

PROJECT REPORT TEMPLATE

Build a event management system using salesforce

1. Introduction

1.1 Overview

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

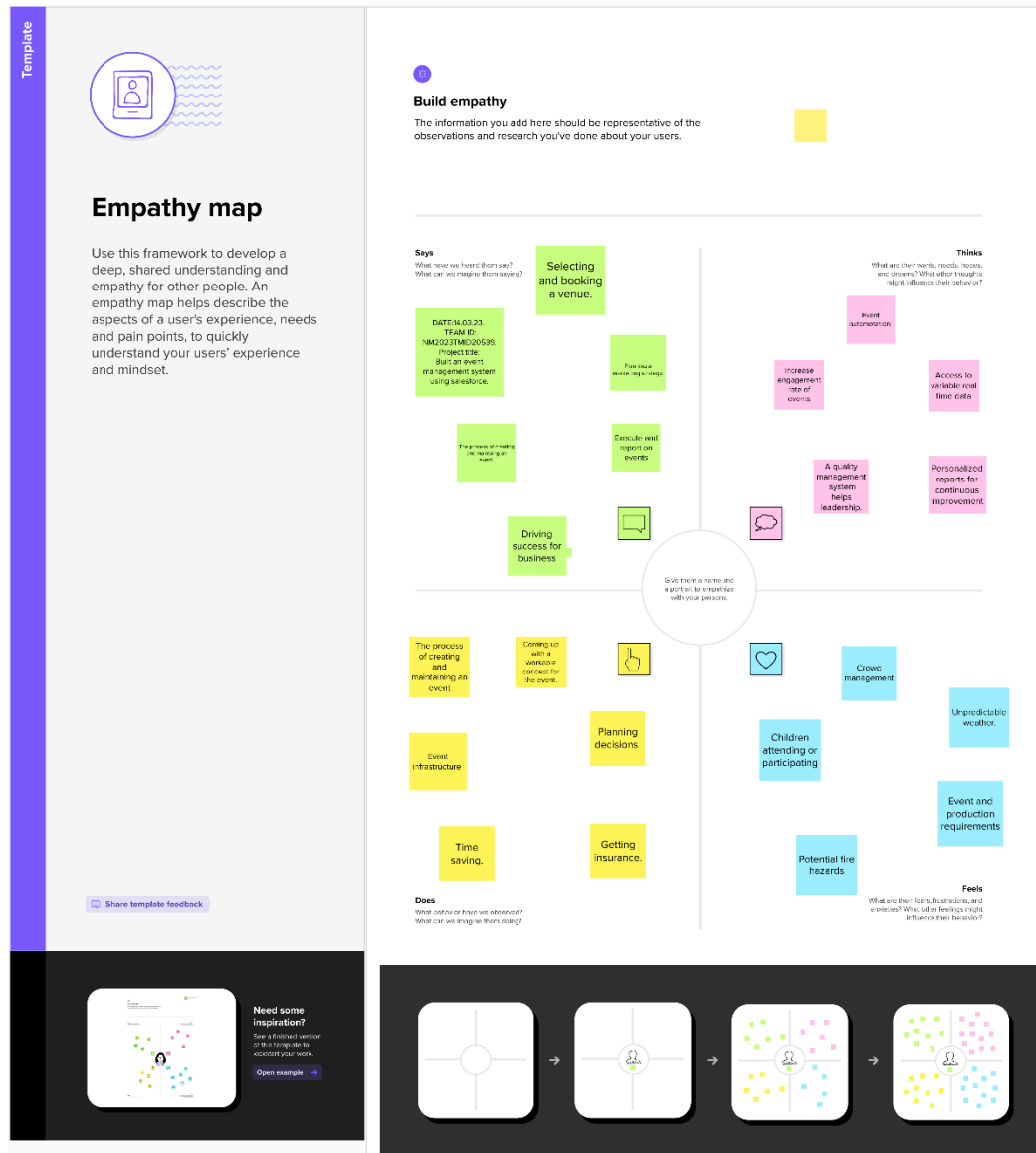
1.2 Purpose

- (i) Purpose to manage events throughout their lifecycle is the purpose of event management.
- (ii) This lifecycle of activities to detect events, make sense of them and determine the appropriate control action, which is coordinated by the event management process.
- (iii) Promotion of new products or services.
- (iv) Achieving the desired exposure and brand awareness.
- (v) Attracting more prospects and clients from exhibitions and trade shows.
- (vi) Improving brand positioning through professional events and conferences.
- (vii) Creative solutions to drive the highest level of satisfaction from the guests.
- (viii) Handling all permissions, permits, insurance and security concerns.
- (ix) Saving valuable time, efforts and money when hiring experience event managers.

