Project Report Template

BUILD AN EVENT MANAGEMENT SYSTEM USING SALESFORCE

1. Introduction:

1.1. <u>Overview</u>

Event management is the application of project management to the creation and development of large or small scale events such as festivals, conferences, ceremonies, formal parties, concerts, or conventions.

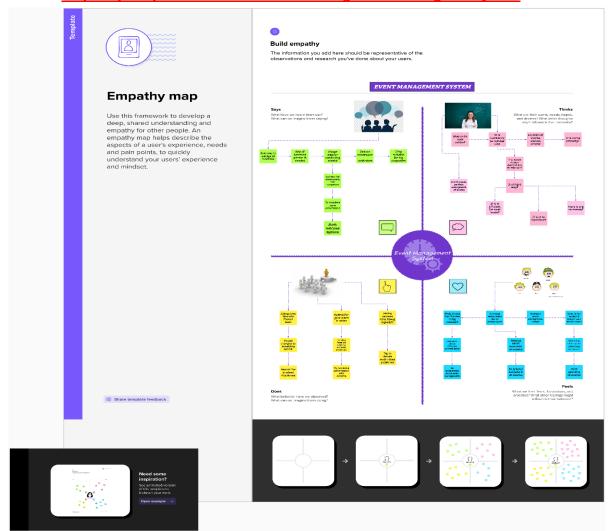
1.2. Purpose

The purpose of our project is to provide customers with a clear vision of

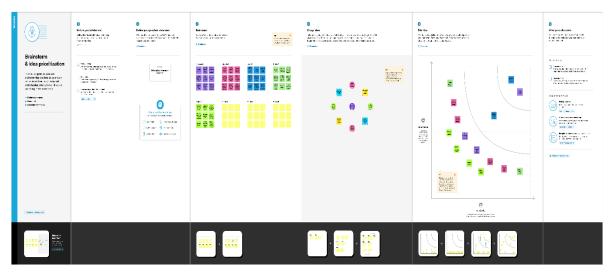
- Event management is the process of creating and maintaining an event. This process spans from the very beginning of planning all the way to post-event strategizing. At the start, an event manager makes planning decisions, such as the time, location, and theme of their event
- Helps organizers plan, Execute, Report on events, Driving success for their business.
- ❖ It should give a guaranteed good satisfaction.

2. Problem Definition & Design Thinking :

2.1. Empathy Map For Build an Event Management Using Salesforce



2.2. Ideation & Brainstorming Map



3. RESULT:

3.1. <u>Data Model :</u>

| Objects | Fields in the Object | |
|----------|--------------------------------------|----------------------------|
| | Field Label | Data Type |
| Event | City | Text |
| | Start Date | Date/Time |
| | End Date | Date/Time |
| | Event Name | Master-detail Relationship |
| | Event Name | Look-up Relationship |
| | | |
| Attendee | Field Label | Data Type |
| | ID | Auto Number |
| | Phone | Phone |
| | E-mail | E-mail |
| | Tickets ✓ Premium ✓ Gold ✓ Silver | Picklist |
| Speaker | Field Label | Data Type |
| | Bio | Text Area |
| | E-mail | E-mail |
| | | |
| Vendor | Field Label | Data Type |
| | E-mail | E-mail |
| | Phone | Phone |
| | E-mail | E-mail |
| | Service Provider | Text |
| | Event Name | Look-up Relationship |

3.2. Activity & Screenshot

3.2.1. Objects:

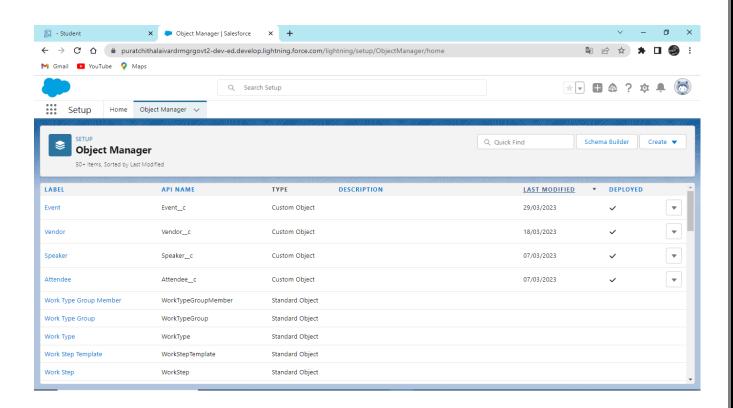
Salesforce objects are database tables that permit you to store data that is specific to an organization. It consists of fields (columns) and records (rows).

