



GOVERNMENT OF TAMILNADU

Naan Muthalvan - Project-Based Experiential Learning

BUILD EVENT MANAGEMENT SYSTEM USING SALESFORCE

Submitted by

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M.V.MUTHIAH GOVERNMENT ARTS COLLEGE FOR WOMEN

(Affiliated To Mother Teresa Women's University, Kodaikanal)

Reaccredited with "A" Grade by NAAC

DINDIGUL-624001.

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PG & RESEARCH DEPARTMENT OF MATHEMATICS

BONAFIDE CERTIFICATE

This is to certify that this is a bonafide record of the project entitled, **"BUILD AN EVENT MANAGEMENT SYSTEM USING SALESFORCE"** done by **Ms.S.LEEMA ROSE(20321TR015),Ms.A.KOUSALYA(20321TR014),Ms.R.MADHIYAZHINI(20321TR016)and Ms.R.MALATHI(20321TR018)**. This is submitted in partial fulfillment for the award of the degree of **Bachelor of Science in Mathematics in M.V.MUTHIAH GOVERNMENT ARTS COLLEGE FOR WOMEN,DINDIGUL** during the period of December 2022 to April 2023.

Project Mentor(s)

Head of the Department

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BUILD AN EVENT MANAGEMENT SYSTEM USING SALESFORCE

INTRODUCTION:

1.1 Overview

Event management is the process of planning and hosting a variety of public and private events for social or business purposes. They may be large-scale or small-scale events and can include business conventions, training seminars, industry conferences, trade

shows, ceremonies, parties, concerts, festivals and press conferences. Event managers must follow the clients' instructions and work within a specified budget and predetermined schedule. To set up the events, they must collaborate with various vendors.

The difference between event management and event planning is that while event planning concerns itself with coming up with workable event ideas and the activities that will take place during the events, event management leans more towards project management and deals with the organization and execution of the event plans. However, the roles do overlap often, and event managers may be involved with the creative planning aspects of the events as well.

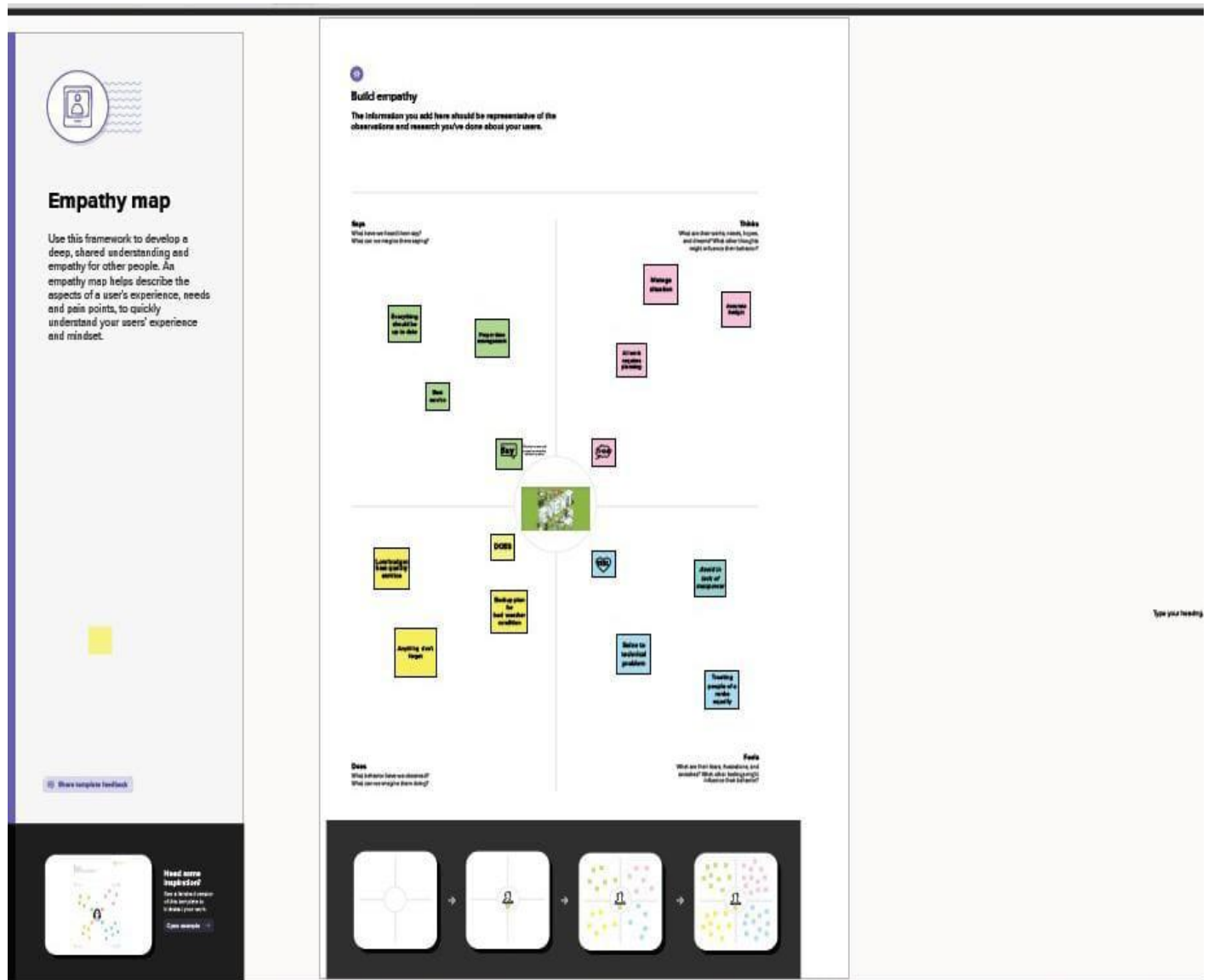
For established and new companies, event management can be an essential aspect of their marketing strategy. The events may also celebrate business milestones and raise money for various causes.

