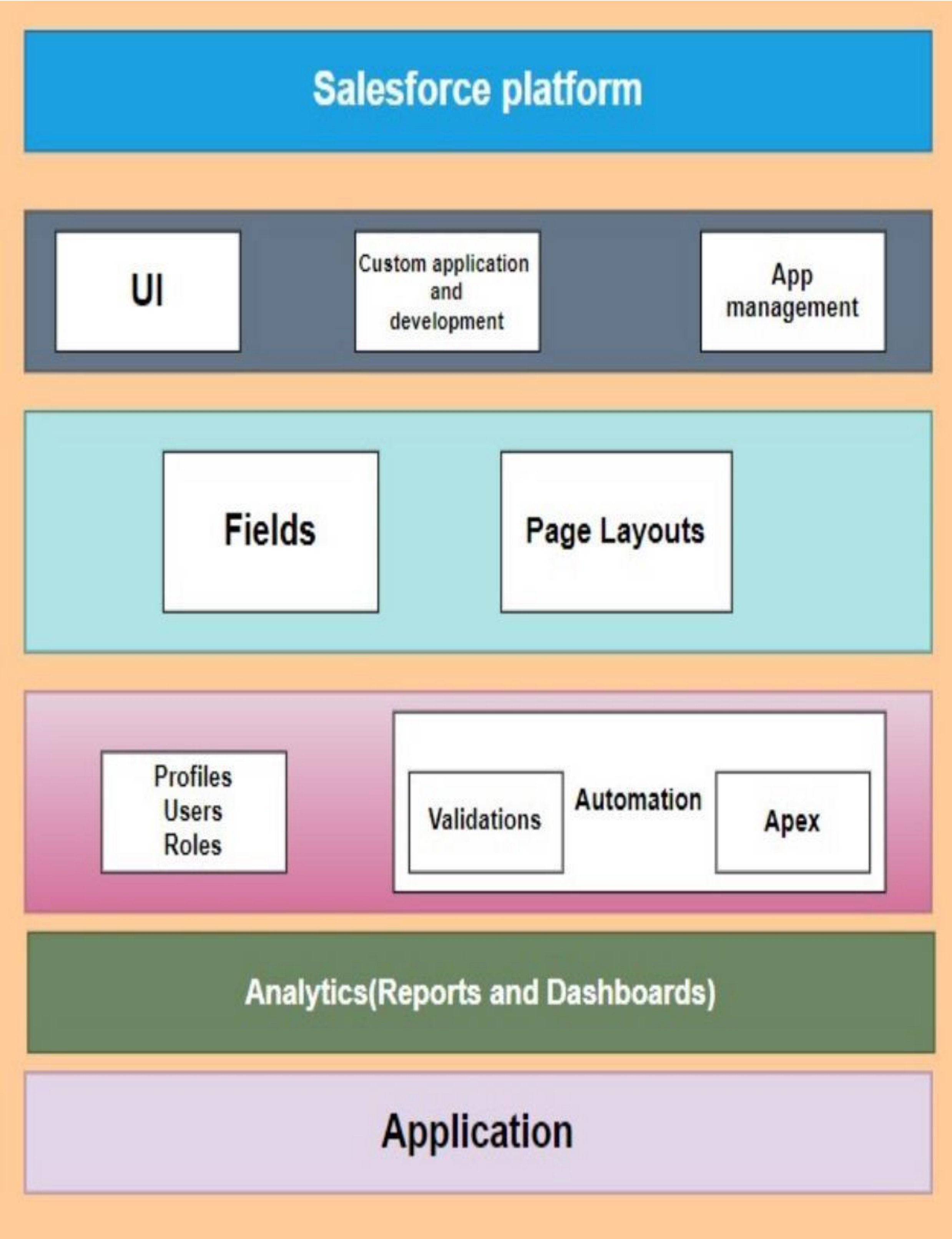
Project Scope

- **Occasion Management:**
  1. Create a custom object for "Occasions" to track event details.
  2. Capture event name, date, time, location, description, and associated event services.
  3. Implement record types for different types of events (e.g., conferences, seminars, workshops).
  4. Link occasions to attendees, speakers, and vendors.

- **Attendee Management:**
  1. Create a custom object for "Attendees" to manage event participants.
  2. Capture attendee details, contact information, and registration status.
  3. Allow attendees to register for events and manage their registration status.
- **Speaker Management:**
  1. Create a custom object for "Speakers" to manage event presenters.
  2. Capture speaker details, bio, contact information, and their assigned events.
  3. Enable speakers to submit presentation proposals and track their acceptance status.
- **Vendor Management:**
  1. Create a custom object for "Vendors" to handle event service providers.
  2. Capture vendor details, services offered, and contract information.
  3. Associate vendors with specific events and manage vendor contracts.
- **Event Services:**
  1. Create a custom object for "Event Services" to define services offered at events.
  2. Include details on service type, cost, and availability.
  3. Link services to occasions and vendors.
- **Profile Management:**
  1. Use Salesforce's built-in User and Profile management to control access.
  2. Define profiles for different user roles (admin, event manager, attendee, speaker, vendor).
  3. Implement record sharing rules and role hierarchies to manage data access.
- **Reports and Dashboards:**
  1. Create custom reports to track event registration, attendance, and financials.

2. Build dashboards to provide at-a-glance insights into event performance.
3. Include graphical representations of key event metrics such as registration counts, revenue, and attendee demographics.

1.1 Technical Requirements



1.1 Functional Requirements

- **Event Creation:**

1. Create events using custom objects in Salesforce, capturing event details like name, date, location, and description.
2. Associate speakers, vendors, and event services with each event using lookup relationships.
3. Set event capacity and manage its status.

- **Attendee Management:**

1. Maintain attendee records as Contacts or a custom object, tracking their registration status for various events.
2. Use Salesforce Communities to enable self-service registration and profile management for attendees.

- **Speaker and Vendor Management:**

1. Manage speakers and vendors as custom objects with associated information.
2. Link speakers and vendors to events and track their availability.

- **Event Services:**

1. Create records for event services and associate them with specific events and vendors.

- **Security and Access Control:**

1. Define user profiles and permission sets to control access to different parts of the system.
2. Ensure data security and privacy compliance by setting up sharing rules and field-level security.

- **Reporting and Dashboards:**

1. Build reports and dashboards to gain insights into event performance, attendee registrations, speaker availability, and vendor services.

2. PREPARATION DATA MODELING

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:

1. Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

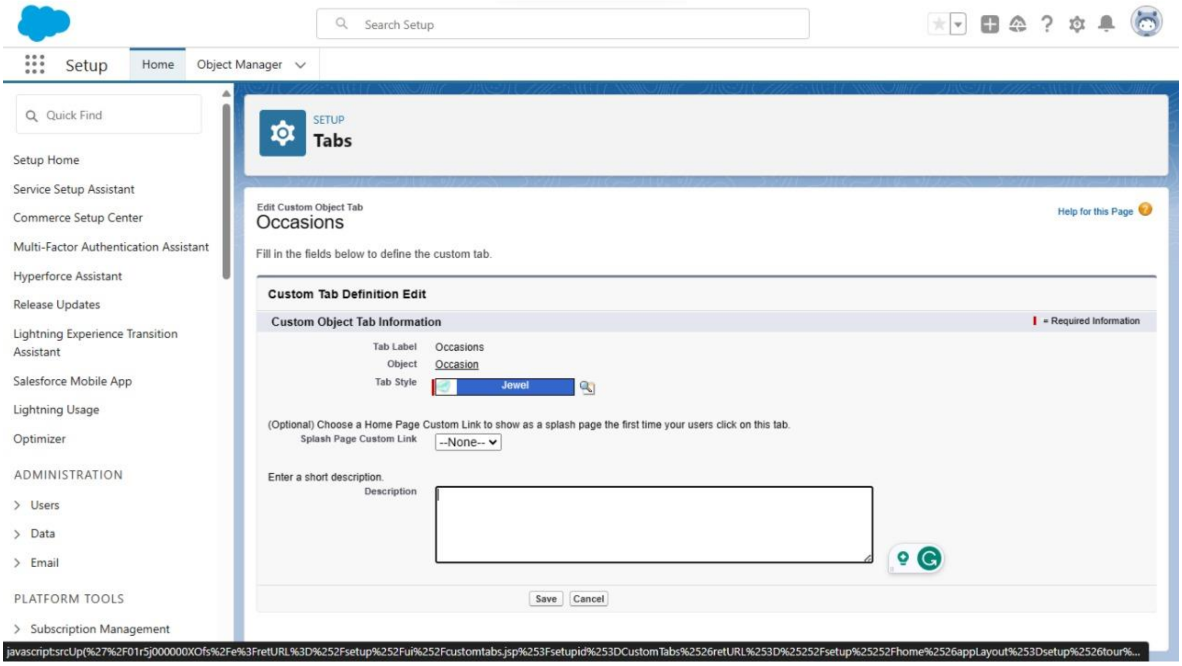
2. Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

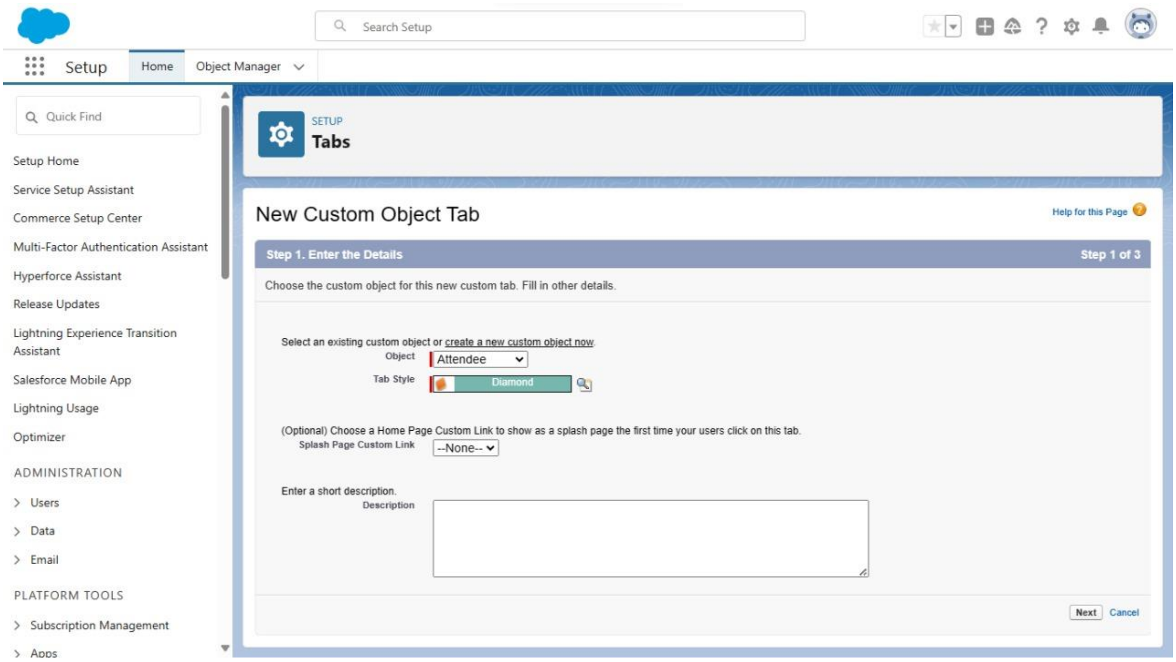
In This Application We Use 5 Custom Objects:

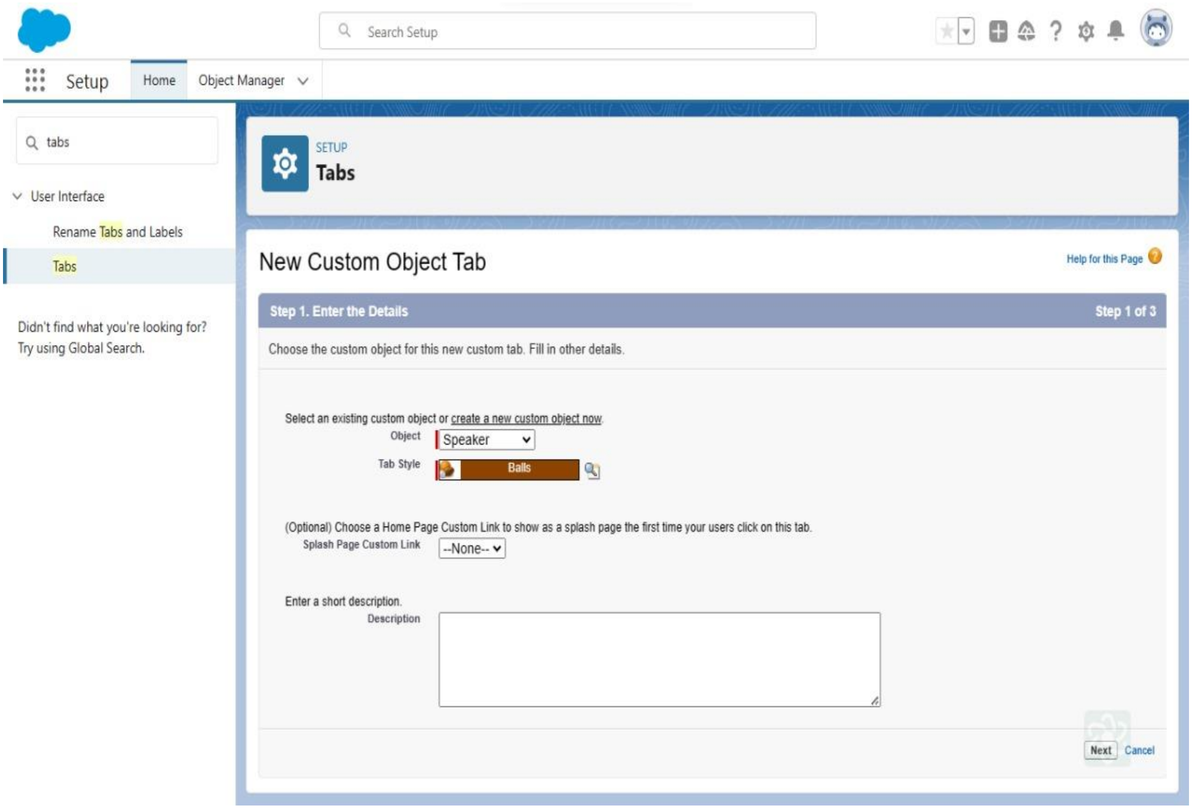
1. Occasion
2. Attendee
3. Speaker
4. Vendors
5. Event Service

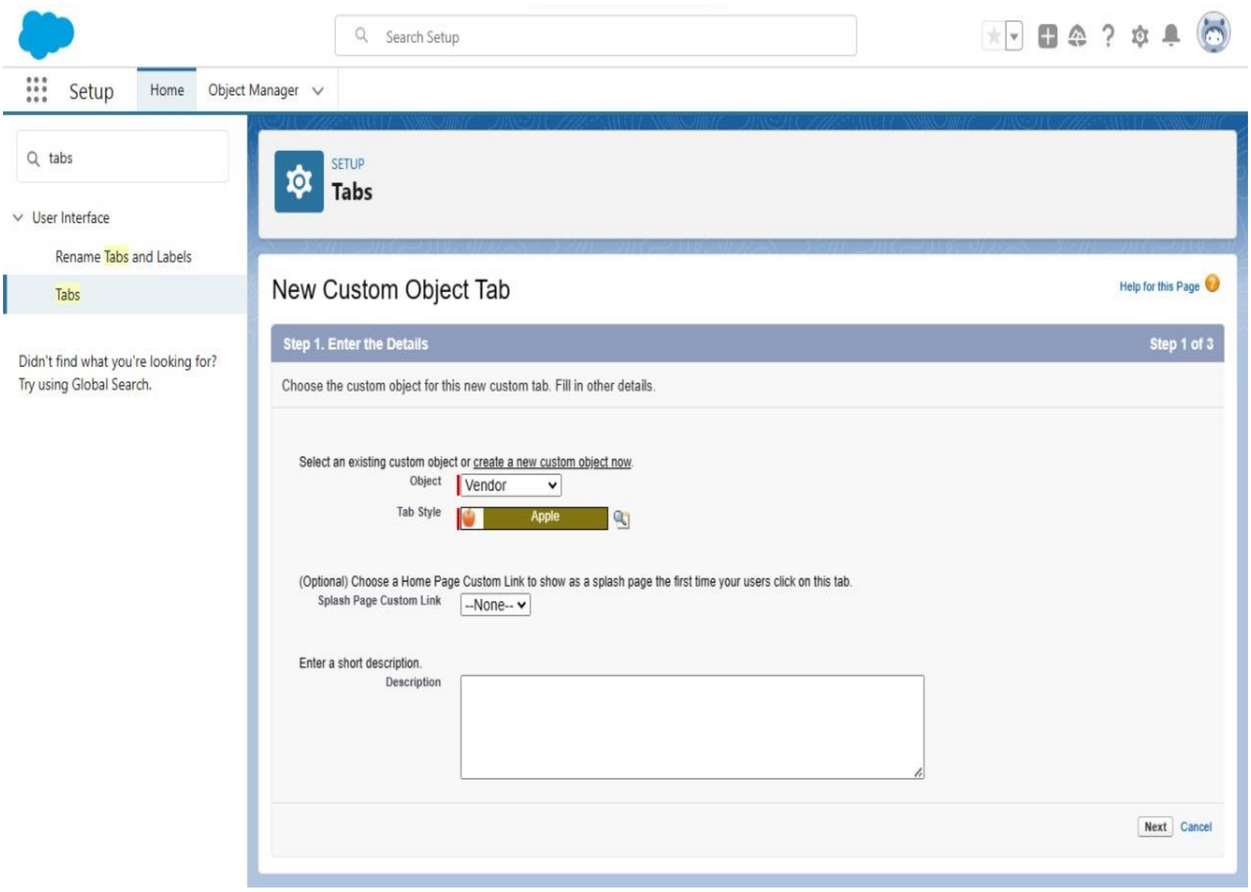
1) Create A Custom Object for Enquiry:

1. To Navigate to Setup page
   To create an object:
   From the setup page? Click on Object Manager? Click on Create? Click on Custom Object.
2. On Custom object defining page:
   Enter the label name (lead), plural label name?, Record name(Customer Name)
3. Click on Allow reports, Allow search?
4. Save






Search Setup
Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for?
Try using Global Search.
SETUP
Tabs
New Custom Object Tab
Help for this Page
Step 1. Enter the Details
Step 1 of 3
Choose the custom object for this new custom tab. Fill in other details.
Select an existing custom object or create a new custom object now.
Object
Speaker
Tab Style
Balls
(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link
--None--
Enter a short description.
Description
Next
Cancel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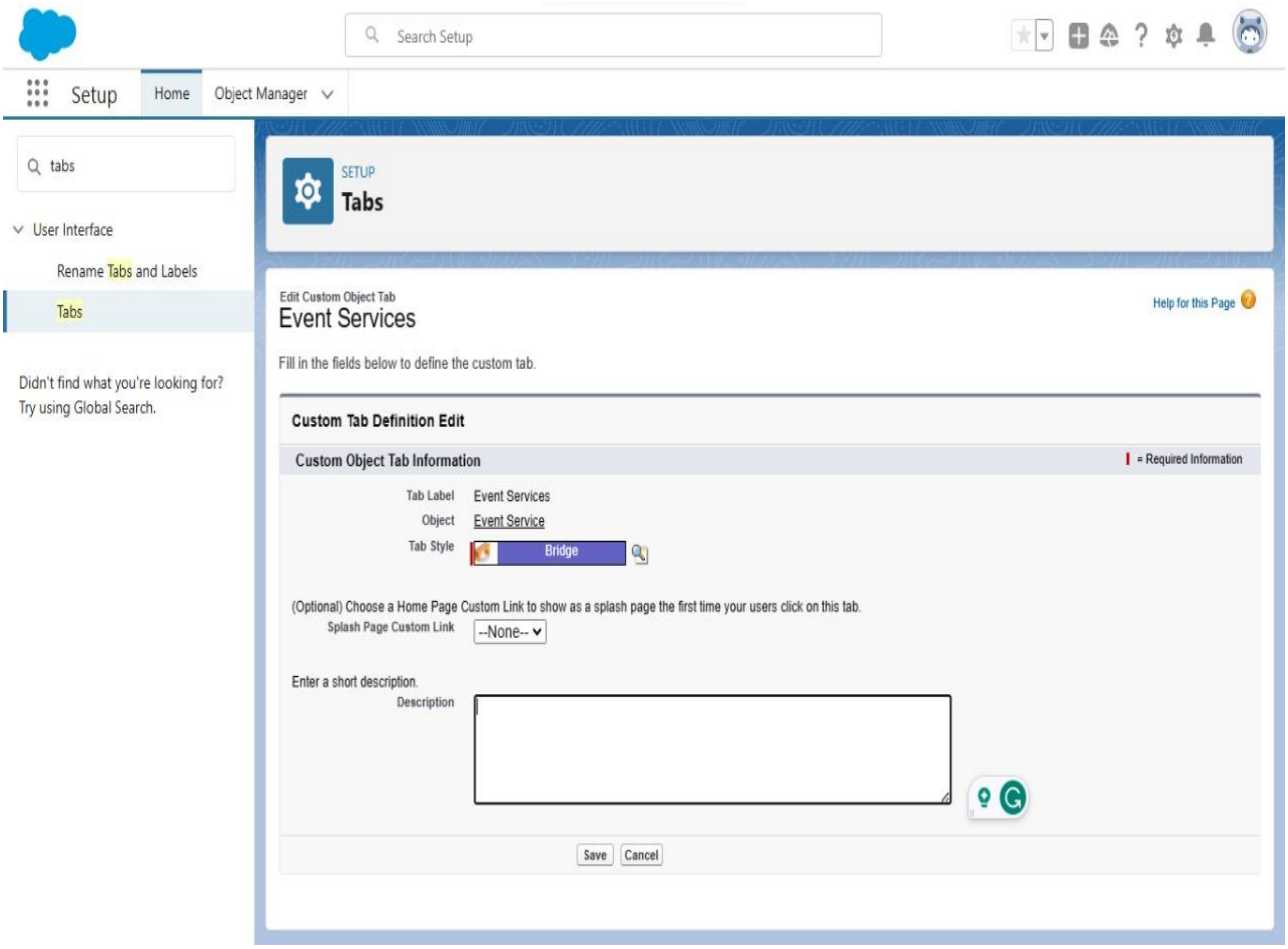
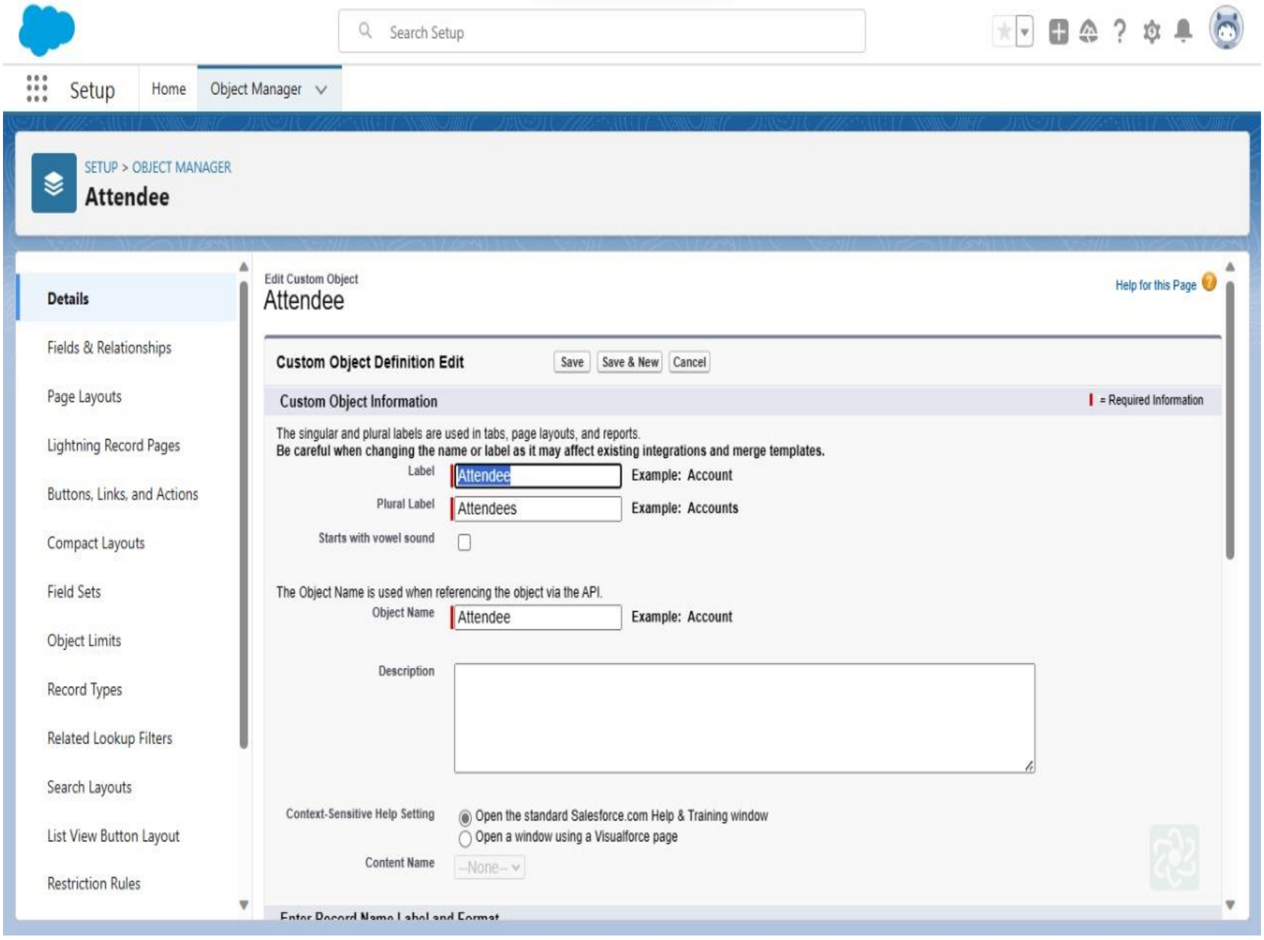
Select an existing custom object or create a new custom object now.
Object
Vendor
Tab Style
Apple
(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link
--None--
Enter a short description.
Description
Next
Cancel