Salesforce objects are of two types:

- **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.

Creation of Custom Objects:

- > Event
- > Attendee
- Speaker
- Vendor



3.2.2. Tab:

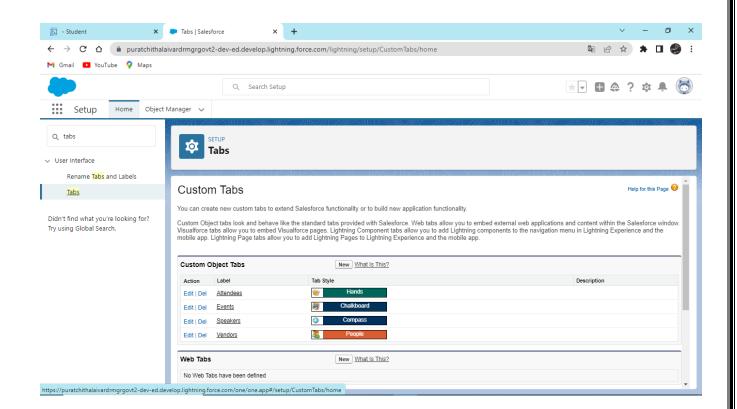
Tabs in Salesforce help users view the information at a glance. It displays the data of objects and other web content in the application.

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.

Creation of Tabs:

- Event Tab
- Attendee Tab
- > Speakers Tab
- Vendors Tab



3.2.3. Application

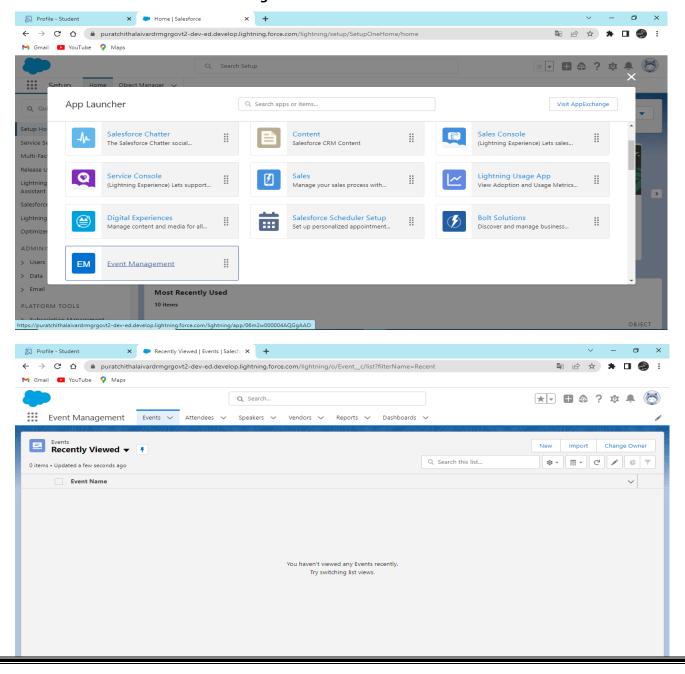
Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs.

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.

Creation of the Event Management Construction app:

> Event Management



3.2.4. 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.

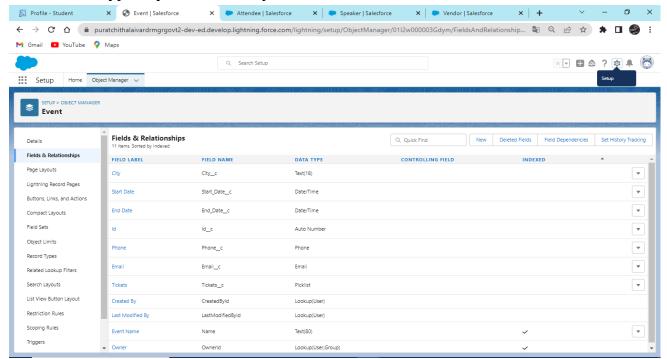
There are 2 types of fields in salesforce:

- 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.

