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Military Road, Ammapet, Salem - 636 003.

## “BUILD AN EVENT MANAGEMENT SYSTEM”

### NAAN MUDHALVAN PROJECT REPORT

*Submitted by*

**SOWMIYAA P (620120104096)**  
**SOWNDHARYA S (620120104097)**  
**PRIYADHARSHINI R (620120104312)**  
**SRI SWETHA DEVI M (620120104314)**  
**VIDHYA SRI R (620120104318)**

*in partial fulfilment for the award of the degree of*

**Bachelor of Engineering**

*in*

**Computer Science and Engineering**

**AVS Engineering College,  
SALEM – 636003.**

**ANNA UNIVERSITY::CHENNAI 600025**



## **BONAFIDE CERTIFICATE**

Certified that this the project report titled “**BUILD AN EVENT MANAGEMENT SYSTEM**” is the bonafide work of “**SOWNDHARYA S (620120104067), SOWMIYAA P (620120104069), PRIYADHARSHINI (620120104312), SRI SWETHA DEVI M (620120104314), VIDHYA SRI R (620120104318)**” who carried out the project work under my supervision.

**SIGNATURE****Prof. S. DHAMODARAN M.E.,****ASSISTANT PROFESSOR****FACULTY MENTOR**

Department of CSE,  
AVS Engineering College,  
Salem-636003.

**SIGNATURE****Dr.R.VISHWANATHAN M.E., Ph.D.,****ASSISTANT PROFESSOR****SPOC FACULTY**

Department of CSE,  
AVS Engineering College,  
Salem-636003.

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**SPOC**

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**HEAD OF THE DEPARTMENT**

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## **LIST OF ABBREVIATIONS**

EMS	Event Management System
CRM	Customer Relationship Management
CMS	Content Management System
API	Application Programming Interface
UX	User Experience
UI	User Interface
DBMS	Database Management System
ERP	Enterprise Resource Planning
CMS	Event Content Management System
SaaS	Software as a Service
PMS	Project Management System
ROI	Return on Investment
KPI	Key Performance Indicator
API	Application Programming Interface
POS	Point of Sale

# **CHAPTER-1**

## **PROJECT SPECIFICATION**

### **1.1 Project Goal**

The goal for building an event management system can vary depending on the specific needs and objectives of the project, but here are some common goals and objectives for such a system. The primary goal of an event management system is to streamline the process of planning and organizing events. This includes managing tasks such as scheduling, venue selection, budgeting, and logistics. Create a centralized platform where all relevant event information is stored and easily accessible. This includes details about venues, vendors, participants, schedules, and budgets. Improve communication among event organizers, team members, and participants. An effective event management system should facilitate real-time communication through features like messaging, notifications, and updates. Provide a platform for event attendees to register, purchase tickets, and manage their participation in the event. This goal includes handling ticket sales, registration forms, and attendee management.

Support marketing efforts by integrating tools for promoting events, tracking marketing campaigns, and collecting feedback from attendees. Efficiently manage and allocate resources such as staff, equipment, and materials required for the event. This ensures that resources are used effectively and without waste. Monitor event budgets, expenses, and revenue. The system should help in tracking financial transactions, managing invoices, and generating financial reports. Collect data on event performance, such as attendance, revenue, and participant feedback. This data can be used to make informed decisions and improve future events. Ensure that the system can handle events of various sizes and complexities, from small meetings to large conferences or festivals.

## **1.2 PROJECT SCOPE**

The project aims to develop and implement an Event Management System (EMS) to streamline the planning, execution, and management of events for [Your Organization Name]. The EMS will serve as a comprehensive tool for managing various types of events, from small meetings to large-scale conferences and festivals. Create a user-friendly, centralized platform to manage all aspects of event planning and execution. Streamline communication and collaboration among event organizers, team members, and participants. Facilitate event registration, ticketing, and attendee management. Enhance marketing and promotional efforts for events. Efficiently manage event resources, budgets, and financial transaction. Collect and analyze data to make informed decisions and improve future events. User registration and authentication for event organizers and attendees. Event creation and management, including event details, dates, locations, and descriptions.

Event scheduling and calendar management. Ticketing and registration functionality. Attendee management, including check-in, badges, and participant information. Vendor and resource management. Budget and financial management, including invoicing and payment processing. Marketing and promotional tools, such as email campaigns and social media integration. Reporting and analytics features. Integration with third-party tools (e.g., CRM, payment gateways, and marketing platforms). Hardware procurement and installation. Mobile application development (initially, but may be considered in future phases). Customization for non-standard or highly specialized event types. Physical event logistics, such as catering and on-site management (beyond resource management). Legal and regulatory compliance beyond data protection and privacy. Ongoing system maintenance and support post-implementation.

## 1.3 PROBLEM DEFINITION

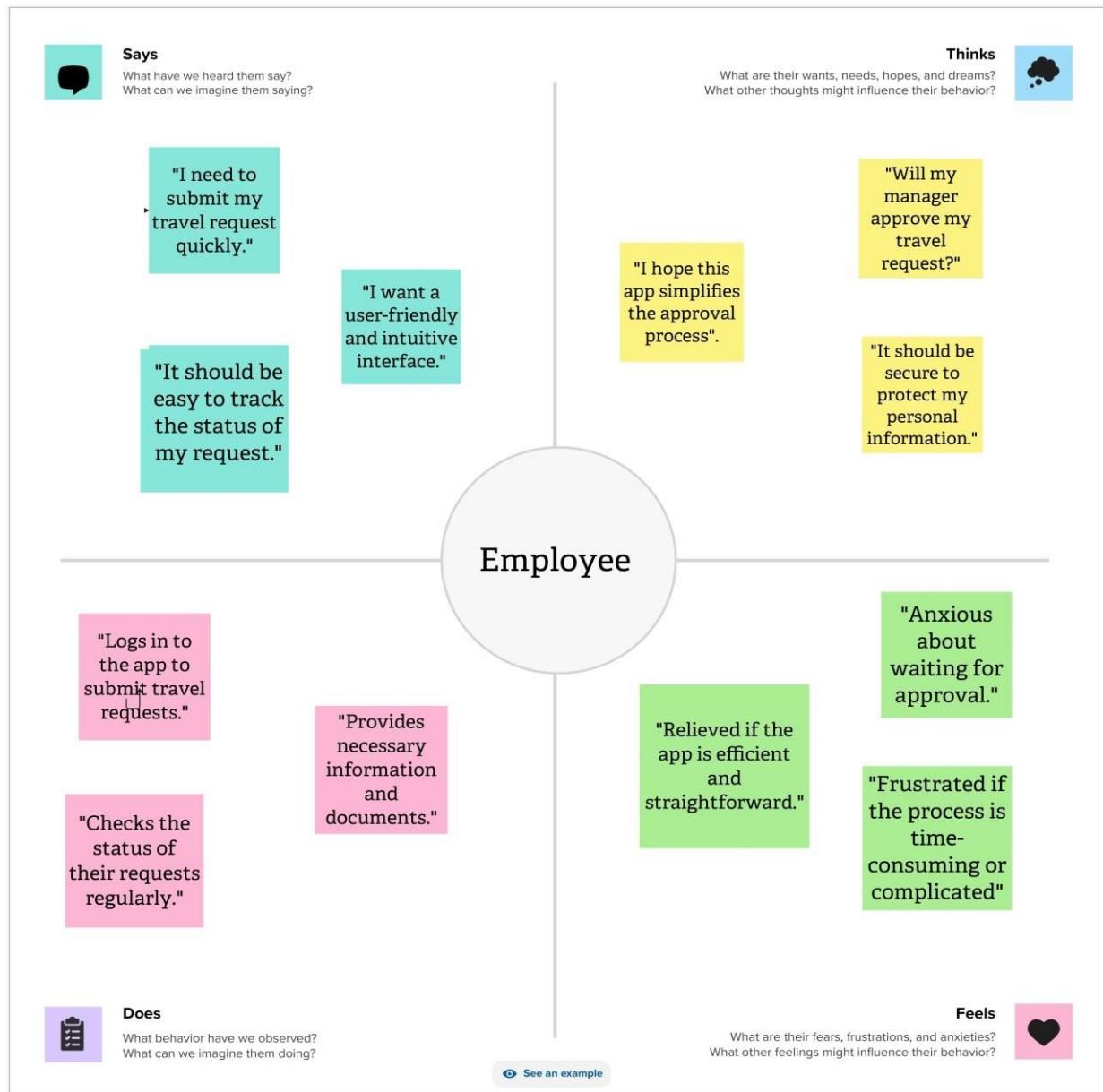


Problem Statement (PS)	I am (Employee)	I'm trying to	But	Because	Which makes me feel
PS	Employee	I am trying to streamline and simplify the process of submitting, tracking, and approving travel requests to ensure a smoother travel experience	But the current process is manual, timeconsuming, and lacks transparency , resulting in delays and confusion.	Because this inefficiency in the travel approval process creates frustration, adds unnecessary administrative work, and can lead to financial discrepancies	Which makes me feel frustrated, anxious about travel plans, and often uncertain about the status of my request, ultimately affecting my overall job satisfaction and productivity

## 1.4 EMPATHY MAP CANVAS

An empathy map is a simple, easy-to-digest visual that captures knowledge about a user's behavior and attitudes.

It is a useful tool to help teams better understand their users. Creating an effective solution requires understanding the true problem and the person who is experiencing it. The exercise of creating the map helps participants consider things from the user's perspective along with his or her goals and challenges.



## 1.5 IDEATION & BRAINSTORMING

Brainstorming provides a free and open environment that encourages everyone within a team to participate in the creative thinking process that leads to problem solving. Prioritizing volume over value, out-of-the-box ideas are welcome and built upon, and all participants are encouraged to collaborate, helping each other develop a rich amount of creative solutions.

### Step-1: Team Gathering, Collaboration and Select the Problem Statement:

The screenshot shows a digital template for a Brainstorm & idea prioritization session. The template is divided into several sections:

- Template**: A vertical sidebar on the left featuring a lightbulb icon and the word "Template".
- Brainstorm & idea prioritization**: The main title of the template.
- Define your problem statement**: A section with a blue circular icon containing a number 1. It includes a brief description of the project aim and a timer indicating 5 minutes.
- Before you collaborate**: A section with a blue circular icon containing a right-pointing arrow. It includes a brief description of preparation and a timer indicating 10 minutes.
- Key rules of brainstorming**: A section with a blue circular icon containing a brain icon. It lists six rules with corresponding icons:
  - Stay in topic.
  - Encourage wild ideas.
  - Defer judgment.
  - Listen to others.
  - Go for volume.
  - If possible, be visual.
- Need some inspiration?**: A small section at the bottom with a button labeled "Open template".

1 of 7

## Step-2: Brainstorm, Idea Listing and Grouping:

**2**

**Brainstorm**

Write down any ideas that come to mind that address your problem statement.

⌚ 10 minutes

**TIP**  
You can select a sticky note and tap the pencil icon to sketch over to start drawing!

**Person 1**

**User-Friendly Dashboard:**  
Create an intuitive dashboard for employees to submit travel requests and track their status.

**Manager Approval Workflow:**  
• Implement a workflow that allows managers to review and approve travel requests easily.

**Person 2**

**Travel Policy Integration:**  
• Include the company's travel policy within the app, ensuring employees are aware of guidelines and restrictions.

**Expense Management:**  
• Allow employees to submit expense reports related to their trips and attach receipts

**Person 3**

**Notification System:**  
• Implement a notification system to keep employees informed about the status of their travel requests.

**Person 4**

**Real-Time Currency Conversion:**  
• Provide a currency conversion feature to help employees manage expenses in different currencies.

**Analytics and Reporting:**  
• Generate reports for corporate administrators to analyze travel patterns and expenses.

**3**

**Group ideas**

Take turns sharing your ideas while clustering similar or related notes as you go. Once all sticky notes have been grouped, give each cluster a sentence-like label. If a cluster is bigger than six sticky notes, try and see if you can break it up into smaller sub-groups.

⌚ 20 minutes

**TIP**  
Add customizable tags to sticky notes to make it easier to find, organize, and categorize important ideas as themes within your mind!

