PROJECT REPORT

BUILD AN EVENT MANAGEMENT SYSTEM USING SALESFORCE

1. INTRODUCTION

1.1 Overview

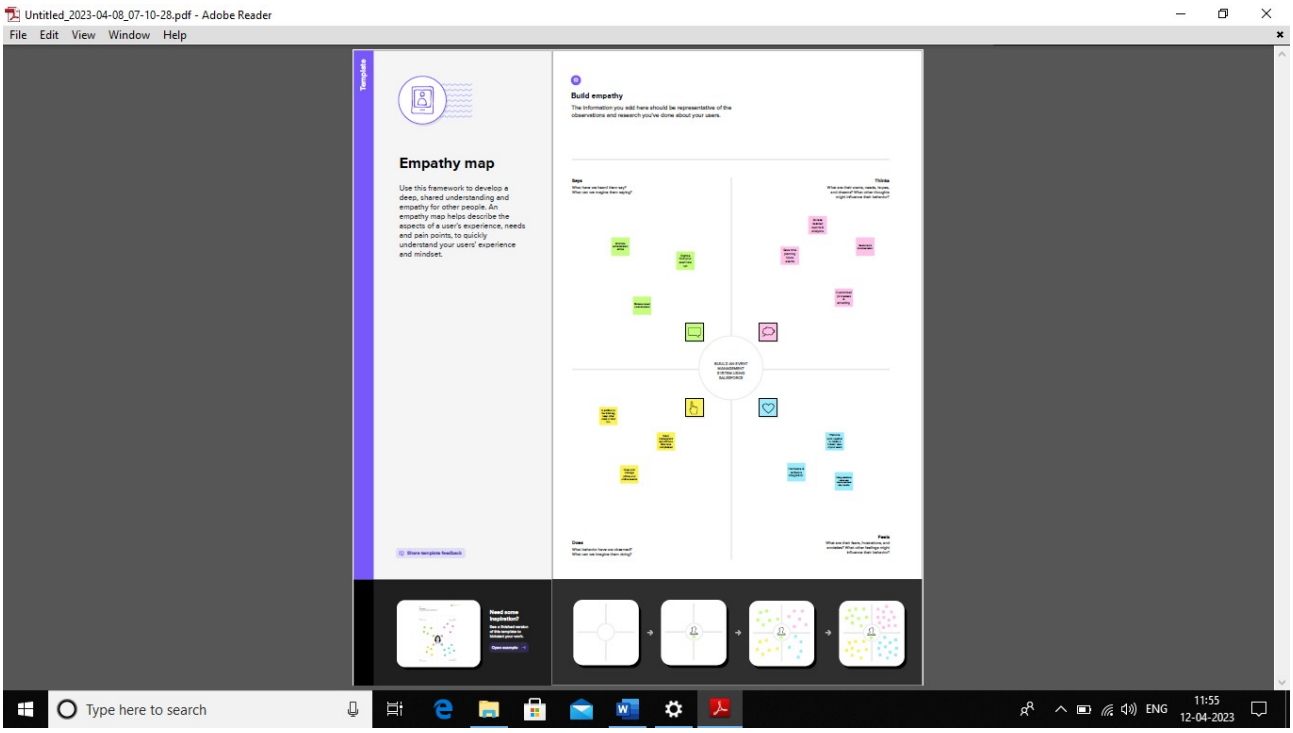
Event management is the process of creating and maintaining an event. This process spans from the very beginning of planning all the way to post event strategizing.

1.2 Purpose

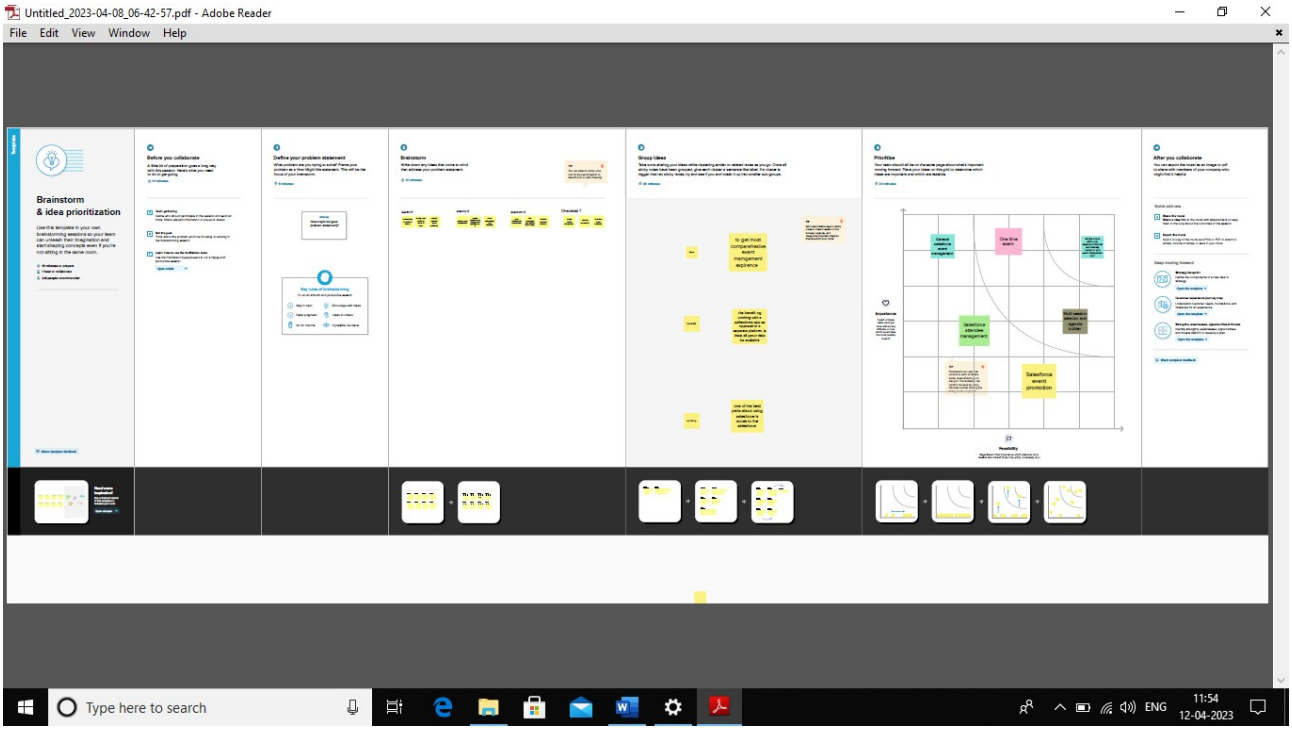
All different branches of planning go into event management, including various types of sourcing, desiging, regulation **checks**, and on-site management.

2. Problem Definition & Design Thinking

2.1 Empathy Map



2.2 Ideation & Brainstorming Map



3 RESULT

3.1 Data Model

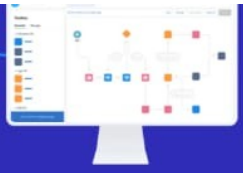
Object name	Fields in the Object	
obj1	Field label	Data type
	City	Text
	Start Data	Data/time
obj2	Field label	Data type
	Id	Auto number
	Phone	phone

3.2 Activity & Screenshort

Milestone 1 – Salesforce?

Activity:

Creating a salesforce developer org:



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salesforce

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Your first name

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Your last name

Email*
Your email address

Role*
Your job role

Company*
Company Name

Country/Region*
Select Country/Region

Postal Code*
Your postal code

Username*
jane@company.sandbox

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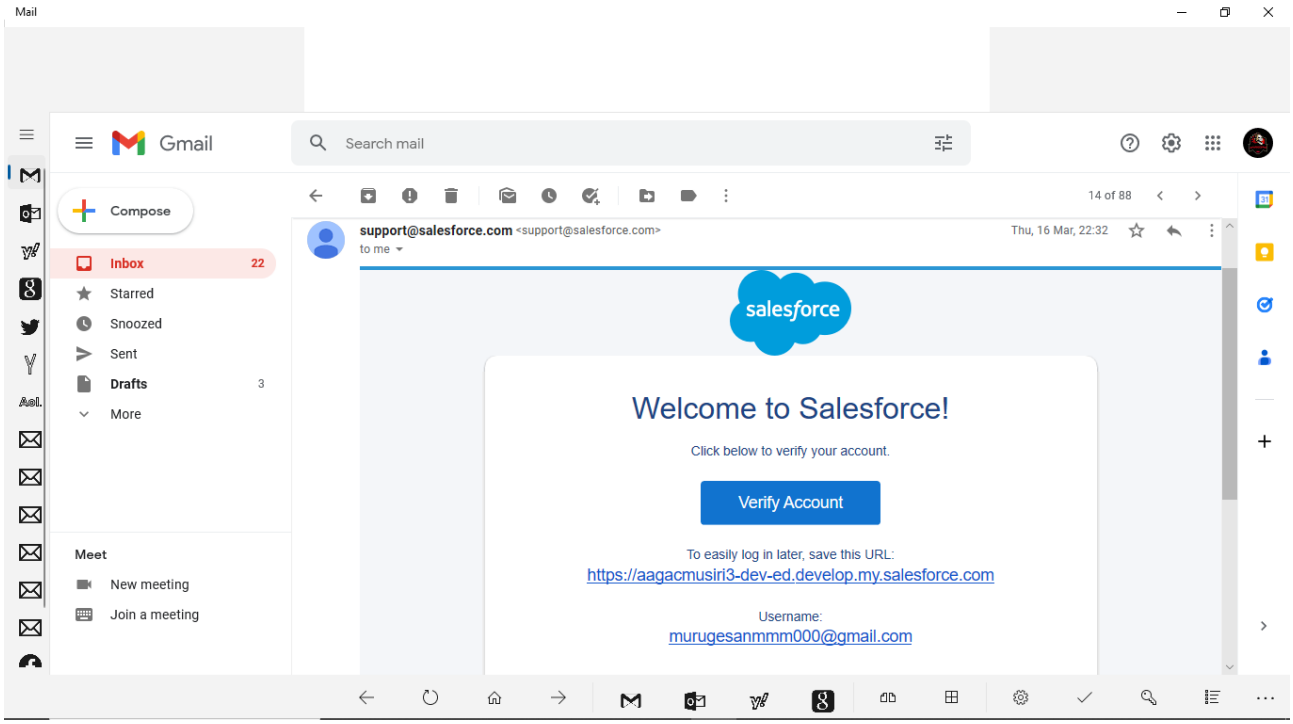
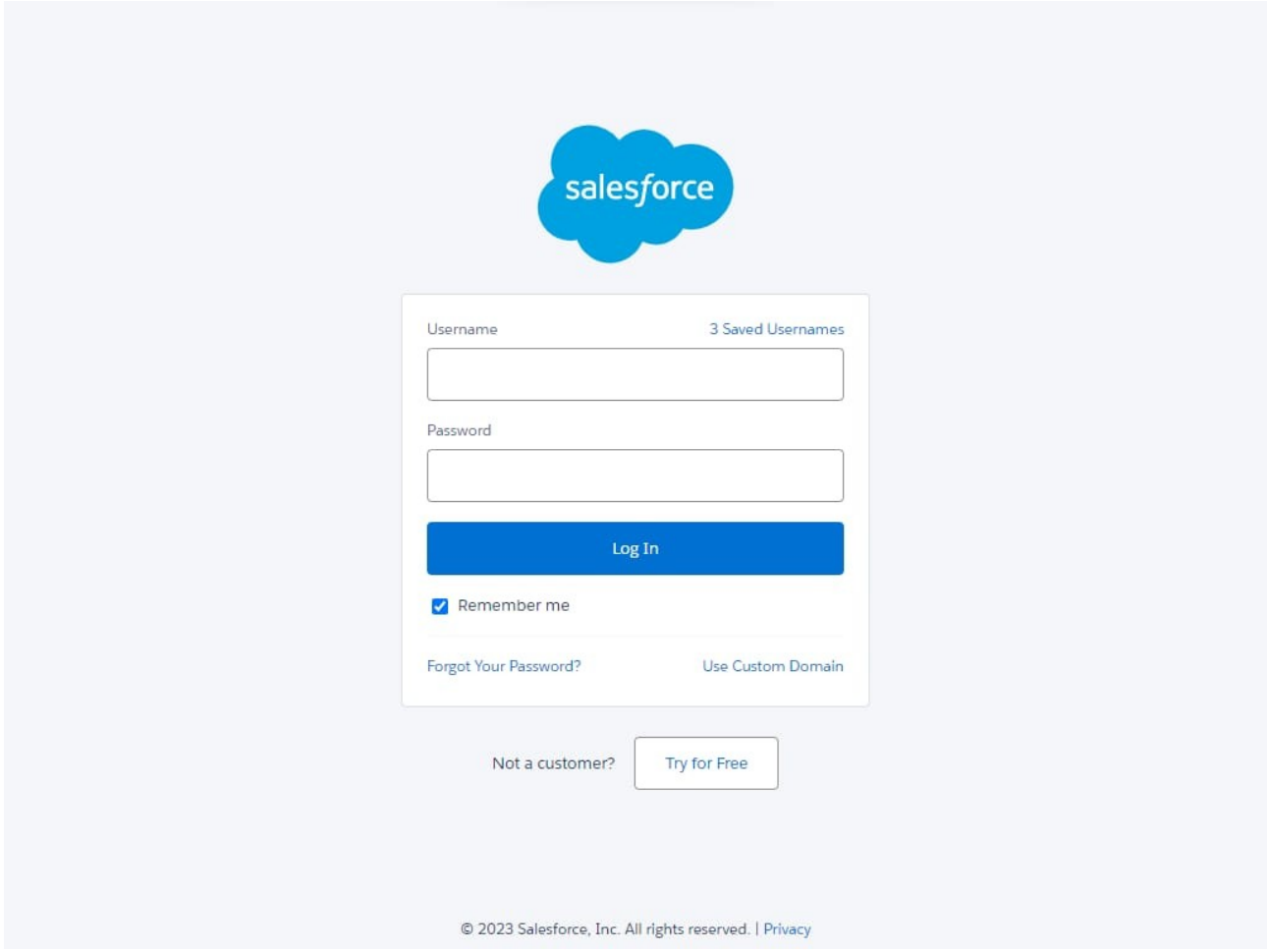
Log In