1.2 Purpose:

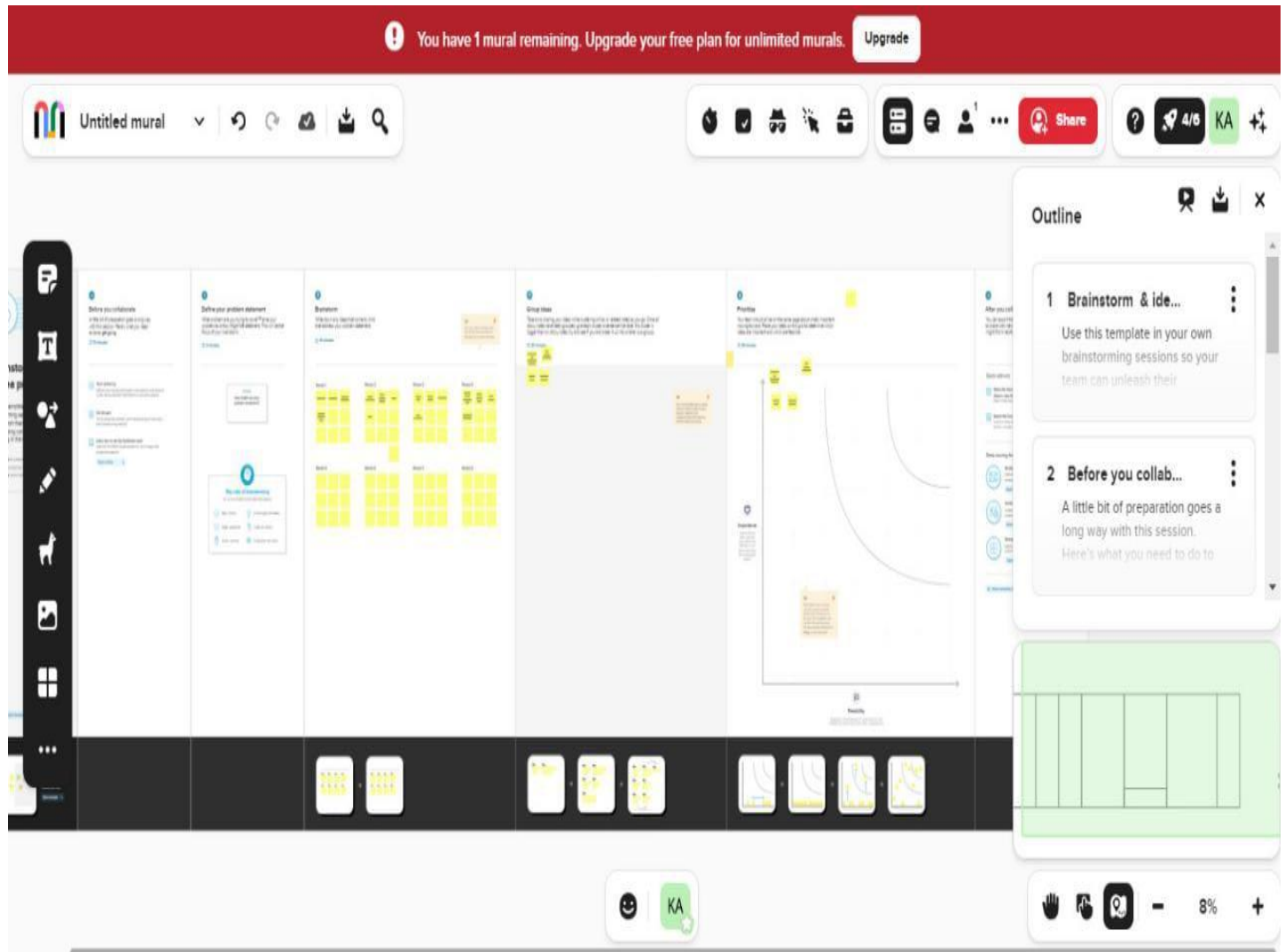
- Event management is the process of creating and maintaining an event.
- This process spans from the very beginning of planning all the way to post-event strategizing.
- At the start, an event manager makes planning decisions, such as the time, location, and theme of their event.
- Event planners' goals are to design and execute memorable events that fulfill their clients' and attendees' wishes.