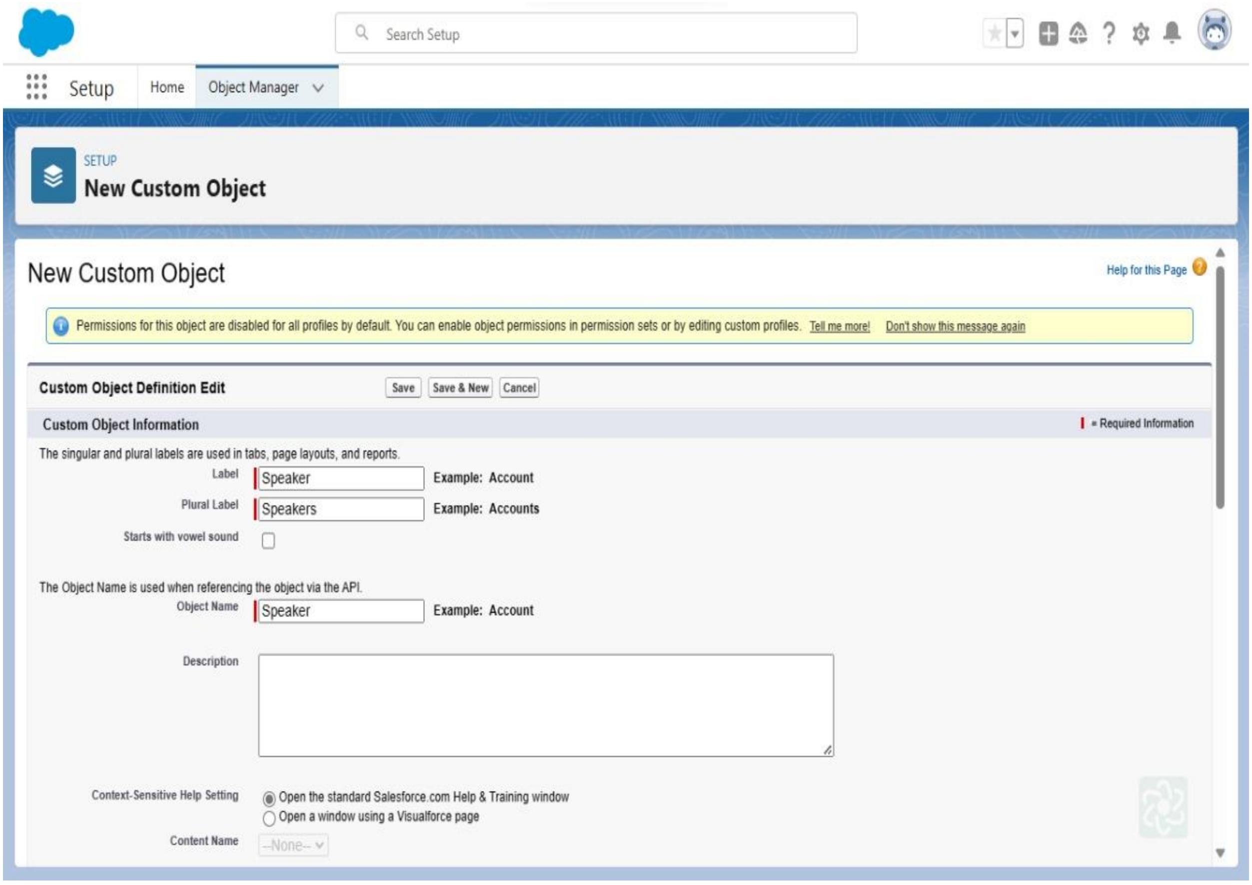
2) Creation of Attendee Object

1) To create an object:
2) From the setup page ? Click on Object Manager ? Click on Create Custom Object.
3) Enter the label name? **Attendee**
4) Plural label name? **Attendee**
5) Record Name? Property Name
6) click on Allow reports,
7) Allow search ?
8) Save



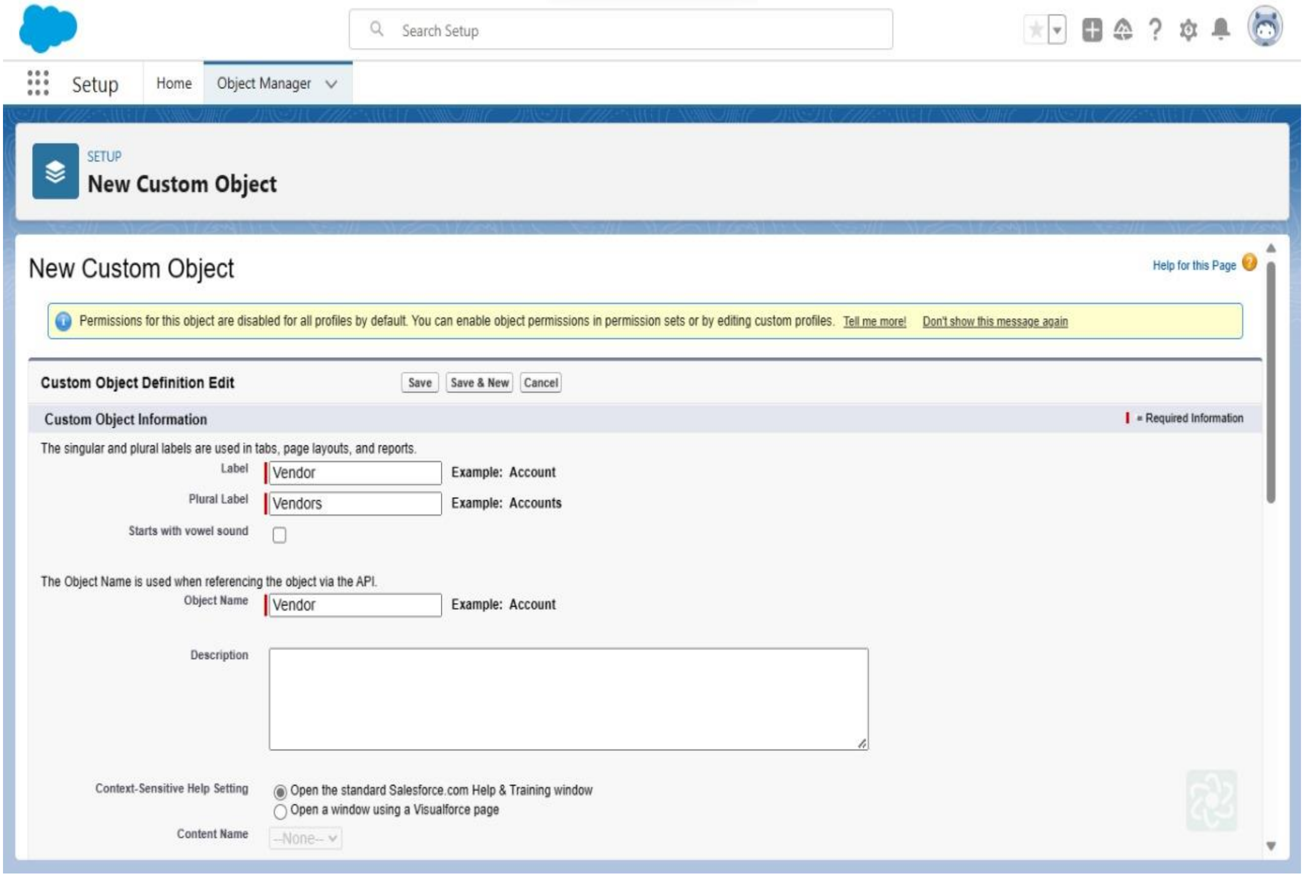
3) Creation of Speaker Object

1) To create an object:
2) From the setup page ? Click on Object Manager ? Click on Create Custom Object.
3) Enter the label name? **Speaker**
4) Plural label name? **Speaker**
5) Record Name? Property Name
6) click on Allow reports,
7) Allow search ?
8) Save