Mail
Gmail
Search mail
Compose
Inbox 22
Starred
Snoozed
Sent
Drafts 3
More
Meet
New meeting
Join a meeting
14 of 88
support@salesforce.com <support@salesforce.com>
to me
Thu, 16 Mar, 22:32
salesforce
Welcome to Salesforce!
Click below to verify your account.
Verify Account
To easily log in later, save this URL:
https://aagacmusiri3-dev-ed.develop.my.salesforce.com
Username:
murugesanmmm000@gmail.com


salesforce
Username
3 Saved Usernames
Password
Log In
Remember me
Forgot Your Password?
Use Custom Domain
Not a customer?
Try for Free
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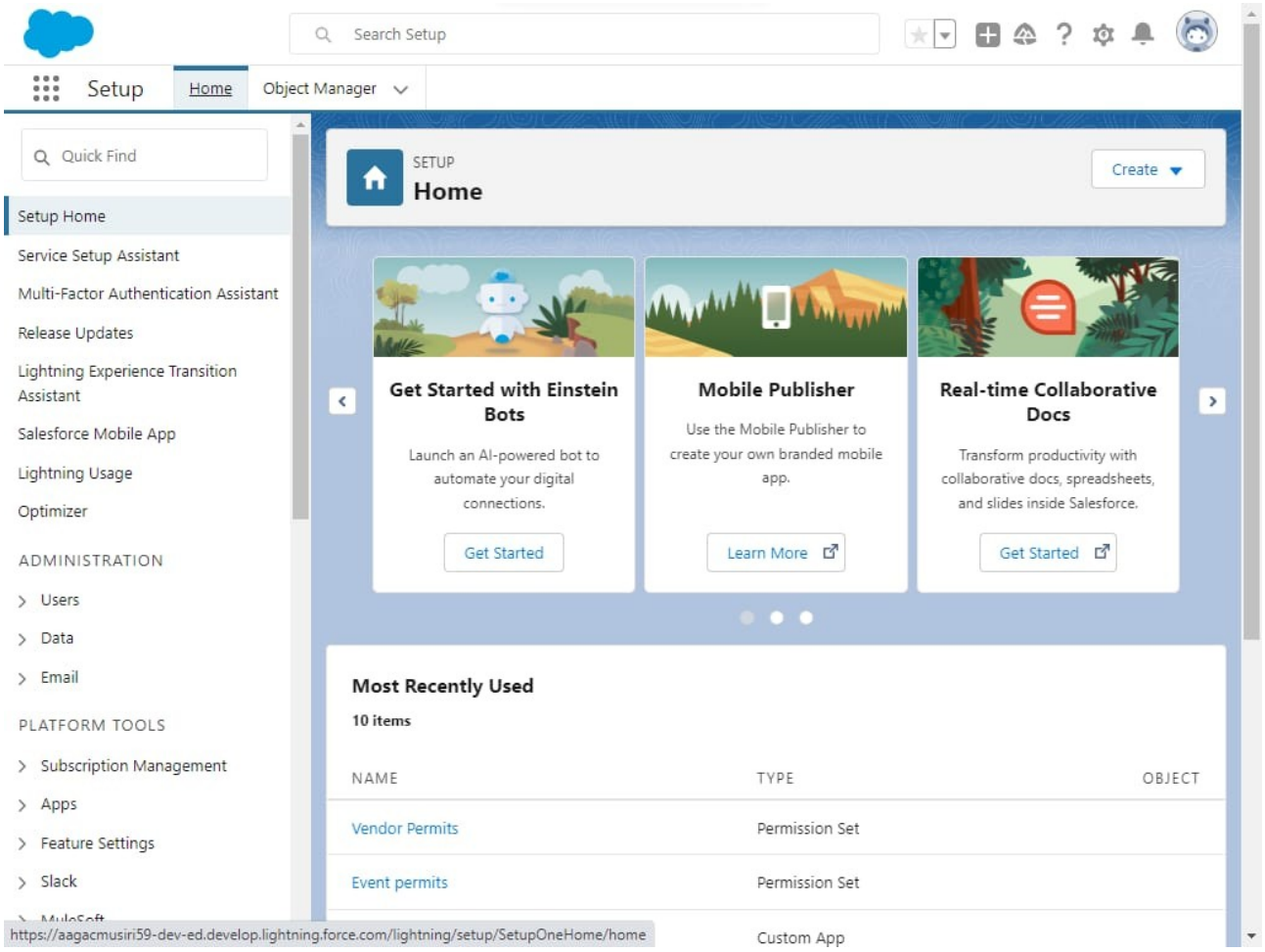
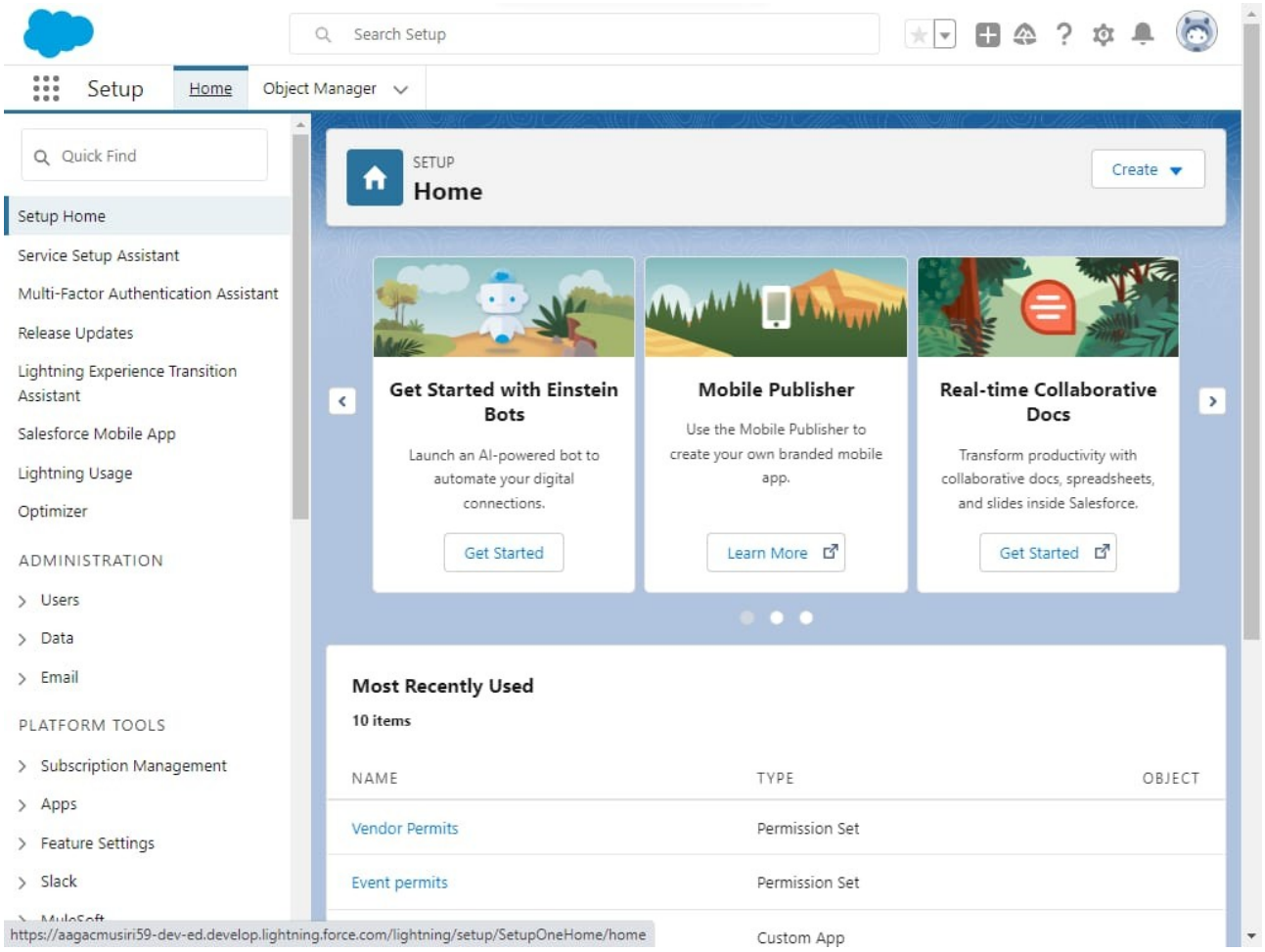
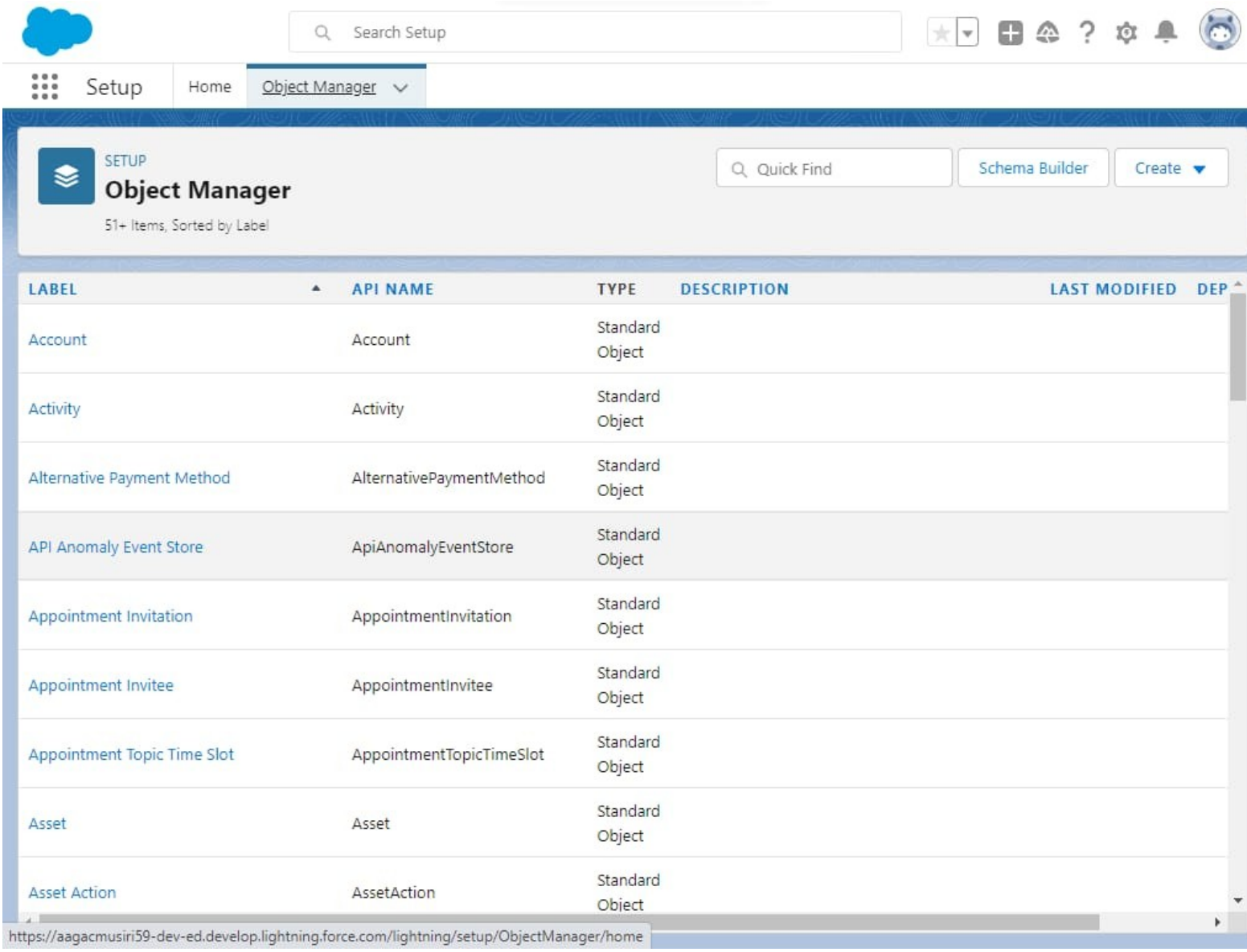


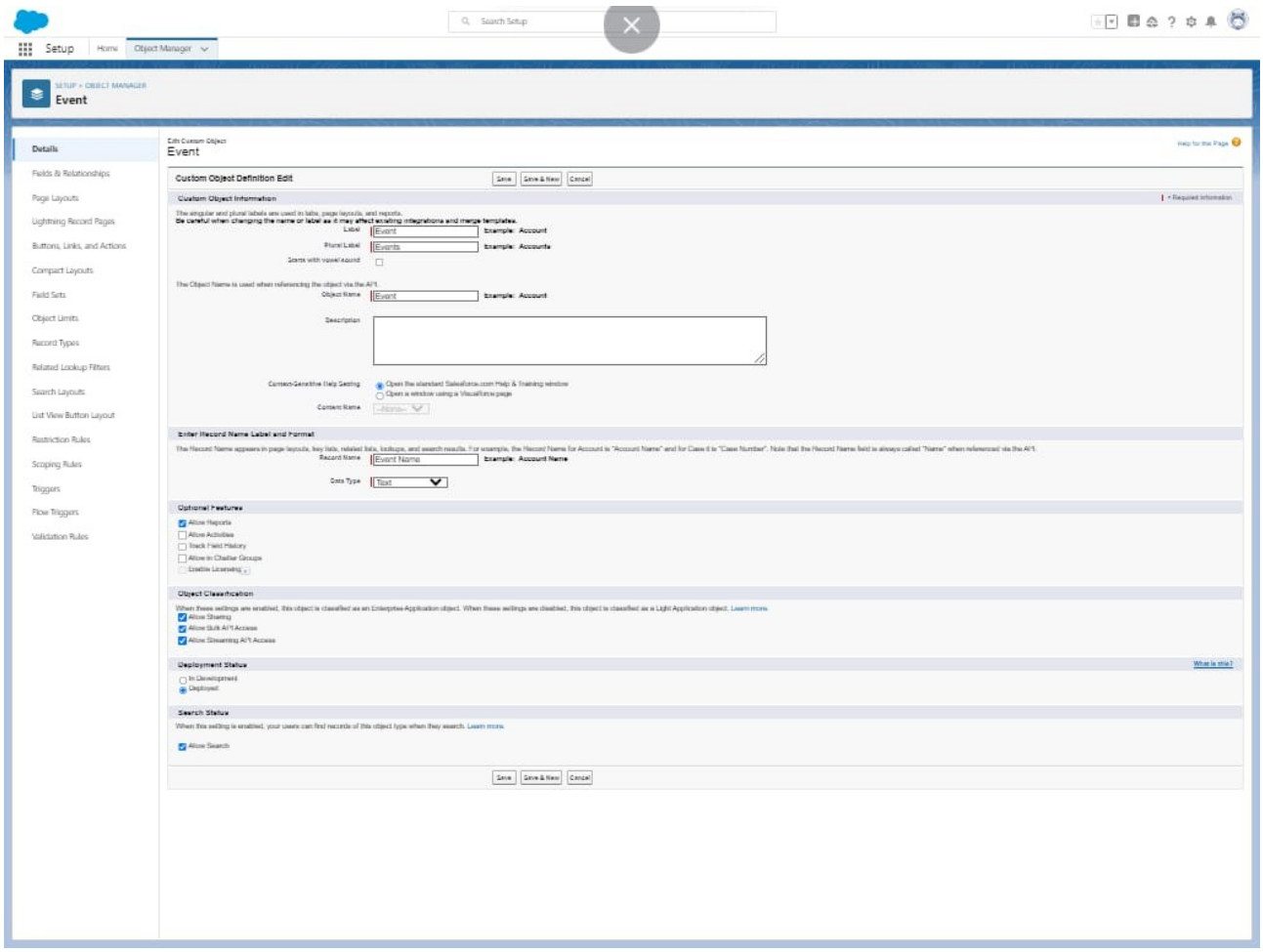
Milestone 2-object:

