

# **BUILD AN EVENT MANAGEMENT SYSTEM USING SALESFORCE**

## **BUILD EVENT MANAGEMENT SYSTEM USING SALESFORCE**

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

**Reaccredited with "A" Grade by NAAC**

**DINDIGUL-624001.**

# Introduction

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## **Introduction**

Event management is the process of creating and maintaining an event. This process spans from the very beginning of planning all the way to post-event strategizing.

At the start, an event manager makes planning decisions, such as the time, location, and theme of their event. During an event, event managers oversee the event live and make sure things run smoothly. After an event, event managers are tasked with reviewing event data, submitting KPI and ROI findings, and staying on the ball for any post-event offerings.

All different branches of planning go into event management, including various types of sourcing, designing, regulation checks, and on-site management. In event management, you could be in the process of creating a conference, a product launch, an internal sales kick-off, or even a wedding. Really, any event that requires considerable planning and execution is event management.

# PROJECT REPORT TEMPPLATE

- 1.1 OVERVIEW
- "EVENT MANAGEMENT"
  - Is the process of planning and hosting a variety of public and private events for social or business purpose. Event managements must follow the client's instructions and work within a special budget and predetermined schedule


## 1.2 PURPOSE

Event management is the process of creating and maintaining an event

1. Provided career opportunities
2. Develop leadership quality
3. Develop team spirit
4. Encourage creativity
5. Financial management

# PROBLEM DEF AND DESIGN THINKING


## 2.1 Empathy Map



### Empathy map

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

[Show complete feedback](#)