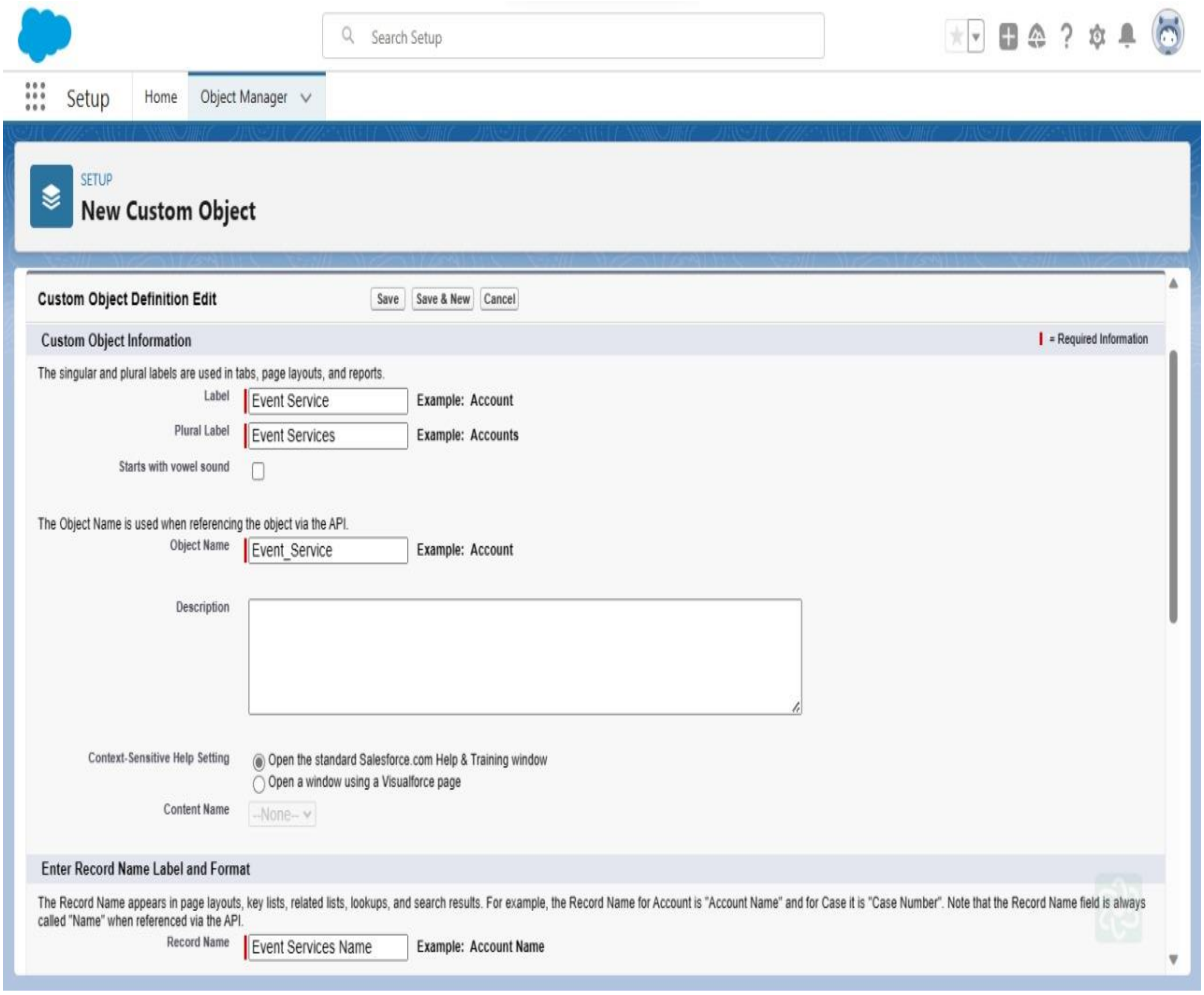
4) Creation of Vendors Object

1) To create an object:
2) From the setup page ? Click on Object Manager ? Click on Create Custom Object.
3) Enter the label name? **Vendors**
4) Plural label name? **Vendors**
5) Record Name? Property Name
6) click on Allow reports,
7) Allow search ?
8) Save



5) Creation of Event Service Object

1) To create an object:
2) From the setup page ? Click on Object Manager ? Click on Create Custom Object.
3) Enter the label name? **Event Service**
4) Plural label name? **Event Service**
5) Record Name? Property Name
6) click on Allow reports,
7) Allow search ?
8) Save


Search Setup
Setup
Home
Object Manager
SETUP
New Custom Object
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
Event Service
Example: Account
Plural Label
Event Services
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
Event_Service
Example: Account
Description
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 Services Name
Example: Account Name

- **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:

1.**Standard Object Tabs:** Standard object tabs display data related to standard objects.

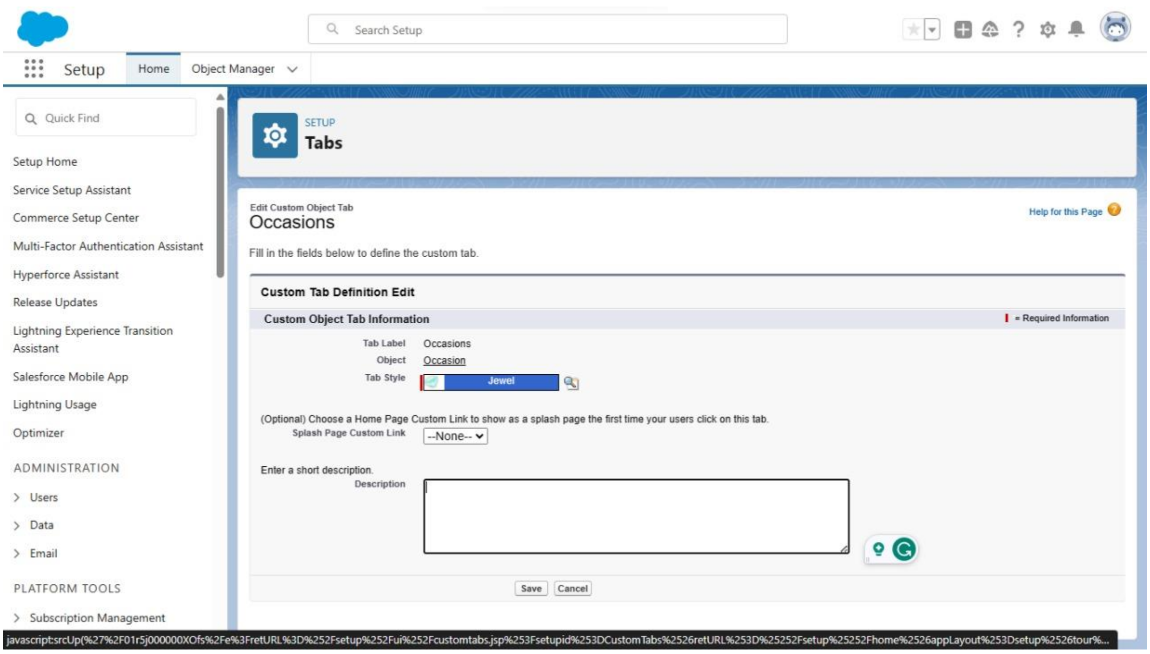
2.**Custom Object Tabs:** Custom object tabs display data related to custom objects. These tabs look and function just like standard tabs.

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

4.**Visualforce Tabs:** Visualforce Tabs display data from a Visualforce Page.

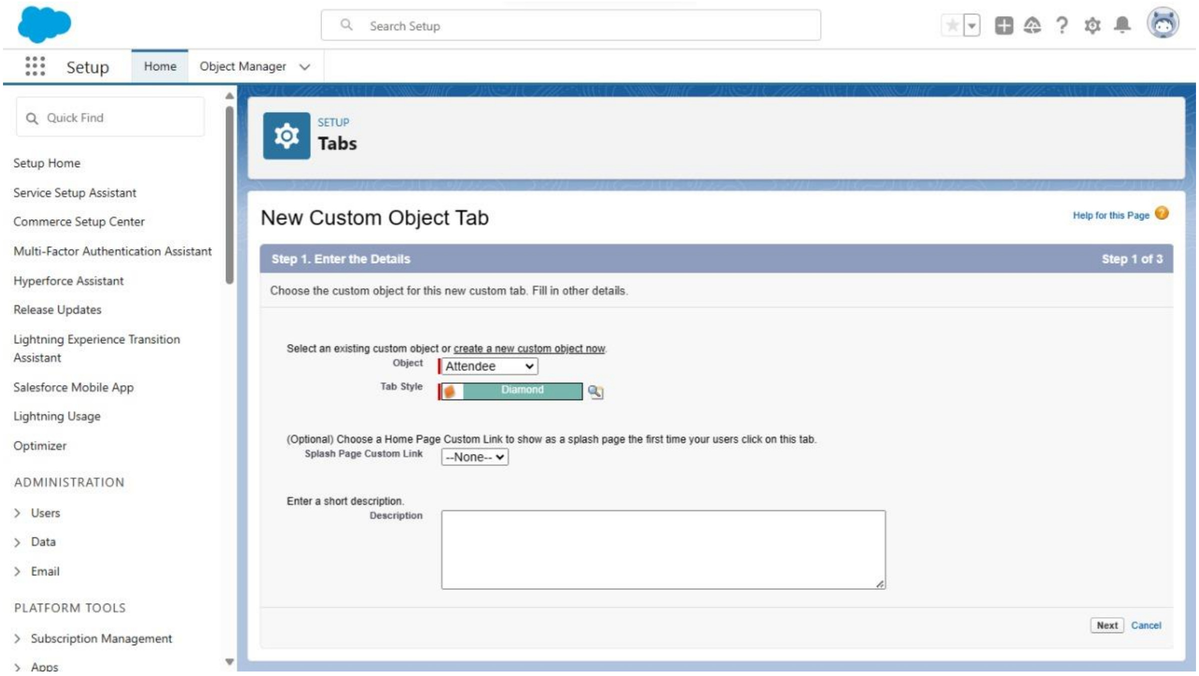
1)Creation of Occasion Tab

1)Go to setup page? type Tabs in Quick Find bar ? click on tabs ? New (under custom object tab)
2)Select Object(Property) ? Select the tab style ? Next (Add to profiles page) keep it as default? Next (Add to Custom App) keep it as default ? Save



2) Creation of Attendee Tab

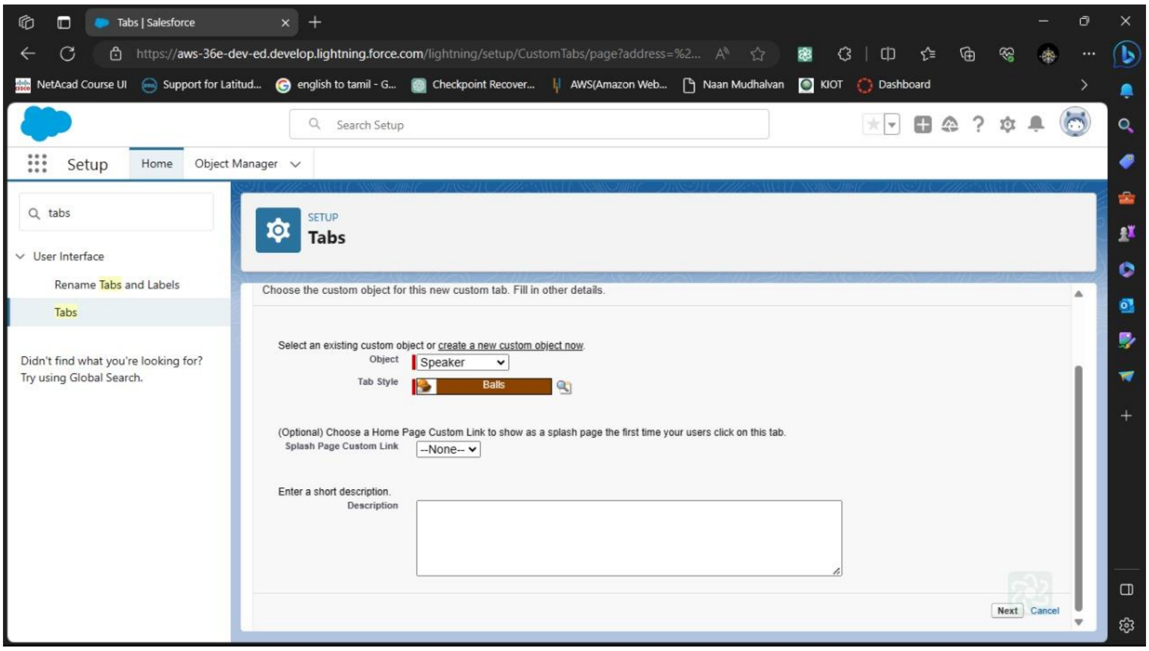
1) Go to setup page? type Tabs in Quick Find bar click on tabs? New (under custom object tab)
2) Select Object(Buy)? Select the tab style? Next (Add to profiles page) keep it as default? Next (Add to Custom App) keep it as default? Save