2. Problem Definition & Design Thinking:

2.1 Empathy Map:



2.2 Ideation & brainstorming map:



RESULT:

3.1 Data Model:

Object name	Fields in the object

EVENT	Field label	Data type
	City	Text
	Start Date	Date/time
	End Date	Date/time
	Event	Master –detail relationship
	Event Name	Look up relationship
ATTENDEES	Field label	Data type
	ID	Auto number
	Phone	Phone
	Email	Email
STUDENTS	Field label	Data type
	Tickets	Picklist
Object name	Fields in the object	
SPEAKERS	Field label	Data type
	Bio	Text Area
	e-mail	Email
VENDORS	Field label	Data type
	e-mail	Email
	Phone	Phone
	e-mail	Email
	Service Provider	Text
	Event name	Look-up Relationship

3.2 Activity & Screenshot :

MILESTONE 2-OBJECTS:

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

Sales force 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.

Activity 1:

Creation of Objects for Event Management:

- On the Custom Object Definition page, create the object as follows:
- Label: Event
- Plural Label: Events
- Record Name: Event Name
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save.

The screenshot shows the Salesforce Setup interface for creating a custom object. The breadcrumb trail at the top reads 'SETUP > OBJECT MANAGER'. The main heading is 'Event'. On the left, a sidebar lists various configuration options: Details (selected), Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View, Button Layout. The 'Details' section is expanded, showing a form with the following fields: Description (empty), API Name (Event__c), Custom (checked), Singular Label (Event), Plural Label (Events), Enable Reports (checked), Track Activities (checked), Track Field History (checked), Deployment Status (Deployed), Help Settings (Standard salesforce.com Help Window), and Edit and Delete buttons.

Activity 2:

Creation of Attendees 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: 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 Object Manager interface for the 'Attendee' object. The breadcrumb navigation at the top reads 'SETUP > OBJECT MANAGER'. The page title is 'Attendee'. On the left, a sidebar menu lists various configuration options: Details (selected), Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View, Button Layout. The main content area is titled 'Details' and contains two columns of settings. The left column includes: Description (empty), API Name (Attendee__c), Custom (checked), Singular Label (Attendee), Plural Label (Attendees), and Record Name (Attendee Name). The right column includes: Enable Reports (checked), Track Activities (checked), Track Field History (checked), Deployment Status (Deployed), Help Settings, and a link to the Standard Salesforce.com Help Window. At the top right of the main content area, there are 'Edit' and 'Delete' buttons.

Activity 3:

Creation of Speaker 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: 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 page for the 'Speaker' object. The breadcrumb trail is 'SETUP > OBJECT MANAGER'. The page title is 'Speaker'. On the left, there is a sidebar with a 'Details' tab selected. The sidebar menu includes: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List Views, Button Layout. The main content area is titled 'Details' and contains the following fields:

Field	Value
Description	
API Name	Speake__c
Custom	<input checked="" type="checkbox"/>
Singular Label	Speaker
Plural Label	Speakers
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	<input checked="" type="checkbox"/>
Track Field History	<input checked="" type="checkbox"/>
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

At the top right of the main content area, there are 'Edit' and 'Delete' buttons.

Activity 4:

Creation of Vendors 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: Vendor