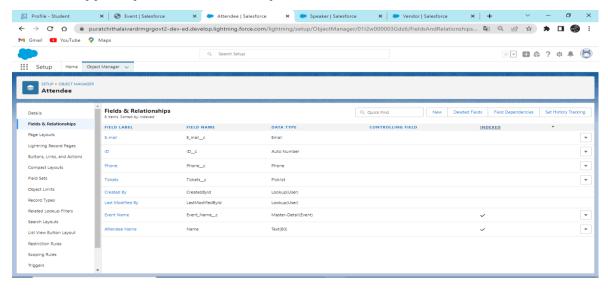
Creation of Fields

- Event objects
- > Attendees objects
- Speakers objects
- Vendors objects

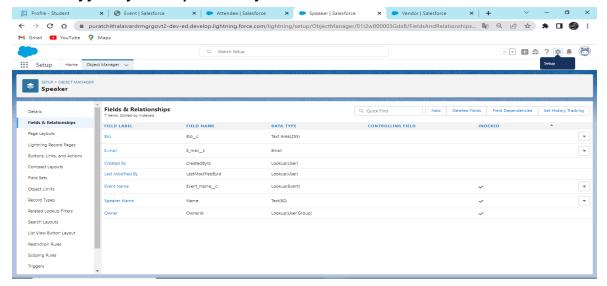
Creation of fields for the Event objects



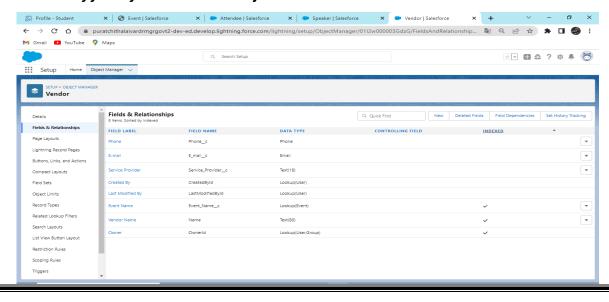
Creation of fields for the Attendees objects



Creation of fields for the Speakers objects



Creation of fields for the Vendors objects



3.2.5. *Profile*

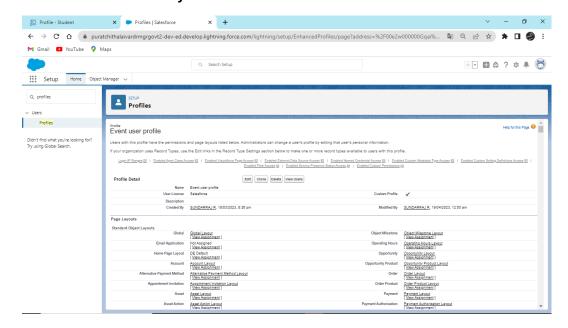
A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls "Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges.

A profile can be assigned to many users, but user can be assigned single profile at a time.