- (x) Reducing the possibility of any incidents that harm the professional atmosphere.

2 Problem Definition & Design Thinking

2.1 Empathy Map



2.2 Ideation and Brainstorming Map



3 Result

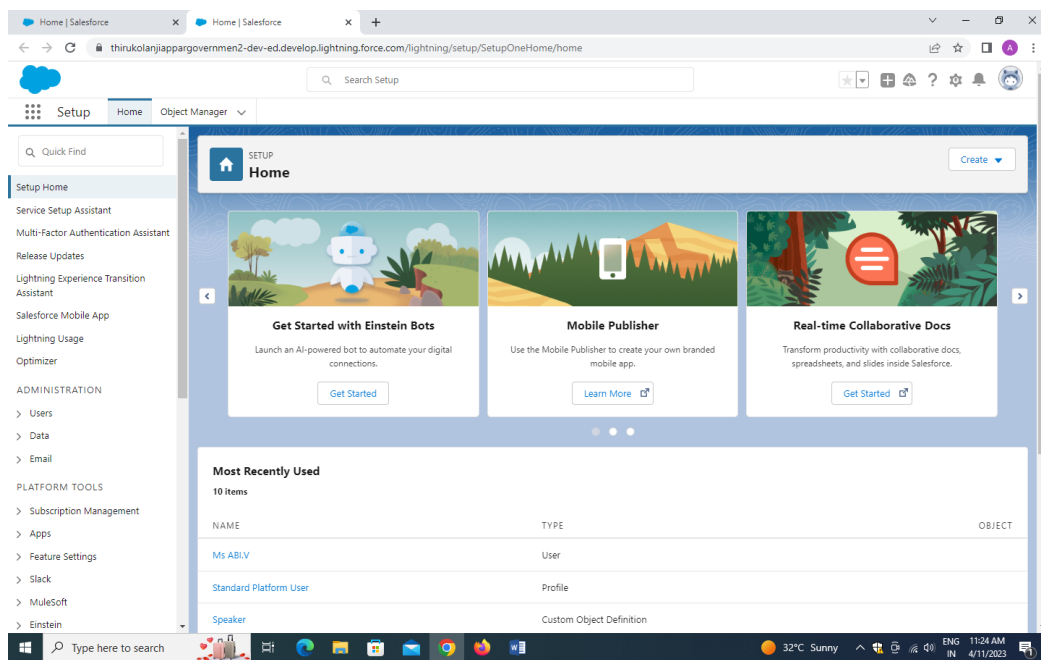
3.1 Data Model

Object Name	Fields in the object	
<u>Event</u>	Field label	Data type
	City	Text
	Start Date	Date/Time
	Event Name	Master-detail relationship
	End Date	Date/Time
<u>Attendee</u>	Field label	Data type
	Id	Auto Number
	Phone	Phone
	Email	Email
<u>Speakers</u>	Field label	Data type
	Bio	Text Area

	e-mail	Email
<u>Vendors</u>	Field label	Data type
	e-mail	Email
	Phone	Phone
	Service Provider	Text
	Event name	Look-up Relationship
<u>Student</u>	Field label	Data type
	Tickets	Picklist