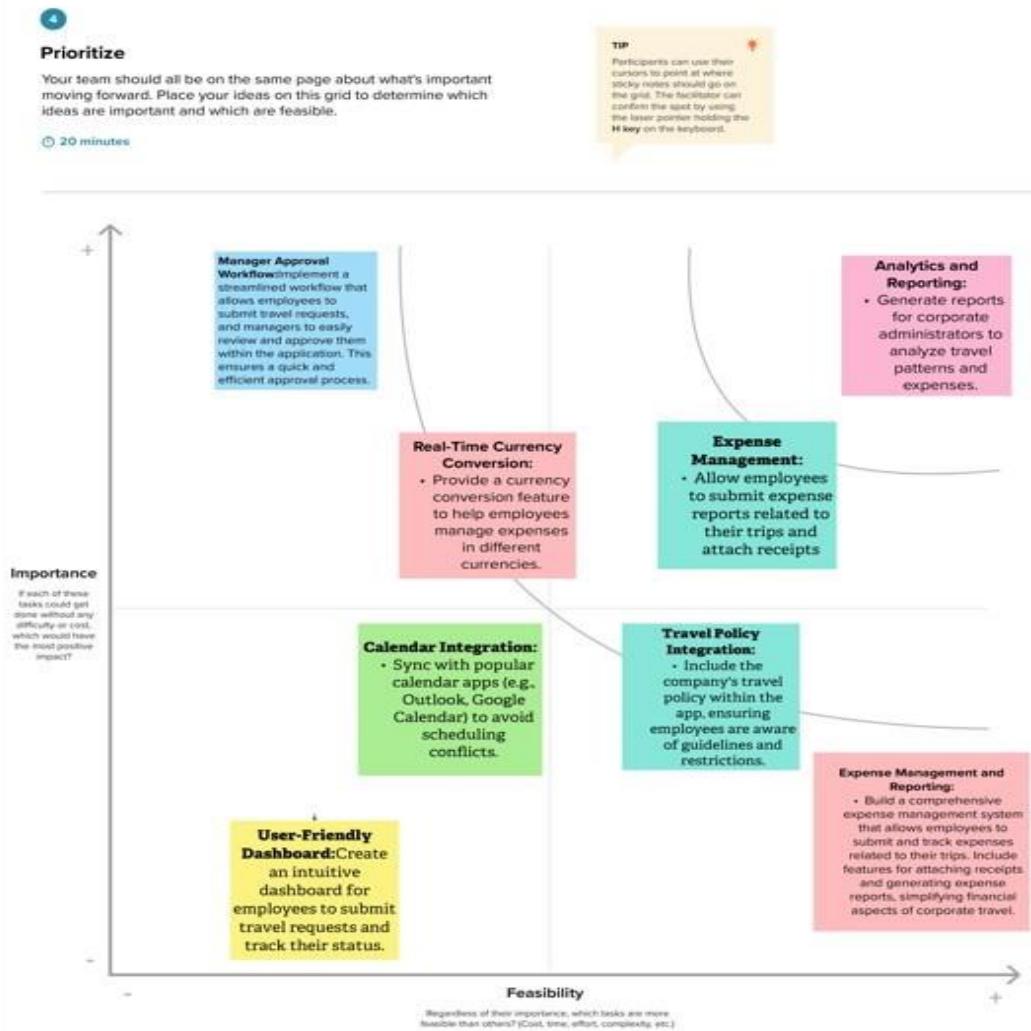
**Manager Approval Workflow:** Implement a streamlined workflow that allows employees to submit travel requests, and managers to easily review and approve them within the application. This ensures a quick and efficient approval process.

**Expense Management and Reporting:**

- Build a comprehensive expense management system that allows employees to submit and track expenses related to their trips. Include features for attaching receipts and generating expense reports, simplifying financial aspects of corporate travel.

The diagram illustrates the process of idea grouping. It starts with four separate sticky notes (one from each person) at the bottom left. An arrow points upwards to a stage where the notes are being clustered into two groups. A second arrow points upwards to a stage where the notes are further refined into a single, larger cluster at the top right, representing the final grouped ideas.

## Step-3: Idea Prioritization:



## 1.6 PROPOSED SOLUTION

S. No	Parameter	Description
1.	Problem Statement (Problem to be solved)	<p>Organizing and managing events within [Your Organization Name] has become a complex and time-consuming task. The absence of a comprehensive Event Management System (EMS) has resulted in several operational challenges and inefficiencies, hindering the successful execution of various events, from small meetings to large-scale conferences and festival</p>
2.	Idea / Solution description	<p>To address the challenges outlined in the problem statement and provide a comprehensive solution for building an Event Management System (EMS), the system will incorporate several key components and features. Firstly, it will create a user-friendly dashboard for event organizers, offering collaborative tools and a shared calendar to streamline event planning and task coordination. Additionally, the system will feature an integrated registration and ticketing module, ensuring secure participant data management while offering a mobile-friendly participant portal for easy access and engagement.</p>

3.	Novelty / Uniqueness	<p>To create a truly novel and unique Event Management System (EMS), consider incorporating cutting-edge features and concepts that set your system apart from existing solutions. One innovative approach is to employ AI-powered event recommendations, utilizing artificial intelligence to analyze attendee preferences and provide personalized event suggestions. Augmented Reality (AR) and Virtual Reality (VR) integration can elevate the event experience, allowing attendees to virtually explore venues or participate in immersive activities from anywhere</p>
4.	Social Impact / Customer Satisfaction	<p>Building an Event Management System (EMS) not only offers operational efficiency and convenience but also has a substantial social impact and the potential to greatly enhance customer satisfaction. By streamlining the event planning process, the EMS reduces the administrative burden on event organizers, allowing them to allocate more time and resources toward creating meaningful and engaging events. This, in turn, benefits event participants who experience smoother registration, ticketing, and overall event interactions.</p>

## 1.7 FUNCTIONAL & TECHNICAL REQUIREMENTS

### 1.7.1 FUNCTIONAL REQUIREMENTS

FR No.	Functional Requirement (Epic)	Description
FR-1	USER REGISTRATION	Allow users to create accounts, including organizers, participants, and admin roles.
FR-2	USER AUTHENTICATION	Implement secure login mechanisms, such as username/password and two-factor authentication.
FR-3	EVENT CREATION	Enable event organizers to create new events, including event details, dates, and descriptions.
FR-4	EVENT SCHEDULING	Provide a calendar for scheduling events, sessions, and related tasks with notifications.
FR-5	REGISTRATION & TICKETING	Develop a module for attendee registration, ticketing, payment processing, and confirmation.
FR-6	ATTENDEE MANAGEMENT	Facilitate attendee check-in, badge generation, and the management of participant information.
FR-7	VENDOR & RESOURCE	Offer tools for managing vendors, resources, staff, equipment, and materials for events.
FR-8	BUDGET MANAGEMENT	Create budgeting features, including tracking expenses, generating invoices, and payment processing.
FR-9	MARKETING & PROMOTION	Integrate marketing tools for email campaigns, social media sharing, and tracking campaign performance.
FR-10	REPORTING & ANALYTICS	Develop reporting features to collect data on event performance, attendance, revenue, and participant feedback.
FR-11	INTEGRATION	Allow integration with other software systems and platforms, such as CRM, payment gateways, and marketing tools.
FR-12	CUSTOMIZATION	Offer customization options to adapt the system to various event types and organization needs.

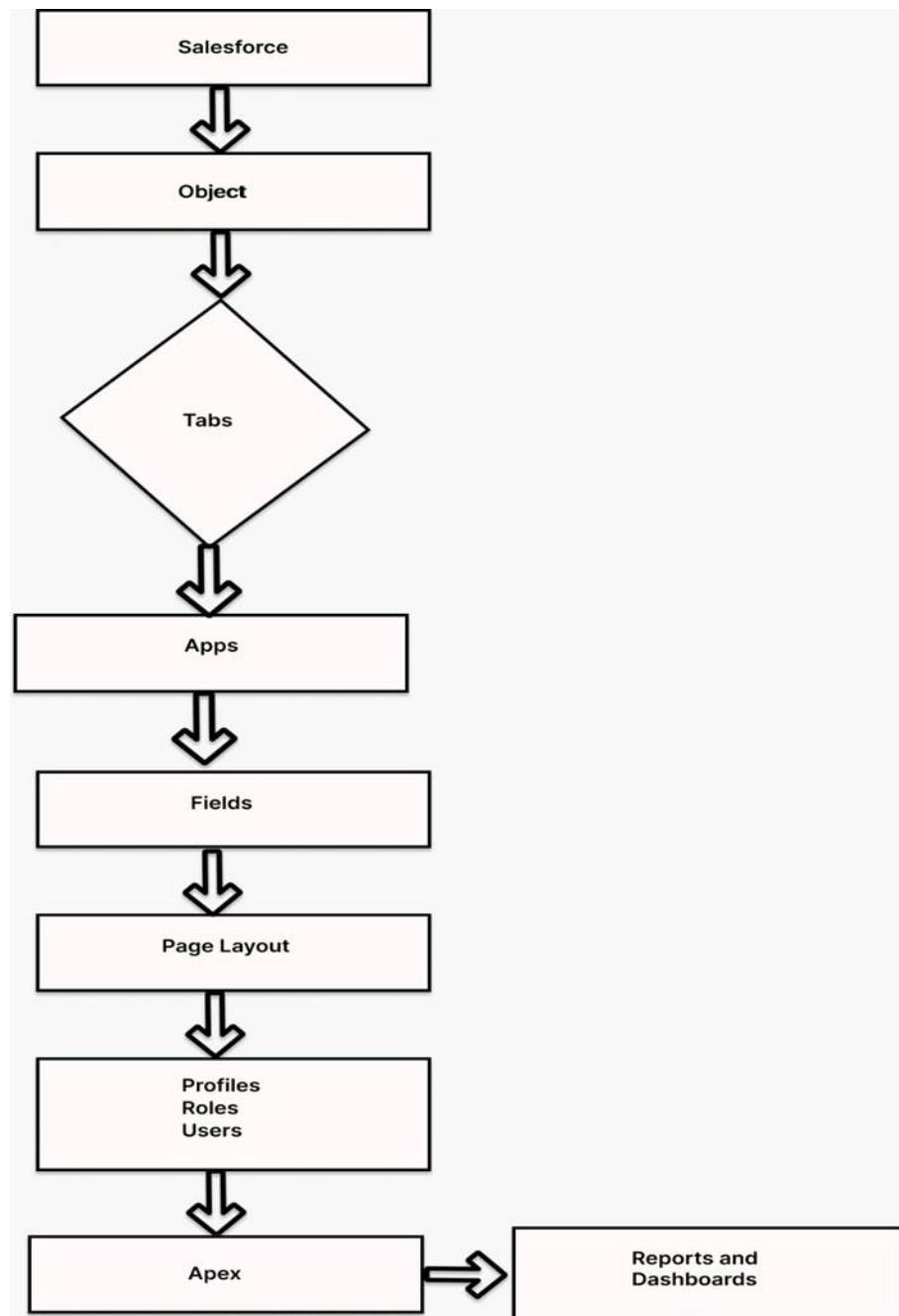
## 1.7.2 TECHNICAL REQUIREMENTS

TR No.	Technical Requirement	Description
TR-1	Technology Stack	Define the technology stack, including programming languages, frameworks, and databases.
TR-2	Hosting and Deployment	Specify the hosting environment (e.g., cloud, on-premises) and deployment procedures.
TR-3	Scalability	Ensure the system can scale horizontally to accommodate varying levels of traffic and events.
TR-4	Security	Implement security protocols, including data encryption, firewalls, and secure APIs to protect sensitive information.
TR-5	Data Backup and Recovery	Set up automated data backup and recovery processes to prevent data loss.
TR-6	Performance Optimization	Optimize system performance to ensure fast response times and efficient resource utilization.
TR-7	Integration	Define standards for integrating with third-party services, systems, and APIs.
TR-9	Mobile Responsiveness	Ensure the EMS is mobile-friendly and responsive for users on various devices.
TR-10	Data Storage and Management	Create a robust database structure for efficient data storage, retrieval, and management.
TR-11	Content Delivery	Employ Content Delivery Networks (CDNs) to enhance content delivery and reduce latency.
TR-12	User Authentication	Implement secure user authentication mechanisms, including password hashing and token-based authentication.
TR-13	Accessibility	Compliance Ensure the system complies with accessibility standards (e.g., WCAG) for users with disabilities.