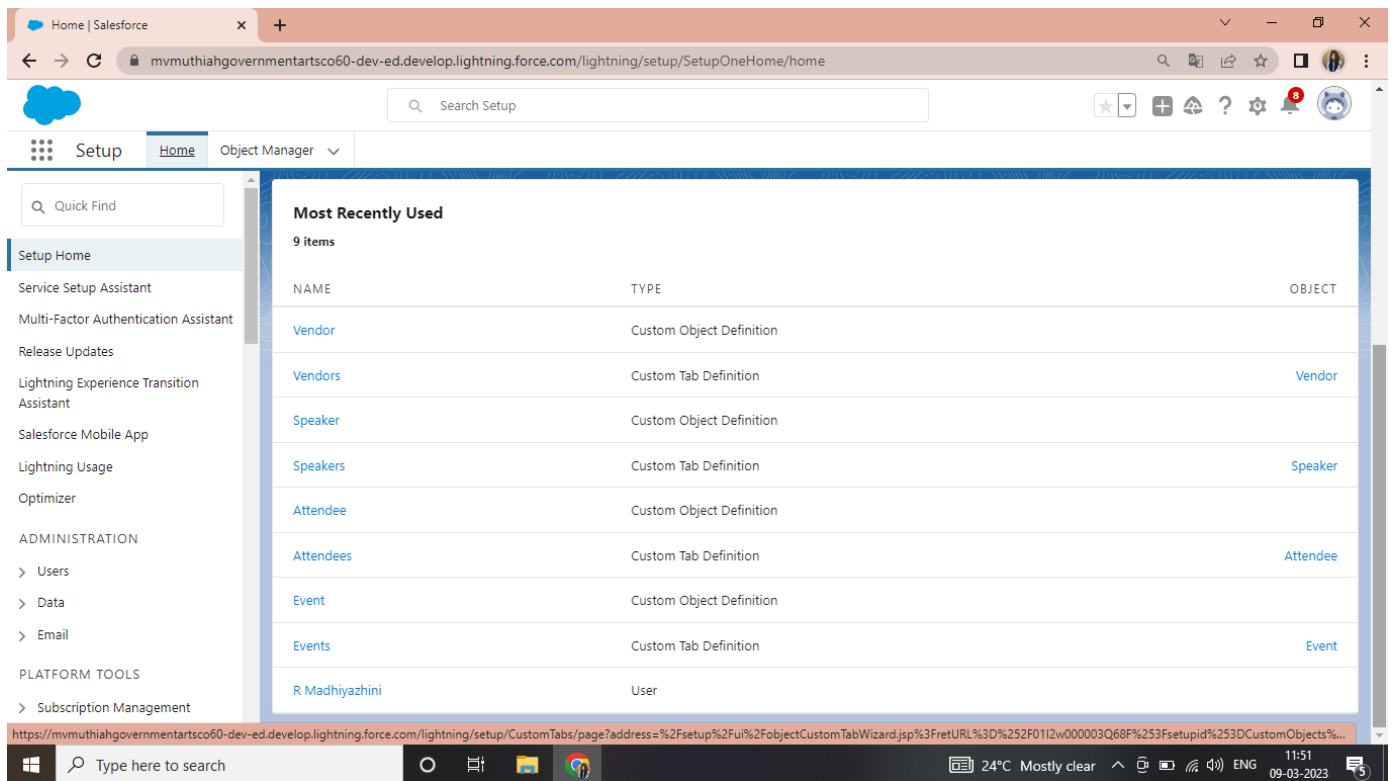
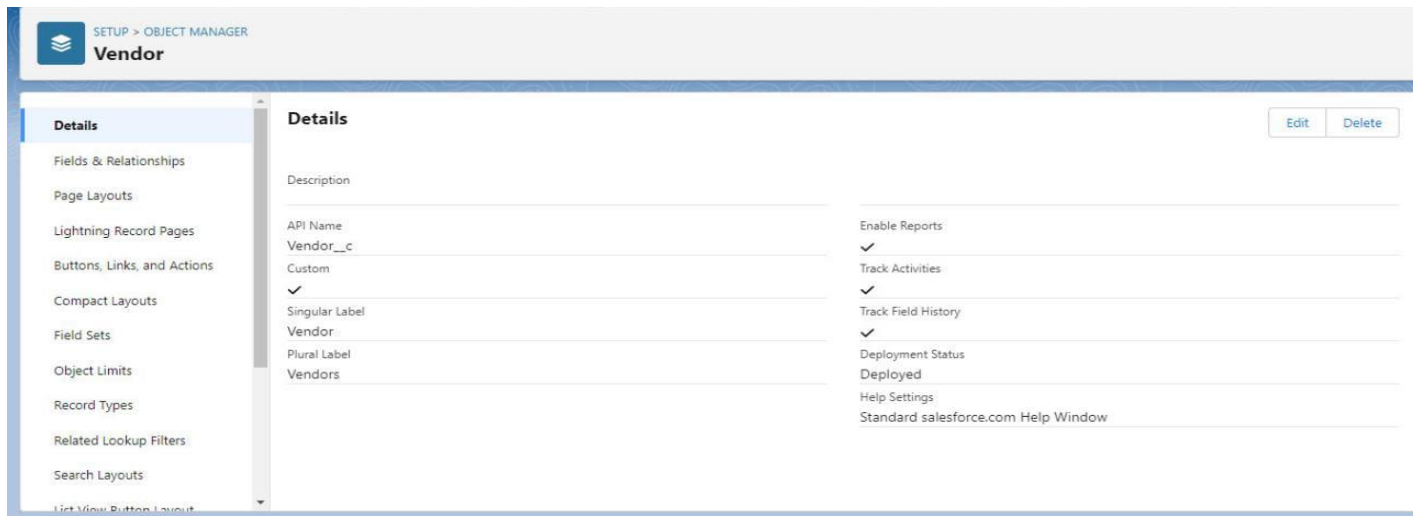
c. Plural Label: Vendors

d. Record Name: Vendor Name

e. Check the Allow Reports checkbox

f. Check the Allow Search checkbox

g. Click Save



Milestone 3 – Tab:

Tab:

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.

NOTE: we wont be dealing with web tabs and visualforce tabs later.

Activity 1:

Creation of Event tab:

Now create a custom 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.