3) Creation of Speaker Tab

1)Go to setup page? type Tabs in Quick find bar? click on tabs? New (under custom object tab)

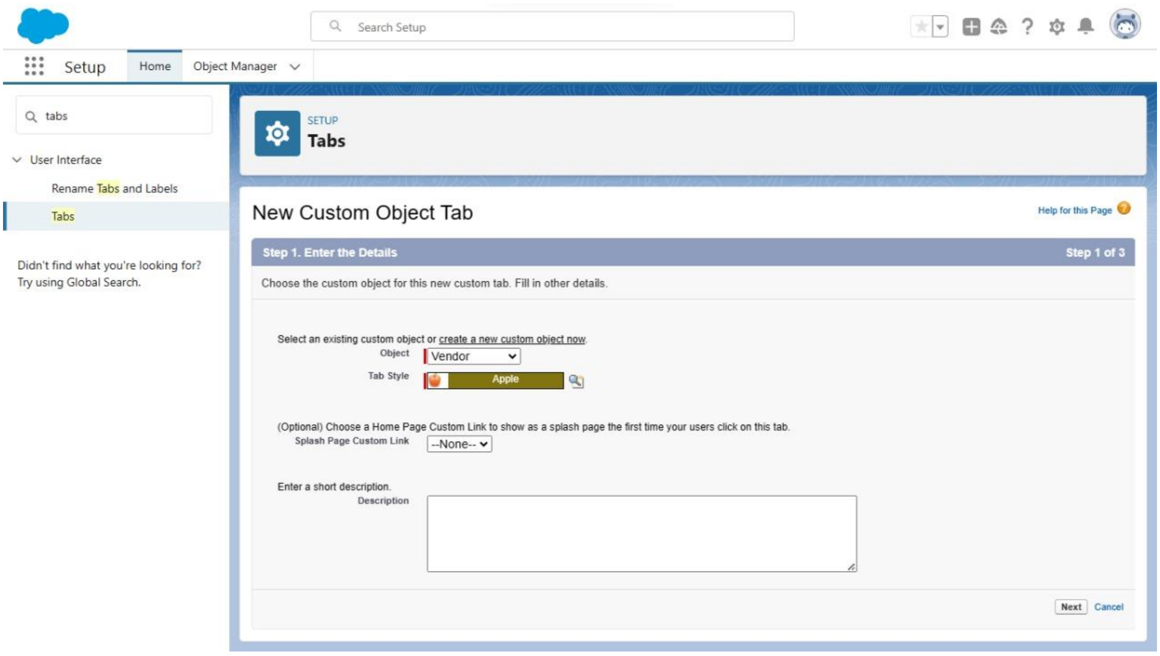
2) Select Object? Select the tab style? Next (Add to profiles page) keep it as default? Next (Add to Custom App) keep it as default? Save.



4) Creation of Vendors Tab

3)Go to setup page? type Tabs in Quick find bar? click on tabs? New (under custom object tab)

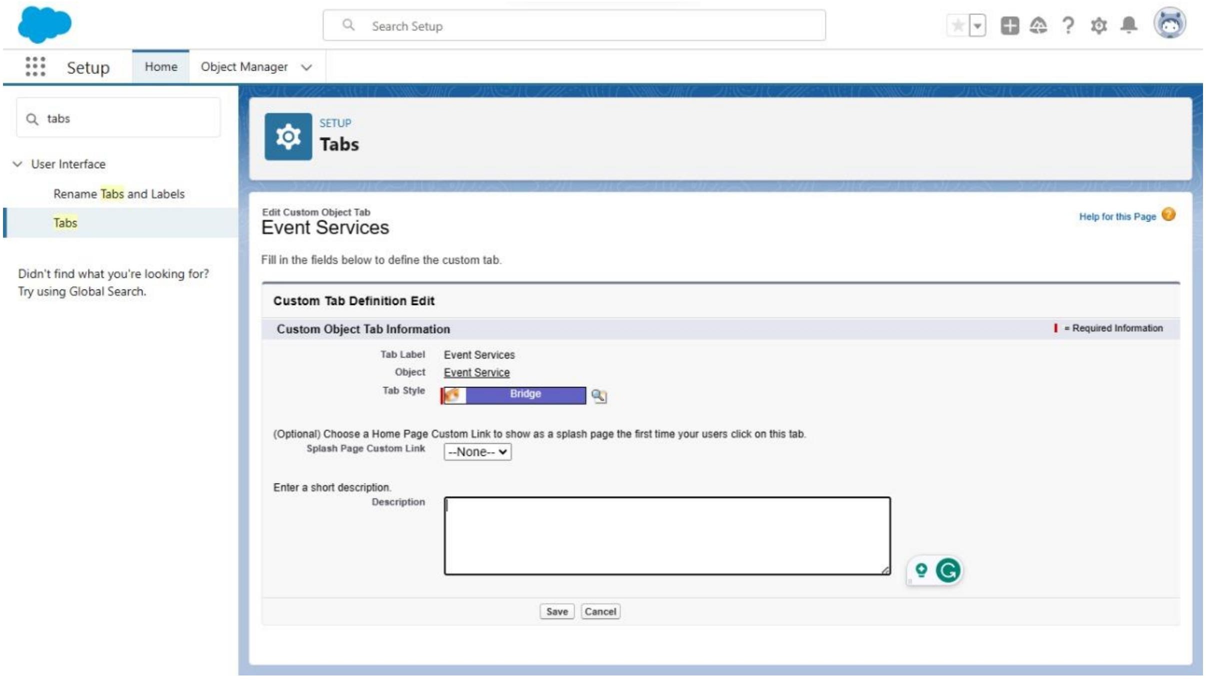
4)Select Object? Select the tab style? Next (Add to profiles page) keep it as default? Next (Add to Custom App) keep it as default? Save.



5) Creation of Event Service Tab

Go to setup page? type Tabs in Quick find bar? click on tabs? New (under custom object tab)

Select Object? Select the tab style? Next (Add to profiles page) keep it as default? Next (Add to Custom App) keep it as default? Save.



Lightning App:

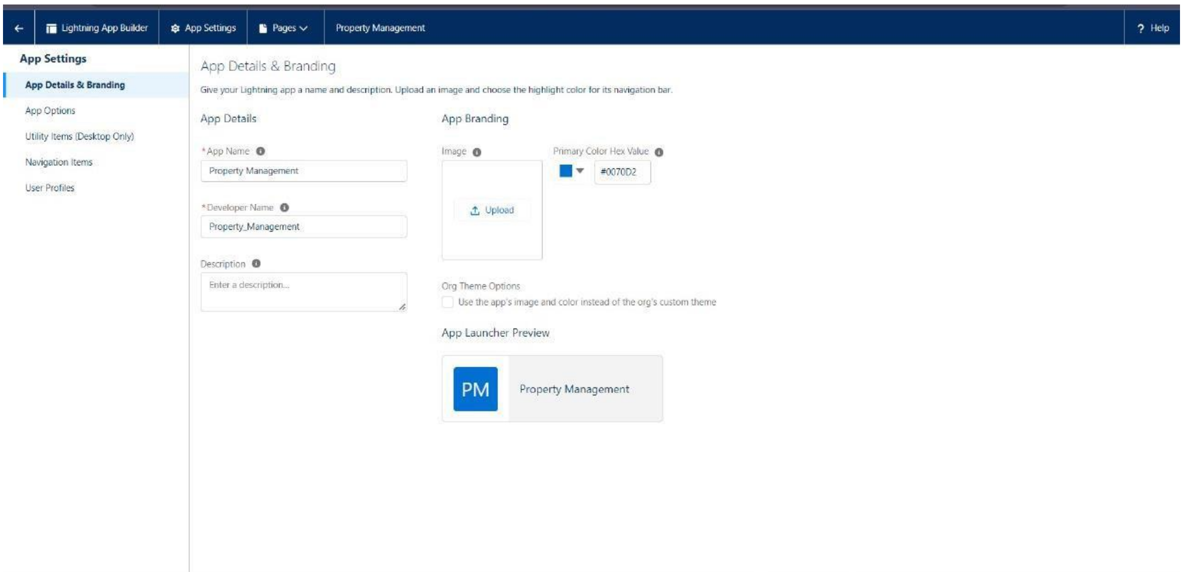
Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs.

There are 2 types of Salesforce applications:

Standard apps: these apps come with every occurrence of Salesforce as default. Community, Call Centre, 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.

1. Click New Lightning App. Event Management as the App Name, then click Next

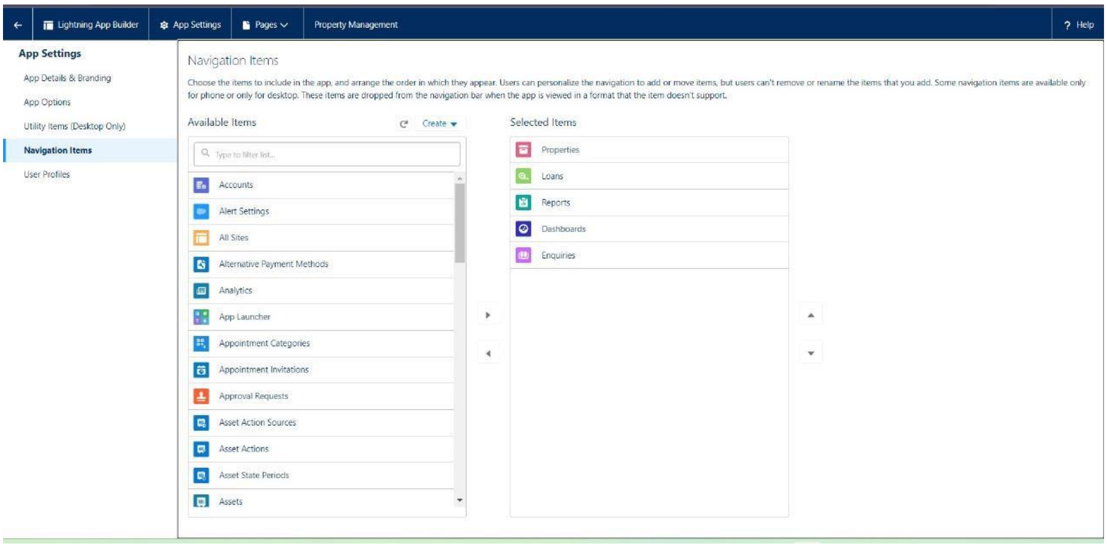


2. Under App Options, leave the default selections and click Next.

3. Under Utility Items, leave as is and click Next.

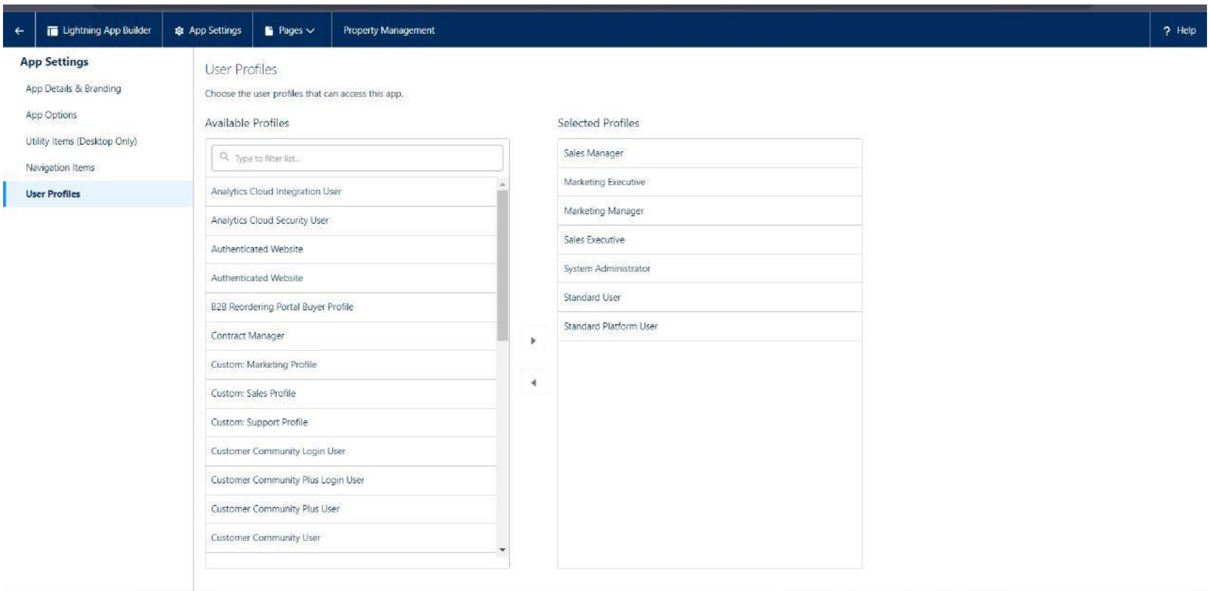
To Add Navigation Items:

Occasion, Pr, Loan, Report, Dashboard) Select the items from the search bar and move it using the arrow button ? Next.