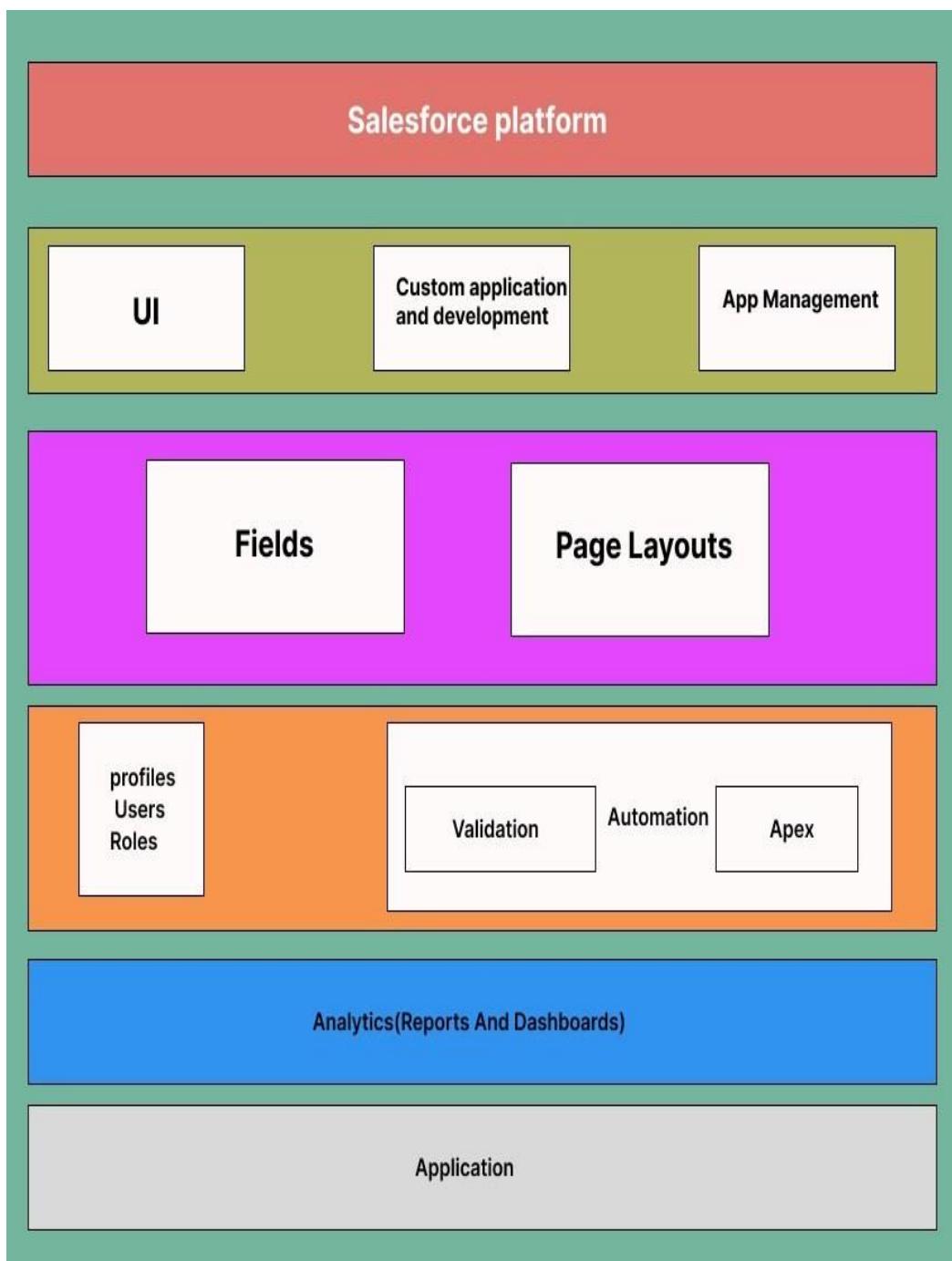
## 1.8 PROJECT ROAD MAP

### 1.8.1 DATA FLOW DIAGRAM

A Data Flow Diagram (DFD) is a traditional visual representation of the information flows within a system. A neat and clear DFD can depict the right amount of the system requirement graphically. It shows how data enters and leaves the system, what changes the information, and where data is stored.



## 1.8.2 TECHNICAL ARCHITECTURE



**TABLE-1: COMPONENT AND TECHNOLOGIES**

S.No	Component	Description	Technology
1.	User Interface	<p><b>Lightning Components:</b> Use Salesforce Lightning components to design the user interface for employees, managers, and administrators.</p> <p><b>Custom Pages:</b> Create custom Visualforce pages for more tailored and complex UI elements</p>	Salesforce
2.	Data Model	<p><b>Custom Objects:</b> Define custom objects in Salesforce to represent entities like travel requests, expenses, and approvals.</p> <p><b>Master-Detail and Lookup Relationships:</b> Establish relationships between objects to maintain data integrity.</p> <p><b>Custom Fields:</b> Create custom fields to capture specific information, such as travel dates, expenses, and approval status.</p>	Salesforce
3.	Workflow Automation	<p><b>Approval Processes:</b> Implement Salesforce Approval Processes to automate and streamline the travel request approval workflow.</p> <p><b>Process Builder and Flows:</b> Use Process Builder and Flows to automate routine tasks and send notifications.</p>	Salesforce
4.	Reporting and Analytics	<b>Custom Reports:</b> Create custom reports to track travel request status, expenses, and other relevant metrics.	Salesforce
5.	Security	<p><b>Role-Based Access Control (RBAC):</b> Configure RBAC to control who can access and modify data.</p> <p><b>Data Encryption:</b> Encrypt sensitive data both in transit and at rest.</p> <p><b>Audit Trails:</b> Maintain audit trails to log user activities for security and compliance purposes.</p>	Salesforce

6.	Salesforce Development	<p><b>Apex:</b> Use Salesforce's proprietary programming language, Apex, for server-side logic and data manipulation.</p> <p><b>Visualforce:</b> Develop custom user interfaces with Visualforce pages and components.</p> <p><b>Lightning Web Components:</b> Create modern, component-based UIs using Lightning Web Components for a more responsive and dynamic user experience</p>	Salesforce
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**TABLE-2: APPLICATION CHARACTERISTICS:**

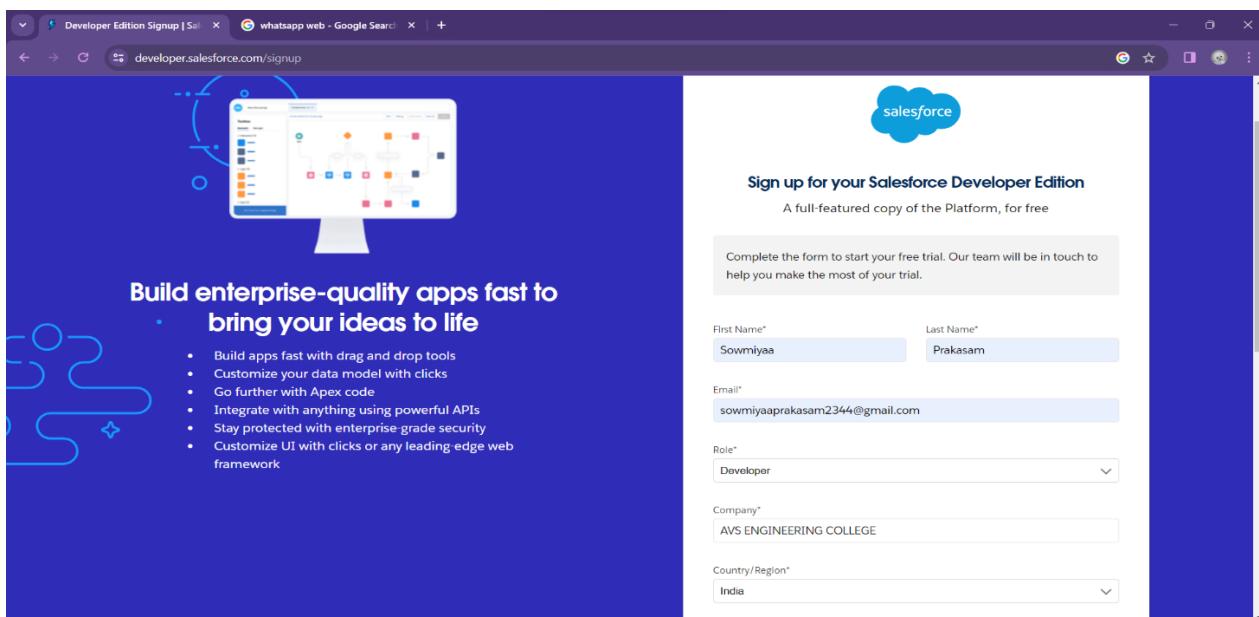
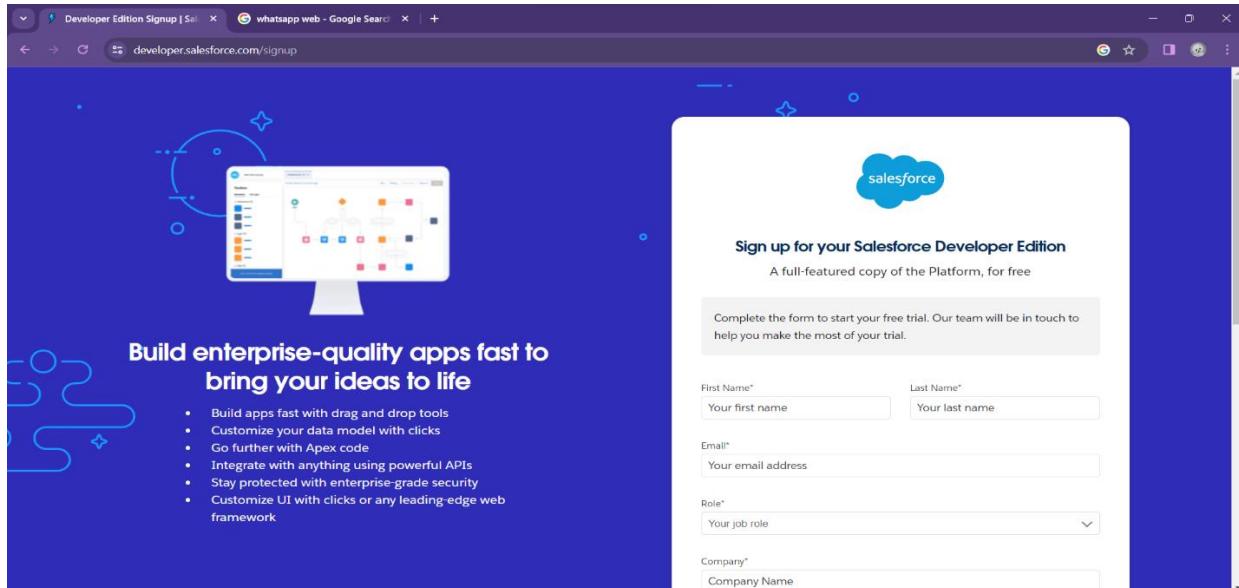
S. No	Characteristics	Description	Technology
1.	Responsive Design	Implement responsive design to adapt to various screen sizes, ensuring a consistent and visually pleasing user experience.	salesforce
2.	Accessibility	Ensure that the application is accessible via multiple devices and browsers, catering to users on desktops, tablets, and mobile devices. This accessibility is crucial for users who need to make or approve travel requests while on the go.	salesforce
3.	Userfriendly	The application should have an intuitive and user-friendly interface to make it easy for employees, managers, and administrators to navigate and use the system without extensive training.	Salesforce
4.	Scalability	The application should be able to scale with the growing number of users and data, accommodating increasing demands without significant performance degradation.	salesforce
5.	Performance	Ensure the application's performance meets or exceeds user expectations, with rapid response times for actions such as submitting requests or generating reports.	salesforce
6.	Reporting and Analytics	Enable users to generate custom reports and access analytics tools to gain insights into travel patterns, expenses, and approval efficiency.	salesforce