**Need some inspiration?**  
Check out the collection of the Empathy Map. It shows your work. Copy template

#### Build empathy

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

**Says**  
What have you heard them say?  
What can we imagine them saying?

Something should be up to date

Programmer

Don't waste

Buy

Don't

Build up your best number condition

Anything that helps

**Thinks**  
What are their worries, beliefs, hopes, and dreams? What other thoughts might influence their behavior?

Storage situation

Strain on my privacy

Buy

Don't

Don't be at my disposal

Trying to solve the problem

**Does**  
What do they do that we observe?  
What can we imagine them doing?

Don't

Build up your best number condition

Buy

Don't

Build up your best number condition

**Feels**  
What are their fears, frustrations, and desires? What are they feeling right now? What does this tell you?





Don't

Build up your best number condition

Buy

Don't

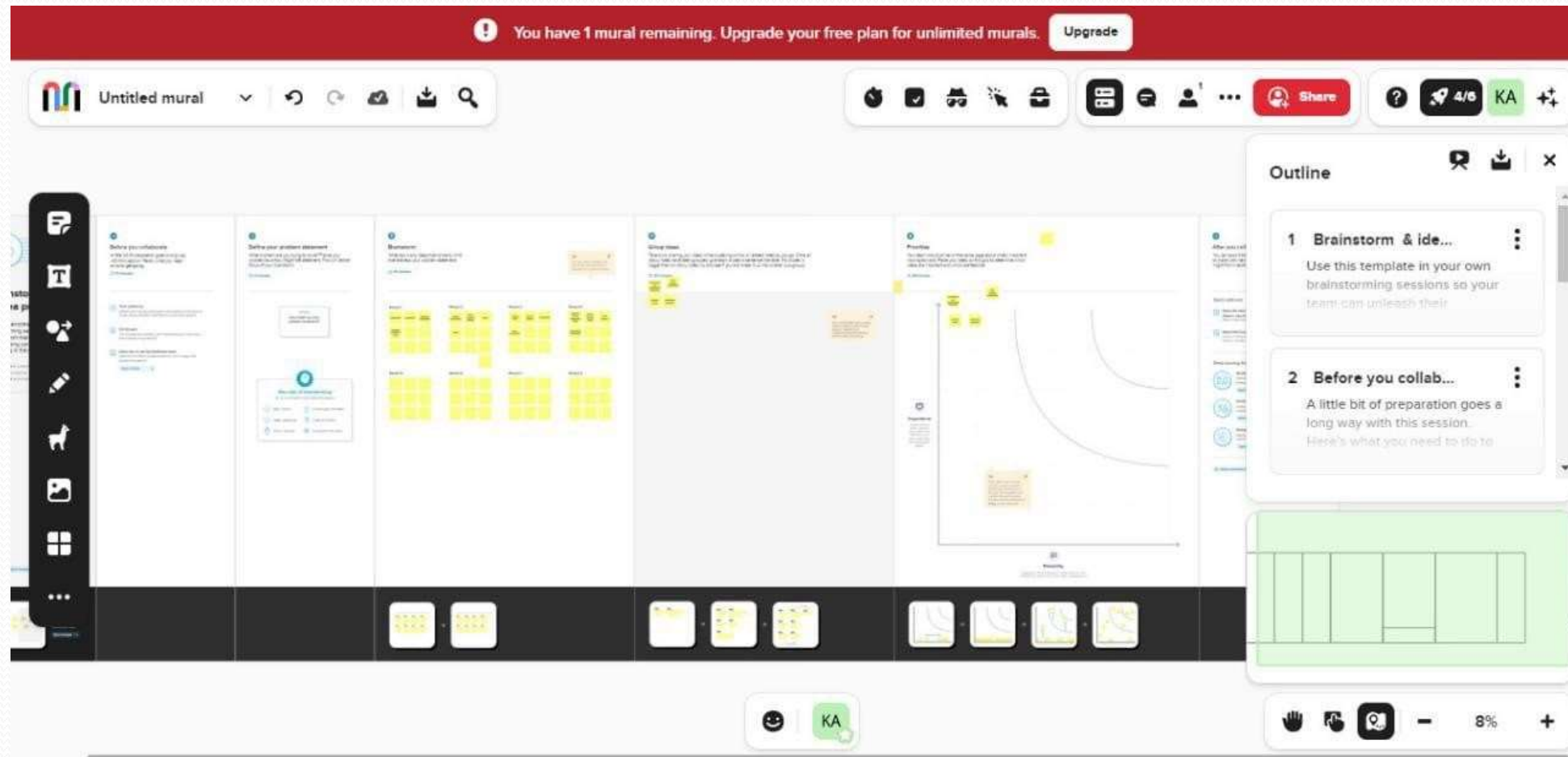
Build up your best number condition



Type your heading

# PROBLEM DEF AND DESIGN THINKING

## 2.2 Ideation and Brainstorming



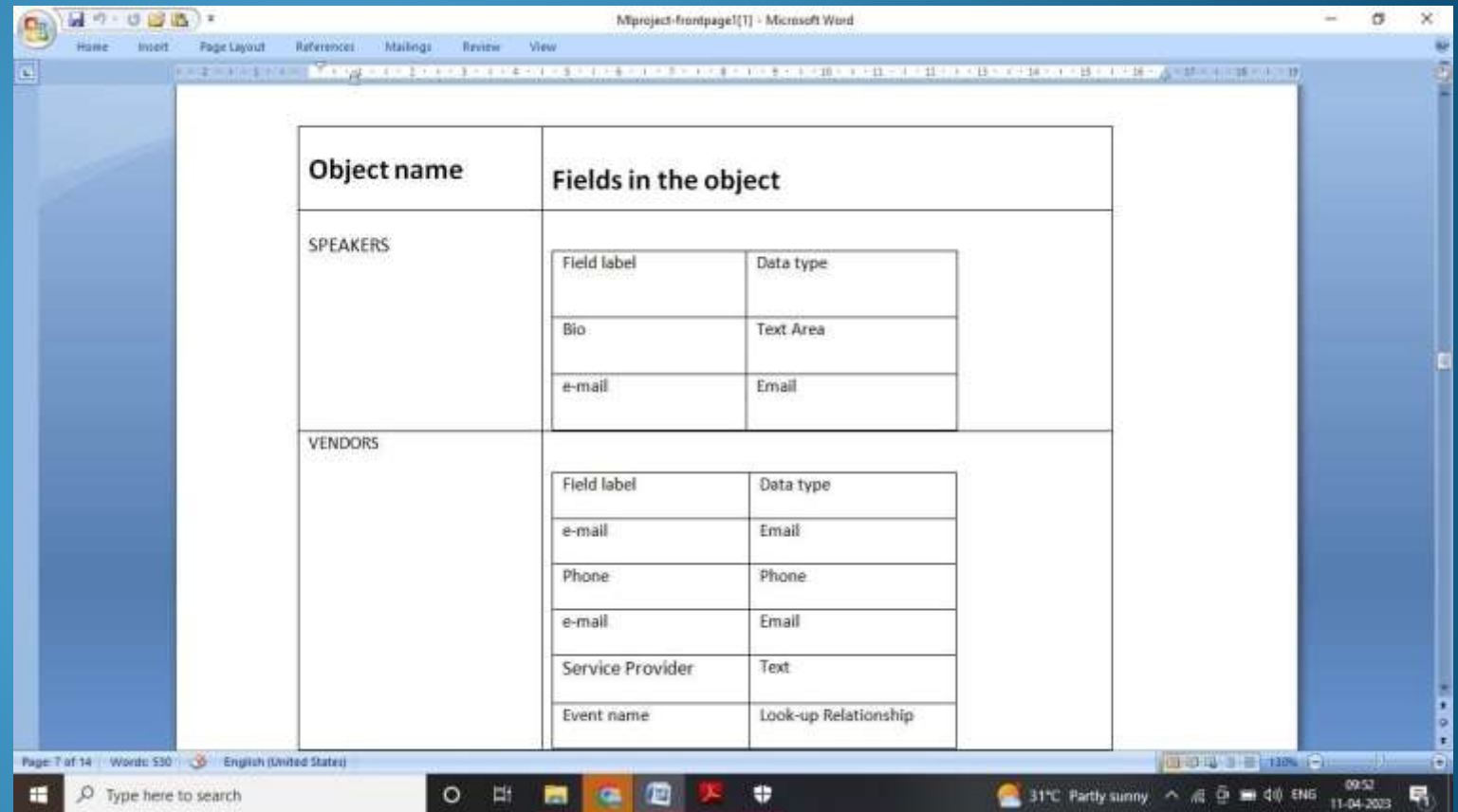


# OBJECT

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	<u>Picklist</u>	

SPEAKERS&VENDORS

OBJECT



The screenshot shows a Microsoft Word document with a table containing two main sections: SPEAKERS and VENDORS. Each section lists fields and their corresponding data types.

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 And SCREENSHOT

The screenshot displays the Salesforce Setup interface, specifically the 'Object Manager' section for the 'Event' object. The left sidebar contains a navigation menu with the following items: 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 includes 'Edit' and 'Delete' buttons in the top right corner. The 'Description' field is empty. The 'API Name' is 'Event\_\_c', and the 'Custom' checkbox is checked. The 'Singular Label' is 'Event' and the 'Plural Label' is 'Events'. On the right side, the 'Enable Reports' checkbox is checked, 'Track Activities' and 'Track Field History' are also checked, and the 'Deployment Status' is 'Deployed'. The 'Help Settings' are set to 'Standard salesforce.com Help Window'.