5. To Add User Profiles:

(System Administrator, Salesforce platform user, Standard User) Search profiles in search bar ? click on the arrow button ? save & finish.



6. To verify your changes, click the App Launcher, type Property Management and select the Property Management app.

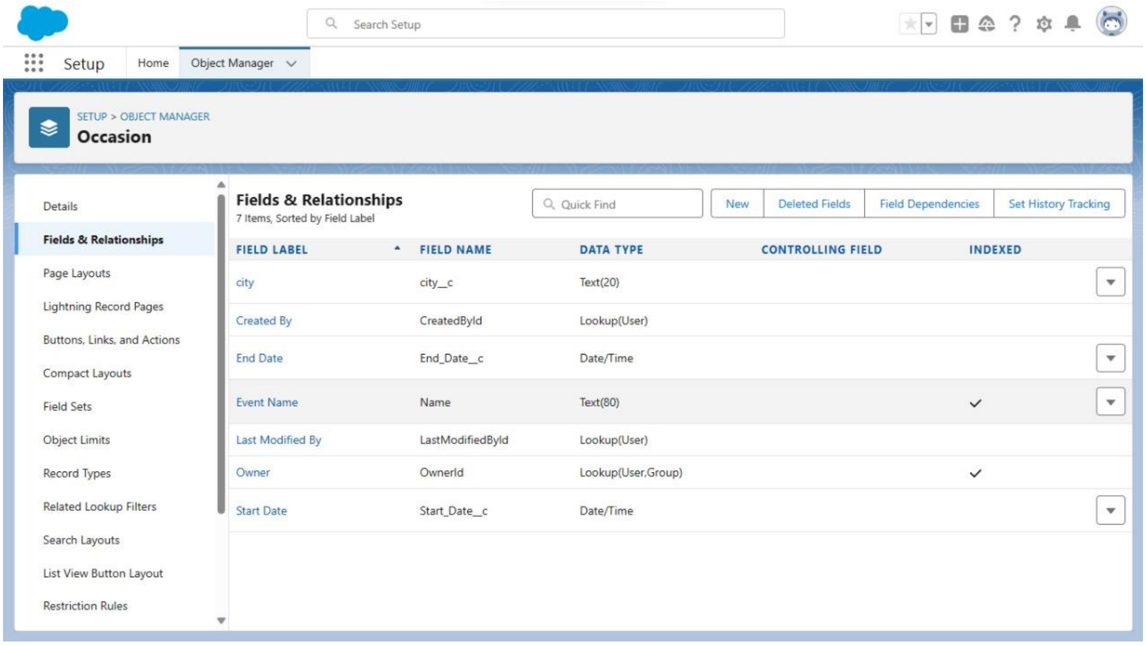
Fields and Relationship:

Fields in Salesforce represent 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.



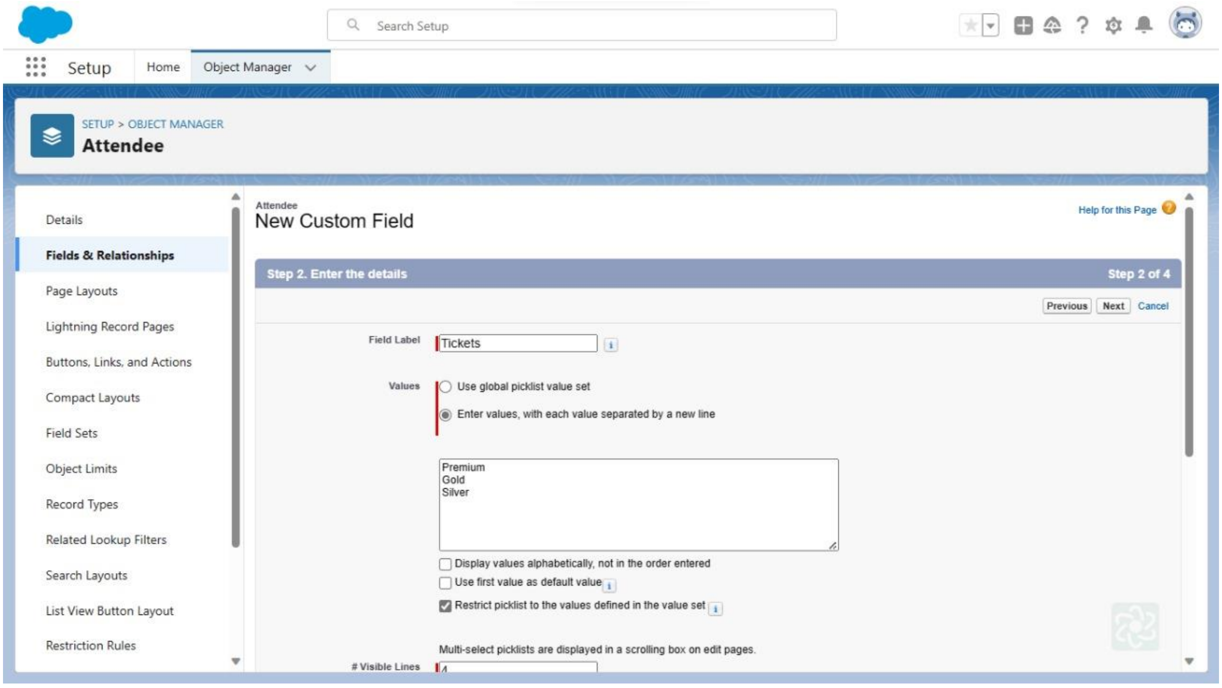
4. USERS & DATA SECURITY

Profile

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.

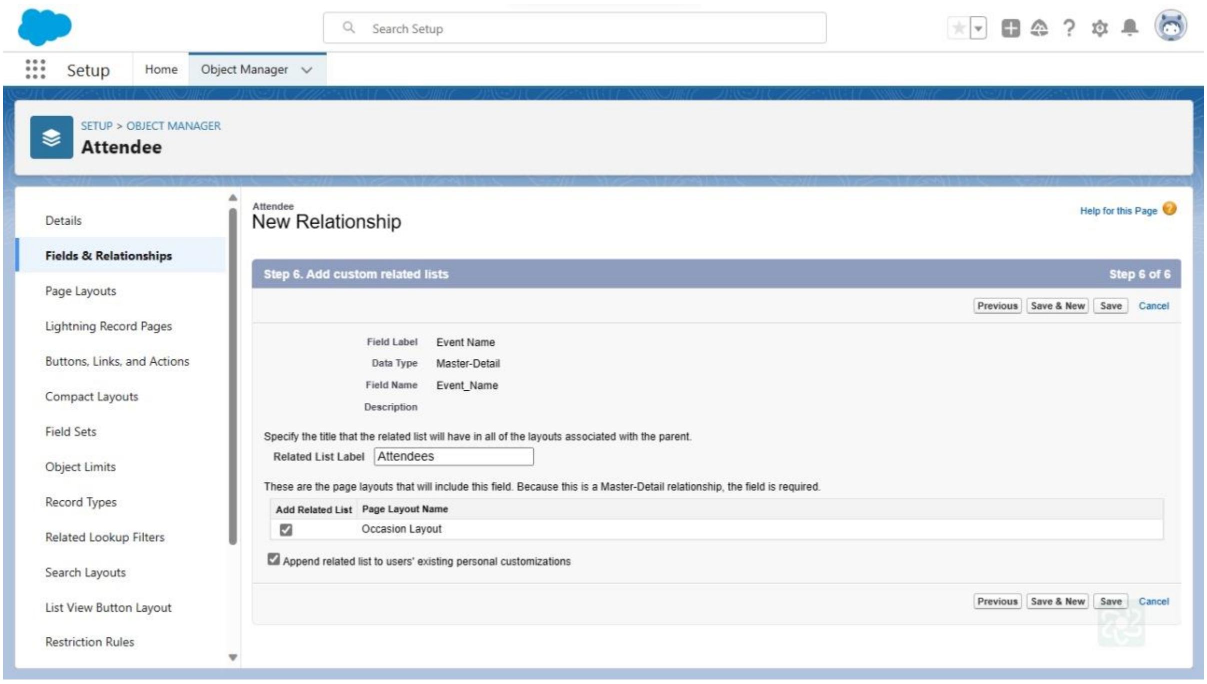
1) Create A Custom Profile

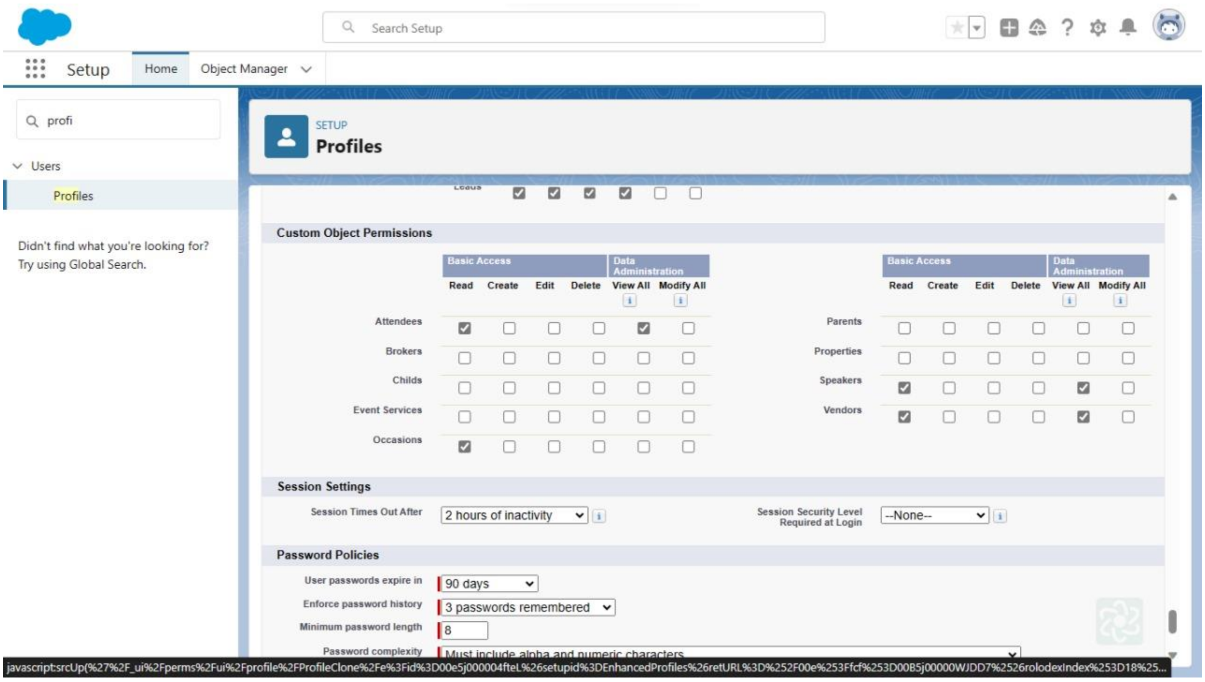
1. From setup, enter profiles in Quick Find box
2. Select profiles (Attendee).
3. Click clone.
4. For Profile, enter Buyer.
5. Click save.