# CHAPTER-2

## PREPARATION DATA MODELING

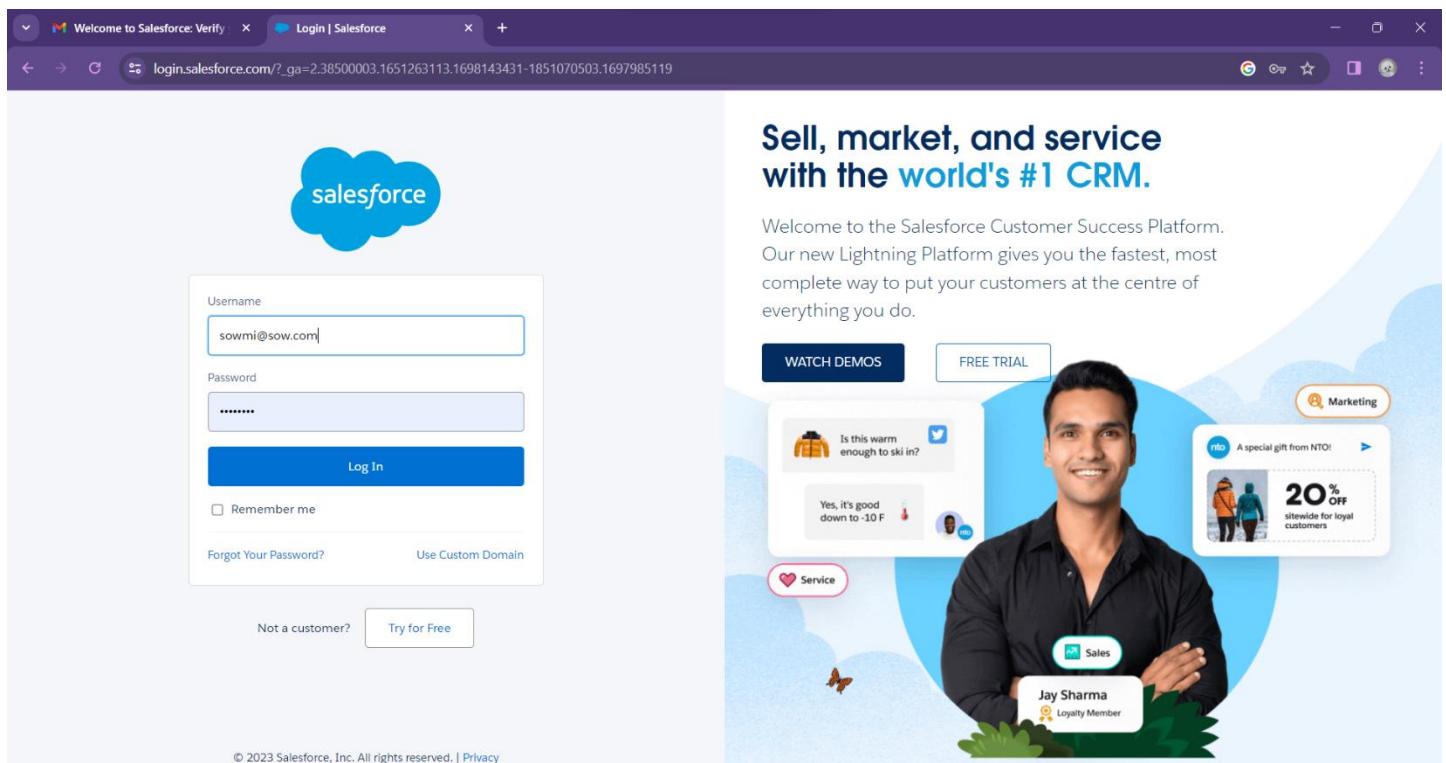
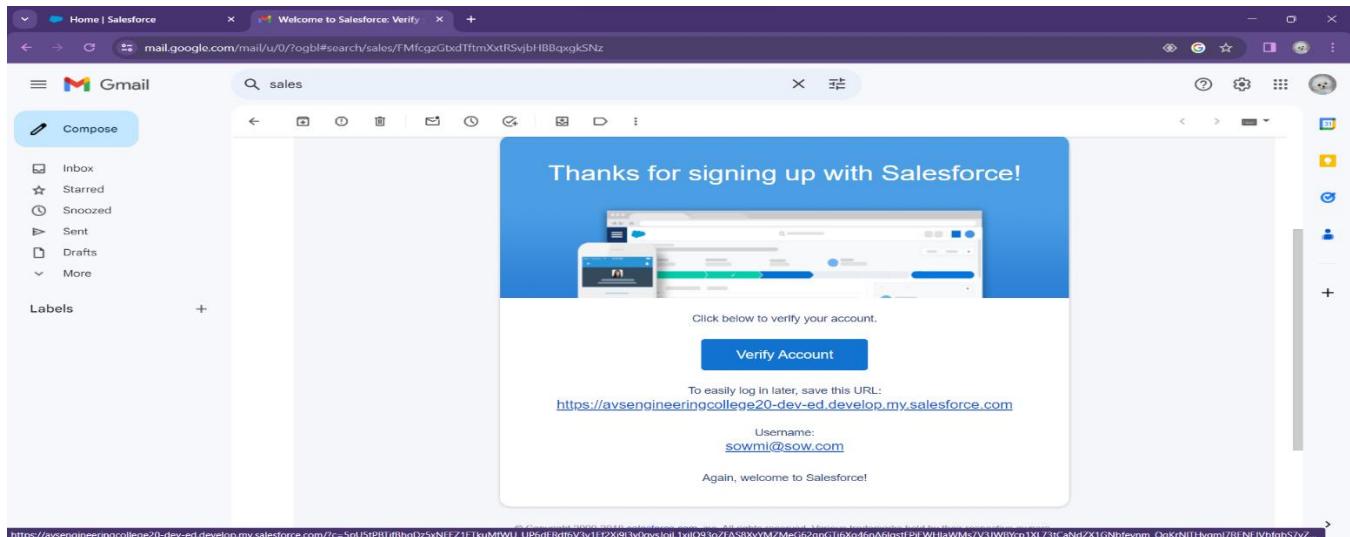
### 2.1 Salesforce Developer Org

In Salesforce, a Developer Sign Up or Developer Edition is a special type of Salesforce environment that is primarily used for development, testing, and learning purposes.



## Account Activation

Activation tracks information about devices from which users have verified their identity.



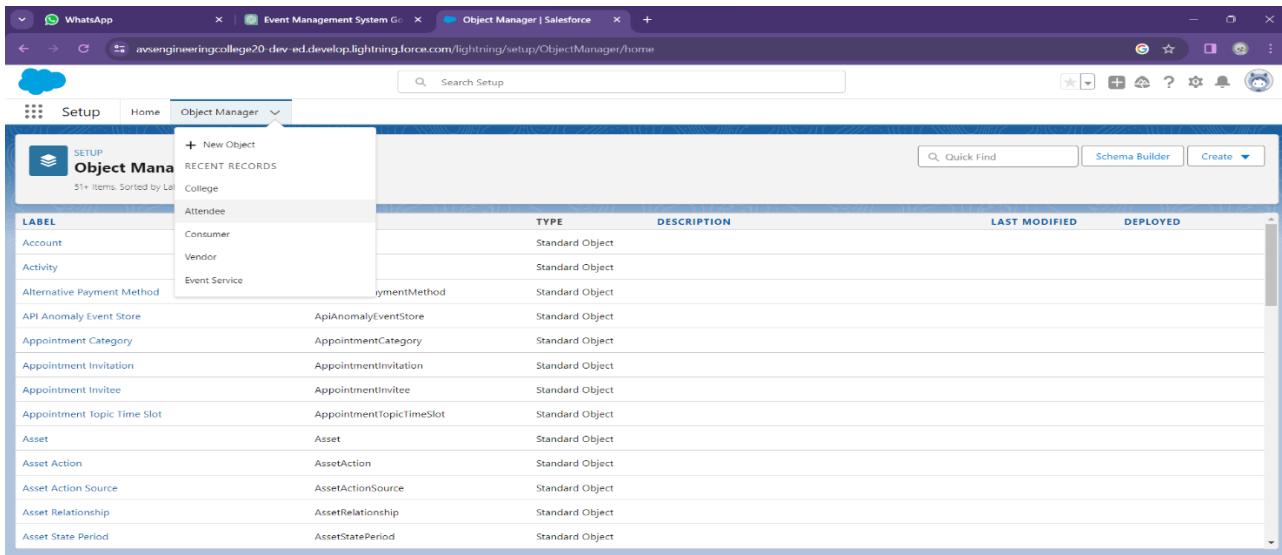
## 2.2 Custom Object Creation & Tabs

### Custom Object Creation

Objects are containers for your information, but they also give you special functionality.

Custom objects are created to store information that's specific to your company or industry.

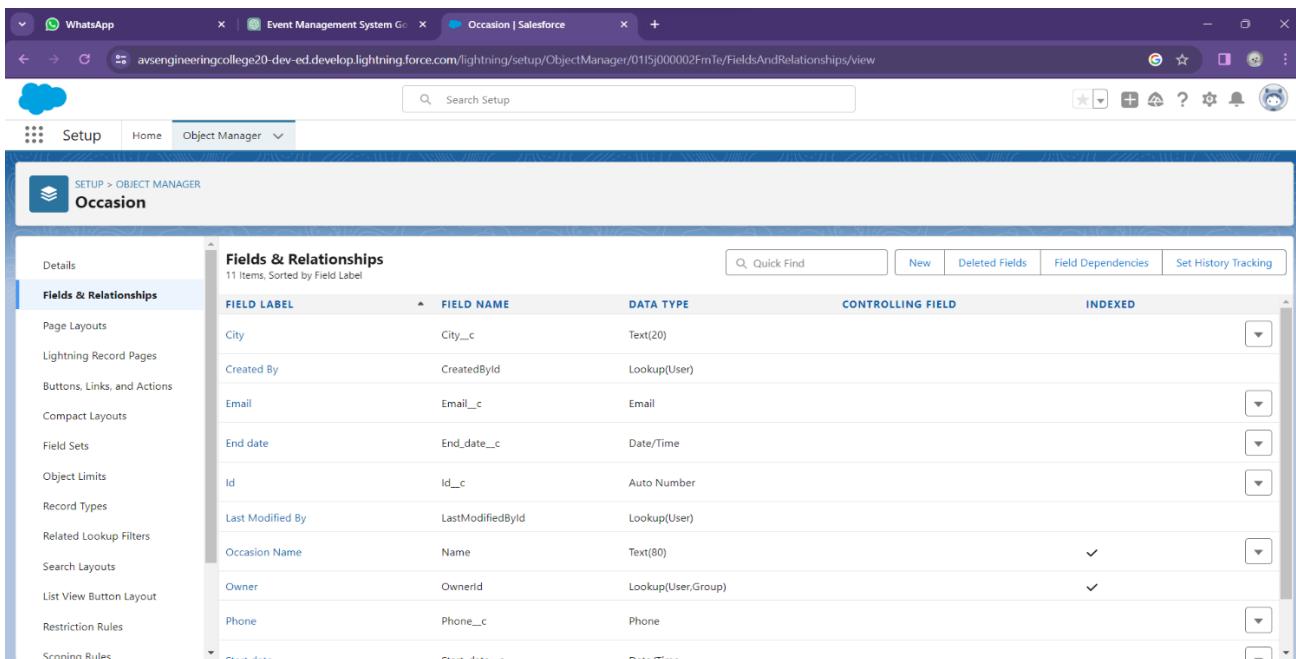
Custom objects in EVENT MANAGEMENT APP:



The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various standard objects under categories like Account, Activity, and Asset. The main area displays a table of objects with columns for Label, Type, Description, Last Modified, and Deployed. Key objects shown include Attendee, Consumer, Vendor, Event Service, API Anomaly Event Store, Appointment Category, Appointment Invitation, Appointment Invitee, Appointment Topic Time Slot, Asset, Asset Action, Asset Action Source, Asset Relationship, and Asset State Period. All objects listed are Standard Objects.

Label	Type	Description	Last Modified	Deployed
Attendee	Standard Object			
Consumer	Standard Object			
Vendor	Standard Object			
Event Service	Standard Object			
API Anomaly Event Store	Standard Object			
Appointment Category	Standard Object			
Appointment Invitation	Standard Object			
Appointment Invitee	Standard Object			
Appointment Topic Time Slot	Standard Object			
Asset	Standard Object			
Asset Action	Standard Object			
Asset Action Source	Standard Object			
Asset Relationship	Standard Object			
Asset State Period	Standard Object			

### FIELDS IN OCCASION OBJECT



The screenshot shows the Salesforce Object Manager interface for the Occasion object. The left sidebar lists various settings like 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, and Scoping Rules. The main area displays a table titled "Fields & Relationships" with columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status. Fields listed include City, Created By, Email, End date, Id, Last Modified By, Occasion Name, Owner, and Phone. Most fields are of type Text(20), except for Created By, Email, and Owner which are Lookup(User). The Controlling Field column shows relationships like LastModifiedBy and Ownerid, and the Indexed column shows checkmarks for several fields.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City_c	Text(20)		
Created By	CreatedById	Lookup(User)		
Email	Email_c	Email		
End date	End_date_c	Date/Time		
Id	Id_c	Auto Number		
Last Modified By	LastModifiedById	Lookup(User)		
Occasion Name	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone_c	Phone		

## FIELDS IN VENDOR OBJECT

The screenshot shows the Salesforce Object Manager interface for the 'Vendor' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Buttons. The main area displays the 'Fields & Relationships' section with 8 items, sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Event Name	Event_Name__c	Lookup(Occasion)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		
Service Provider	Service_Provider__c	Text(30)		
Vendor Name	Name	Text(80)		✓

## FIELDS IN SPEAKER OBJECT

The screenshot shows the Salesforce Object Manager interface for the 'Speaker' object. The left sidebar lists various setup options. The main area displays the 'Fields & Relationships' section with 8 items, sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Bio	Bio__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Event Name	Event_Name__c	Lookup(Occasion)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		
Speaker Name	Name	Text(80)		✓

## FIELDS IN ATTENDEE OBJECT

The screenshot shows the Salesforce Setup interface with the URL <https://avseengineeringcollege20-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000002FmTy/FieldsAndRelationships/view>. The page title is "Attendee | Salesforce". The left sidebar shows navigation options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The main content area is titled "Fields & Relationships" and lists 9 items, sorted by Field Label. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Attendees Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Event Name	Event_Name__c	Master-Detail(Occasion)		✓
Id	Id__c	Auto Number		
Last Modified By	LastModifiedById	Lookup(User)		
Phone	Phone__c	Phone		
Ticket Status	Ticket_Status__c	Picklist		
Tickets	Tickets__c	Picklist		

