



# BUILD AN EVENT MANAGEMENT SYSTEM USING SALESFORCE

# PROJECT REPORT TEMPLATE

## 1 INTRODUCTION

### 1.1 Overview

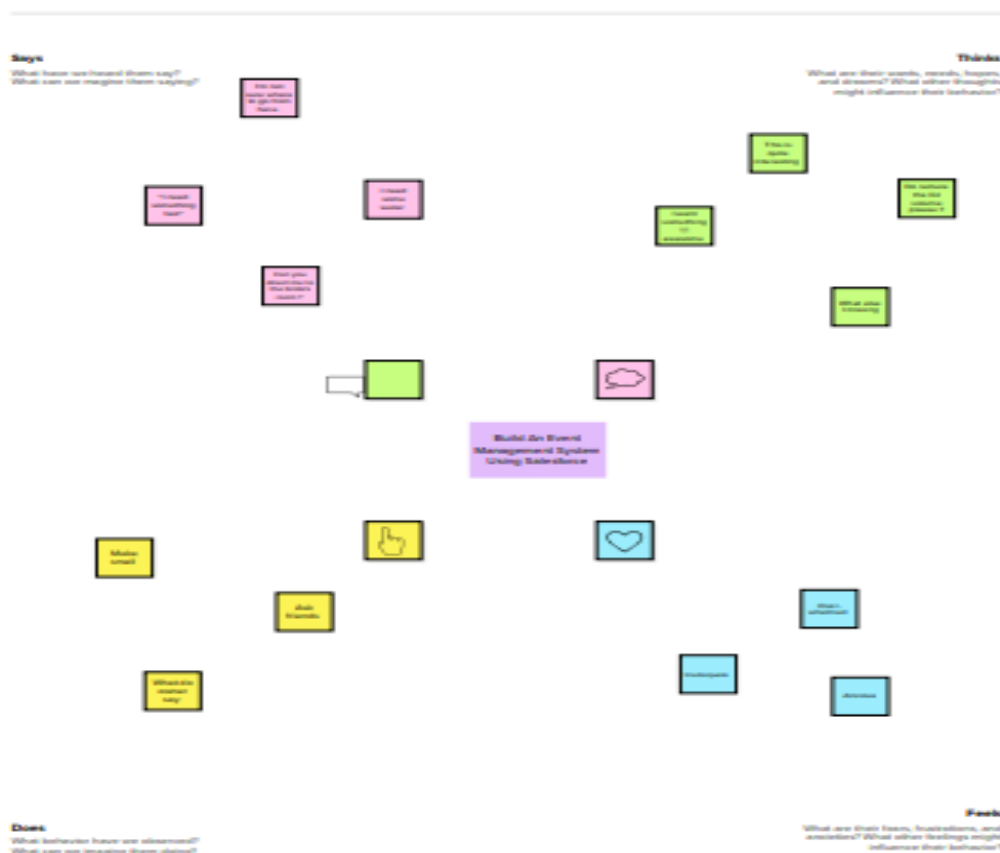
Event management is the process of creating and maintaining an event. This process spans from the very beginning of planning all the way to post-event strategy . At the start, an event manager makes planning decisions, such as the time, location, and theme of their event. During an event, event managers oversee the event live and make sure things run smoothly. After an event, event managers are tasked with reviewing event data, submitting KPI and ROI findings, and staying on the ball for any post-event offerings. All different branches of planning go into event management, including various types of sourcing, designing, regulation checks, and on-site management. In event management, the process of creating a conference, a product launch, an internal sales kick-off, or even a wedding. Really, any event that requires considerable planning and execution is event management.