Field	Value
Description	
API Name	Event__c
Custom	<input checked="" type="checkbox"/>
Singular Label	Event
Plural Label	Events
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

# CRATION OF EVENT

Label:Event

Plural label:Events


Record name:Event name

Check the Allow Reports checkbox

Check the Allow Search checkbox

Click save

# CRATION OF ATTENDEES OBJECT

 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

Details

Edit

Delete

Description

API Name

Attendee\_\_c

Custom

✓

Singular Label

Attendee

Plural Label

Attendee Name

Enable Reports

✓

Track Activities

✓

Track Field History

✓

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

## CREATION OF ATTENDEES

Label:Attendee


Plural label:Attendees

Record name:Attendee name

Check the Allow Reports checkbox

Click save

# CREATION OF SPEAKER

 [SETUP > OBJECT 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

**Details**

EditDelete

Description

API Name

Speake\_\_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

SPEAKER

Label:Speaker

Plural label:Speakers


Record name:Speaker name

Check the Allow Reports checkbox

Click save



# CREATION OF VENDOR

 [SETUP > OBJECT MANAGER](#)  
**Vendor**

**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](#)

**Details**

EditDelete

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

## VENDORS

Label: Vendor

Plural Label: Vendors

Record Name: Vendor

Check the Allow Reports checkbox

Check the Allow Search checkbox

Click save

# MILSTONE-3


## TAB

Tabs | Salesforce

startsc-5e-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home

Search Setup

ger ▾

 **SETUP**  
**Tabs**







### Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce interface. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