Activity 2:

Creation of Attendee tab:

Now create a custom 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.

Activity 3:

Creation of Speakers tab:

Now create a custom tab.

1. Click on Home tab, enter Tabs in Quick Find and select Tabs.
2. Under custom object tabs, click New.

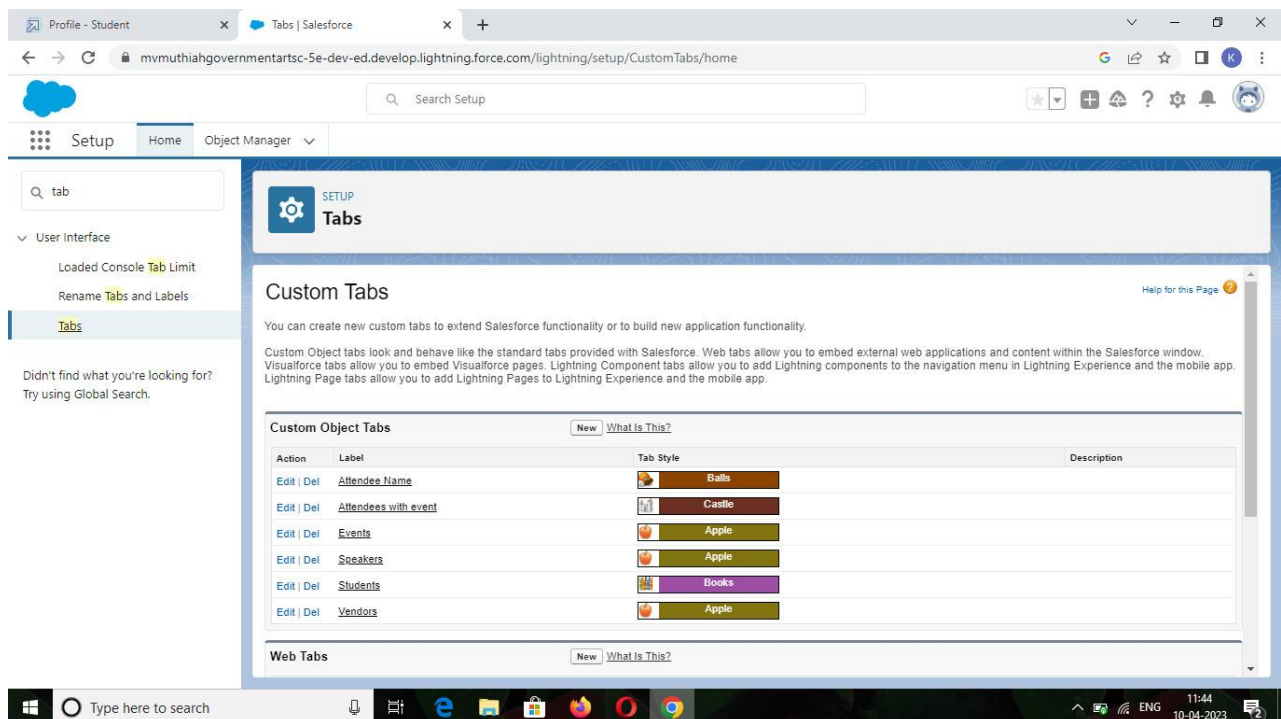
3. For Object, select Speaker.
4. For Tab Style, select any icon.
5. Leave all defaults as is. Click Next, Next, and Save.

Activity 4:

Creation of Vendor tab:

Now create a custom 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



Milestone 3 – Application:

Activity

Create the Event Management Construction app

- From Setup, enter App Manager in the Quick Find and select App Manager.

- Click New Lightning App. Enter Event Management as the App Name, then click Next
- Under App Options, leave the default selections and click Next.
- Under Utility Items, leave as is and click Next.
- From Available Items, select Events, Attendees, speakers, vendors, Reports, and Dashboards and move them to Selected Items. Click Next.
- From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.

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.

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

*App Name ⓘ

*Developer Name ⓘ

Description ⓘ

App Branding

Image ⓘ

Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

EM

Event Management

Milestone 4 – 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.