### 1.2 Purpose

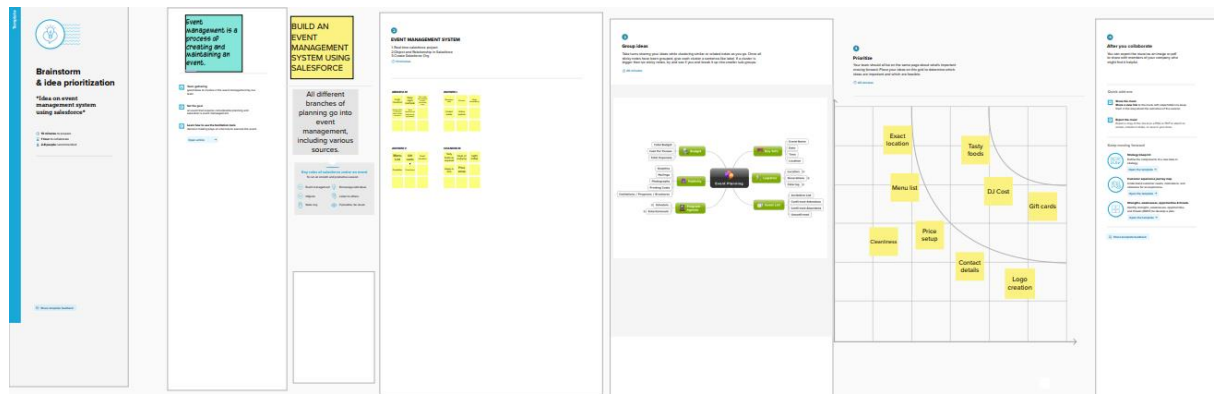
The duties and responsibilities of an event manager's career will vary from event to event and between industries. Some coordinators may only be responsible for the day of the event, while others may plan the entire function for an extended period and are included in every aspect of the planning stages as well as the day of the event. They will start with general research and creative brainstorming, then begin by collecting lists and information from the host company.

## 2 PROBLEM DEFINITION & DESIGN THINKING

### 2.1 Empathy map



### 2.2 Ideation & Brainstorming map screenshot



### 3 RESULT

#### 3.1 Data Model

Object name	Fields in the object	
FIELDS	<b>Field label</b>	<b>Data type</b>
	City	Text
	Start Date	Date/Time
	Phone	Phone
	Email	Email
RELATIONSHIPS	<b>Field label</b>	<b>Data type</b>
	Id	Auto Number
	Tickets	Picklist
	Values	Master-Detail Relationship

#### 3.2 Activity & Screenshot

##### MILESTONE 1 – SALESFORCE

Setup Home

Quick Find

Setup Home  
[/one/one.app#/setup/SetupOneHome/hy](#)  
[Service Setup Assistant](#)  
[/one/one.app#/setup/ServiceHome/hom](#)  
[Multi-Factor Authentication Assistant](#)  
[/one/one.app#/setup/MfaAssistant/hom](#)  
[Release Updates](#)  
[/one/one.app#/setup/ReleaseUpdates/hy](#)  
[Lightning Experience Transition Assistant](#)  
[/one/one.app#/setup/EnabledLightningEx](#)  
[Salesforce Mobile App](#)  
[/one/one.app#/setup/SalesforceMobileA](#)  
[Lightning Usage](#)  
[/one/one.app#/setup/LightningUsageSet](#)  
[Optimizer](#)  
[/one/one.app#/setup/SalesforceOptimize](#)

ADMINISTRATION

- > Users
- > Data
- > Email

PLATFORM TOOLS

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  
 7 Items

NAME	TYPE	OBJECT
Loan Amount	Custom Field Definition	Contact /one/one.app#/setup/ObjectManager/Contact/view
Level	Custom Field Definition	Contact /one/one.app#/setup/ObjectManager/Contact/view