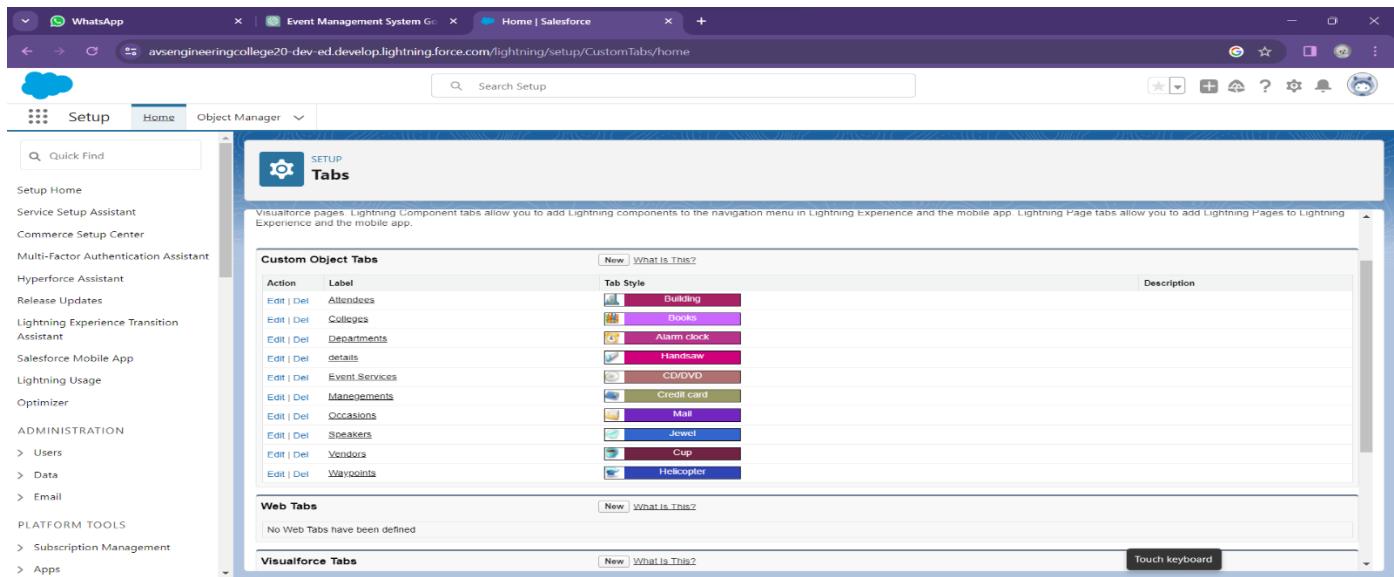
## FIELDS IN EVENT SERVICE OBJECT

The screenshot shows the Salesforce Setup interface with the URL <https://avseengineeringcollege20-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000002FmTl/FieldsAndRelationships/view>. The page title is "Event Service | Salesforce". The left sidebar shows navigation options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The main content area is titled "Fields & Relationships" and lists 5 items, sorted by Field Label. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Event Name	Event_Name__c	Master-Detail(Occasion)		✓
Event Service Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Vendor Name	Vendor_Name__c	Master-Detail(Vendor)		✓

# Tabs

Salesforce Tabs are like the menu options in a software application. They allow you to access specific functions, objects, or data.

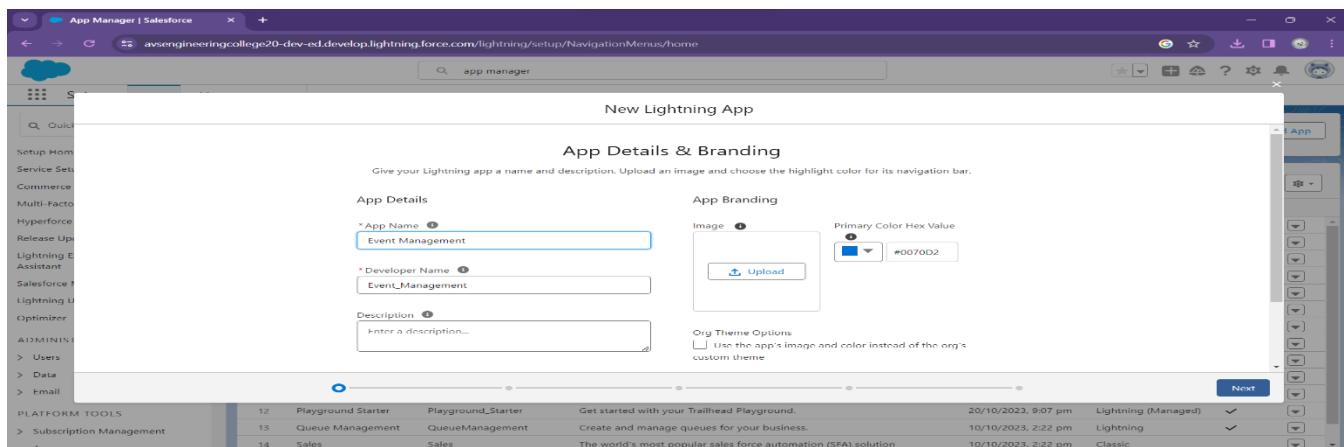


## 2.3 Lightning App

The Lightning App Builder is a point-and-click tool that makes it easy to create custom pages for the Salesforce mobile app and Lightning Experience, giving your users what they need all in one place.

### Create a Travel Approval Lightning App

- Build a Lightning app, add tabs, and customize page layouts.
- Create custom objects and fields for the app.
- Define relationships between objects.
- Import data and test the app.



**New Lightning App**

**Navigation Items**

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

**Available Items**

- Accounts
- Alert Settings
- All Sites
- Alternative Payment Methods
- Analytics
- App Launcher

**Selected Items**

- Occasions
- Attendees
- Speakers
- Vendors
- Event Services
- Reports
- Dashboards

Back Next

PLATFOM TOOLS

12	Playground Starter	Playground_Starter	Get started with your Trailhead Playground.	20/10/2023, 9:07 pm	Lightning (Managed)
13	Queue Management	QueueManagement	Create and manage queues for your business.	10/10/2023, 2:22 pm	Lightning
14	Sales	Sales	The world's most popular sales force automation (SFA) solution	10/10/2023, 2:22 pm	Classic

**Lightning App Builder** | **App Settings** | **Pages** | **Event Management** | ? Help

**User Profiles**

Choose the user profiles that can access this app.

**Available Profiles**

- Analytics Cloud Integration User
- Analytics Cloud Security User
- Authenticated Website
- Authenticated Website
- B2B Reordering Portal Buyer Profile
- Consumer
- Consumer1
- Contract Manager
- Custom: Marketing Profile
- Custom: Sales Profile
- Custom: Support Profile

**Selected Profiles**

- System Administrator
- Custom Standard User Profile

# CHAPTER 3

## USERS AND DATA SECURITY

### 3.1 USER

Before customizing the event management app, first create a new user, Sanjay gupta Executive, and set him up as manager. This involves assigning roles and profiles so that Sanjay has the correct permissions to approve event requests.

The image contains two screenshots of the Salesforce Setup interface, both titled "User Edit".

**Screenshot 1: User Edit - Sanjay Gupta**

- General Information:**
  - First Name: Sanjay
  - Last Name: Gupta
  - Alias: Sanj
  - Email: sowmyaaaprakasam2344@gmail.com
  - Username: sanjayguptlasanj@thesmart
  - Nickname: Sanju
  - Title:
  - Company:
  - Department:
  - Division:
- Role:** <None Specified>
- User License:** Identity
- Profile:** Identity User
- Active:**
- Marketing User:**
- Offline User:**
- Knowledge User:**
- Flow User:**
- Service Cloud User:**
- Site.com Contributor User:**
- Site.com Publisher User:**
- WDC User:**
- Data.com User Type:** <None>
- Data.com Monthly Addition Limit:** 300
- Accessibility Mode (Classic Only):**

**Screenshot 2: User Edit - Rahul Sharma**

- General Information:**
  - First Name: Rahul
  - Last Name: Sharma
  - Alias: Rahus
  - Email: sowmyaaaprakasam2344@gmail.com
  - Username: rahulsharmarahuhs@thesma
  - Nickname: Rahu
  - Title:
  - Company:
  - Department:
  - Division:
- Role:** Western Sales Team
- User License:** Identity
- Profile:** Identity User
- Active:**
- Marketing User:**
- Offline User:**
- Knowledge User:**
- Flow User:**
- Service Cloud User:**
- Site.com Contributor User:**
- Site.com Publisher User:**
- WDC User:**
- Data.com User Type:** <None>
- Data.com Monthly Addition Limit:** 300
- Accessibility Mode (Classic Only):**

## 3.2 PERMISSION SETS

On this page you can create, view, and manage permission sets.

### CREATION OF EVENT PERMIT:

The screenshot shows the 'Permission Sets' section of the Salesforce Setup. A new permission set is being created with the following details:

- Label:** Event Permits
- API Name:** Event\_Permits
- Description:** (empty)
- Session Activation Required:** (unchecked)
- Select the type of users who will use this permission set:** (checkboxes for 'None', 'Specific user license', and 'Specific permission set license')
  - Who will use this permission set?**:
    - Choose 'None' if you plan to assign this permission set to multiple users with different user and permission set licenses.
    - Choose a specific user license if you want users with only one license type to use this permission set.
    - Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.
  - Not sure what a permission set license is? Learn more here.**
  - License:** --None--

At the bottom are 'Save' and 'Cancel' buttons.

The screenshot shows the 'Event Permit' assignment page. It lists users assigned to the 'Event Permits' permission set:

Full Name	Alias	Username	Role	Action	Profile
Integration User	integ	integration@00d5j00000pdjjeax.com	Analytics Cloud Integration User	<input checked="" type="checkbox"/>	
Manager 444	m444	man444@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Solution Manager
Provider 494	p494	prov494@gmail.com	Marketing Team	<input checked="" type="checkbox"/>	Provider12
Rahul Sharma	Rahus	rahulsharmarahu@thesmartbridge.com	Western Sales Team	<input checked="" type="checkbox"/>	Identity User
Sanjay Gupta	Sanj	sanjayguptasanj@thesmartbridge.com		<input checked="" type="checkbox"/>	Identity User

Buttons at the bottom include 'Cancel' and 'Next'.

The screenshot shows the 'Permission Sets | Salesforce' page. The URL is [avsgengineeringcollege20-dev-ed.lightning.force.com/lightning/setup/PermSets/OP5j0000098f4l/PermissionSetAssignment/new](https://avsgengineeringcollege20-dev-ed.lightning.force.com/lightning/setup/PermSets/OP5j0000098f4l/PermissionSetAssignment/new). The page title is 'Event Permit'. The left sidebar shows 'Users' selected under 'Permission Sets'. The main content area is titled 'Select an Expiration Option For Assigned Users'. It has two radio button options: 'No expiration date' (selected) and 'Specify the expiration date'. Below this are buttons for '1 Day', '1 Week', '30 Days', '60 Days', and 'Custom Date'. A 'Time Zone' dropdown is labeled 'Select a time zone...'. A table titled 'Selected Users' lists two users: Sanjay Gupta (Identity User, Active, Identity License, Never Expires) and Rahul Sharma (Western Sales Team, Identity User, Active, Identity License, Never Expires). At the bottom are 'Cancel', 'Back', and 'Assign' buttons.

## CREATION OF VENDOR PERMIT:

The screenshot shows the 'Permission Sets | Salesforce' page. The URL is [avsgengineeringcollege20-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2FPermissionSet%2FnewPermissionSet.apexp](https://avsgengineeringcollege20-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2FPermissionSet%2FnewPermissionSet.apexp). The page title is 'Permission Sets'. The left sidebar shows 'Permission Sets' selected under 'Permission Sets'. The main content area is titled 'Create'. It has fields for 'Label' (Vendor Permits), 'API Name' (Vendor\_Permits), and 'Description'. A checkbox 'Session Activation Required' is checked. Below this is a section 'Select the type of users who will use this permission set' with a note: 'Who will use this permission set?'. It lists three options: '-Choose '-None-' if you plan to assign this permission set to multiple users with different user and permission set licenses.', '-Choose a specific user license if you want users with only one license type to use this permission set.', and '-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.' A note at the bottom says 'Not sure what a permission set license is? Learn more here.' A dropdown 'License' is set to '--None--'. At the bottom are 'Save' and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface. On the left, the navigation sidebar includes sections like 'Permission Set Groups', 'Permission Sets' (which is selected), 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', and 'Users'. Under 'Users', there's a 'Prospector' section. A search bar at the top says 'Search Setup'. In the center, a modal window titled 'Vendor Permits' displays a success message: '2 assignments were successful.' Below this, an 'Assignment Summary' table lists two users: Sanjay Gupta and Rahul Sharma, both assigned to the 'Identity' user license. The status for both assignments is 'Success'. At the bottom right of the modal is a 'Done' button.

### 3.3 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.

The screenshot shows the Salesforce Setup interface. The navigation sidebar includes 'Profiles' (selected), 'Users', and other sections. A search bar at the top says 'Search Setup'. In the center, a modal window titled 'Clone Profile' asks for the name of the new profile. It states 'You must select an existing profile to clone from.' and shows 'Existing Profile: Standard User', 'User License: Salesforce', and 'Profile Name: Event user profile'. A note at the bottom right indicates that the 'Save' button is required information. At the bottom of the modal are 'Save' and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. A search bar at the top right contains the text 'Search Setup'. The main content area is titled 'Clone Profile' and displays a message: 'You must select an existing profile to clone from.' Below this, there are three fields: 'Existing Profile' (Standard User), 'User License' (Salesforce), and 'Profile Name' (Event vendors profile). At the bottom right of the form are 'Save' and 'Cancel' buttons.

This screenshot is identical to the one above, but the 'Profile Name' field contains the text 'Custom Standard User Prof' instead of 'Event vendors profile'.