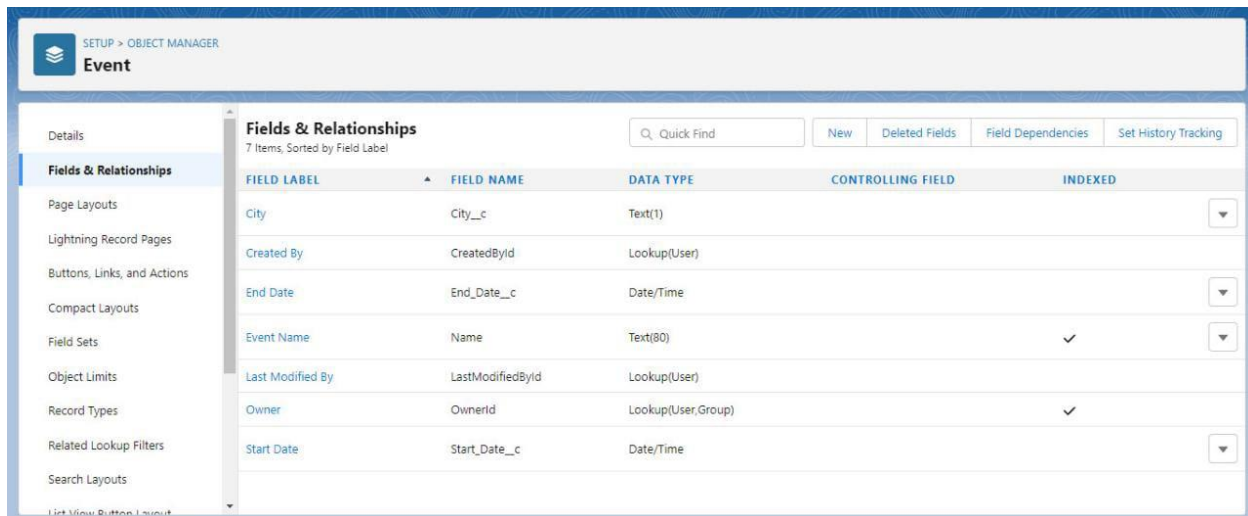
There are 2 types of fields in salesforce:

- **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.

Activity 1:

Creation of fields for the Event objects:

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



Activity 2:

Creation of fields for the Attendees objects:

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

SETUP > OBJECT MANAGER

Attendee

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
Attendee Name	Name	Text(80)		✓
Created By	CreatedByid	Lookup(User)		
Email	Email__c	Email		
id	id__c	Auto Number		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		

List View, Button Layout

Activity 3:

Let's create a 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.

Activity 4:

Creation of fields for the Speakers objects:

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

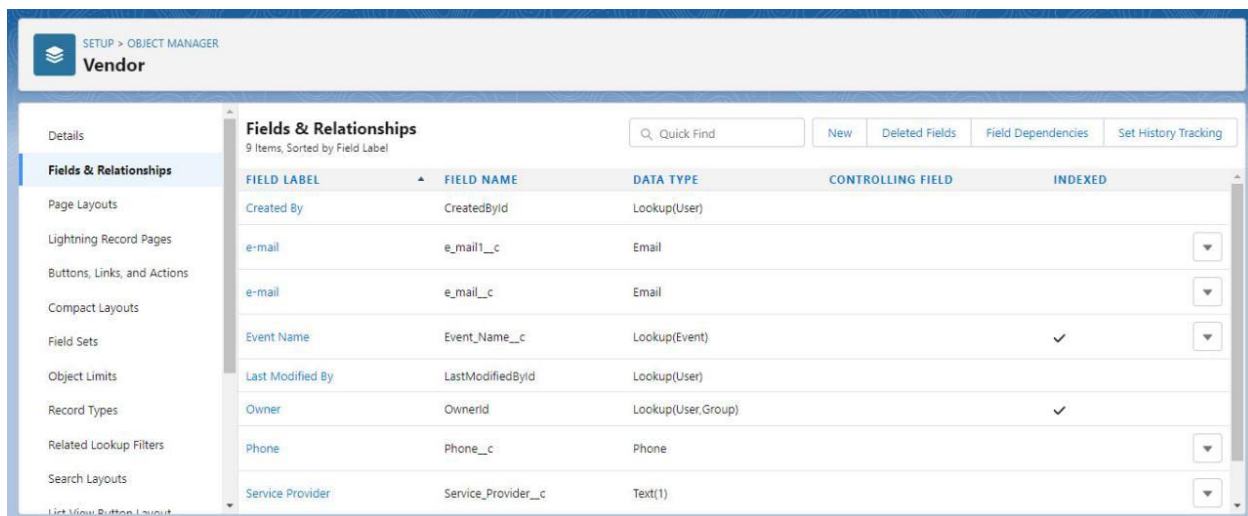
1. Select Look-up Relationship as the Data Type and click Next.
2. For Related to, enter Event.
3. Click Next.
4. For Field Label, Event Name.

5. Click Next, Next, Next and Save.

Activity 5:

Creation of fields for the Vendors objects:

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.



FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
e-mail	e_mail__c	Email		
e-mail	e_mail__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(1)		

Milestone 5 – 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.