##### MILESTONE 2 – OBJECT

## CREATION OF OBJECTS FOR EVENT MANAGEMENT

SETUP > OBJECT MANAGER

Event

Details(/one/one.app#/setup/Obj

Fields & Relationships (/one/one.app#/s

Page (/one/one.app#/setup/Ob

Layouts (/one/one.app#/setup/Ob

Lightning Record (/one/one.app#/setup/C

Pages (/one/one.app#/setup/Ob

Buttons, Links, and Actions (/one/one.app#/setup/O

Compact Layouts (/one/one.app#/setup/C

Field Sets (/one/one.app#/setup/Objec

Object Limits (/one/one.app#/setup/Obj

Record Types (/one/one.app#/setup/Ob

Search Layouts (/one/one.app#/setup/Ob

List View Button Layout (/one/one.app#/setup/Obj

Restriction Rules (/one/one.app#/setup/

Scoping Rules (/one/one.app#/setup/O

Triggers (/one/one.app#/setup/Ob

Flow Triqqers (/one/one.app#/setup/O

Fields & Relationships

18+ Items, Sorted by Field Label

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TY
All-Day Event (/lightning/setup/ObjectManager/Event/FieldsAndRelationships/IsAllDayEv	IsAllDayEvent	Checkbox
Assigned To (/lightning/setup/ObjectManager/Event/FieldsAndRelationships/Owner/Vie	OwnerId	Lookup(L
Created By (/lightning/setup/ObjectManager/Event/FieldsAndRelationships/CreatedBy	CreatedById	Lookup(L
Date (/lightning/setup/ObjectManager/Event/FieldsAndRelationships/ActivityDa	ActivityDate	Date/Tim
Description (/lightning/setup/ObjectManager/Event/FieldsAndRelationships/Descriptio	Description	Long Text
Duration (/lightning/setup/ObjectManager/Event/FieldsAndRelationships/DurationIn	DurationInMinutes	Number(1
Email (/lightning/setup/ObjectManager/Event/FieldsAndRelationships/Email/view	Email	Email
End (/lightning/setup/ObjectManager/Event/FieldsAndRelationships/EndDateT	EndDateTime	Date/Tim
Event Subtype (/lightning/setup/ObjectManager/Event/FieldsAndRelationships/EventSubt	EventSubtype	Picklist
Last Modified By (/lightning/setup/ObjectManager/Event/FieldsAndRelationships/LastModif	LastModifiedById	Lookup(L
Location (/lightning/setup/ObjectManager/Event/FieldsAndRelationships/Location/A	Location	Text(255)
Name (/lightning/setup/ObjectManager/Event/FieldsAndRelationships/Who/view	WhoId	Lookup(C
Phone (/lightning/setup/ObjectManager/Event/FieldsAndRelationships/Phone/view	Phone	Phone
Private (/lightning/setup/ObjectManager/Event/FieldsAndRelationships/IsPrivate/v	IsPrivate	Checkbox
		Lookup(C

## MILESTONE 3 – TAB



Q TABS

· User Interface

[Rename Tabs and Labels](#)  
[\(/one/one.app#/setup/RenameTab](#)

[Tabs](#)  
[\(/one/one.app#/setup/CustomTab](#)

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
<a href="#">Edit</a>   <a href="#">Del</a>	 <a href="#">Brokers</a>	<input type="text" value="People"/>	
<a href="#">Edit</a>   <a href="#">Del</a>	 <a href="#">Properties</a>	<input type="text" value="Real Estate Sign"/>	

#### 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?](#)

Action	Label	Tab Style	Description
<a href="#">Edit</a>	 <a href="#">Get Your Login Credentials</a>	<input type="text" value="Flag"/>	
<a href="#">Edit</a>	 <a href="#">Install a Package</a>	<input type="text" value="Compass"/>	
<a href="#">Edit</a>	 <a href="#">Welcome</a>	<input type="text" value="Chalkboard"/>	

#### Lightning Page Tabs

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

Action	Label	Tab Style	Description
<a href="#">Edit</a>   <a href="#">Del</a>	 <a href="#">Property Explorer</a>	<input type="text" value="Telescope"/>	Created by Lightning App Builder
<a href="#">Edit</a>   <a href="#">Del</a>	 <a href="#">Property Finder</a>	<input type="text" value="Map"/>	Created by Lightning App Builder
			Created by

MILESTONE 3- APPLICATION

APP

Salesforce Mobile App

/one/one.app#/setup/SalesforceMobil

Data

Mass Transfer Approval Request

/one/one.app#/setup/DataMar

Apps

App Manager

/one/one.app#/setup/Navigati

AppExchange Marketplace

/one/one.app#/setup/AppExch

Connected Apps

Connected Apps OAuth Usac

/one/one.app#/setup/Conn

Manage Connected Apps

/one/one.app#/setup/Conn

Lightning Bolt

Flow Category

/one/one.app#/setup/FlowC

Lightning Bolt Solutions

/one/one.app#/setup/Lightn

Mobile Apps

Salesforce

Salesforce Branding

/one/one.app#/setup/Sal

Salesforce Navigation

/one/one.app#/setup/Pro

Salesforce Notifications

/one/one.app#/setup/No

Salesforce Offline

/one/one.app#/setup/Mo

SETUP

Lightning Experience App Manager

New Lightning App

New Connected App

Clone Apps(Beta)

Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the [Winter '23 release notes](https://help.salesforce.com/s/articleview?id=release-notes.m_forcecom_general_clone_apps.htm%26type=5%26release=240) ([https://help.salesforce.com/s/articleview?id=release-notes.m\\_forcecom\\_general\\_clone\\_apps.htm%26type=5%26release=240](https://help.salesforce.com/s/articleview?id=release-notes.m_forcecom_general_clone_apps.htm%26type=5%26release=240)).