# CHAPTER-4

## AUTOMATION

### 4.1 APPROVAL PROCESS

The approval process in Salesforce is a powerful tool that allows you to automate and streamline the approval of records such as opportunities, leads, cases, and custom objects. It is a workflow process that is triggered when a record meets certain criteria and requires approval from one or more approvers before it can be moved forward in the sales process.

This screenshot shows the 'Approval Processes' setup page in Salesforce. The page title is 'Approval Processes'. Under the 'Approval Process Information' section, the name is set to 'Attendee approval process' and the unique name is 'Attendee\_approval\_process'. The 'Approval Assignment Email Template' field contains 'Attendee\_approval\_process'. A checkbox 'Add the Submit for Approval button and Approval history related list to all Attendee page layouts' is checked. In the 'Specify Entry Criteria' section, there is a table with four rows, each containing a field name ('Attendee: Attendees Name'), an operator ('equals'), and a value ('True'). The table has three 'AND' rows and one 'OR' row. The 'Field' column lists 'Attendee: Attendees Name', 'Attendee: Attendees Name', 'Attendee: Attendees Name', and 'Attendee: Attendees Name'. The 'Operator' column lists 'equals', 'equals', 'equals', and 'equals'. The 'Value' column lists 'True', 'True', 'True', and 'True'. The 'AND' row is repeated three times, and the 'OR' row is at the bottom.

This screenshot shows the 'Field Updates' setup page in Salesforce. The page title is 'Field Updates'. Under the 'Identification' section, the name is 'Cancel Status' and the unique name is 'Cancel\_Status'. The object is 'Attendee' and the field to update is 'Ticket Status'. The field data type is 'Picklist'. A checkbox 'Re-evaluate Workflow Rules after Field Change' is checked. In the 'Specify New Field Value' section, under 'Picklist Options', the radio button 'A specific value' is selected with the value 'Pending'. The 'Save' and 'Save & New' buttons are visible at the bottom.

Field Updates | Salesforce

avseengineeringcollege20-dev-ed.develop.lightning.force.com/lightning/setup/WorkflowFieldUpdates/page?address=%2F04Y%2Fe%3Fpx%3D04c5j0000001dB2%26TableEnumOrId%3D01i5j0...

Setup Home Object Manager

Search Setup

Q appro

v Data Mass Transfer Approval Requests

v Process Automation Approval Processes

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

## SETUP Field Updates

Define the field update, including the object associated with the workflow rule, approval process, or entitlement process, the field to update, and the value to apply. Note that the field to update may be on a related object. Fields are shown only for the type that you select.

**Field Update Edit**

**Identification**

Name: Confirm Cancel Status  
Unique Name: Confirm\_Cancel\_Status  
Description:  
Object: Attendee  
Field to Update: Ticket Status  
Field Data Type: Picklist  
Re-evaluate Workflow Rules after Field Change

**Specify New Field Value**

Picklist Options

The value above the current one  
 The value below the current one  
 A specific value: Not Confirmed

Save Save & New Cancel

Approval Processes | Salesforce

avseengineeringcollege20-dev-ed.develop.lightning.force.com/lightning/setup/ApprovalProcesses/page?address=%2F04a5j000000iHP%3FappLayout%3Dsetup%26tour%3D%26sfclFrameOri...

Setup Home Object Manager

Q appro

v Data Mass Transfer Approval Requests

v Process Automation Approval Processes

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

## SETUP Approval Processes

Help for this Page

Approval Processes

Attendee: Attendee approval processes

< Back to Approval Process List

**Process Definition Detail**

Process Name	Attendee approval processes	Active
Unique Name	Attendee_approval_processes	Next Automated Approver Determined By
Description		
Entry Criteria	Attendee: Attendee Name EQUALS True	
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests
Approval Assignment Email Template		
Initial Submitters	Occasion Owner	
Created By	Sowmyya Prakasam 29/10/2023, 3:44 pm	Modified By Sowmyya Prakasam 29/10/2023, 3:56 pm

**Initial Submission Actions**

Action	Type	Description
Record Lock	Field Update	Lock the record from being edited
Edit   Remove	Field Update	Cancel Status
Edit   Remove	Field Update	Cancel Status

**Approval Steps**

Action	Step Number	Name	Description	Criteria	Assigned Approver	Direct Behavior

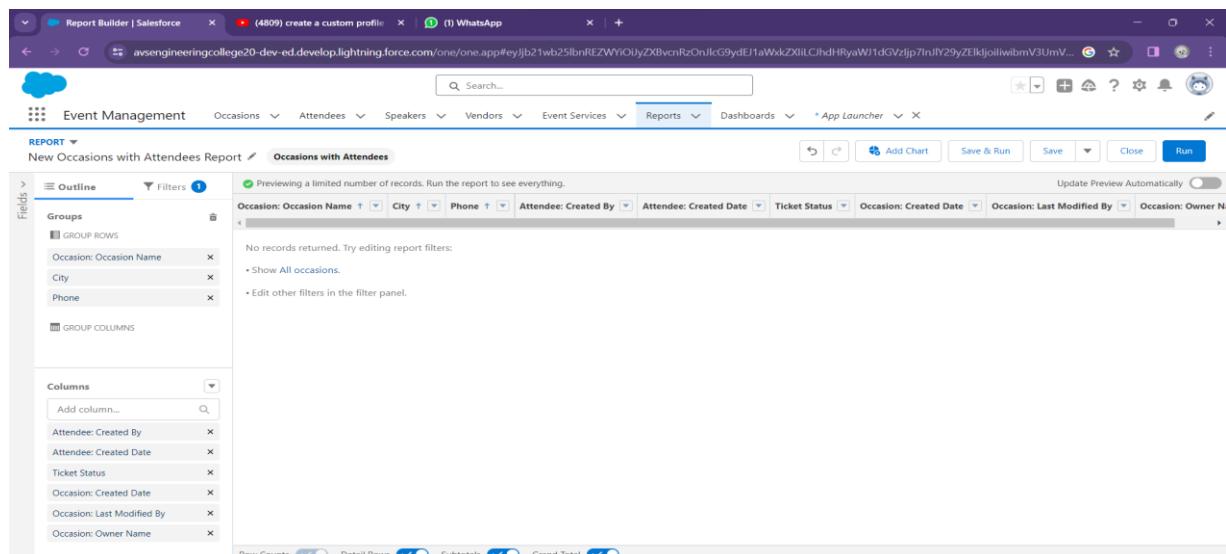
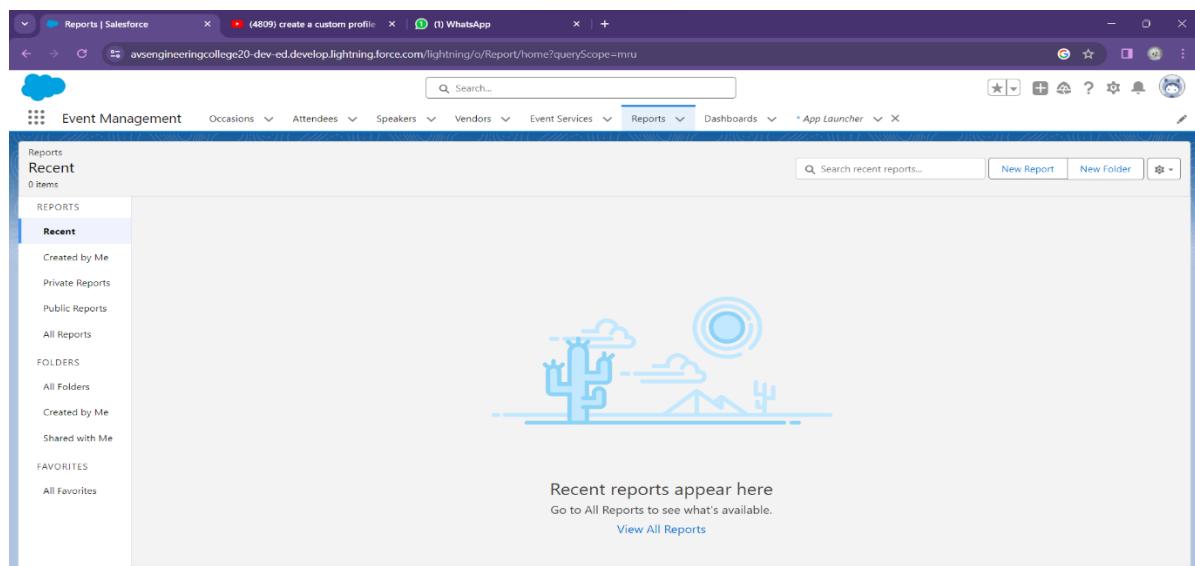
# CHAPTER-5

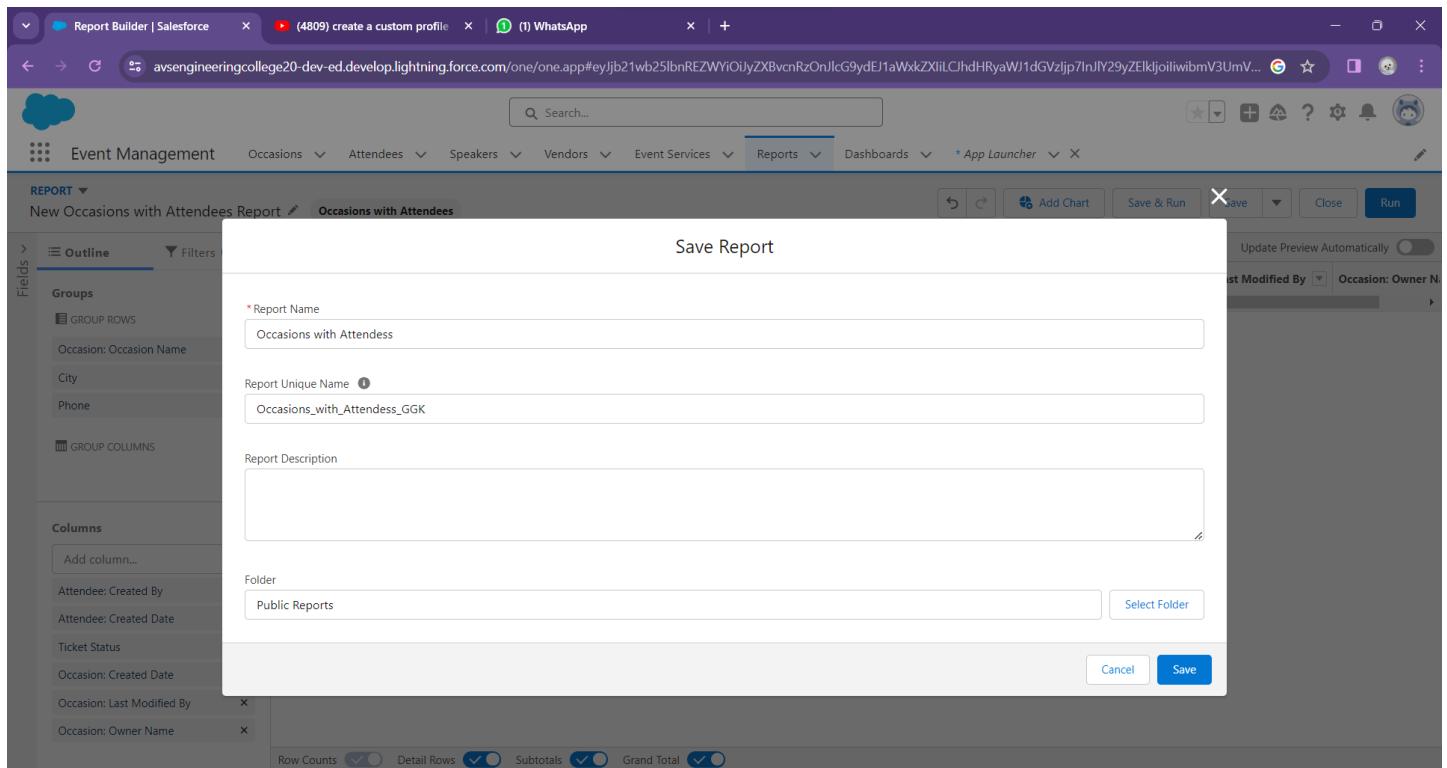
## REPORTS & DASHBOARD

### 5.1 Reports

A Salesforce report is a list of data generated based on filter criteria. Salesforce Reports helped us predict trends and gives us the advantage to increase profits.

The report builder provides a drag-and-drop interface to easily build and customize your reports.