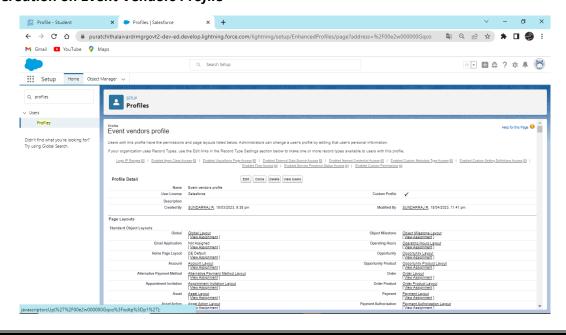
Creation of Profile

- > Event user profile
- > Event vendors profile

Creation on Event User Profile



Creation on Event Vendors Profile



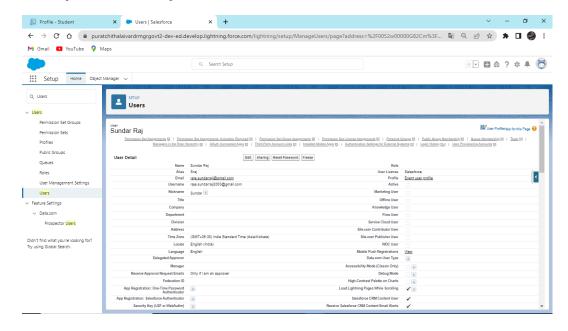
3.2.6. User

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.

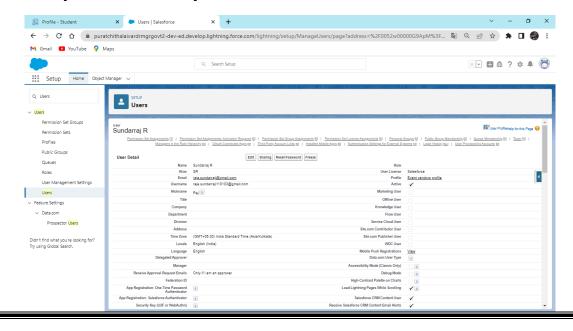
Creation of User

- > Event user profile User
- > Event vendors profile User

Creation of Event user Profile User



Creation of Event Vendors Profile User



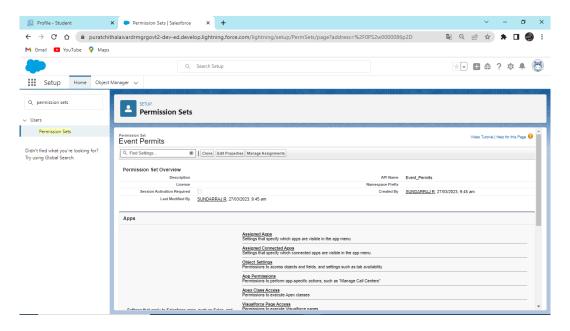
3.2.7. Permission Sets

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.

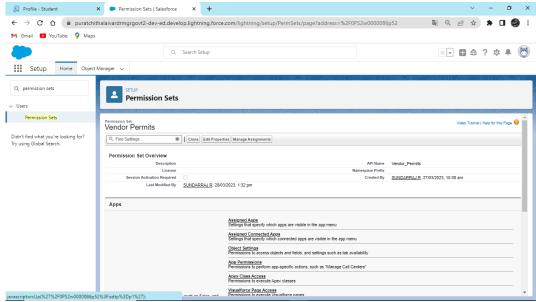
Creating a Permission Set

- Event Permits
- Vendor Permits

Event Permits



Vendor Permits



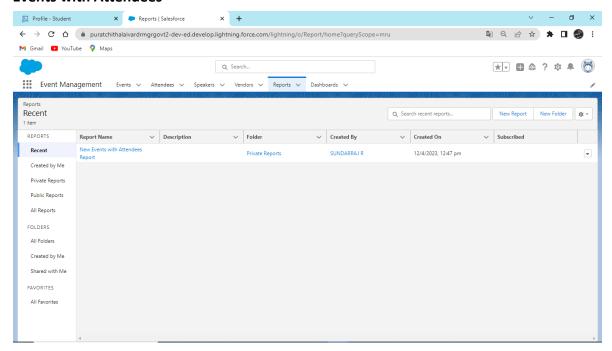
3.2.8. Reports

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.