Enable App Cloning

Disabled

29 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

	App Name	Developer Name	Description	Last Modifie...
1	All Tabs	AllTabSet		4/15/2023, 3:47 A
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	4/15/2023, 3:47 A
3	Ant Migration Tool	Forcecom_Migration_Tool	The Force.com Migration Tool is a Java/Ant-based c...	4/15/2023, 3:47 A
4	App Launcher	AppLauncher	App Launcher tabs	4/15/2023, 3:47 A
5	Bolt Solutions	LightningBolt	Discover and manage business solutions designed f...	4/15/2023, 3:47 A
6	Commerce	Commerce	Manage your store's products, catalogs, and priceb...	4/15/2023, 3:47 A
7	Community	Community	Salesforce CRM Communities	4/15/2023, 3:47 A
8	Content	Content	Salesforce CRM Content	4/15/2023, 3:47 A
9	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, an...	4/15/2023, 3:47 A
10	Dataloader Bulk	Dataloader_Bulk	The Data Loader is an easy to use graphical tool tha...	4/15/2023, 3:47 A
11	Dataloader Partner	Dataloader_Partner	The Data Loader is an easy to use graphical tool tha...	4/15/2023, 3:47 A
12	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	4/15/2023, 3:47 A
13	Dreamhouse	Dreamhouse		4/15/2023, 4:48 A
14	Force.com IDE	Forcecom_IDE	The Force.com IDE is a powerful client application f...	4/15/2023, 3:47 A

## MILESTONE 4- FIELDS

SETUP > OBJECT MANAGER

Event

Details/one/one.app#/setup/Object

Fields & Relationships

/one/one.app#/setup/Obje

Page Layouts

/one/one.app#/setup/Obje

Lightning Record Pages

/one/one.app#/setup/Obje

Buttons, Links, and Actions

/one/one.app#/setup/Obje

Compact Layouts

/one/one.app#/setup/Obje

Field Sets

/one/one.app#/setup/ObjectM

Event Field

All-Day Event

Back to Event Fields

Help for this Page

Field Information

Field Label	All-Day Event	Field Name	IsAllDayEv
Date Type	Help Text	Checkbox	
Description	Data Owner	Field Usage	
Data Sensitivity Level			

## MILESTONE 5- PROFILE

PROFILE

Users

Profiles

/one/one.app#/setup/EnhancedP

Profiles

Help for this Page

All Profiles

Edit | Delete | Create New View

New Profile

Action

Profile Name

Edit | Del | ...

Custom: Marketing Profile

Edit | Del | ...

Custom: Sales Profile

Edit | Del | ...

Custom: Support Profile

Edit | Clone

Customer Community Login User

Edit | Clone

Customer Community Plus Login User

Edit | Clone

Customer Community Plus User

Edit | Clone

Customer Community User

Edit | Clone

Customer Portal Manager Custom

Edit | Clone

Customer Portal Manager Standard

Edit | Clone

External Apps Login User

1-25 of 39

0 Selected

## MILESTONE 6- USER

Q USER

Users

Permission Set Groups

[/one/one.app#/setup/PermSet](#)

Permission Sets

[/one/one.app#/setup/PermSet](#)

Profiles

[/one/one.app#/setup/Enhance](#)

Public Groups

[/one/one.app#/setup/PublicGr](#)

Queues

[/one/one.app#/setup/Queues/](#)

Roles

[/one/one.app#/setup/Roles/fhc](#)

User Management Settings

[/one/one.app#/setup/UserMar](#)

Users

[/one/one.app#/setup/Manage](#)

Feature Settings

Data.com

Prospector Users

[/one/one.app#/setup/Prosp](#)

User Interface

SETUP

Users

Help for this Page

All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: All Users Edit Create New View

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

New User

Reset Password(s)