Activity 1:

Creation of object for event management


Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Data
Email
PLATFORM TOOLS
Subscription Management
Apps
Feature Settings
Slack
SETUP
Home
Create
Get Started with Einstein Bots
Launch an AI-powered bot to automate your digital connections.
Get Started
Mobile Publisher
Use the Mobile Publisher to create your own branded mobile app.
Learn More
Real-time Collaborative Docs
Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.
Get Started
Most Recently Used
10 items
NAME
TYPE
OBJECT
Vendor Permits
Permission Set
Event permits
Permission Set
Custom App
https://aagacmusiri59-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home

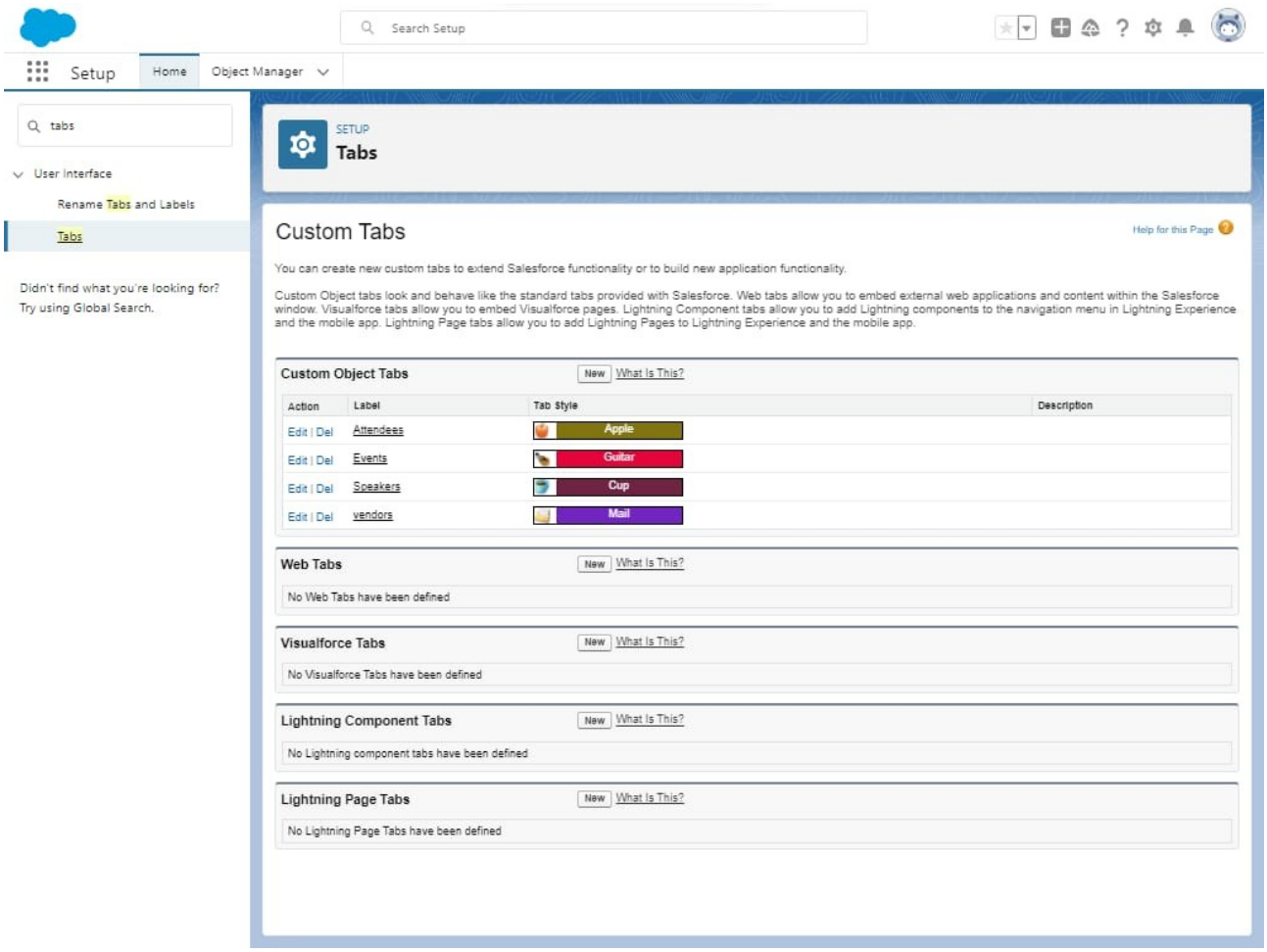

Search Setup
Setup
Home
Object Manager
SETUP
Object Manager
51+ Items, Sorted by Label
Quick Find
Schema Builder
Create
LABEL
API NAME
TYPE
DESCRIPTION
LAST MODIFIED
DEP
Account
Account
Standard Object
Activity
Activity
Standard Object
Alternative Payment Method
AlternativePaymentMethod
Standard Object
API Anomaly Event Store
ApiAnomalyEventStore
Standard Object
Appointment Invitation
AppointmentInvitation
Standard Object
Appointment Invitee
AppointmentInvitee
Standard Object
Appointment Topic Time Slot
AppointmentTopicTimeSlot
Standard Object
Asset
Asset
Standard Object
Asset Action
AssetAction
Standard Object
https://aagacmusiri59-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

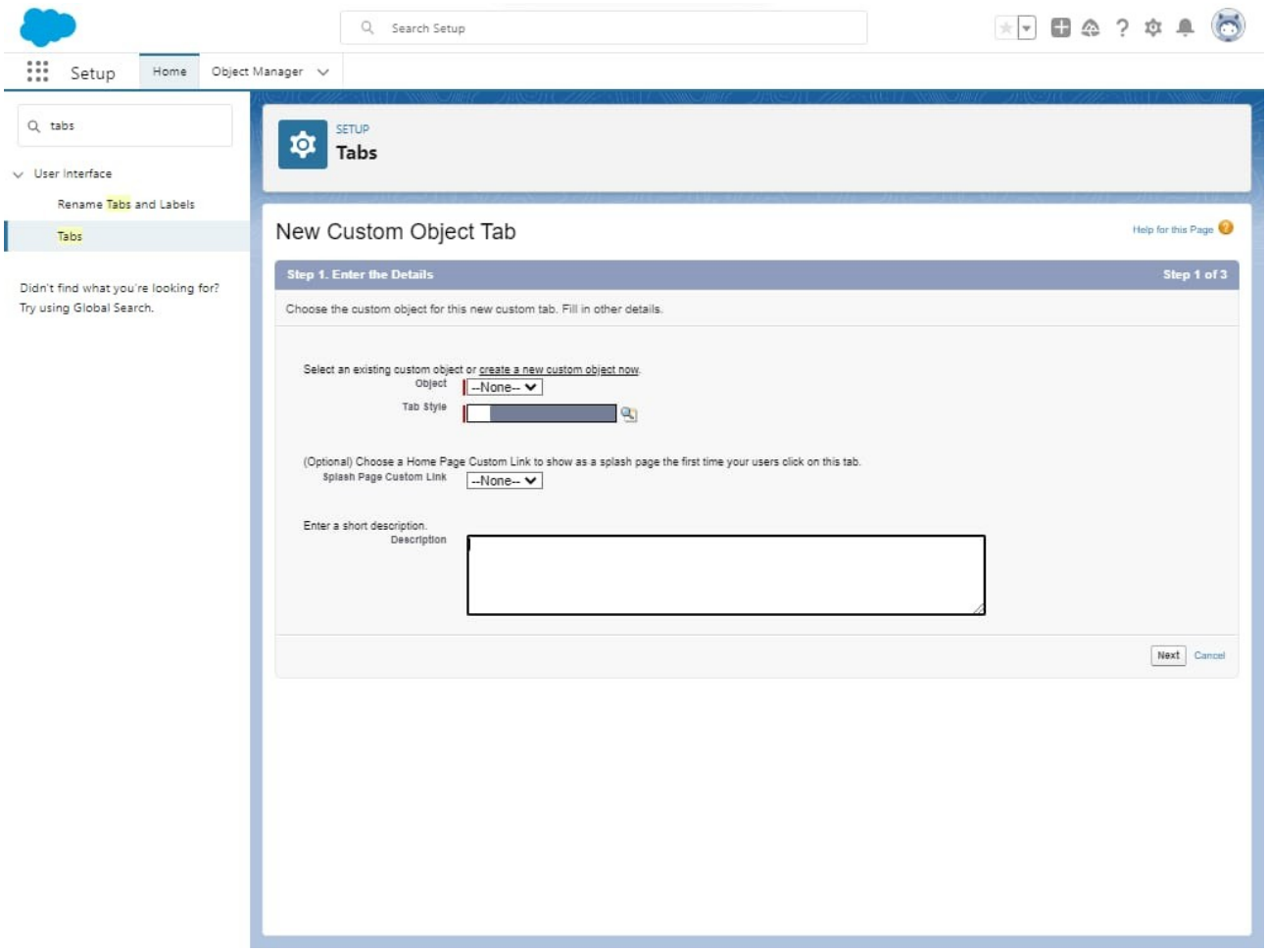


Milestone 3-Tab:

Activity 1:

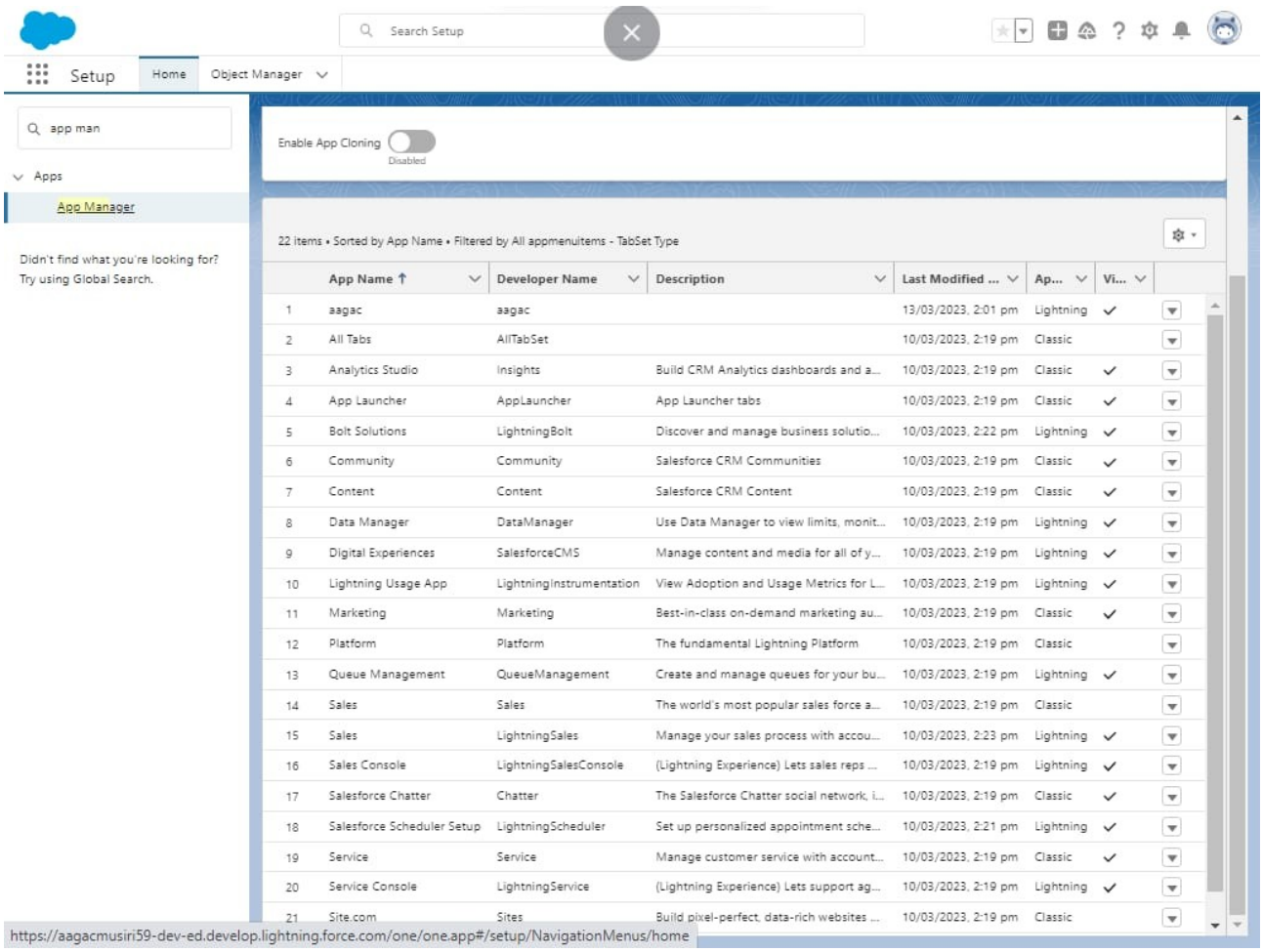
Creation of event tab:

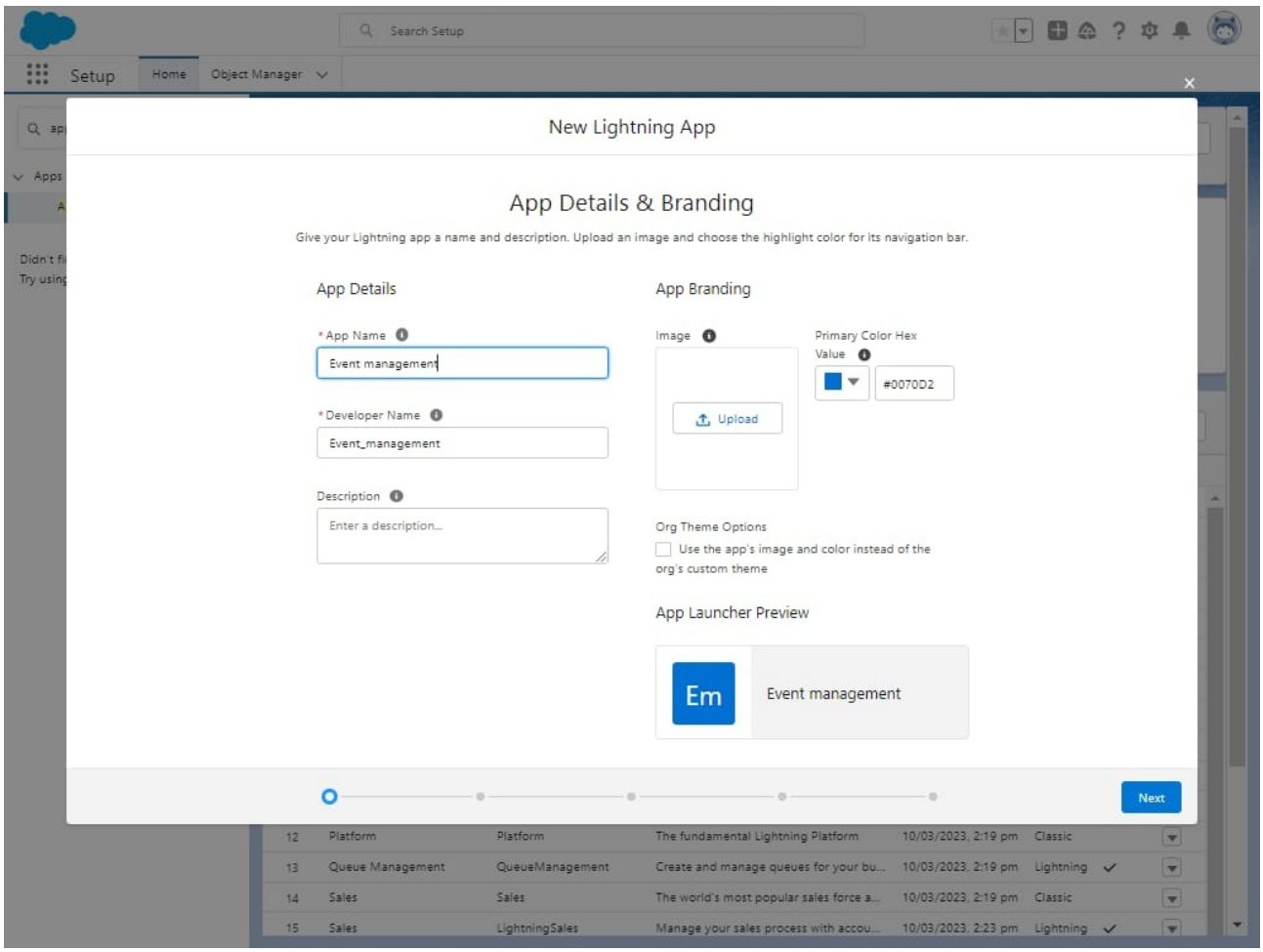

Search Setup
Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for?
Try using Global Search.
SETUP
Tabs
Custom Tabs
Help for this Page
You can create new custom tabs to extend Salesforce functionality or to build new application functionality.
Custom 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 window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. 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
Edit | Del
Attendees
Apple
Edit | Del
Events
Guitar
Edit | Del
Speakers
Cup
Edit | Del
vendors
Mail
Web Tabs
New
What Is This?
No Web Tabs have been defined
Visualforce Tabs
New
What Is This?
No Visualforce Tabs have been defined
Lightning Component Tabs
New
What Is This?
No Lightning component tabs have been defined
Lightning Page Tabs
New
What Is This?
No Lightning Page Tabs have been defined

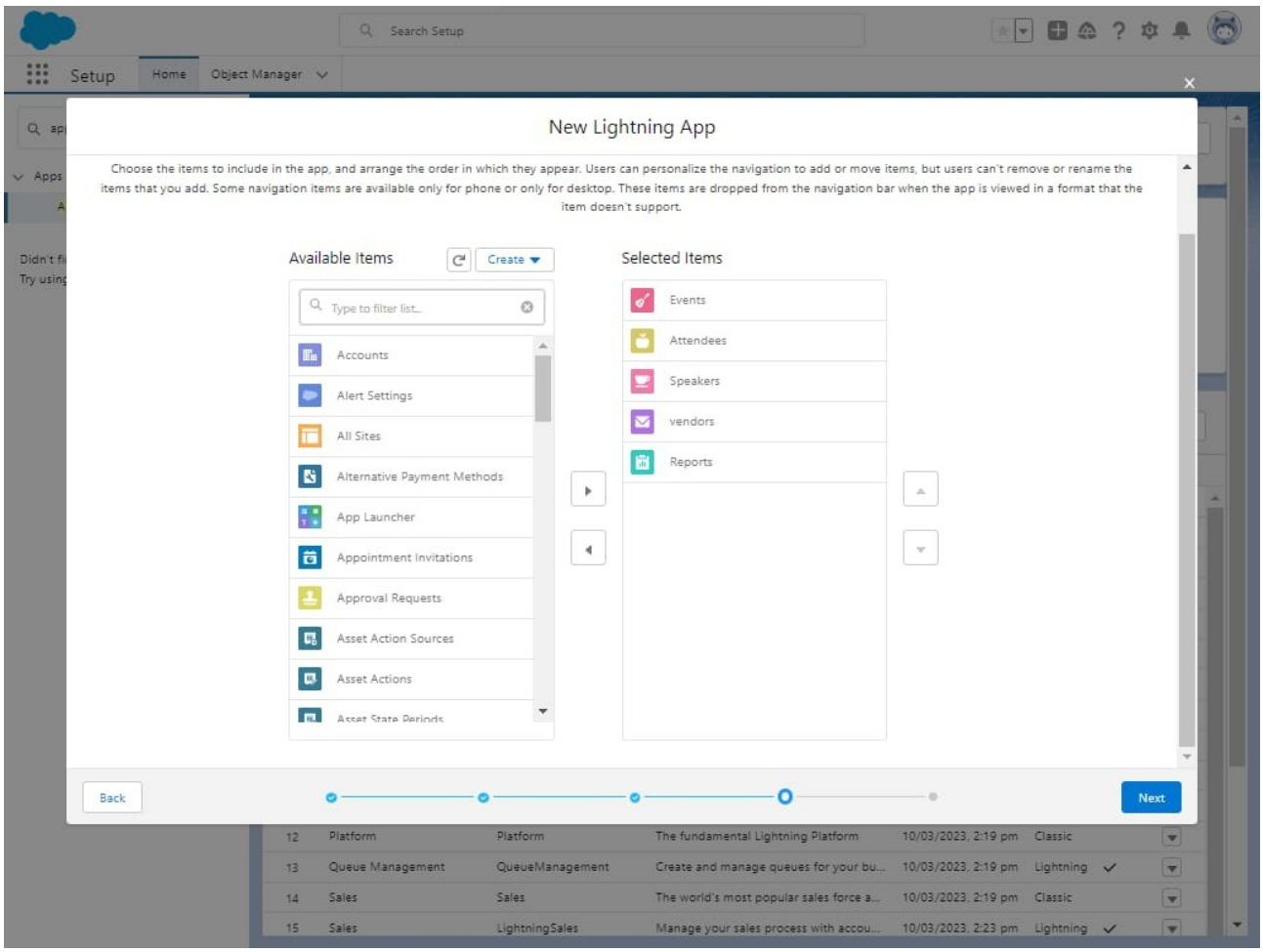


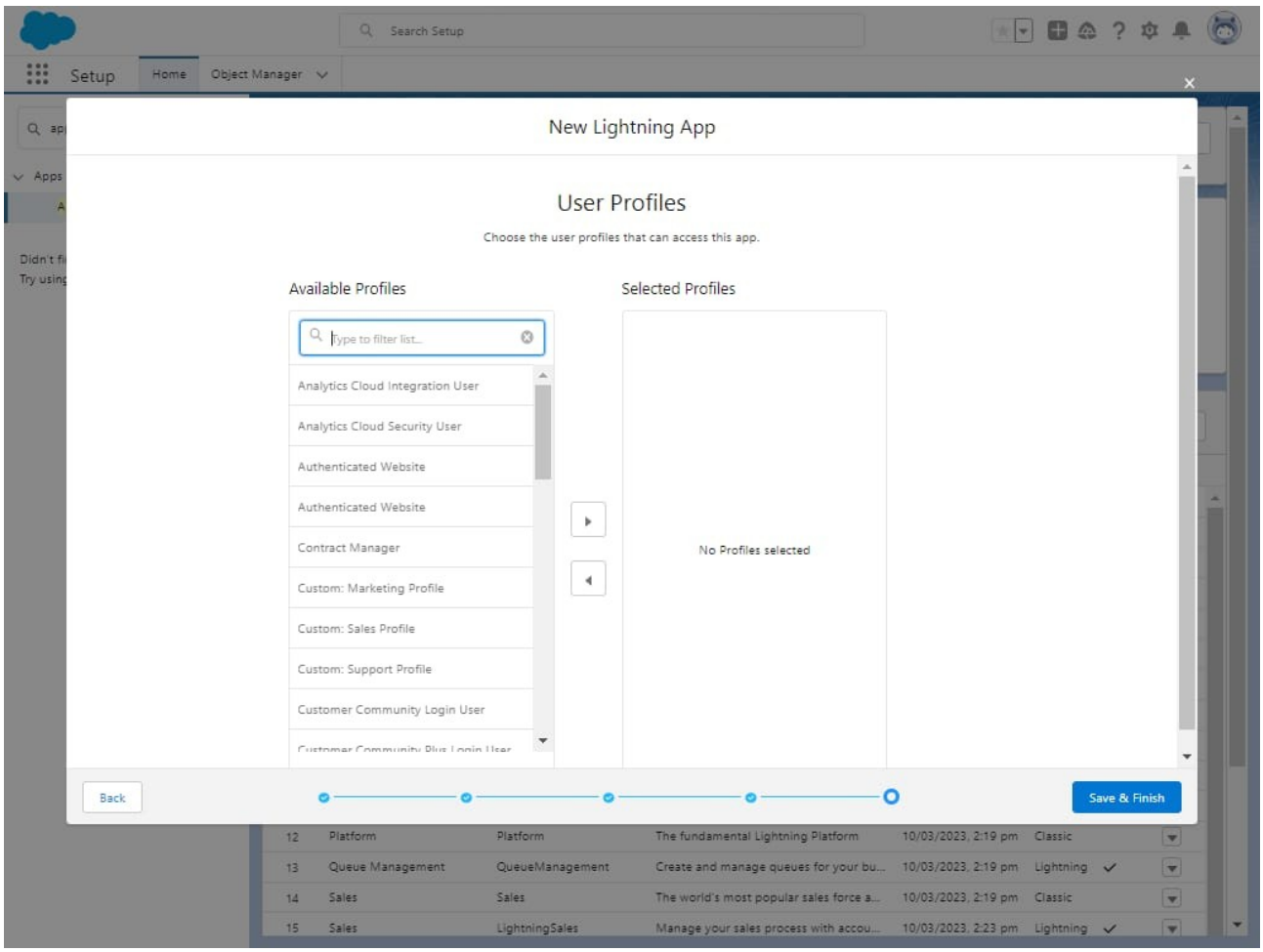
Milestone 3 – Application:

Creat the event management construction app


Search Setup
Setup
Home
Object Manager
app man
Apps
App Manager
Didn't find what you're looking for?
Try using Global Search.
Enable App Cloning
Disabled
22 items • Sorted by App Name • Filtered by All appmenuItems - TabSet Type
App Name
Developer Name
Description
Last Modified ...
Ap...
Vi...
1 aagac aagac 13/03/2023, 2:01 pm Lightning
2 All Tabs AllTabSet 10/03/2023, 2:19 pm Classic
3 Analytics Studio Insights Build CRM Analytics dashboards and a... 10/03/2023, 2:19 pm Classic
4 App Launcher AppLauncher App Launcher tabs 10/03/2023, 2:19 pm Classic
5 Bolt Solutions LightningBolt Discover and manage business solutio... 10/03/2023, 2:22 pm Lightning
6 Community Community Salesforce CRM Communities 10/03/2023, 2:19 pm Classic
7 Content Content Salesforce CRM Content 10/03/2023, 2:19 pm Classic
8 Data Manager DataManager Use Data Manager to view limits, monit... 10/03/2023, 2:19 pm Lightning
9 Digital Experiences SalesforceCMS Manage content and media for all of y... 10/03/2023, 2:19 pm Lightning
10 Lightning Usage App LightningInstrumentation View Adoption and Usage Metrics for L... 10/03/2023, 2:19 pm Lightning
11 Marketing Marketing Best-in-class on-demand marketing au... 10/03/2023, 2:19 pm Classic
12 Platform Platform The fundamental Lightning Platform 10/03/2023, 2:19 pm Classic
13 Queue Management QueueManagement Create and manage queues for your bu... 10/03/2023, 2:19 pm Lightning
14 Sales Sales The world's most popular sales force a... 10/03/2023, 2:19 pm Classic
15 Sales LightningSales Manage your sales process with accou... 10/03/2023, 2:23 pm Lightning
16 Sales Console LightningSalesConsole (Lightning Experience) Lets sales reps ... 10/03/2023, 2:19 pm Lightning
17 Salesforce Chatter Chatter The Salesforce Chatter social network, i... 10/03/2023, 2:19 pm Classic
18 Salesforce Scheduler Setup LightningScheduler Set up personalized appointment sche... 10/03/2023, 2:21 pm Lightning
19 Service Service Manage customer service with account... 10/03/2023, 2:19 pm Classic
20 Service Console LightningService (Lightning Experience) Lets support ag... 10/03/2023, 2:19 pm Lightning
21 Site.com Sites Build pixel-perfect, data-rich websites ... 10/03/2023, 2:19 pm Classic
https://aagacmusiri59-dev-ed.develop.lightning.force.com/one/one.app#/setup/NavigationMenus/home


Search Setup
Setup
Home
Object Manager
New Lightning 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
Event management
* Developer Name
Event_management
Description
Enter a description...
App Branding
Image
Upload
Primary Color Hex Value
#0070D2
Org Theme Options
Use the app's image and color instead of the org's custom theme
App Launcher Preview
Em
Event management
Next
12 Platform Platform The fundamental Lightning Platform 10/03/2023, 2:19 pm Classic
13 Queue Management QueueManagement Create and manage queues for your bu... 10/03/2023, 2:19 pm Lightning
14 Sales Sales The world's most popular sales force a... 10/03/2023, 2:19 pm Classic
15 Sales LightningSales Manage your sales process with accou... 10/03/2023, 2:23 pm Lightning