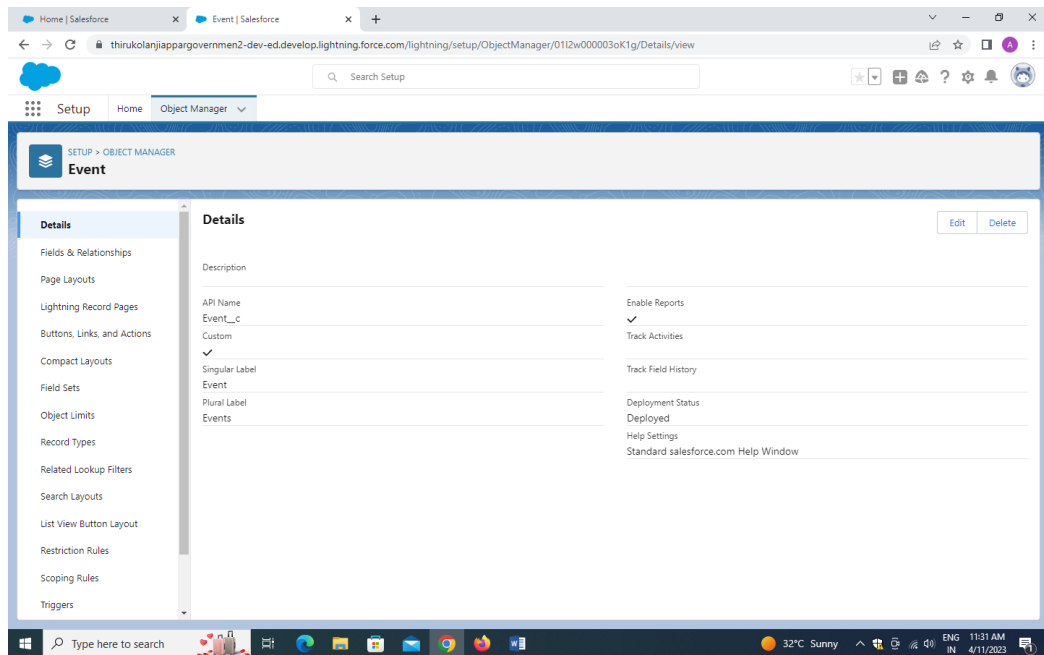
3.2 Activity and Screenshot

Milestone 1:

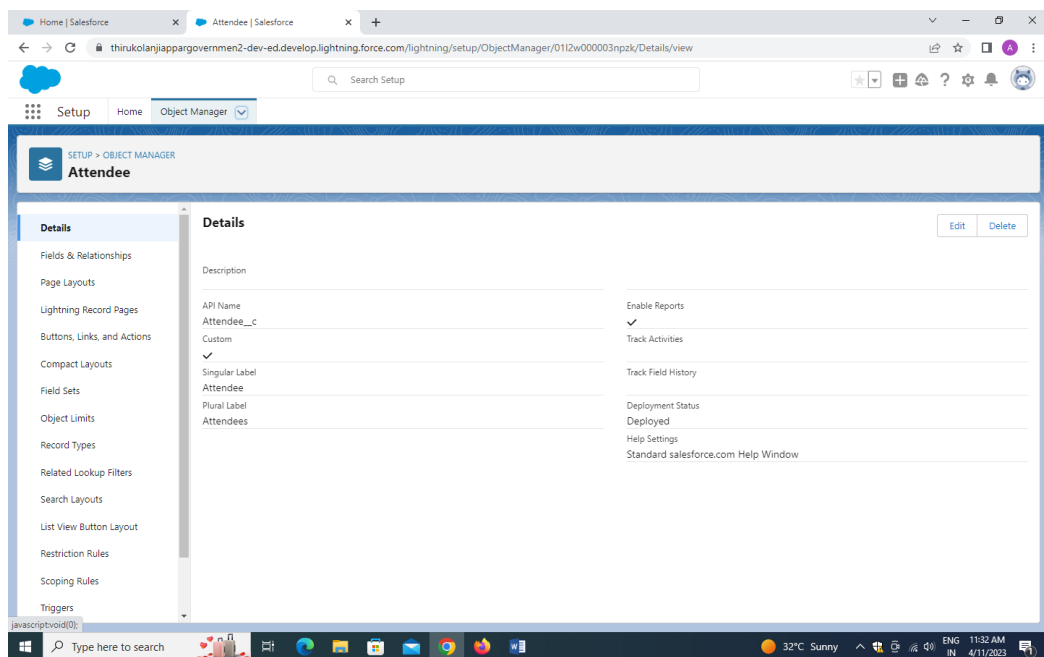


Milestone 2:- Object

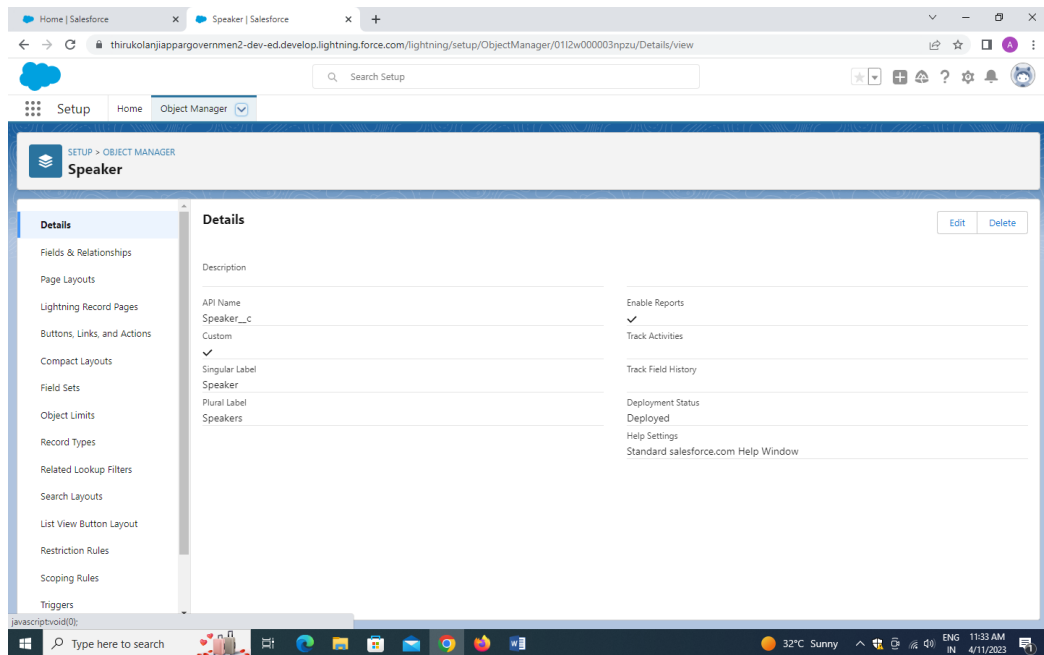
Activity 1:



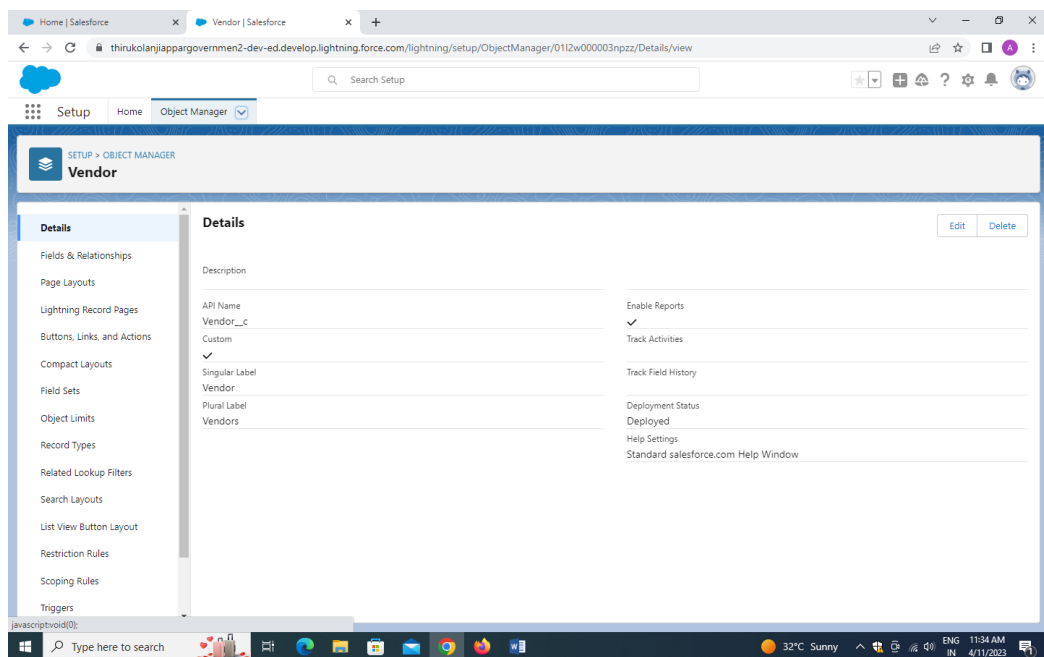
Activity 2:



Activity 3:

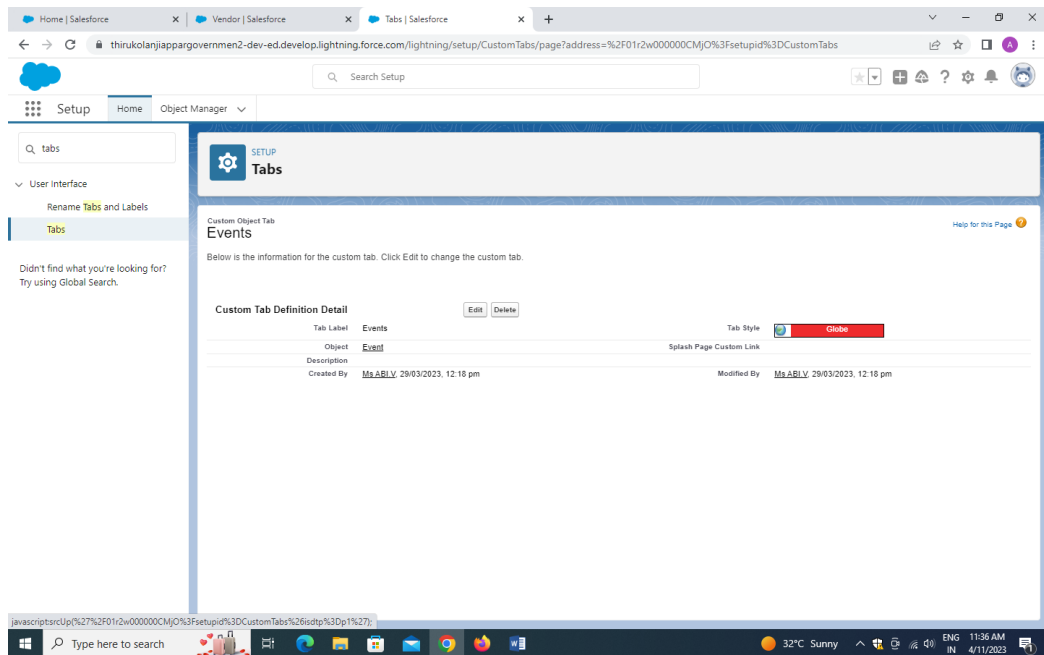


Activity 4:

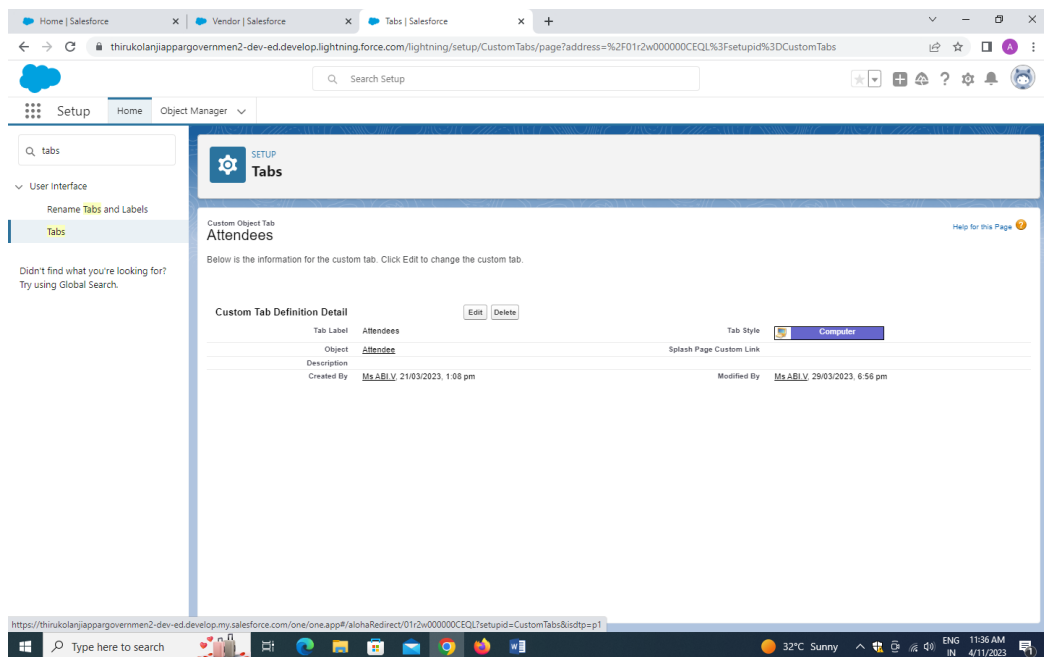


Milestone 3:- Tab

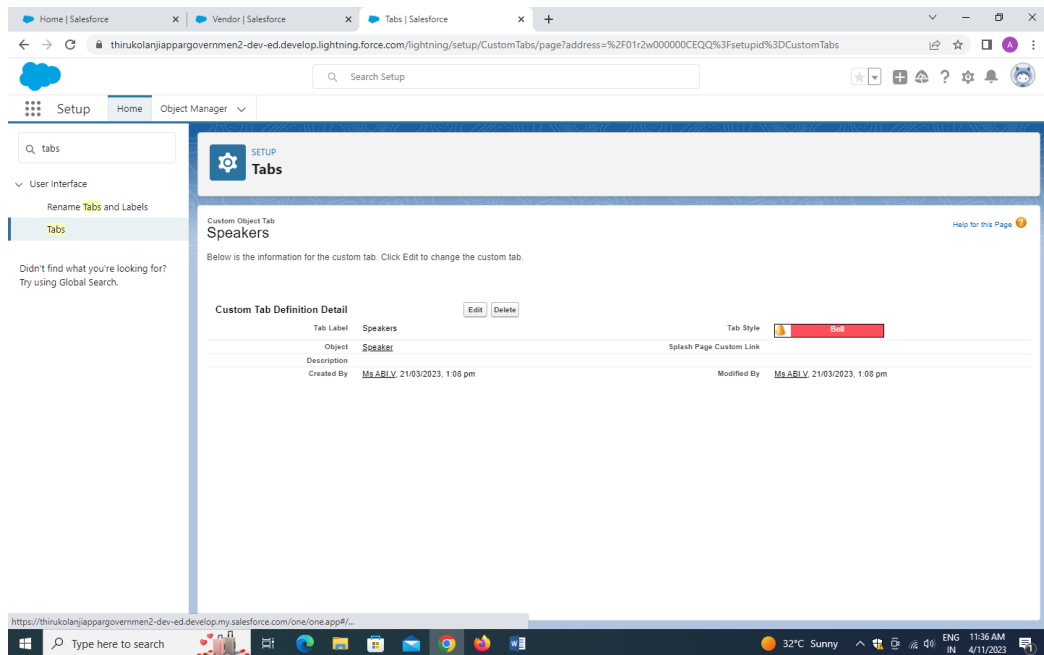
Activity 1: Creation of Event Tab



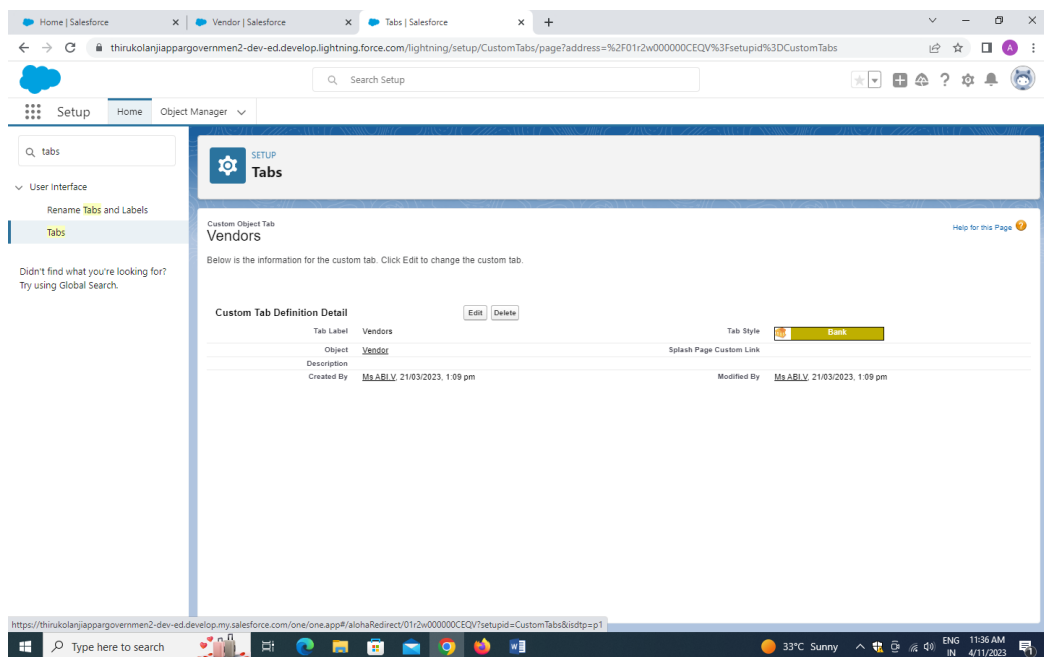
Activity 2: Creation of Attendee Tab



Activity 3: Creation of Speaker Tab

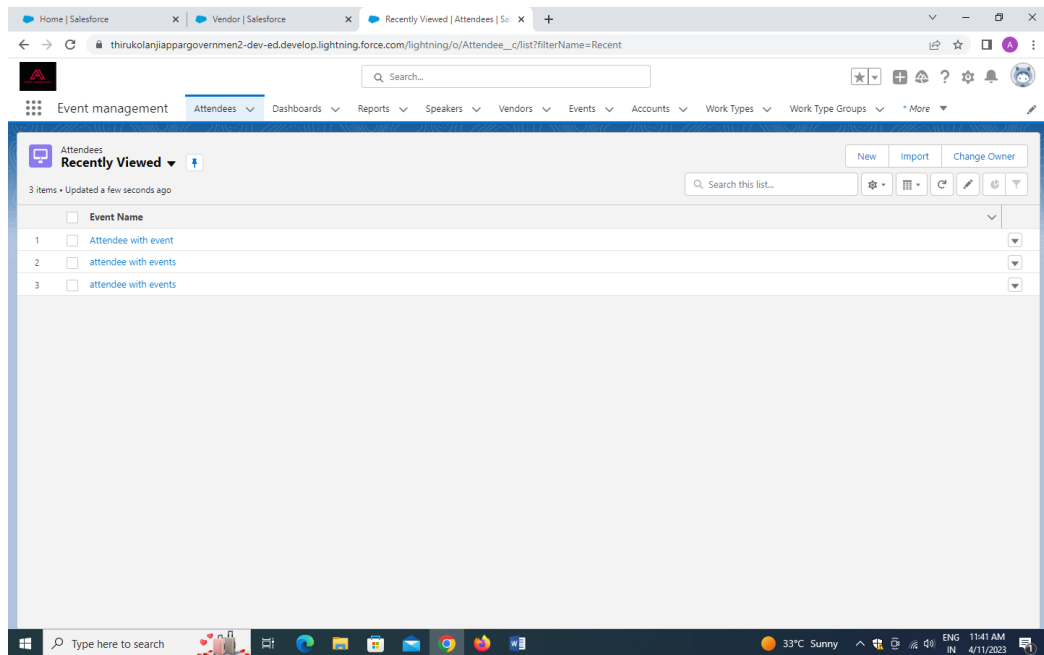


Activity 4: Creation of Vendor Tab



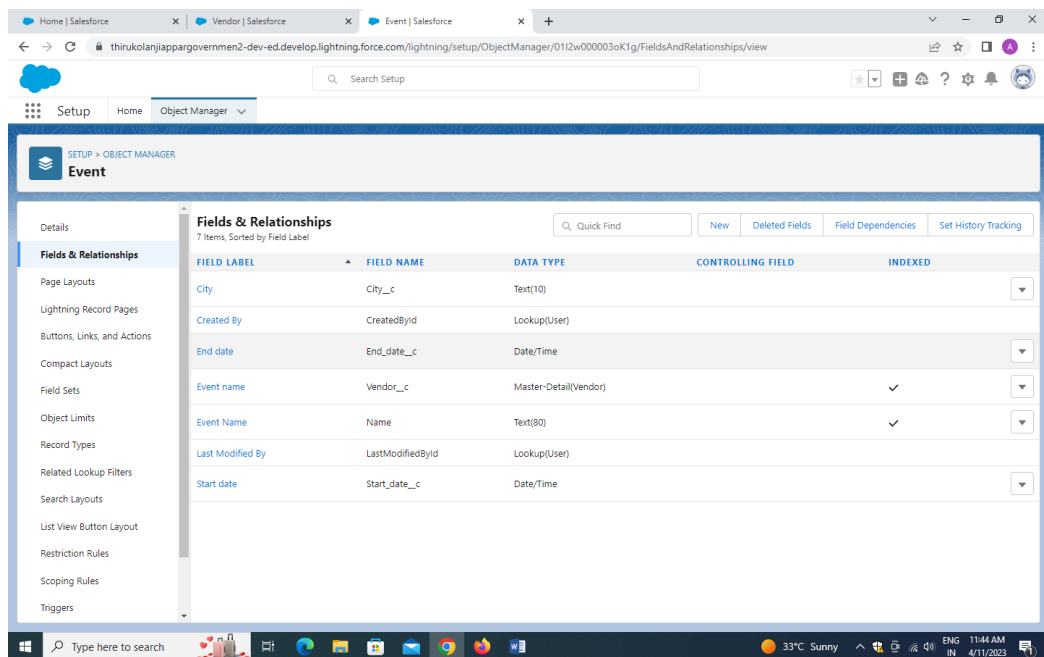
Milestone 3 :- Application

Activity: Create the event management construction App



Milestone 4:- Fields

Activity 1: Creation of Fields for the event objects



Activity 2: Creation of Fields for the Attendee objects

Home | Salesforce x Vendor | Salesforce x Attendee | Salesforce x +

thirukolanjappargovemen2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003npzk/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Attendee

Details

Fields & Relationships

8 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Event Name	Name	Text(80)		✓
Id	Id__c	Auto Number		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		
Tickets	Tickets__c	Picklist		

Type here to search

33°C Sunny

ENG 11:47 AM IN 4/11/2023

Home | Salesforce x Vendor | Salesforce x Student | Salesforce x +

thirukolanjappargovemen2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003oSPH/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Student

Details

Fields & Relationships

5 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Event Name	Event_Name__c	Master-Detail(Event)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Student Name	Name	Text(80)		✓
Tickets	Tickets__c	Picklist		

Type here to search

33°C Sunny