#### Custom Object Tabs

[New](#) [What Is This?](#)

Action	Label	Tab Style	Description
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Attendee Name</a>	 <b>Balls</b>	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Attendees with event</a>	 <b>Castle</b>	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Events</a>	 <b>Apple</b>	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Speakers</a>	 <b>Apple</b>	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Students</a>	 <b>Books</b>	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Vendors</a>	 <b>Apple</b>	

#### Web Tabs

[New](#) [What Is This?](#)

# TAB

TAB Events is a wedding planning company located in North Delhi. Wedding planning plays an important role in turning a function successful and memorable and if you are looking for one such thing then TAB Events can help you in availing all the fairy-like facilities. This company has a group of hardworking and talented artists who aim in achieving its goal with utmost perfection and satisfaction. Get a chance to make a bunch of alluring memories with your loved ones while you contemplate the beautiful atmosphere around.

## **Services Offered**

What's better than executing Indian wedding tradition with excitement and enjoying every service with ease and calmness? The team at, TAB Events has got you covered with accessible services and leaves no stone unturned in lighting up the aura with happiness. If you are planning a destination wedding then they are ready to travel around the cities and offer a hassle-free experience to your friends and family members.

Have a constraint budget? Remove all the problems and confusions as TAB Events provides a plethora

# MILSTONE-3 APPLICATION

**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 ⓘ

Primary Color Hex Value ⓘ

**Org Theme Options**

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

**App Launcher Preview**

Event Management

## 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.

### Milestone 3 – Application:

What is an 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.

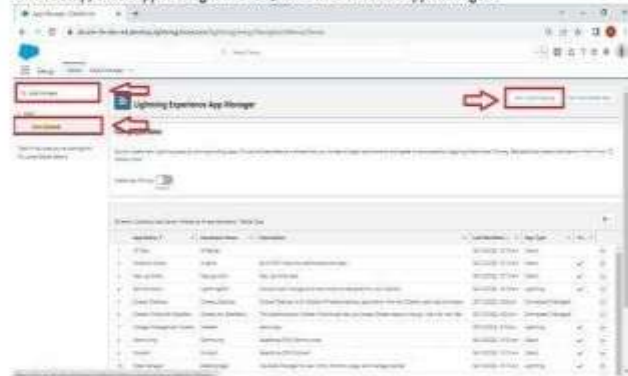
There are 2 types of Salesforce applications:

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

### Activity

Create the Event Management Construction app

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



- 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.



# MILSTONE-4

## FIELDS

 SETUP > OBJECT MANAGER

Event

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

**Fields & Relationships**

7 Items, Sorted by Field Label

New


Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Text(1)		
Created By	CreatedById	Lookup(User)		
End Date	End_Date__c	Date/Time		
Event Name	Name	Text(80)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		
Start Date	Start_Date__c	Date/Time		

# ATTENDEES

 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

Fields & Relationships

7 Items, Sorted by Field Label

Quick Find

New


Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Attendee Name	Name	Text(80)		✓	▼
Created By	CreatedBy	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			▼

# SPEAKE R

 **Speaker**

SETUP > OBJECT MANAGER

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

**Fields & Relationships**

4 Items, Sorted by Field Label

[New](#)

[Deleted Fields](#)

[Field Dependencies](#)

[Set History Tracking](#)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Speaker Name	Name	Text(80)		✓

# VENDOR S

SETUP > OBJECT MANAGER

Vendor

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

Fields & Relationships

9 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
e-mail	e_mail1__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)		

# PROFILE

MILSTONE-5

# CREATION ON PROFILE


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 pe Attendees, speakers and vendors.