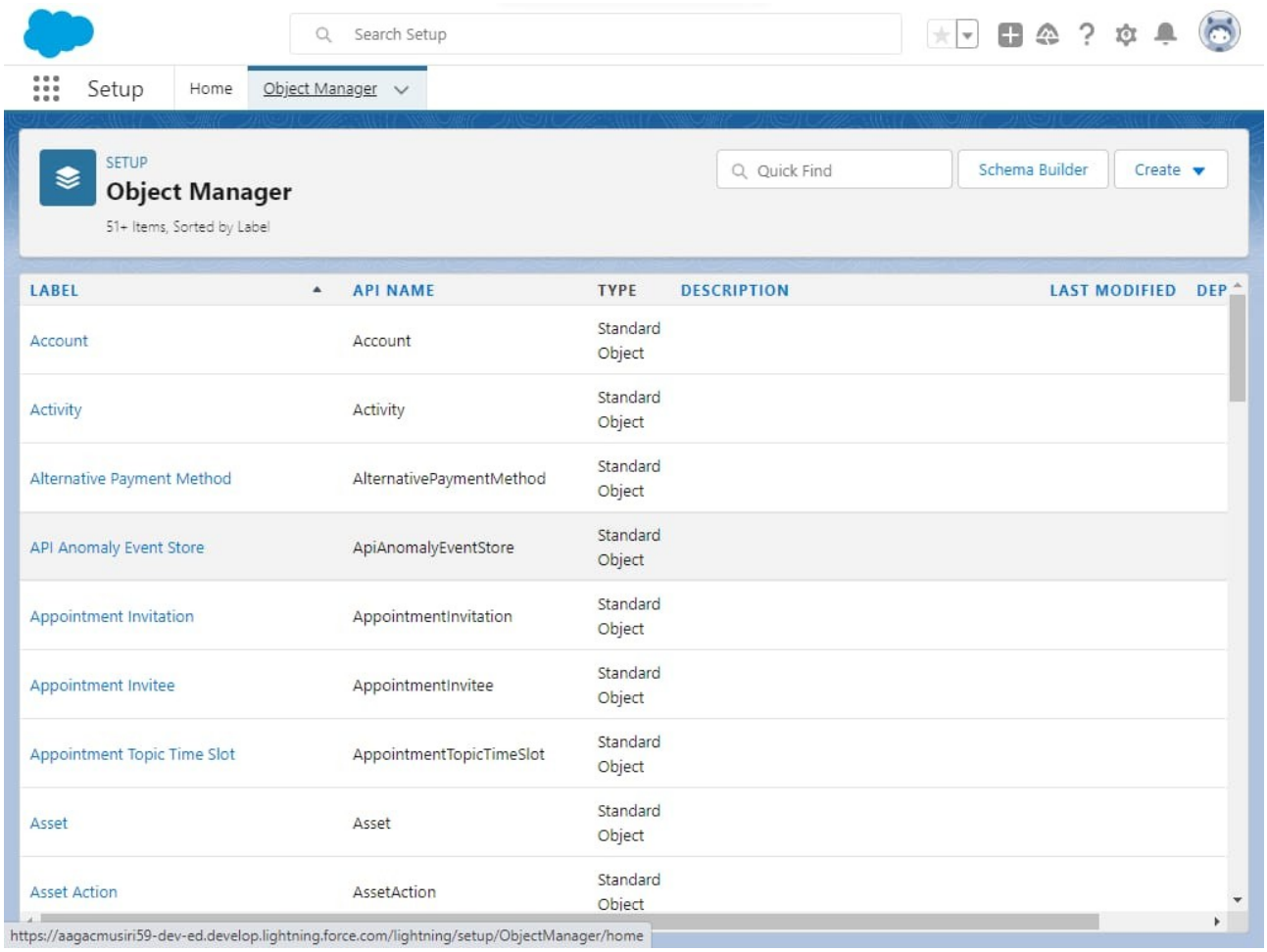

Search Setup
Setup
Home
Object Manager
New Lightning App
Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for 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
Create
Type to filter list...
Accounts
Alert Settings
All Sites
Alternative Payment Methods
App Launcher
Appointment Invitations
Approval Requests
Asset Action Sources
Asset Actions
Selected Items
Events
Attendees
Speakers
vendors
Reports
Back
Next
12 Platform Platform The fundamental Lightning Platform 10/03/2023, 2:19 pm Classic
13 Queue Management QueueManagement Create and manage queues for your bu... 10/03/2023, 2:19 pm Lightning
14 Sales Sales The world's most popular sales force a... 10/03/2023, 2:19 pm Classic
15 Sales LightningSales Manage your sales process with accou... 10/03/2023, 2:23 pm Lightning



Milestone 4 – Fields:

Activity 1:

Creation of fields for the event object;


Search Setup
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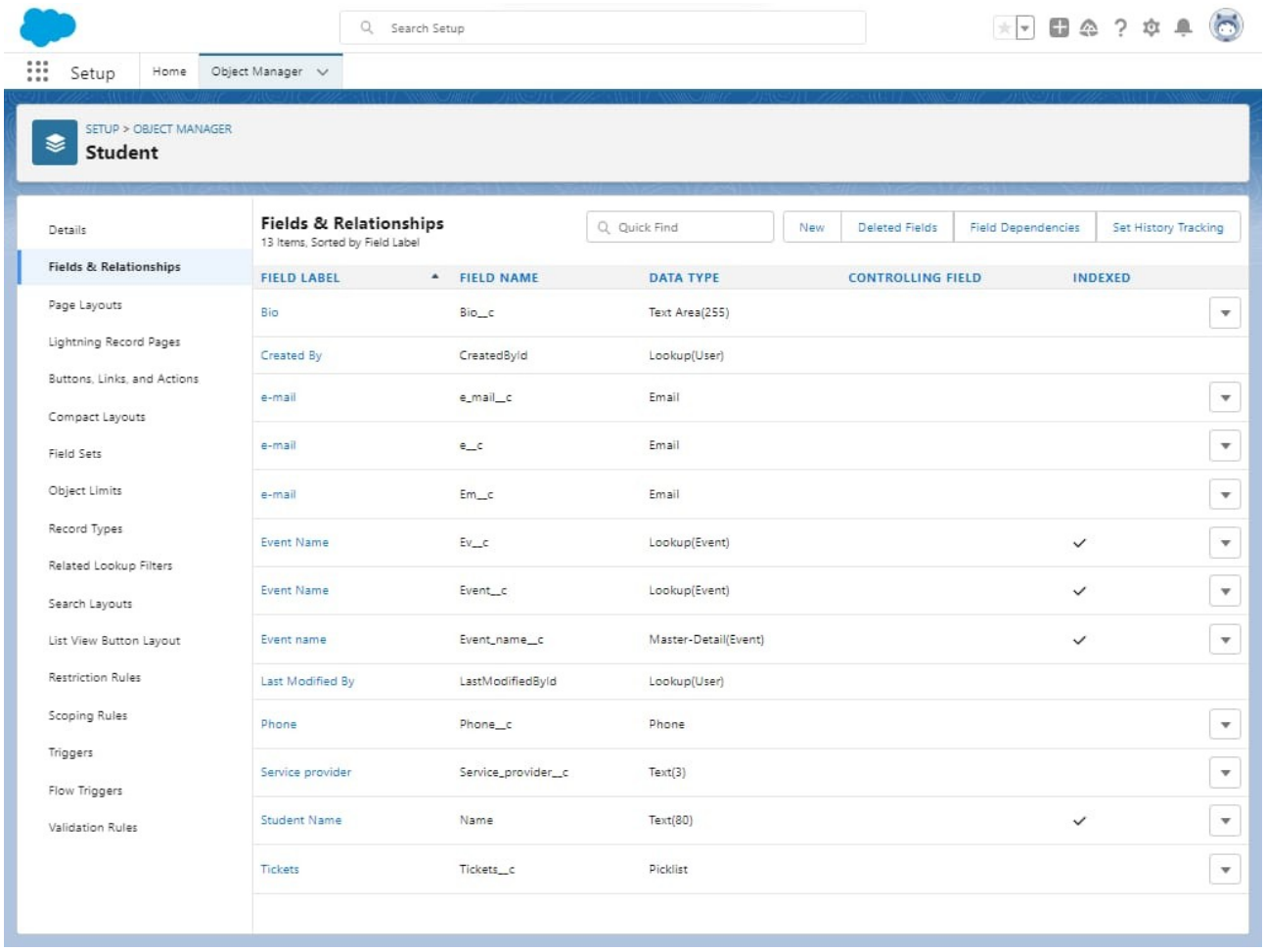
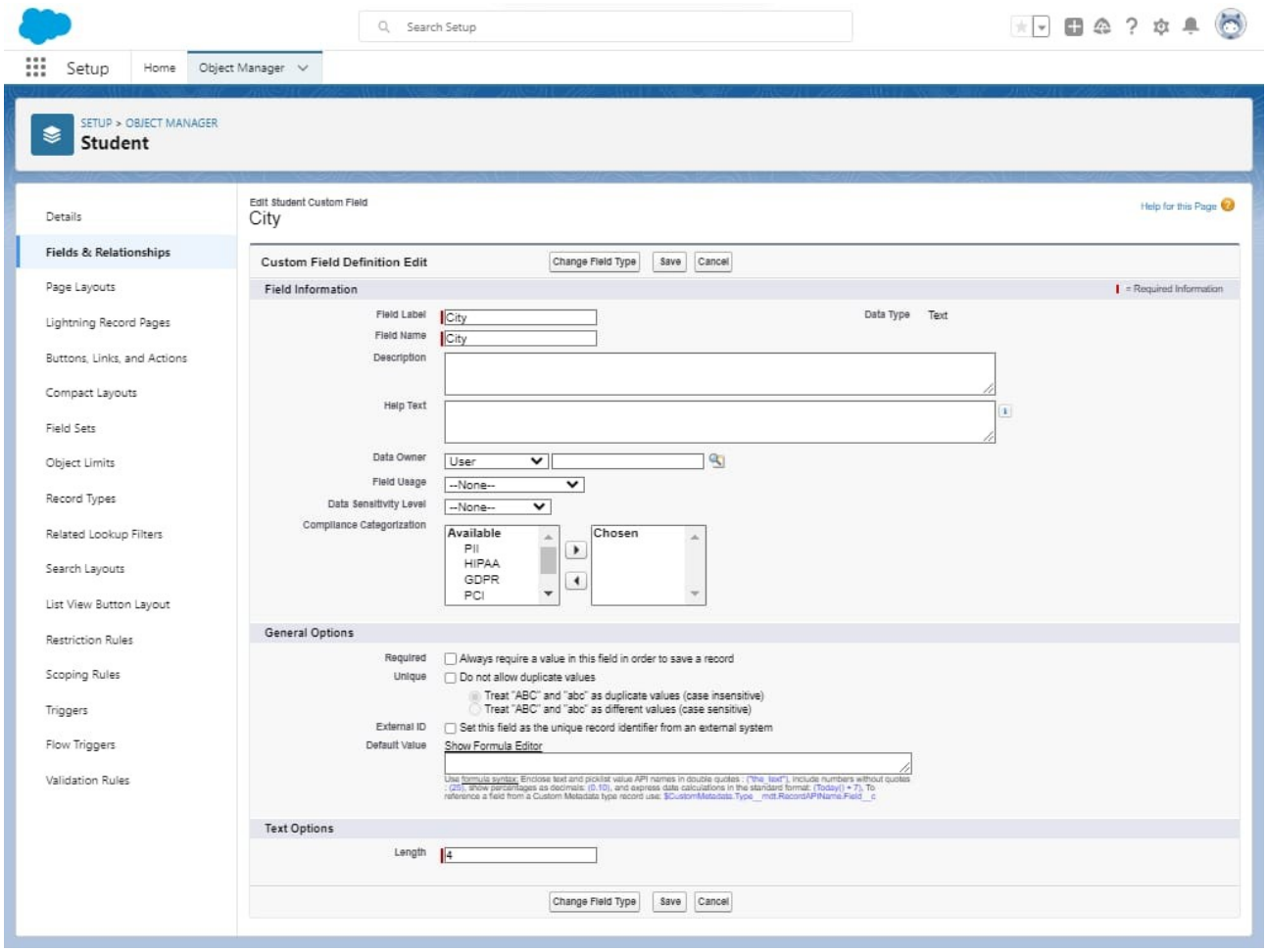
Object Manager
SETUP
Object Manager
51+ Items, Sorted by Label
Quick Find
Schema Builder
Create
LABEL
API NAME
TYPE
DESCRIPTION
LAST MODIFIED
DEP
Account
Account
Standard Object
Activity
Activity
Standard Object
Alternative Payment Method
AlternativePaymentMethod
Standard Object
API Anomaly Event Store
ApiAnomalyEventStore
Standard Object
Appointment Invitation
AppointmentInvitation
Standard Object
Appointment Invitee
AppointmentInvitee
Standard Object
Appointment Topic Time Slot
AppointmentTopicTimeSlot
Standard Object
Asset
Asset
Standard Object
Asset Action
AssetAction
Standard Object
https://aagacmusiri59-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