2) Create A Custom Profile-2

1. Create a profile with the profile name as “Attendee”.
2. From setup, enter profiles in Quick Find box
3. Select profiles (Standard user).
4. Click clone.


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT 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
Attendee
New Relationship
Help for this Page
Step 6. Add custom related lists
Step 6 of 6
Previous
Save & New
Save
Cancel
Field Label
Event Name
Data Type
Master-Detail
Field Name
Event_Name
Description
Specify the title that the related list will have in all of the layouts associated with the parent.
Related List Label
Attendees
These are the page layouts that will include this field. Because this is a Master-Detail relationship, the field is required.
Add Related List
Page Layout Name
Occasion Layout
Append related list to users' existing personal customizations
Previous
Save & New
Save
Cancel


Search Setup
Setup
Home
Object Manager
profi
Users
Profiles
Didn't find what you're looking for?
Try using Global Search.
SETUP
Profiles
Custom Object Permissions
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
Attendees
Brokers
Childs
Event Services
Occasions
Parents
Properties
Speakers
Vendors
Session Settings
Session Times Out After
2 hours of inactivity
Session Security Level Required at Login
--None--
Password Policies
User passwords expire in
90 days
Enforce password history
3 passwords remembered
Minimum password length
8
Password complexity
Must include alpha and numeric characters

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.

1)To Create A User

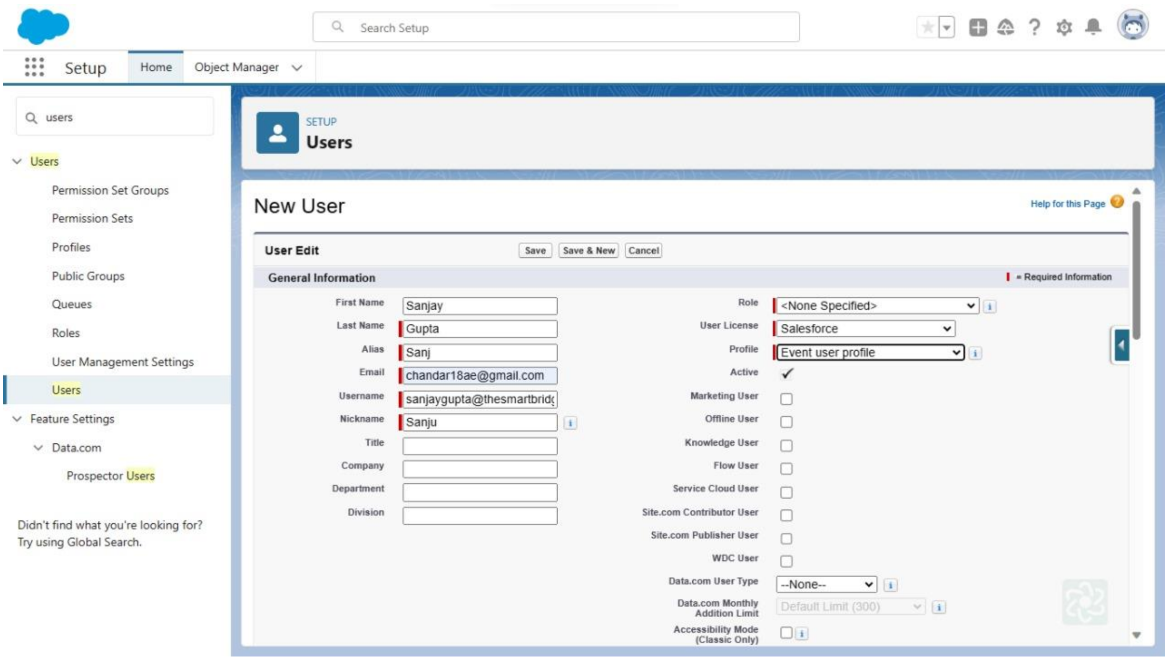
1. Go to setup? type users in quick find box? select users? click New user.

2.Click New User.

First Name: Sanjay
Last Name: Gupta
Alias: Sanjeev
Email: provide your personal email id for future reference
Username: sanjaygupta@thesmartbridge.com

Nickname: Sanjay
Role: leave it as default
User License: Salesforce
Profile: Attendee and Click Save Button.

8.Click save



8.Click save

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. Users can have only one profile but, depending on the Salesforce edition, they can have multiple permission sets.

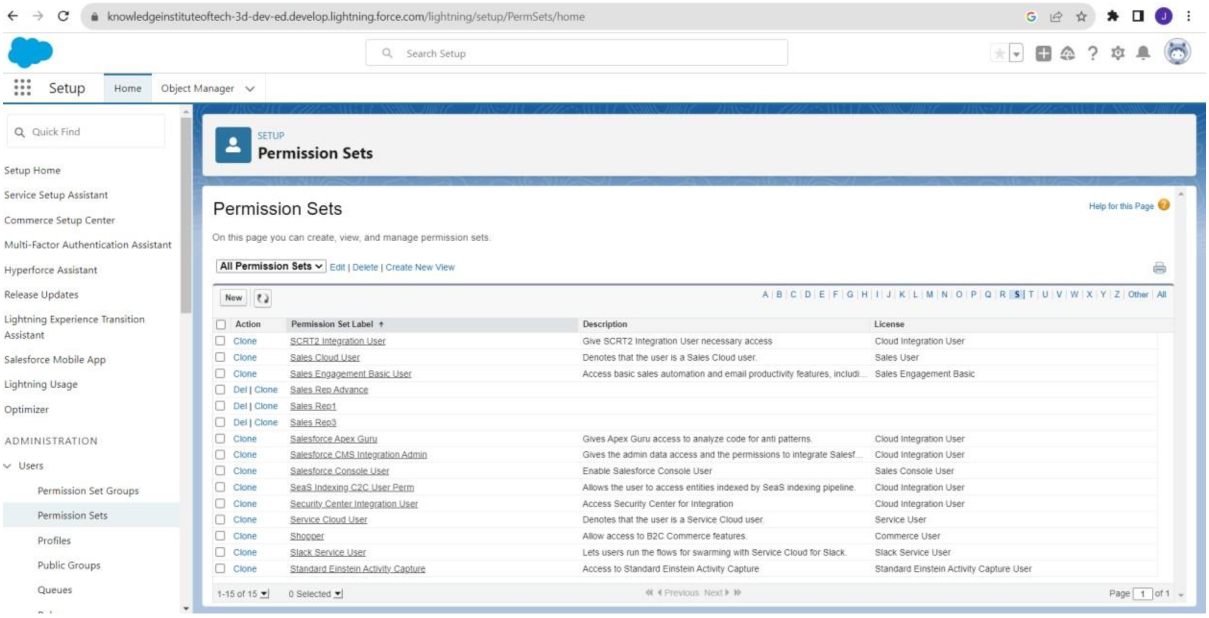
1. Go to setup ? type “permission sets” in quick search ? select permission sets ? New
2. Enter the label name (Sales Rep Advance)? save
3. Select Object settings
4. Search object property and select property object. and click Edit button
5. In Object Permission we give View all permission. And click save button

   Repeat 4th and 5th steps for Enquiry and Loan objects.

   After saving the permission click on the Manage assignment

6.Now click on the Add Assignment

7.Now select the user (sunny) and click on next & assign.



USER ADOPTION

User adoption is the process of enabling users to use the full capabilities of the Salesforce CRM. Here are some strategies to increase Salesforce user adoption:

- Offer adequate training: Provide online training resources, remote support, and integrate the platform with other tools.
- Create a Salesforce training folder: Create strategies around onboarding, training, and continued development.
- Define adoption metrics: Plan which metrics you want to track and how you'll track them.

Some important metrics include:

- Premium
- Gold
- Silver
- Confirm
- Not Confimed
- Pending

5.REPORTS & DASHBOARD

Reports

A report is a list of records that meet the criteria you define. It's displayed in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

1)Create A Report

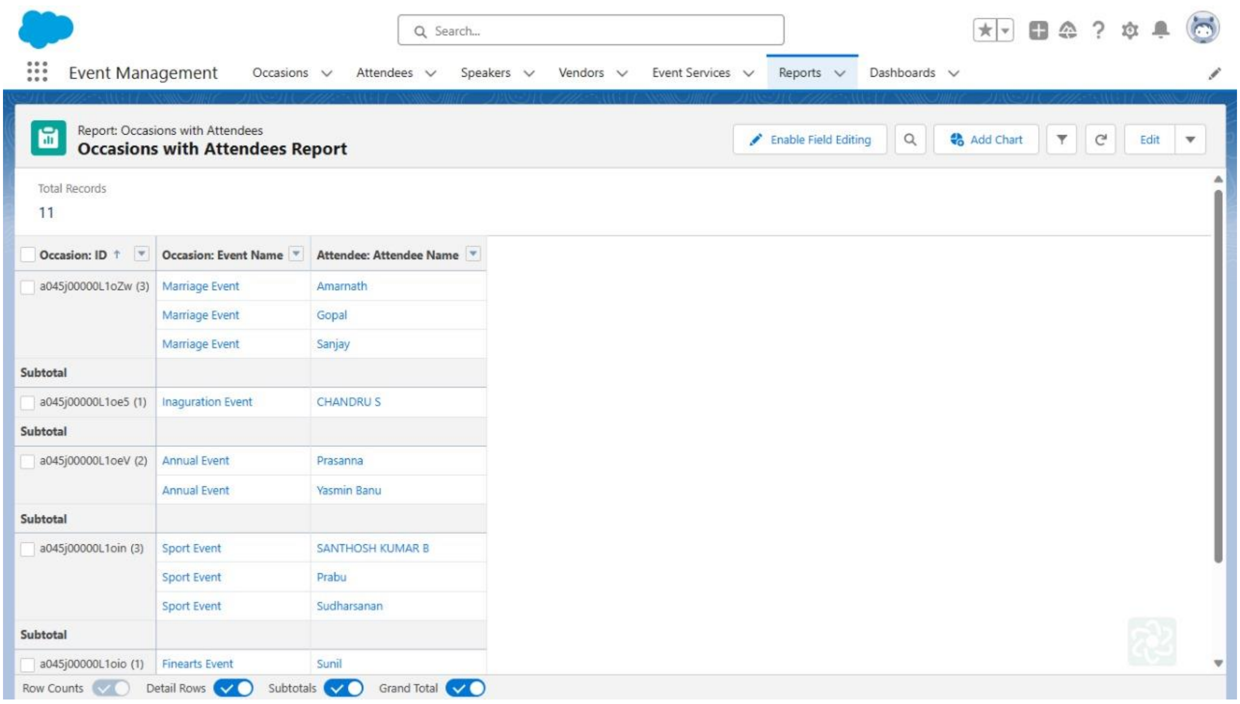
1)Go to the app ? click on the reports tab