Activity 1:

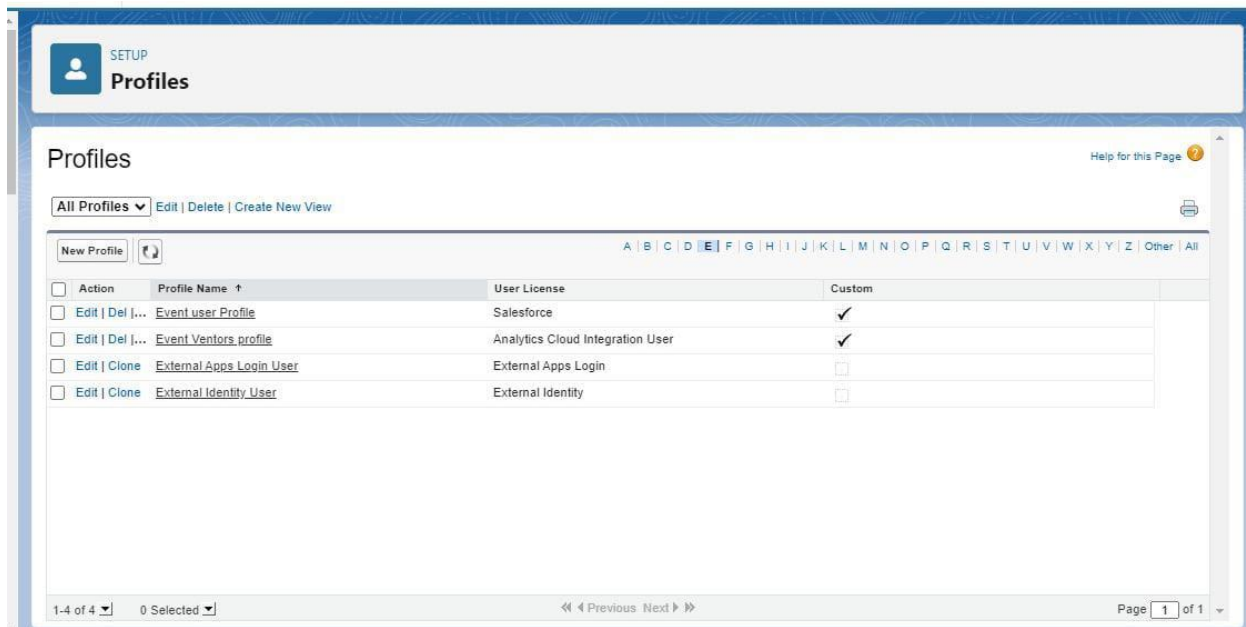
Creation on profile:

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.

Activity 2:

Create a profile with the profile name as “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.



Milestone 6 – 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.

Activity 1:

Creating a 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

Activity 2:

Create a user with a username as “Rahul Sharma”, and assign him the sales executive profile.

From setup type “users” in quick find and select users, then click **New User**

- First Name: Rahul
- Last Name: Sharma
- Alias: Rahus
- Email: provide your personal email id for future reference
- Username: rahulsharma@thesmartbridge.com
- Nickname: Rahu
- Role: leave it as default
- User License: Salesforce
- Profile: Event vendors profile

SETUP Users

All 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](#)

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	A. KOUSALYA	KA	freefire9952628457@gmail.com		✓	System Administrator
Edit	Chatter Expert	Chatter	chatty.00d2w00000riu5meax.jr1xavhijche@chatter.salesforce.com		✓	Chatter Free User
Edit	Gupta, Sanjay	sanj	sanjyvgupta@thesmartbridge.com		✓	Standard User
Edit	Sharma, Rahul	Rahus	rahul7543@gmail.com		✓	Standard Platform User
Edit	User Integration	integ	integration@00d2w00000riu5meax.com		✓	Analytics Cloud Integration User
Edit	User Security	sec	insightssecurity@00d2w00000riu5meax.com		✓	Analytics Cloud Security User

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

Milestone 7 – Permission sets:

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.

Activity 1:

Creating a Permission Set:

- From setup search “permission sets” in quick find and select **permission set** then click on **New**
- Enter label as: Event Permits and Save.
- After saving the permission click on the Manage assignment
- Now click on the Add Assignment
- Now select the users and click on save

Activity 2:

- From setup search “permission sets” in quick find and select **permission set** then click on **New**
- Enter label as: Vendor Permits and Save.
- After saving the permission click on the Manage assignment
- Now click on the Add Assignment
- Now select the users and click on save

The screenshot shows the 'Permission Sets' page in Salesforce, specifically the 'Edit View' section. The page has a blue header with a user icon and the text 'SETUP Permission Sets'. Below the header, the page title is 'Permission Sets Edit View'. There are four buttons: 'Save', 'Save As', 'Delete', and 'Cancel'. The page is divided into three steps:

- Step 1. Enter View Name**: This section includes a 'View Name' field with the text 'All Permission Sets', a 'Created By' field with the text 'KOUSALYAA, 02/03/2023, 1:24 pm', and a 'Last Modified By' field with the text 'KOUSALYAA, 02/03/2023, 1:24 pm'. A red exclamation mark icon indicates required information.
- Step 2. Specify Filter Criteria**: This section includes a 'Setting' field, an 'Operator' dropdown menu with the text 'equals', and a 'Value' field. There is a 'Clear All Rows' link. Below this, there are two examples: 'Modify All Data equals False' and 'Contact: Modify All equals True'.
- Step 3. Select Columns to Display**: This section includes a text box with the instruction: 'Specify the columns to show in the list view. To set the columns, you can add profile details, user permissions, and object-level permissions.'