ENG 11:45 AM IN 4/11/2023

Activity 3: Creation of Fields for the Speaker objects

The screenshot shows the Salesforce Setup interface for the 'Speaker' object. The 'Fields & Relationships' section is active, displaying a table of 7 fields. The table has 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)		
e-mail	e_mail__c	Email		
Event name	Event__c	Lookup(Event)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Speaker Name	Name	Text(80)		✓

Activity 4: Creation of Fields for the Vendor objects

The screenshot shows the Salesforce Setup interface for the 'Vendor' object. The 'Fields & Relationships' section is active, displaying a table of 9 fields. The table has 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)		
e-mail	e_mail__c	Email		
Event Name	Event_Name__c	Lookup(Event)		✓
Event name	Event__c	Lookup(Event)		✓
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)		✓

Milestone 5:- Profile

Activity 1: Creation on event user profile

The screenshot shows the Salesforce Setup interface for the 'Event user profile'. The left sidebar contains a search bar and a navigation menu with 'Users' and 'Profiles' (selected). The main content area is titled 'Event user profile' and includes a description: '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.'

Below the description is a list of enabled access settings: 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 Settings Definitions Access, Enabled Flow Access, Enabled Service Presence Status Access, and Enabled Custom Permissions.

The 'Profile Detail' section shows the following information:

Name	Event user profile