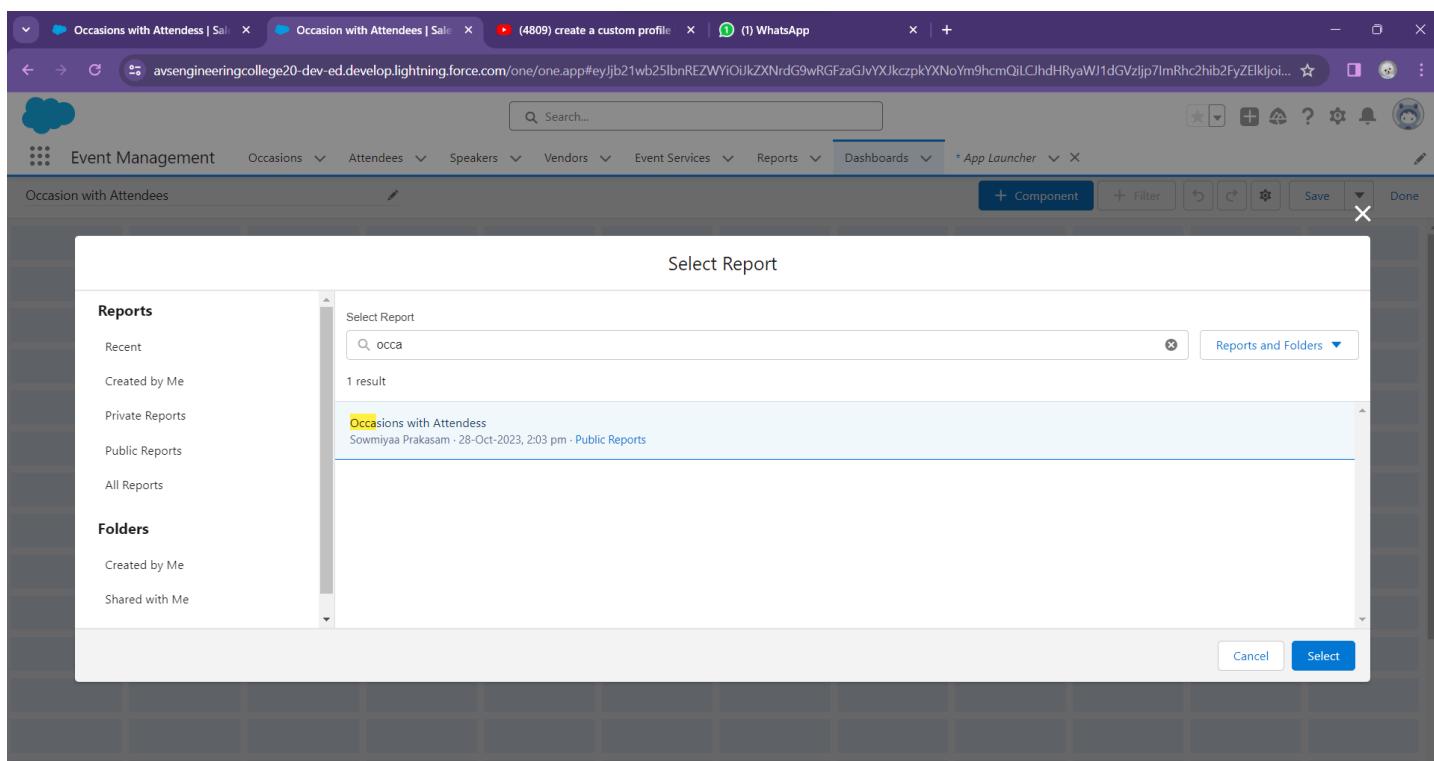
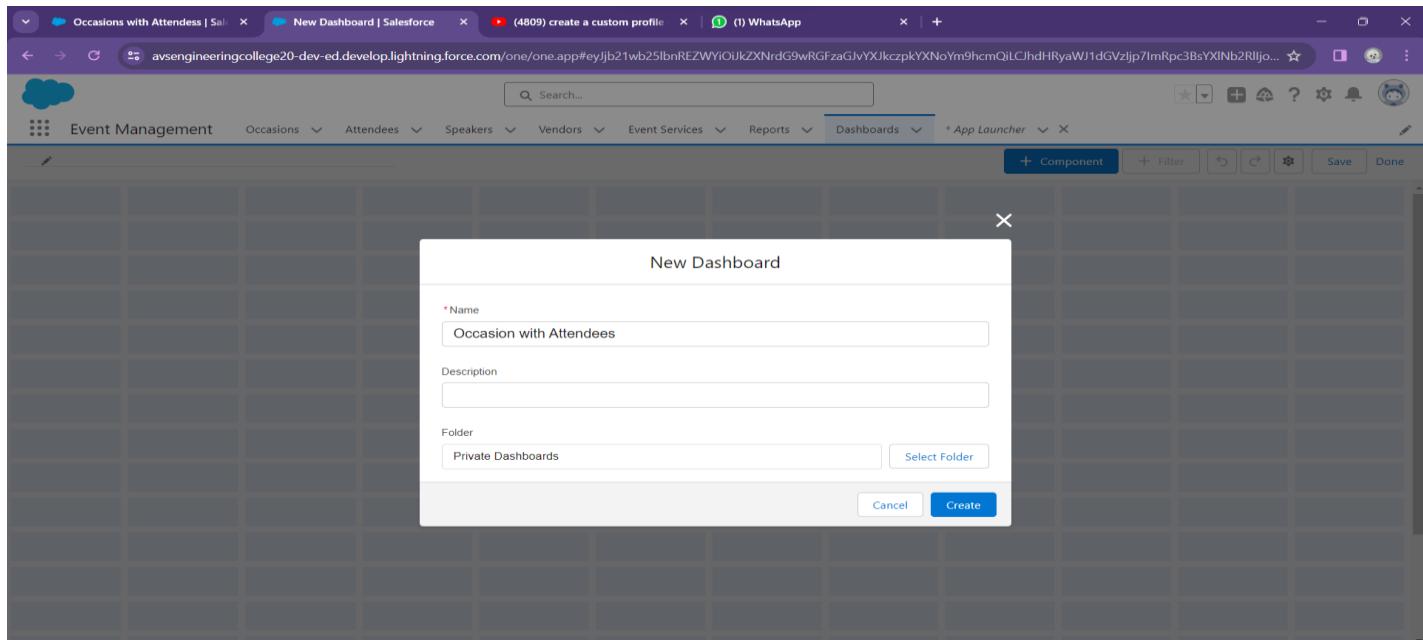


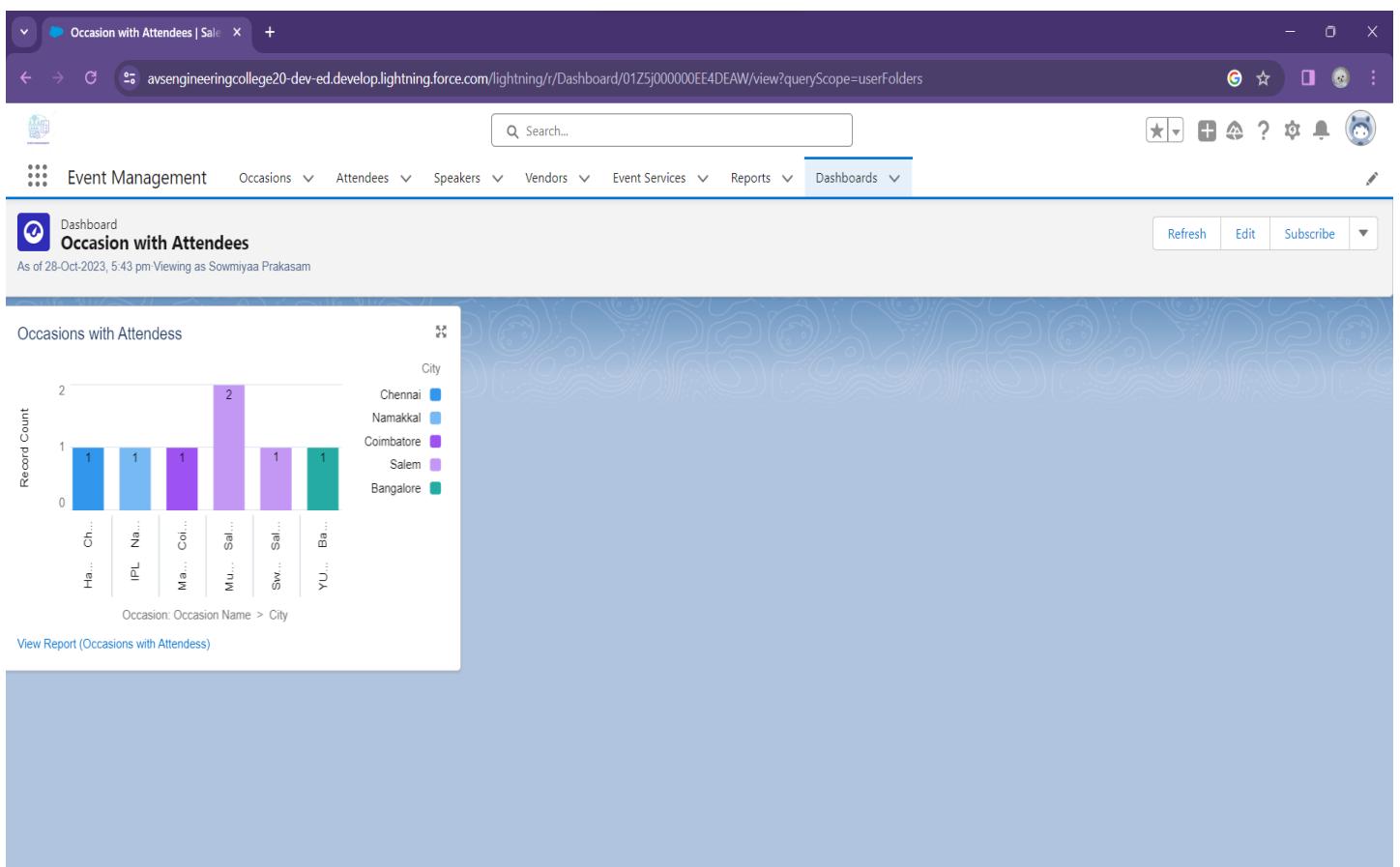
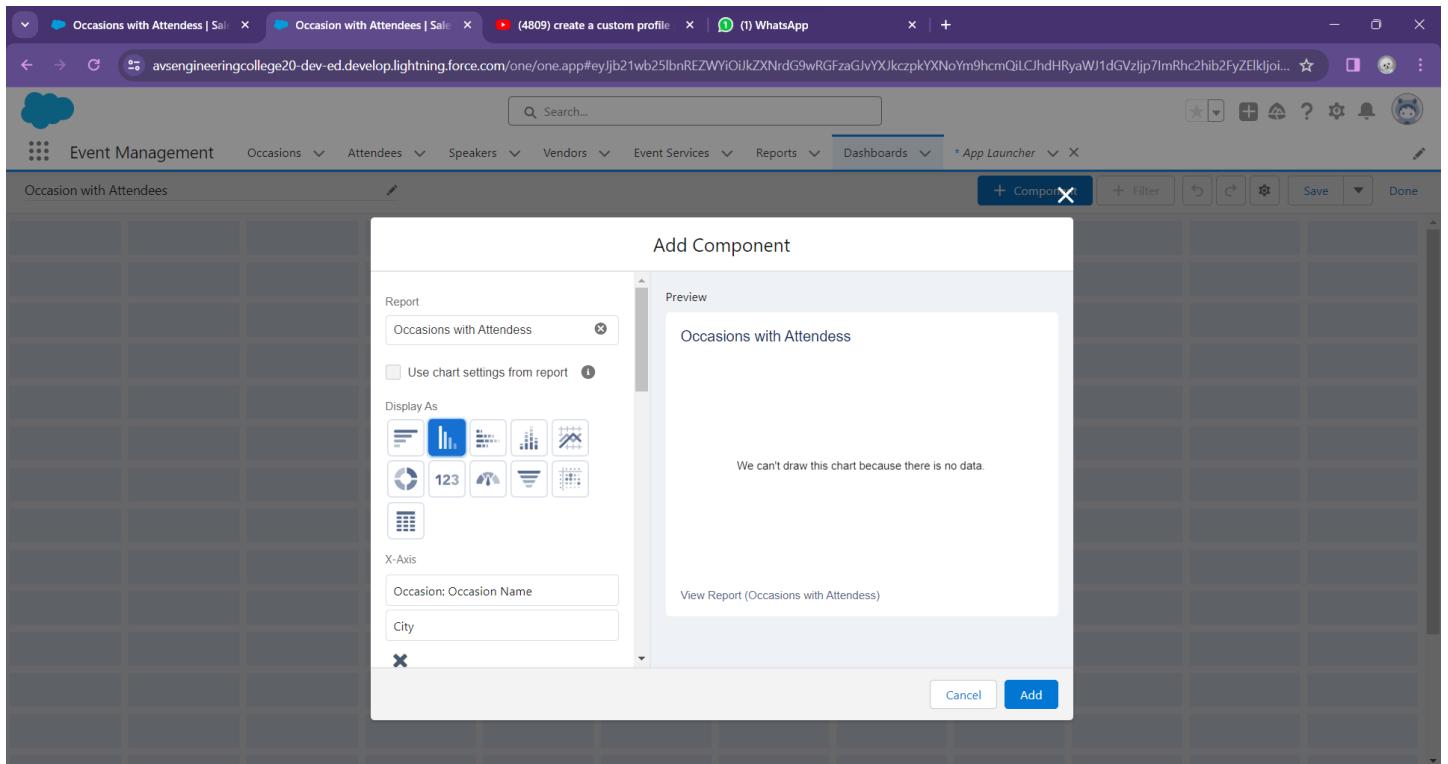