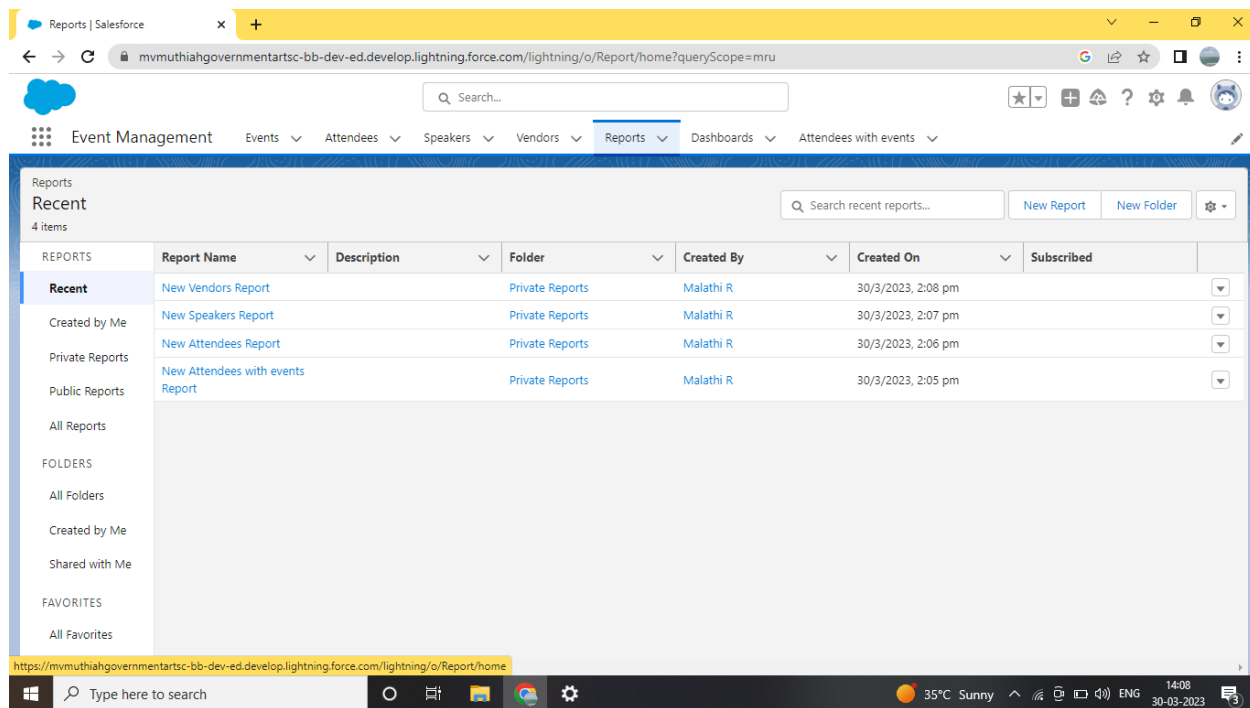
Milestone 8 - Reports

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.

Activity

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.



The screenshot shows the Salesforce Reports interface. The top navigation bar includes tabs for Event Management, Events, Attendees, Speakers, Vendors, Reports (selected), Dashboards, and Attendees with events. The main content area displays a list of recent reports under the 'Recent' section. The table has columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. The reports listed are:

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Vendors Report		Private Reports	Malathi R	30/3/2023, 2:08 pm	
Created by Me	New Speakers Report		Private Reports	Malathi R	30/3/2023, 2:07 pm	
Private Reports	New Attendees Report		Private Reports	Malathi R	30/3/2023, 2:06 pm	
Public Reports	New Attendees with events Report		Private Reports	Malathi R	30/3/2023, 2:05 pm	

The interface also includes a search bar for recent reports, buttons for 'New Report' and 'New Folder', and a sidebar with navigation options like 'All Reports', 'All Folders', 'Created by Me', 'Shared with Me', 'FAVORITES', and 'All Favorites'.

4.Trailhead Profile Public URL

Team Lead -S .Leema Rose-<https://trailblazer.me/id/lrose170>

Team Member 1 –A. Kousalya

Team Member 2-R.Madhiyazhini

Team Member 3 –R.Malathi

5.ADVANTAGES

- An Event Management System **minimizes the steps needed to manage your events, creating a much more efficient administrative process.** This way, event planners can focus more on the details, without getting lost in administrative tasks.
- Opportunities for creativity. ...
- Ability to work on different events. ...
- Chance to work with diverse clients. ...
- Collaborative work environment. ...
- High projections for job growth.

DISADVANTAGE

- Unconventional work hours. ...
- Time away from family and friends. ...
- Experience requirements. ...
- Job instability. ...
- Multiple events at the same time. ...
- High level of responsibility.

6.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.

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 objectives and goals on top priority while developing any plan of work

8.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.

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.**

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