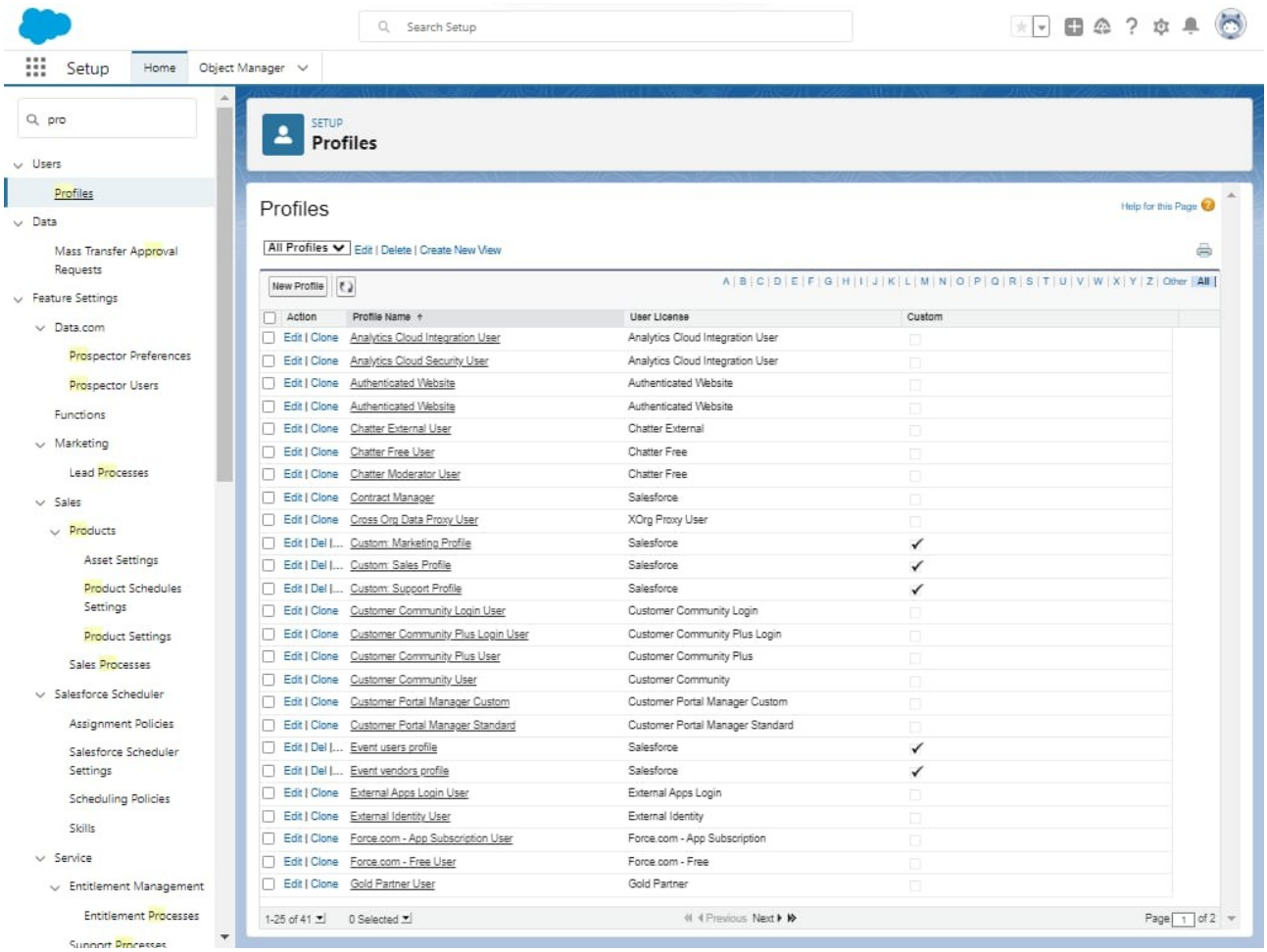

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Student
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules
Fields & Relationships
13 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Bio
Bio__c
Text Area(255)
Created By
CreatedById
Lookup(User)
e-mail
e_mail__c
Email
e-mail
e__c
Email
e-mail
Em__c
Email
Event Name
Ev__c
Lookup(Event)
Event Name
Event__c
Lookup(Event)
Event name
Event_name__c
Master-Detail(Event)
Last Modified By
LastModifiedById
Lookup(User)
Phone
Phone__c
Phone
Service provider
Service_provider__c
Text(3)
Student Name
Name
Text(80)
Tickets
Tickets__c
Picklist

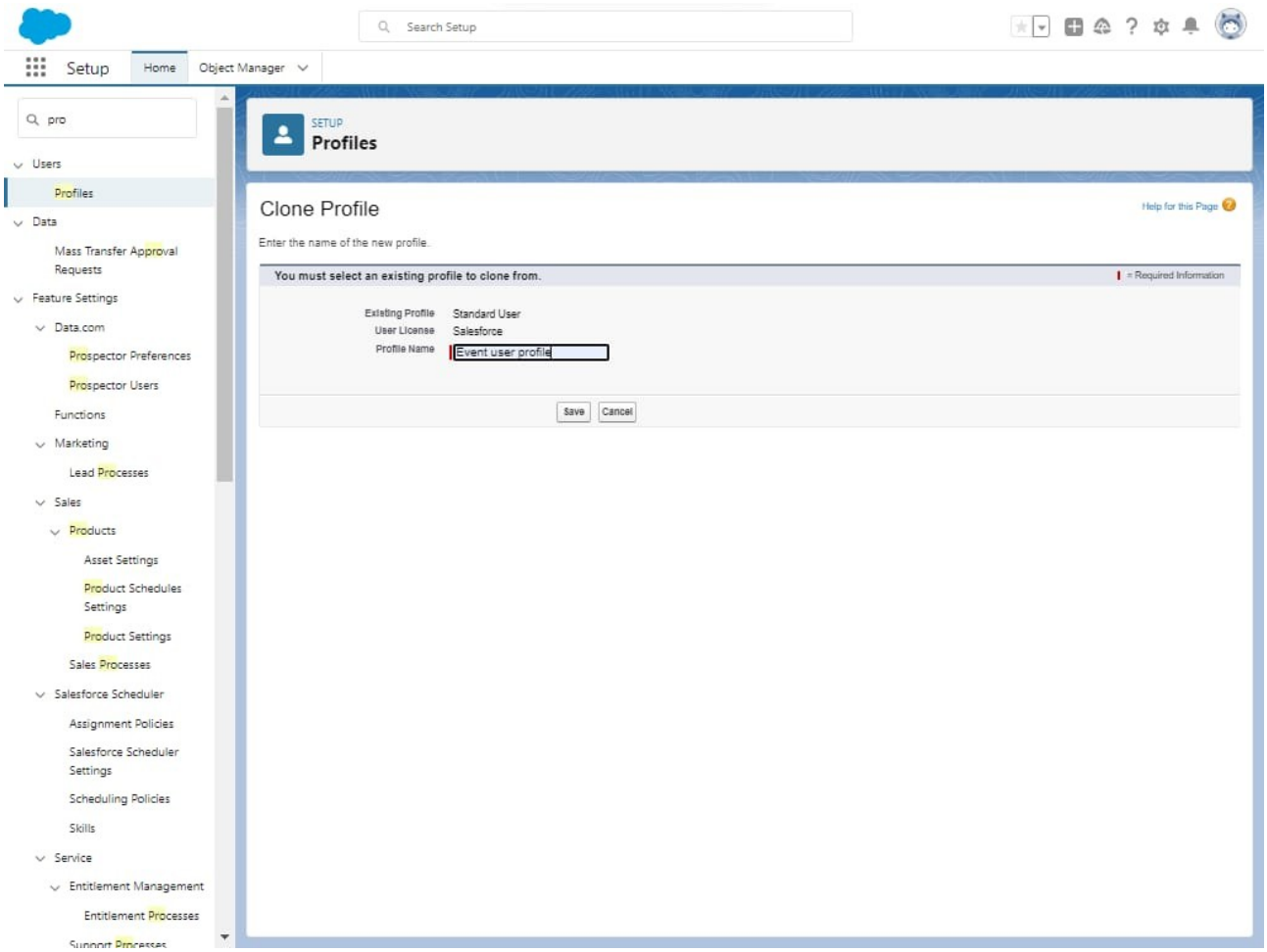


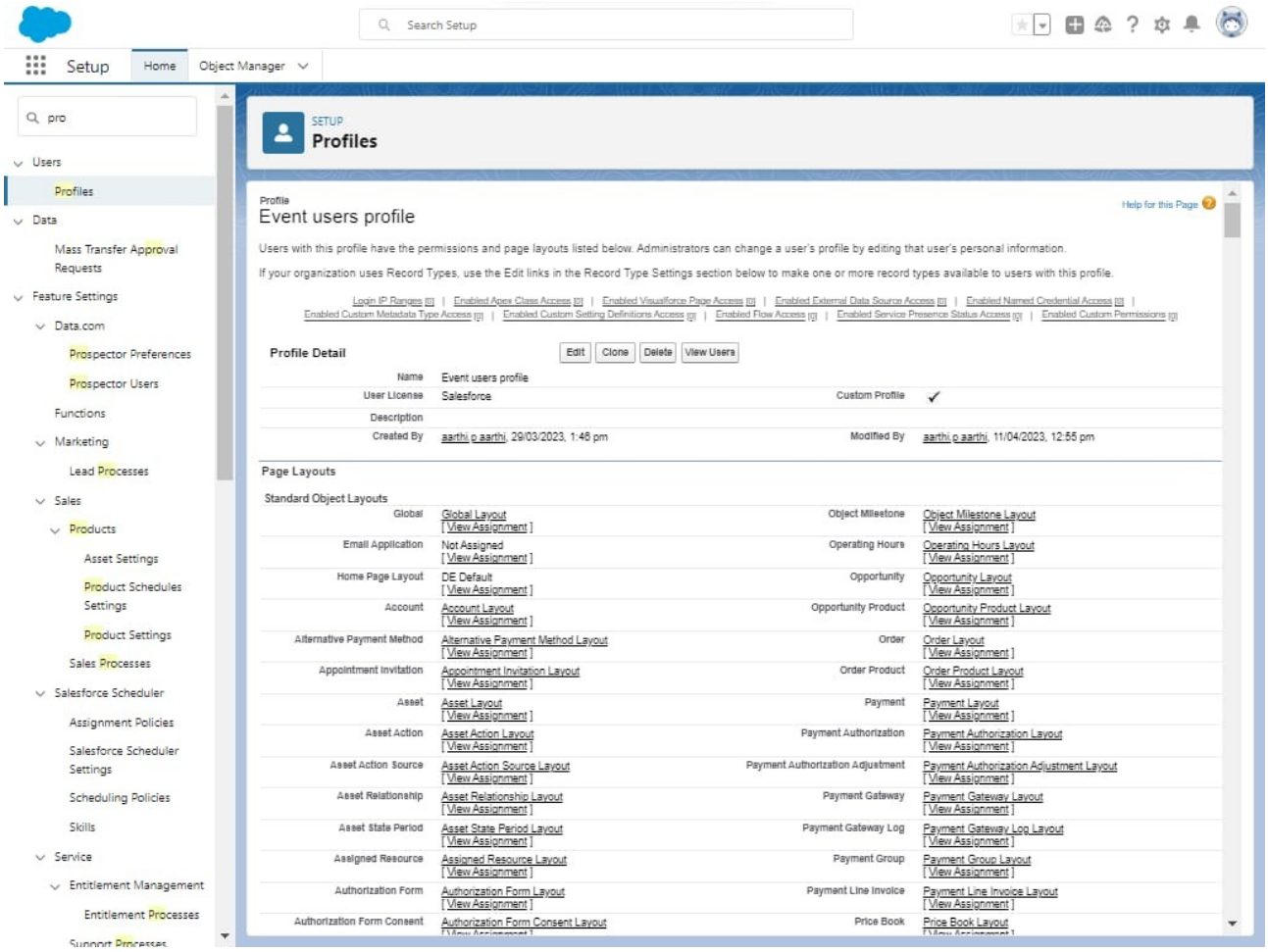
Milestone 5 – profile:

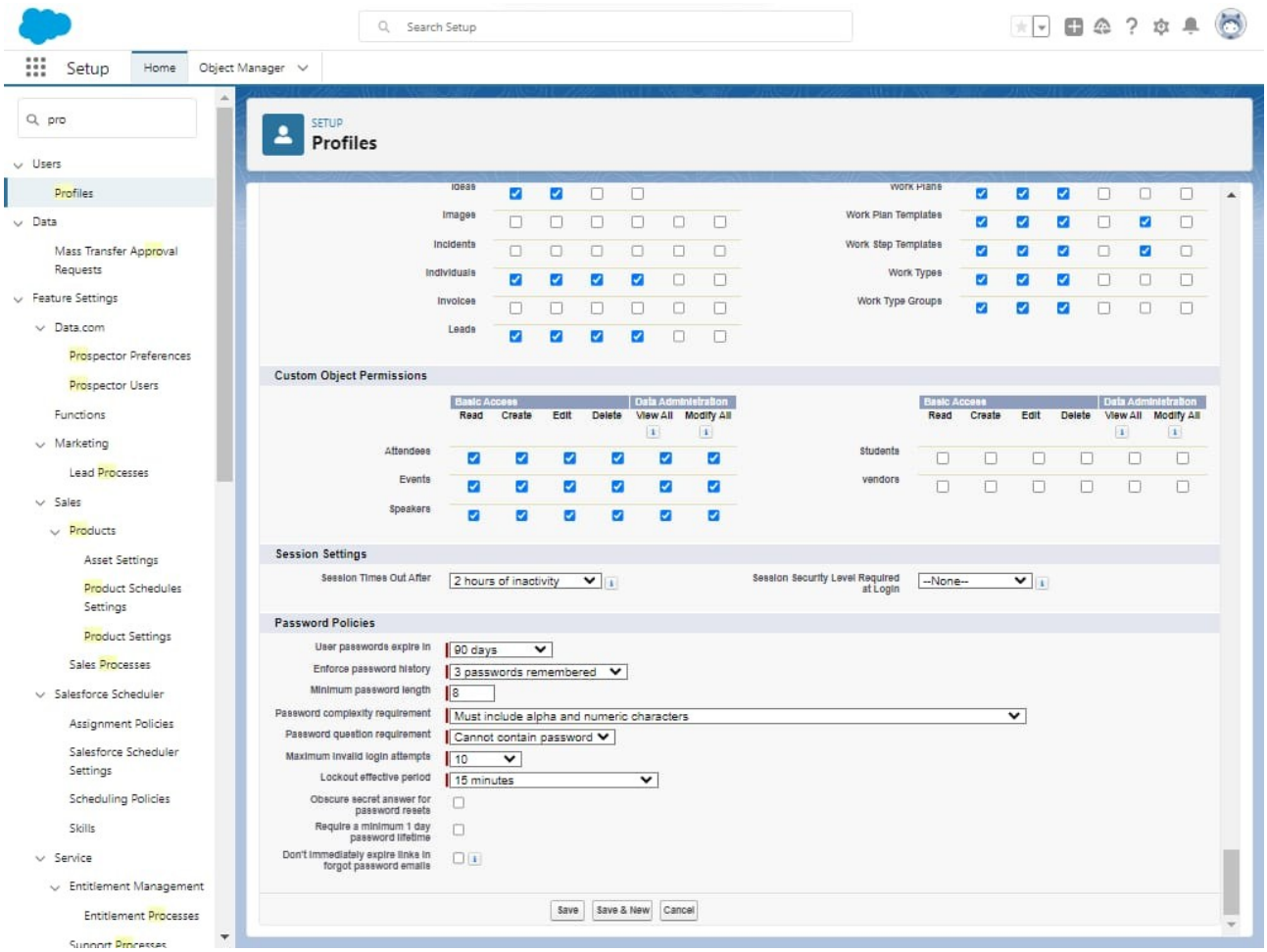
Activity 1;

Creation on profile:


Search Setup
Setup
Home
Object Manager
pro
Users
Profiles
Data
Mass Transfer Approval Requests
Feature Settings
Data.com
Prospector Preferences
Prospector Users
Functions
Marketing
Lead Processes
Sales
Products
Asset Settings
Product Schedules Settings
Product Settings
Sales Processes
Salesforce Scheduler
Assignment Policies
Salesforce Scheduler Settings
Scheduling Policies
Skills
Service
Entitlement Management
Entitlement Processes
SETUP
Profiles
Profiles
Help for this Page
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
Action
Profile Name
User License
Custom
Edit | Clone Analytics Cloud Integration User Analytics Cloud Integration User
Edit | Clone Analytics Cloud Security User Analytics Cloud Integration User
Edit | Clone Authenticated Website Authenticated Website
Edit | Clone Authenticated Website Authenticated Website
Edit | Clone Chatter External User Chatter External
Edit | Clone Chatter Free User Chatter Free
Edit | Clone Chatter Moderator User Chatter Free
Edit | Clone Contract Manager Salesforce
Edit | Clone Cross Org Data Proxy User XOrg Proxy User
Edit | Del | ... Custom: Marketing Profile Salesforce ✓
Edit | Del | ... Custom: Sales Profile Salesforce ✓
Edit | Del | ... Custom: Support Profile Salesforce ✓
Edit | Clone Customer Community Login User Customer Community Login
Edit | Clone Customer Community Plus Login User Customer Community Plus Login
Edit | Clone Customer Community Plus User Customer Community Plus
Edit | Clone Customer Community User Customer Community
Edit | Clone Customer Portal Manager Custom Customer Portal Manager Custom
Edit | Clone Customer Portal Manager Standard Customer Portal Manager Standard
Edit | Del | ... Event users profile Salesforce ✓
Edit | Del | ... Event vendors profile Salesforce ✓
Edit | Clone External Apps Login User External Apps Login
Edit | Clone External Identity User External Identity
Edit | Clone Force.com - App Subscription User Force.com - App Subscription
Edit | Clone Force.com - Free User Force.com - Free
Edit | Clone Gold Partner User Gold Partner
1-25 of 41
0 Selected
Previous Next
Page 1 of 2


Search Setup
Setup
Home
Object Manager
pro
Users
Profiles
Data
Mass Transfer Approval Requests
Feature Settings
Data.com
Prospector Preferences
Prospector Users
Functions
Marketing
Lead Processes
Sales
Products
Asset Settings
Product Schedules Settings
Product Settings
Sales Processes
Salesforce Scheduler
Assignment Policies
Salesforce Scheduler Settings
Scheduling Policies
Skills
Service
Entitlement Management
Entitlement Processes
SETUP
Profiles
Clone Profile
Help for this Page
Enter the name of the new profile.
You must select an existing profile to clone from.
= Required Information
Existing Profile
Standard User
User License
Salesforce
Profile Name
Event user profile
Save
Cancel

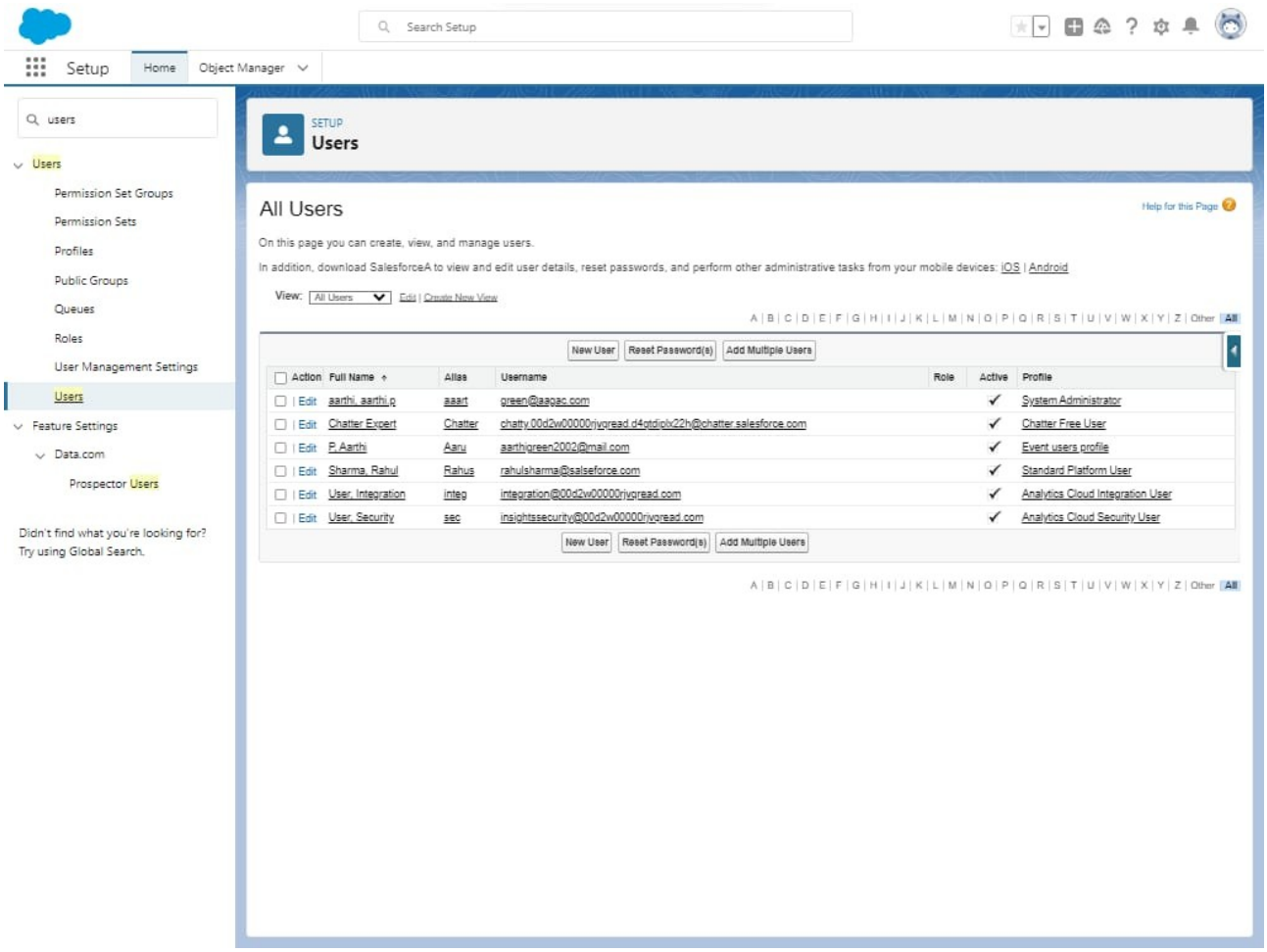

Search Setup
Setup
Home
Object Manager
pro
Users
Profiles
Data
Mass Transfer Approval Requests
Feature Settings
Data.com
Prospector Preferences
Prospector Users
Functions
Marketing
Lead Processes
Sales
Products
Asset Settings
Product Schedules Settings
Product Settings
Sales Processes
Salesforce Scheduler
Assignment Policies
Salesforce Scheduler Settings
Scheduling Policies
Skills
Service
Entitlement Management
Entitlement Processes
SETUP
Profiles
Profile
Event users profile
Help for this Page
Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.
If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.
Login IP Ranges | Enabled Apex Class Access | Enabled Visualforce Page Access | Enabled External Data Source Access | Enabled Named Credential Access | Enabled Custom Metadata Type Access | Enabled Custom Setting Definitions Access | Enabled Flow Access | Enabled Service Presence Status Access | Enabled Custom Permissions
Profile Detail
Edit
Clone
Delete
View Users
Name
Event users profile
User License
Salesforce
Custom Profile
Description
Created By
aarthi p aarthi, 29/03/2023, 1:46 pm
Modified By
aarthi p aarthi, 11/04/2023, 12:55 pm
Page Layouts
Standard Object Layouts
Global
Global Layout [View Assignment]
Email Application
Not Assigned [View Assignment]
Home Page Layout
DE Default [View Assignment]
Account
Account Layout [View Assignment]
Alternative Payment Method
Alternative Payment Method Layout [View Assignment]
Appointment Invitation
Appointment Invitation Layout [View Assignment]
Asset
Asset Layout [View Assignment]
Asset Action
Asset Action Layout [View Assignment]
Asset Action Source
Asset Action Source Layout [View Assignment]
Asset Relationship
Asset Relationship Layout [View Assignment]
Asset State Period
Asset State Period Layout [View Assignment]
Assigned Resource
Assigned Resource Layout [View Assignment]
Authorization Form
Authorization Form Layout [View Assignment]
Authorization Form Consent
Authorization Form Consent Layout
Object Milestone
Object Milestone Layout [View Assignment]
Operating Hours
Operating Hours Layout [View Assignment]
Opportunity
Opportunity Layout [View Assignment]
Opportunity Product
Opportunity Product Layout [View Assignment]
Order
Order Layout [View Assignment]
Order Product
Order Product Layout [View Assignment]
Payment
Payment Layout [View Assignment]
Payment Authorization
Payment Authorization Layout [View Assignment]
Payment Authorization Adjustment
Payment Authorization Adjustment Layout [View Assignment]
Payment Gateway
Payment Gateway Layout [View Assignment]
Payment Gateway Log
Payment Gateway Log Layout [View Assignment]
Payment Group
Payment Group Layout [View Assignment]
Payment Line Invoice
Payment Line Invoice Layout [View Assignment]
Price Book
Price Book Layout

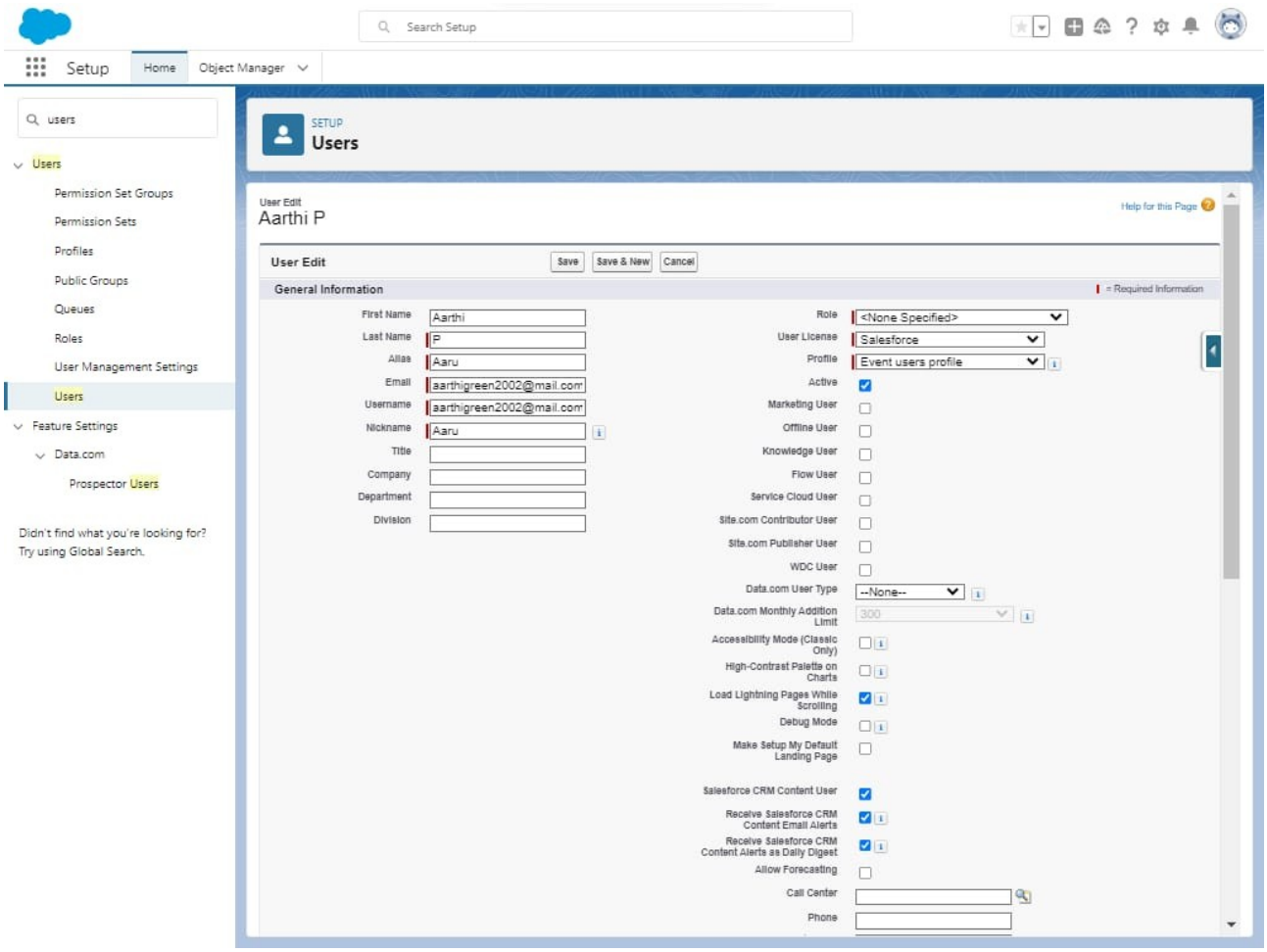


Milestone 6 – User:

Activity 1:

Creating a User:

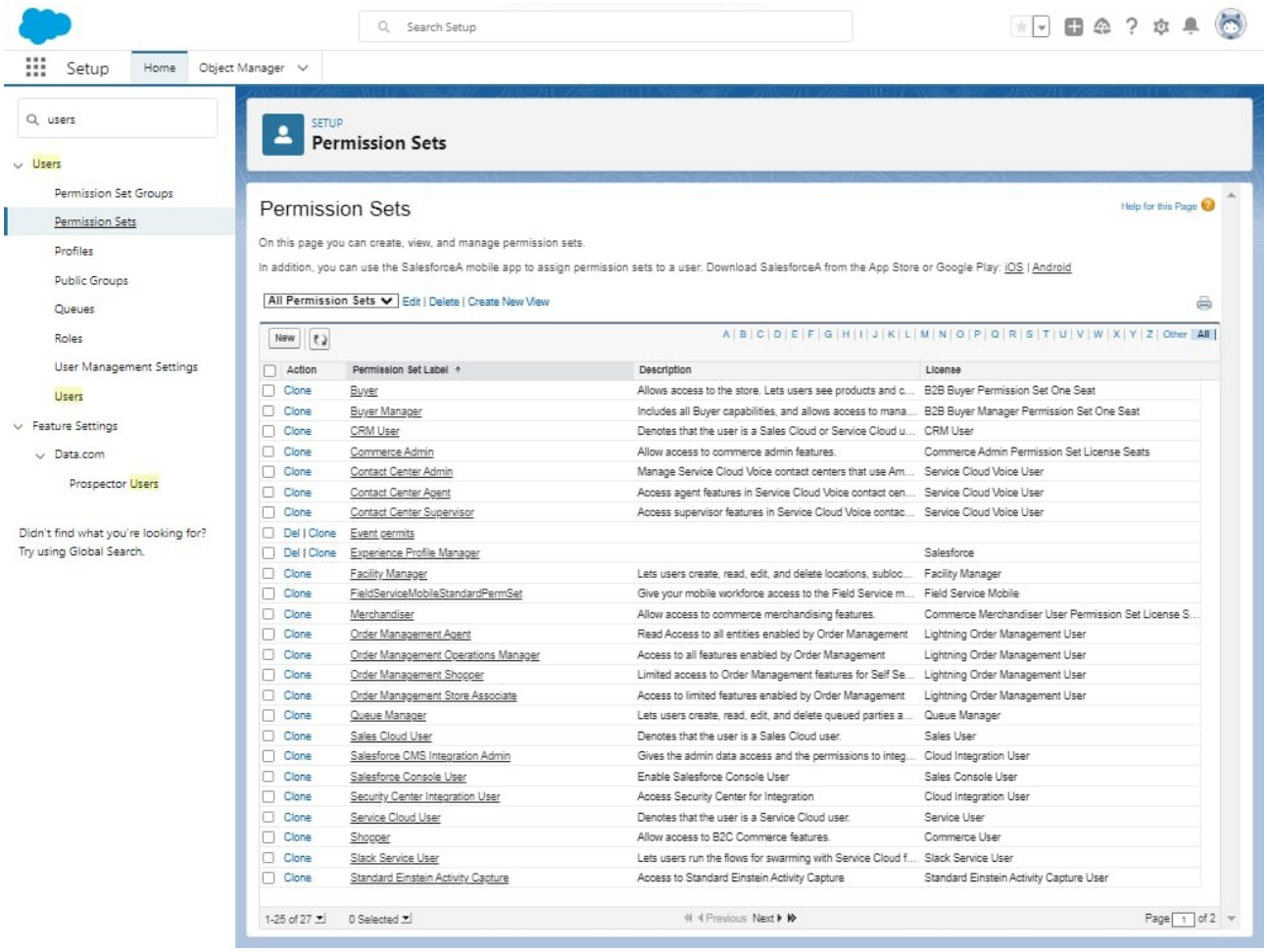

Search Setup
Setup
Home
Object Manager
users
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Didn't find what you're looking for?
Try using Global Search.
SETUP
Users
All Users
Help for this Page
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
Action
Full Name
Alias
Username
Role
Active
Profile
Edit
aarthi, aarthi p
aaart
green@aaqac.com
Edit
Chatter Expert
Chatter
chatty.00d2w00000rjvqread.d4qtdiqlv22h@chatter.salesforce.com
Edit
P, Aarthi
Aaru
aarthigreen2002@mail.com
Event users profile
Edit
Sharma, Rahul
Rahus
rahulsharma@salseforce.com
Standard Platform User
Edit
User, Integration
integ
integration@00d2w00000rjvqread.com
Analytics Cloud Integration User
Edit
User, Security
sec
insightssecurity@00d2w00000rjvqread.com
Analytics Cloud Security User
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

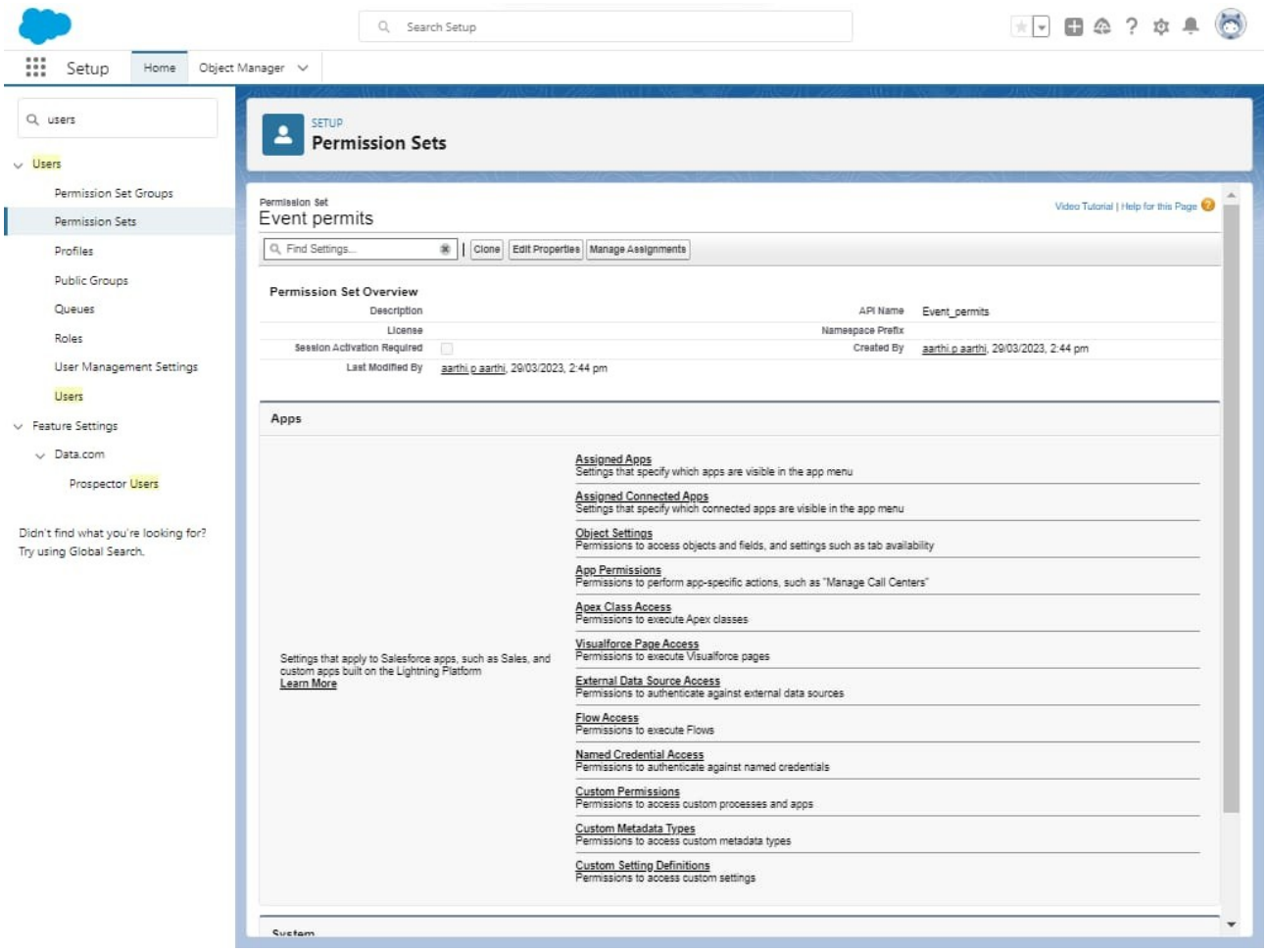


Milestone 7 – Permission sets:

Activity 1:

Creating a permission set:

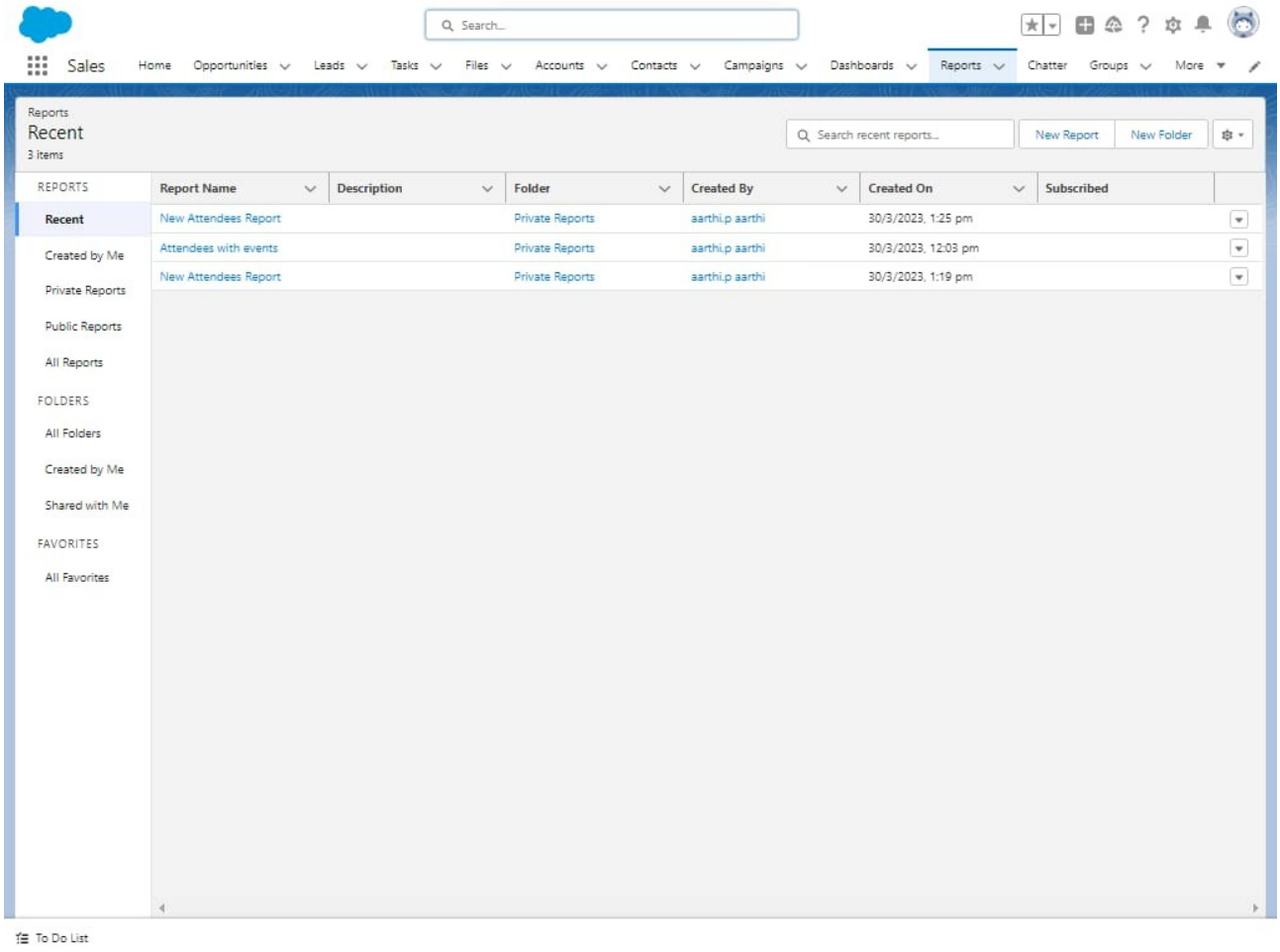

Search Setup
Setup
Home
Object Manager
users
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Didn't find what you're looking for?
Try using Global Search.
SETUP
Permission Sets
Permission Sets
Help for this Page
On this page you can create, view, and manage permission sets.
In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: iOS | Android
All Permission Sets
Edit | Delete | Create New View
New
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
Action
Permission Set Label
Description
License
Clone Buyer Allows access to the store. Lets users see products and c... B2B Buyer Permission Set One Seat
Clone Buyer Manager Includes all Buyer capabilities, and allows access to mana... B2B Buyer Manager Permission Set One Seat
Clone CRM User Denotes that the user is a Sales Cloud or Service Cloud u... CRM User
Clone Commerce Admin Allow access to commerce admin features. Commerce Admin Permission Set License Seats
Clone Contact Center Admin Manage Service Cloud Voice contact centers that use Am... Service Cloud Voice User
Clone Contact Center Agent Access agent features in Service Cloud Voice contact cen... Service Cloud Voice User
Clone Contact Center Supervisor Access supervisor features in Service Cloud Voice contac... Service Cloud Voice User
Del | Clone Event permits
Del | Clone Experience Profile Manager Salesforce
Clone Facility Manager Lets users create, read, edit, and delete locations, subloc... Facility Manager
Clone FieldServiceMobileStandardPermSet Give your mobile workforce access to the Field Service m... Field Service Mobile
Clone Merchandiser Allow access to commerce merchandising features. Commerce Merchandiser User Permission Set License S...
Clone Order Management Agent Read Access to all entities enabled by Order Management Lightning Order Management User
Clone Order Management Operations Manager Access to all features enabled by Order Management Lightning Order Management User
Clone Order Management Shopper Limited access to Order Management features for Self Se... Lightning Order Management User
Clone Order Management Store Associate Access to limited features enabled by Order Management Lightning Order Management User
Clone Queue Manager Lets users create, read, edit, and delete queued parties a... Queue Manager
Clone Sales Cloud User Denotes that the user is a Sales Cloud user. Sales User
Clone Salesforce CMS Integration Admin Gives the admin data access and the permissions to integ... Cloud Integration User
Clone Salesforce Console User Enable Salesforce Console User Sales Console User
Clone Security Center Integration User Access Security Center for Integration Cloud Integration User
Clone Service Cloud User Denotes that the user is a Service Cloud user. Service User
Clone Shopper Allow access to B2C Commerce features. Commerce User
Clone Slack Service User Lets users run the flows for swarming with Service Cloud f... Slack Service User
Clone Standard Einstein Activity Capture Access to Standard Einstein Activity Capture Standard Einstein Activity Capture User
1-25 of 27
0 Selected
Previous Next
Page 1 of 2



Milestone 8 – Reports

Activity

Creating a Report:



4 Trailhead Profile Public URL

Team Lead-https://trailblazer.me/id/aaarthi10
Team Member 1-https://trailblazer.me/id/avabarna
Team Member 2-https://trailblazer.me/id/aravv14
Team Member 3-https://trailblazer.me/id/dhbal1

5. ADVANTAGES AND DISADVANTAGES

Advantages

1. **Opportunities for creativity**
2. **Ability to work on different events**
3. **Chance to work with diverse clients**
4. **Collaborative work environment**
5. **High projections for job growth**
6. **Few educational requirements**

Disadvantage

1. **Unconventional work hours**
2. **Time away from family and friends**
3. **Experience requirements**
4. **Job instability**
5. **Multiple events at the same time**
6. **High level of responsibility**

6. APPLICATIONS

1. **Start with the right salesforce event management app**
2. **segment your salesforce data**
3. **Set pricing levels for your salesforce event**
4. **Management event logistic using your salesforce app**
5. **Compile event reports and get ready for next event**

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. Solution Dot 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