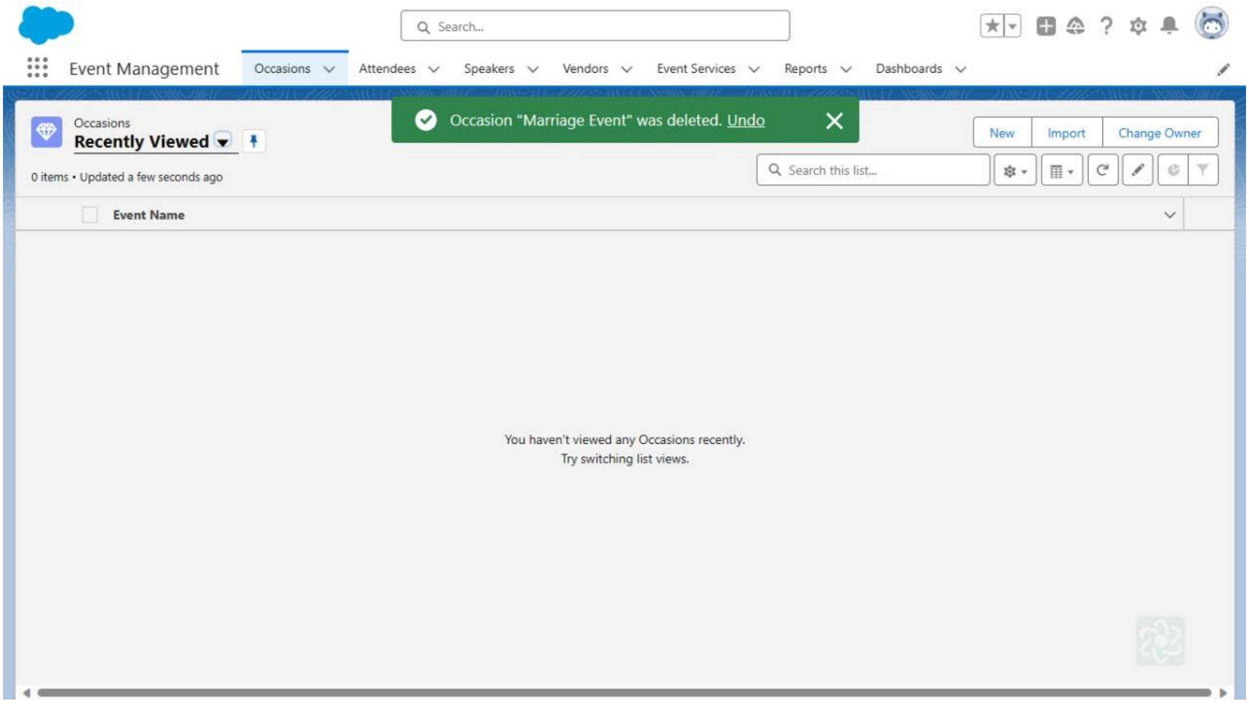
2)Click New Report

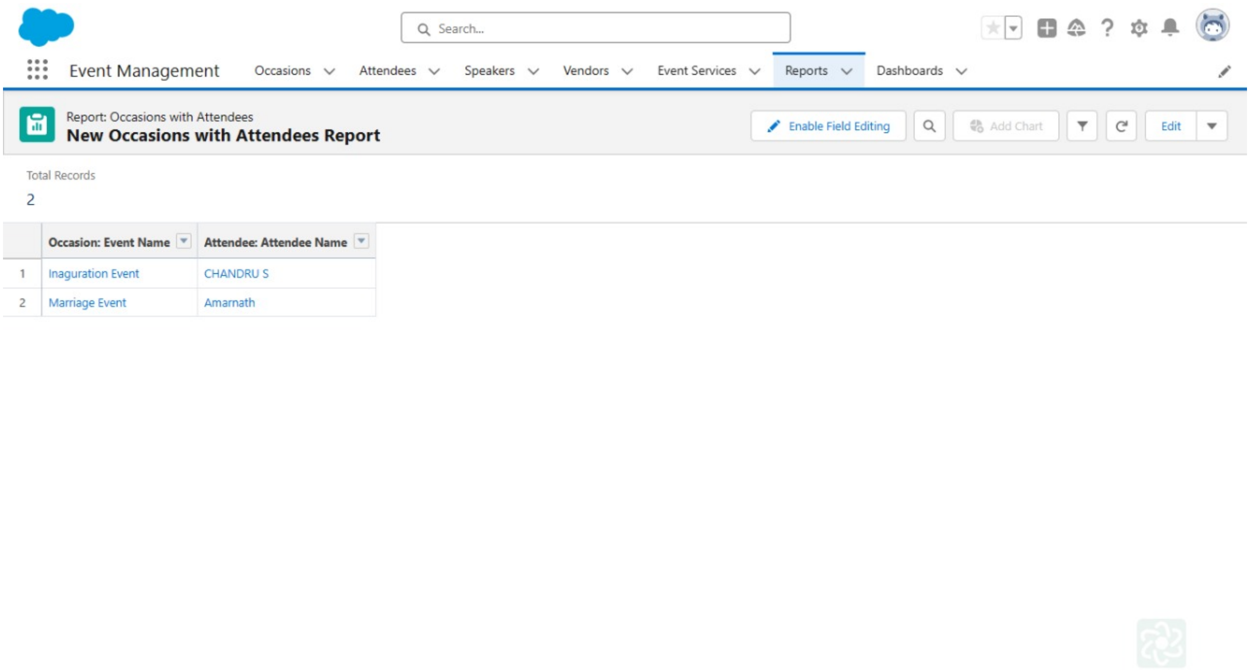
3)Select report type from category or from report type panel or from search panel (properties with customer name)? click on start report.

4)Customize your report, add fields like event name, attendee name. Click on save& run (Properties with Customer Name Report)

5)Create Report for following Condition




Search...
Event Management
Occasions
Attendees
Speakers
Vendors
Event Services
Reports
Dashboards
Occasions
Recently Viewed
Occasion "Marriage Event" was deleted. Undo
New
Import
Change Owner
Search this list...
0 items • Updated a few seconds ago
Event Name
You haven't viewed any Occasions recently.
Try switching list views.


Search...
Event Management
Occasions
Attendees
Speakers
Vendors
Event Services
Reports
Dashboards
Report: Occasions with Attendees
New Occasions with Attendees Report
Enable Field Editing
Add Chart
Edit
Total Records
2
Occasion: Event Name
Attendee: Attendee Name
1
Inaguration Event
CHANDRU S
2
Marriage Event
Amarnath

DASHBOARD

Dashboards provide more insights than reports as they combine the data from many reports and show a summarized result. Looking at many reports at a time gives the flexibility of combining the results from them quickly. Also, summaries in dashboards help us decide on action plans quicker. The dashboards can contain charts, graphs and Tabular data.

1)Create A Dashboard

1.Click the Dashboards tab.

2.Click New Dashboard.

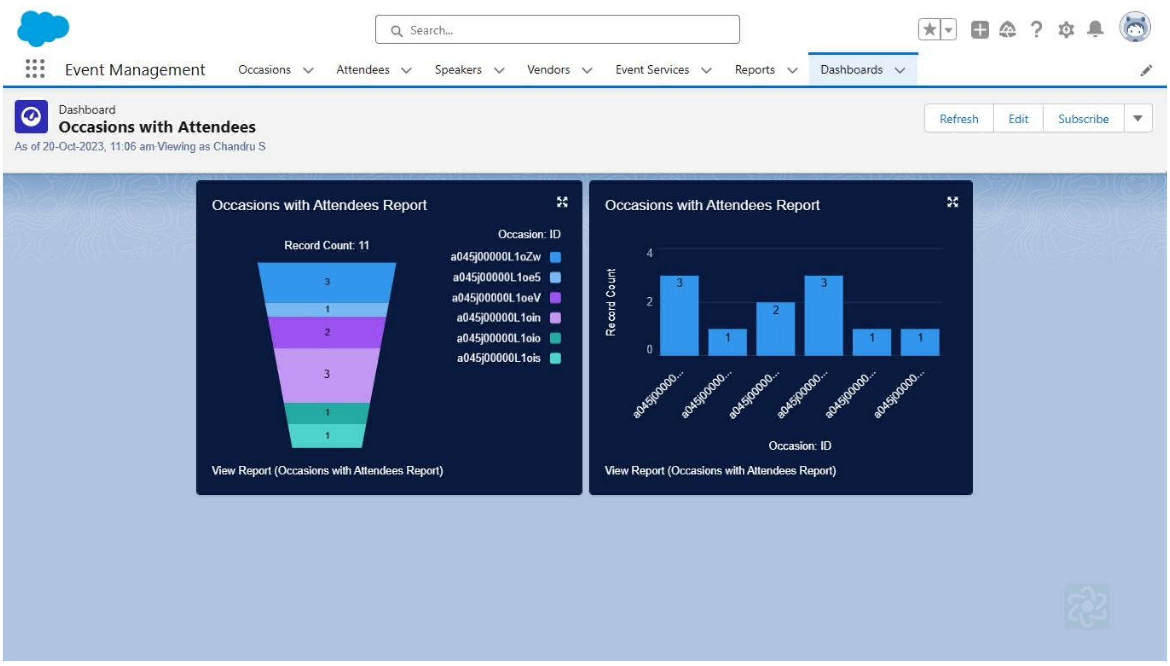
3.Name the Properties with Customer Name Report and click Create.

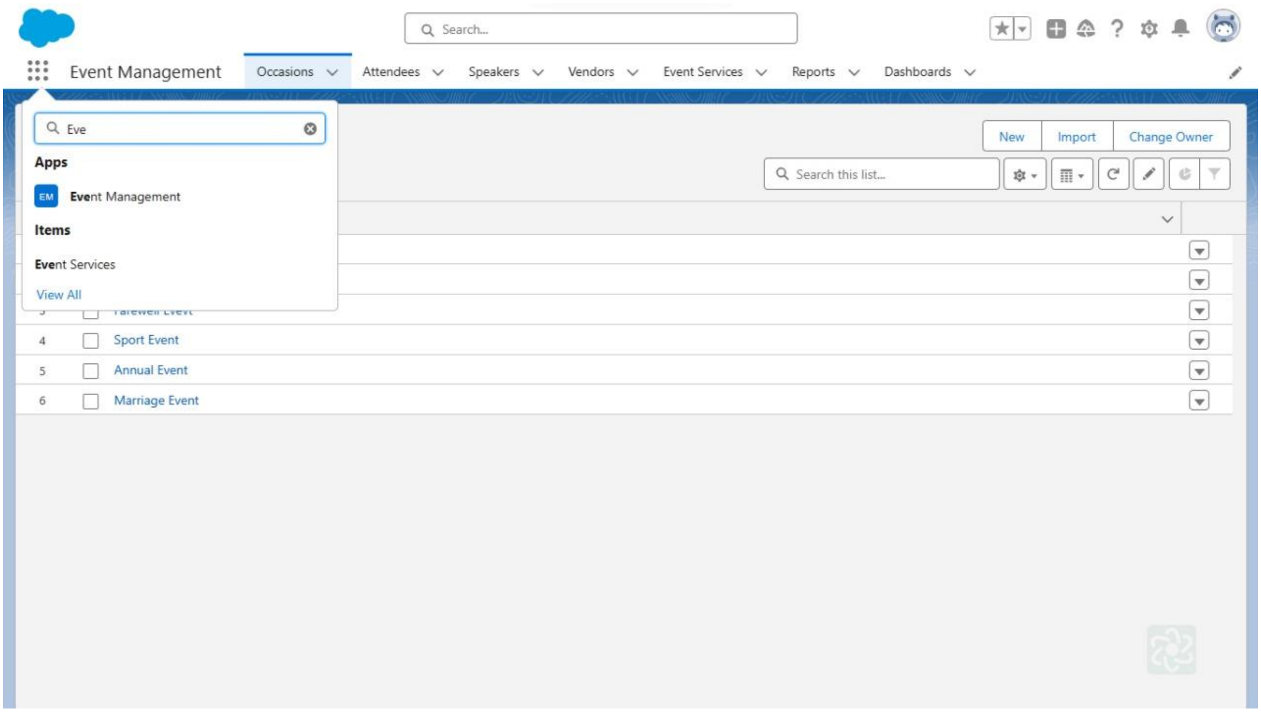
4.Click +Component.

5.Select the Properties with Customer Name Report and click Select

6.Select the Vertical Bar Chart component (select in which format you want display chart and click Add.

7.Click Save and then Done.





GitHub & Project Video Demo Link

1.GitHub Link- https://github.com/Logesh-developer/Nan-mudhalvan-Project.git

2.Video Demo - https://drive.google.com/drive/folders/1kc4jf_V_N1A9zxDFYVb2_nG_VL07QYlx?usp=sharing