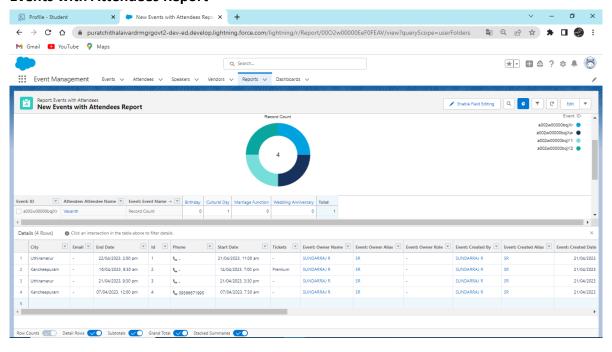
Creating a Report

> Events with Attendees

Events with Attendees



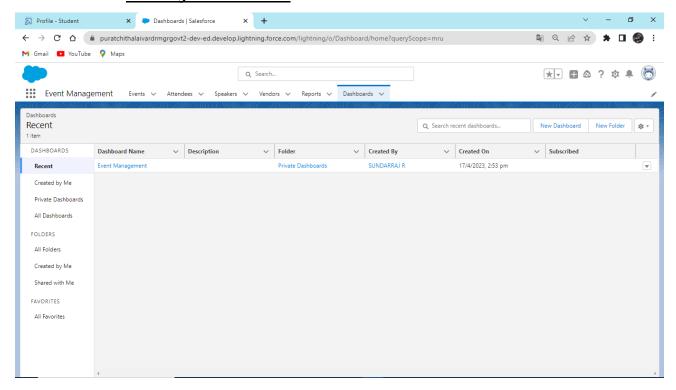
Events with Attendees Report



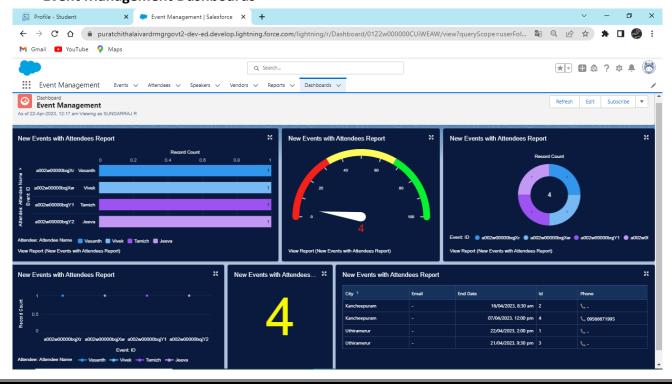
3.2.9. Dasboards

Dashboards let you curate data from reports using charts, tables, and metrics. If your colleagues need more information, then they're able to view your dashboard's data-supplying reports. Dashboard filters make it easy for users to apply different data perspectives to a single dashboard.

Creating a Dashboards



Event Management Dashboards



4. Trailhead Profile Public URL:

Team Lead - https://trailblazer.me/id/hifibrothers110103

Team Member 1 - https://trailblazer.me/id/fvikram
Team Member 2 - https://trailblazer.me/id/fvikram

Team Member 3 - https://trailblazer.me/id/srajendiran6
Team Member 4 - https://trailblazer.me/id/srajendiran6

5. ADVANTAGES & DISADVANTAGES:

ADVANTAGES:

- Easier event management. A dedicated event platform makes the entire event easier to manage. ...
- ❖ Saves time. ...
- **Cut costs....**
- Increase engagement. ...
- ❖ Analyze and improve. ...
- ❖ Automate your event. ...
- ❖ Display a greater level of professionalism. ...
- * Take a holistic approach to event management.

DISADVANTAGES:

- Budgeting Problems. One of the most common challenges that event planners face is budgeting. ...
- Understaffing Problems. ...
- ❖ Picking The Right Venue. ...
- ❖ Technological Challenges. ...
- ❖ Keeping Track of Event Planning Process. ...
- Lack of Backup Plan for Bad Weather. ...
- ❖ Lack of Event Planning Experience. ...
- Time Management.

6. APPLICATIONS:

- **Solution** Easier access to information about the event.
- **Access to event information even offline.**
- Easier to make use of tools to interact with other participants (networking)
- **Solution** Easier to interact with products and job offers.

7. CONCLUSION:

On the whole, it can be concluded that this application is very useful for people who are planning to Event management in this current situation.

8. FUTURE SCOPE:

- The scope of event management as a career in India is immense. This career provides a unique opportunity to rephrase our social beliefs.
- Hosting events can redesign the structure of a city by facilitating economic growth, employment opportunities, urban development, and promoting indigenous culture and heritage.