Add Multiple Users

<input type="checkbox"/>	Action	Full Name	Alias	Username
<input type="checkbox"/>	<a href="#">Edit</a>	Chatter Expert	Chatter	chatty.00d8b0000023@seam.criqdy1qlxmy6
<input type="checkbox"/>	<a href="#">Edit</a>	MANI ABINAYA	AMANI	abinayamanindira@resilient-voif-svve2.com
<input type="checkbox"/>	<a href="#">Edit</a>	User Integration	integ	integration@00d8b0000023@seam.com
<input type="checkbox"/>	<a href="#">Edit</a>	User Security sec	insightssecurity@00d8b0000023@seam.com	

New User

Reset Password(s)

Add Multiple Users

## MILESTONE 7- PERMISSION SETS

Q PERMISSIONIO

Users

Permission Set Groups

[/one/one.app#/setup/PermSetGir](#)

Permission Sets

[/one/one.app#/setup/PermSets/fh](#)

Custom Code

Custom Permissions

[/one/one.app#/setup/CustomPer](#)

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

SETUP

Permission Sets

Help for this Page

Permission Sets

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 Edit Delete Create New View

New

☐

<input type="checkbox"/>	Action	Permission Set Label
<input type="checkbox"/>	<a href="#">Clone</a>	Buyer
<input type="checkbox"/>	<a href="#">Clone</a>	Buyer Manager
<input type="checkbox"/>	<a href="#">Clone</a>	CRM User
<input type="checkbox"/>	<a href="#">Clone</a>	Commerce Admin
<input type="checkbox"/>	<a href="#">Clone</a>	FieldServiceMobileStandardPermSet
<input type="checkbox"/>	<a href="#">Clone</a>	Merchandiser
<input type="checkbox"/>	<a href="#">Clone</a>	Sales Cloud User
<input type="checkbox"/>	<a href="#">Clone</a>	Salesforce CMS Integration Admin

1-15 of 15 0 Selected

## MILESTONE 8- REPORTS

SETUP > OBJECT MANAGER

Report Anomaly Event Store

Details(/one/one.app#/setup/Obj

Fields & Relationships

[/one/one.app#/setup/](#)

Page Layouts

[/one/one.app#/setup/Objec](#)

Buttons, Links, and Actions

[/one/one.app#/setup/Objec](#)

Compact Layouts

[/one/one.app#/setup/Objec](#)

Field Sets

[/one/one.app#/setup/ObjectM](#)

Details

Description

API Name

ReportAnomalyEventStore

Custom

Singular Label

Report Anomaly Event Store

Plural Label

Report Anomaly Event Stores

Enable Reports

Track Activities

Track Field History

Deployment Status

Help Settings

Standard salesforce.com Help Window



## 4 TRAILHEAD PROFILE PUBLIC URL

TEAM LEAD – <https://trailblazer.me/id/abinaya3>

TEAM MEMBER 1 – <https://trailblazer.me/id/ashwini335>

TEAM MEMBER 2 – <https://trailblazer.me/id/ashwini30>

TEAM MEMBER 3 - <https://trailblazer.me/id/chandini983>

## 5 ADVANTAGES AND DISADVANTAGES

### 5.1 ADVANTAGES OF THE PROPOSED SOLUTION

- Save time and money
- Event experts
- Creativity
- Skilled teams
- Measurability

### 5.2 DISADVANTAGES OF THE PROPOSED SOLUTION

- Long hours
- Travel Requirements
- Client demands
- High stress
- Low starting salaries

## 6 APPLICATIONS

Project management is the process of leading the work of a team to achieve all project goals within the given constraints .This information is usually described in project documentation, created at the beginning of the development process. The primary constraints are scope, time, and budget .The secondary challenge is to optimize the allocation of necessary inputs and apply them to meet pre-defined objectives.

The objective of project management is to produce a complete project which complies with the client's objectives. In many cases, the objective of project management is also to shape or reform the client's brief to feasibly address the client's objectives. Once the client's objectives are clearly established, they should influence all decisions made by other people involved in the project – for example, project managers, designers, contractors, and subcontractors. Ill-defined or too tightly prescribed project management objectives are detrimental to decision-making.

A project is a temporary and unique designed to produce a product, service, or result with a defined beginning and end undertaken to meet unique goals and objectives, typically to bring about beneficial change or added value .. The temporary nature of projects stands in contrast with business as usual which are repetitive, permanent, or semi-permanent functional activities to produce products or services. In practice, the management of such distinct production approaches requires the development of distinct technical skills and management strategies.

## 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.

## 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.