Report: Occasions with Attendees														
Occurrences with Attendees														
Total Records 7														
Occasion: Occasion Name	City	Phone	Attendee: Created By	Attendee: Created Date	Ticket Status	Occasion: Created Date	Occasion: Last Modified By	Occasion: Owner Name						
Happening Street (1)	Chennai (1)	9845876323 (1)	Sowmiyaa Prakasam	28/10/2023	Not Confirmed	28/10/2023	Sowmiyaa Prakasam	Sowmiyaa Prakasam						
		Subtotal												
Subtotal														
IPL (1)	Namakkal (1)	6369497351 (1)	Sowmiyaa Prakasam	28/10/2023	Pending	28/10/2023	Sowmiyaa Prakasam	Sowmiyaa Prakasam						
		Subtotal												
Subtotal														
Magic show (1)	Coimbatore (1)	9943608017 (1)	Sowmiyaa Prakasam	28/10/2023	Confirmed	28/10/2023	Sowmiyaa Prakasam	Sowmiyaa Prakasam						
		Subtotal												
Subtotal														
Music Concert (2)	Salem (2)	9843952933 (2)	Sowmiyaa Prakasam	28/10/2023	Confirmed	28/10/2023	Sowmiyaa Prakasam	Sowmiyaa Prakasam						
		Sowmiyaa Prakasam												
Row Counts														
Detail Rows														
Subtotals														
Grand Total														

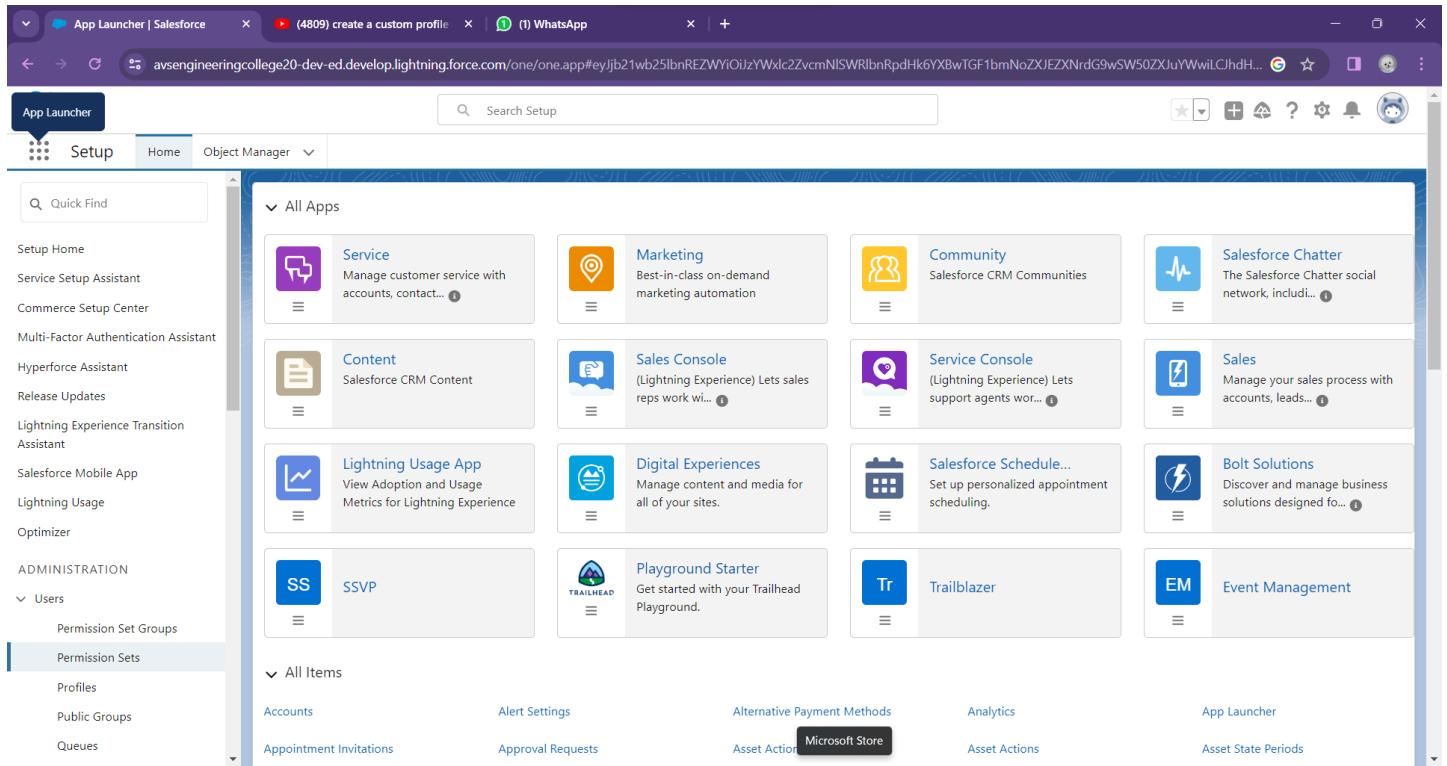
## 5.2 Dashboard

A dashboard provides an interactive visual display of key metrics and trends. Multiple dashboard components can be shown together on a single dashboard layout, creating rich visual displays of multiple reports that have a common theme.

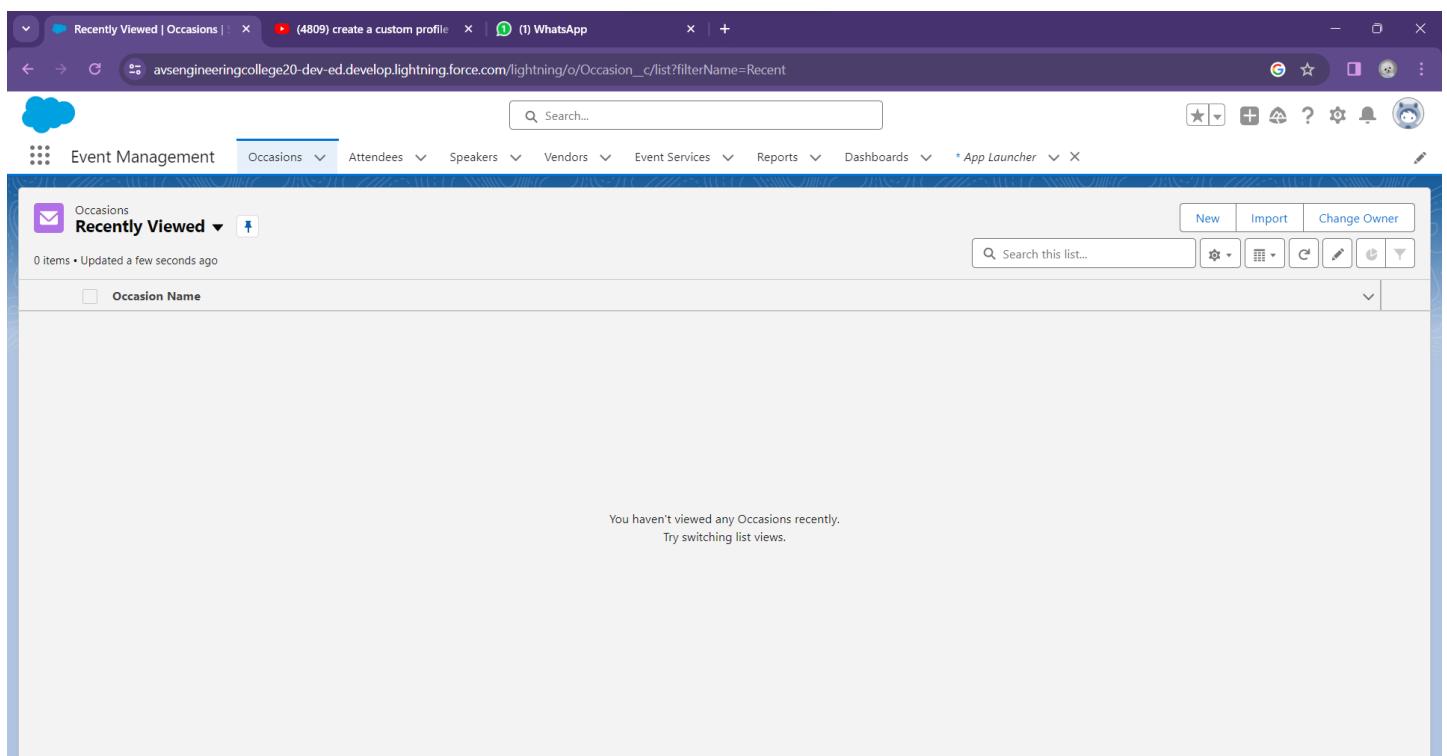




## 5.3 USER ADOPTION



The screenshot shows the Salesforce App Launcher interface. The top navigation bar includes tabs for App Launcher, Setup, Home, and Object Manager. A search bar labeled "Search Setup" is present. The main area displays a grid of "All Apps" with icons and names: Service, Marketing, Community, Salesforce Chatter, Content, Sales Console, Service Console, Sales, Lightning Usage App, Digital Experiences, Salesforce Schedule..., Bolt Solutions, SSVP, Playground Starter, Trailblazer, and Event Management. On the left sidebar, under "Setup Home", there are links for Service Setup Assistant, Commerce Setup Center, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration, Users, Permission Set Groups, and Permission Sets. Under "Permission Sets", "Profiles" and "Public Groups" are listed. The bottom section shows "All Items" with links for Accounts, Alert Settings, Alternative Payment Methods, Analytics, App Launcher, Appointment Invitations, Approval Requests, Asset Action (Microsoft Store), Asset Actions, and Asset State Periods.

The screenshot shows the Salesforce Event Management page. The top navigation bar includes tabs for Event Management, Occasions, Attendees, Speakers, Vendors, Event Services, Reports, Dashboards, and App Launcher. A search bar labeled "Search..." is present. The main area displays a list titled "Recently Viewed" under the "Occurrences" tab. It shows 0 items updated a few seconds ago. A message at the bottom states: "You haven't viewed any Occasions recently. Try switching list views." There are buttons for New, Import, and Change Owner, along with a search bar for this list.

New Occasion | Salesforce | (4809) create a custom profile | (1) WhatsApp

avseengineeringcollege20-dev-ed.lightning.force.com/lightning/o/Occasion\_\_c/new?count=1&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST\_VIEW&uid=16984806...

**New Occasion**

Information

\* = Required Information

Occasion Name	Owner
Music Concert	Sowmiya Prakasam
City	
Salem	
Phone	
9843952933	
Email	
sowmiyaaprakasam2344@gmail.com	
Tickets	
Premium	
Start date	
09/12/2023	10:45 am
<input type="button" value="Cancel"/> <input type="button" value="Save &amp; New"/> <input type="button" value="Save"/>	

- Recently Viewed | Occasions | (4809) create a custom profile | (1) WhatsApp
- avseengineeringcollege20-dev-ed.lightning.force.com/lightning/o/Occasion\_\_c/list?filterName=Recent
- 
- Recently Viewed
- |               |  |
|---------------|--|
| Occasion Name |  |
| Music Concert |  |
- 
-

## **CONCLUSION**

In conclusion, the development of an Event Management System (EMS) represents an opportunity to transform the way we plan, execute, and experience events. The challenges outlined in the initial problem statement underscore the need for a comprehensive solution that not only streamlines event management but also enhances participant satisfaction and fosters a sense of community. Through innovative features and functionalities, such as AI-powered recommendations, blockchain ticketing, and sustainability initiatives, an EMS can set new standards in the industry.

Furthermore, the system's technical and functional requirements, ranging from security and scalability to data analytics and accessibility, are crucial in delivering a robust and reliable platform. By adhering to these requirements, we can ensure that the EMS meets the highest standards in terms of performance, data privacy, and user accessibility.

In an era where events play a vital role in professional and social life, the creation of an EMS opens the door to efficient, engaging, and sustainable event management. It empowers organizers to make data-driven decisions, provides a personalized experience for attendees, and contributes to a more connected and eco-conscious event ecosystem. Ultimately, the successful development and implementation of this system promise to revolutionize the event management landscape, leaving a lasting positive impact on organizers, participants, and the environment alike.

## CHAPTER-7

### PROJECT DEMONSTRATION

**Github:**

<https://github.com/Sowmiyaa-Prakasam/NAAN-MUDHALVAN>

**Demo Link:**

<https://youtu.be/vasbrxmsDco>

**TRAILHEAD LINKS:**

**SOWMIYAA P:**

<https://www.salesforce.com/trailblazer/sowmiyaaprakasam>

**SOWNDARYA S:**

<https://www.salesforce.com/trailblazer/sowndharyas3170>

**PRIYADHARSHINI R:**

<https://www.salesforce.com/trailblazer/priyadharshinirziftao2auyun>

**SRI SETHA DEVI M:**

<https://www.salesforce.com/trailblazer/sriswethadevim>

**VIDHYA SRI R:**

<https://www.salesforce.com/trailblazer/vidhyasriraja>