# MILSTONE-5

## PROFILE

 **SETUP**  
**Profiles**

### Profiles

[All Profiles](#) [Edit](#) [Delete](#) [Create New View](#)

[New Profile](#) 


[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [Other](#) [All](#)

<input type="checkbox"/>	Action	Profile Name : ↑	User License	Custom
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>   ...	<a href="#">Event user Profile</a>	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>   ...	<a href="#">Event Ventors profile</a>	Analytics Cloud Integration User	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">External Apps Login User</a>	External Apps Login	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">External Identity User</a>	External Identity	<input type="checkbox"/>

1-4 of 4  [Previous](#) [Next](#) [Page 1 of 1](#)

# MILSTONE-6

## USER

 **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](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other **All**

New User Reset Password(s) Add Multiple Users

<input type="checkbox"/>	Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	<a href="#">Edit</a>	A. KOUSALYA	KA	<a href="#">freefire9952628457@gmail.com</a>		✓	<a href="#">System Administrator</a>
<input type="checkbox"/>	<a href="#">Edit</a>	Chatter Expert	Chatter	<a href="#">chatty.00d2w00000riu5meax.jr1xavh1che@chatter.salesforce.com</a>		✓	<a href="#">Chatter Free User</a>
<input type="checkbox"/>	<a href="#">Edit</a>	Gupta, Sanjay	sanj	<a href="#">sanjygupta@thesmartbridge.com</a>		✓	<a href="#">Standard User</a>
<input type="checkbox"/>	<a href="#">Edit</a>	Sharma, Rahul	Rahus	<a href="#">rahul7543@gmail.com.com</a>		✓	<a href="#">Standard Platform User</a>
<input type="checkbox"/>	<a href="#">Edit</a>	User Integration	integ	<a href="#">integration@00d2w00000riu5meax.com</a>		✓	<a href="#">Analytics Cloud Integration User</a>
<input type="checkbox"/>	<a href="#">Edit</a>	User Security	sec	<a href="#">insightssecurity@00d2w00000riu5meax.com</a>		✓	<a href="#">Analytics Cloud Security User</a>

New User Reset Password(s) Add Multiple Users

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other **All**

12:26

# 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

- First Name: Rahul
- Last Name: Sharma
- Alias: Rahu
- 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

# MILSTONE-7

## PERMISSION SET

 **SETUP**  
**Permission Sets**

Permission Sets

Edit View

SaveSave AsDeleteCancel

Step 1. Enter View Name

View Name

All Permission Sets

Created By

KOUSALYAA, 02/03/2023, 1:24 pm

Last Modified By

KOUSALYAA, 02/03/2023, 1:24 pm

= Required Information

Step 2. Specify Filter Criteria

Setting

Operator

Value

equals

Clear All Rows

Add Row

Examples







Modify All Data equals False

Contact: Modify All equals True

Step 3. Select Columns to Display

Specify the columns to show in the list view. To set the columns, you can add profile details, user permissions, and object-level permissions.

# MILSTONE-8 REPORTS

<div><input type="text" value="Search recent reports..."/> <input type="button" value="New Report"/> <input type="button" value="New Folder"/> </div>						
Report Name	Description	Folder	Created By	Created On	Subscribed	
New Attendees with event Report		Private Reports	KOUSALYA A	6/4/2023, 3:27 pm		
New Events Report		Private Reports	KOUSALYA A	6/4/2023, 2:49 pm		
New Vendors Report		Private Reports	KOUSALYA A	6/4/2023, 2:55 pm		
New Attendee Name Report		Private Reports	KOUSALYA A	6/4/2023, 2:52 pm		
New Speakers Report		Private Reports	KOUSALYA A	6/4/2023, 2:50 pm		

# REPORT T

1

From the report tab,click  
new report

2

Select thhe report type

3

Customize ur accordingly  
and includes all fles the  
save or run it



# conclusion

## Conclusion



My predictions are that in 5 years time the events industry will increase due to key factors such as:

- Increase in job opportunities in the UK which increases disposable income
- Increase of tourism
- Improvement of technology to publicise events
- Increase of public transport to events

these factors benefit the events industry due to profit going in to the economy therefor more individuals will have disposable income justifying an increase in individuals participating in events, Duncann (2000) suggests that disposable income is money left over from households taxes and is there to buy on enjoyment and leisure. The more individuals partaking in events the more profit an event makes therefor increasing overall profit for each classification of events although if these factors decrease the events industry will also be effected with a decrease in worth Harris (2012) states that certain factors affect profit to any organisation.



THANK YOU