User License	Salesforce
Description	
Created By	Ms ABLY 27/03/2023, 11:05 am
Modified By	Ms ABLY 03/04/2023, 10:11 am

The 'Page Layouts' section displays a table of standard object layouts:

Standard Object Layouts	Global	Object Milestone
Email Application	Global Layout (View Assignment)	Object Milestone Layout (View Assignment)
Home Page Layout	Not Assigned (View Assignment)	Operating Hours Layout (View Assignment)
Account	DE Default (View Assignment)	Opportunity Layout (View Assignment)
Alternative Payment Method	Account Layout (View Assignment)	Opportunity Product Layout (View Assignment)
Appointment Invitation	Alternative Payment Method Layout (View Assignment)	Order Layout (View Assignment)
Asset	Appointment Invitation Layout (View Assignment)	Order Product Layout (View Assignment)
Asset Action	Asset Layout (View Assignment)	Payment Layout (View Assignment)
	Asset Action Layout	Payment Authorization Layout

Activity 2: Creation on event vendors profile

The screenshot shows the Salesforce Setup interface for the 'Event vendor profile'. The left sidebar contains a search bar and a navigation menu with 'Users' and 'Profiles' (selected). The main content area is titled 'Event vendor profile' and includes a description: '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.'

Below the description is a list of enabled access settings: 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 Settings Definitions Access, Enabled Flow Access, Enabled Service Presence Status Access, and Enabled Custom Permissions.

The 'Profile Detail' section shows the following information:

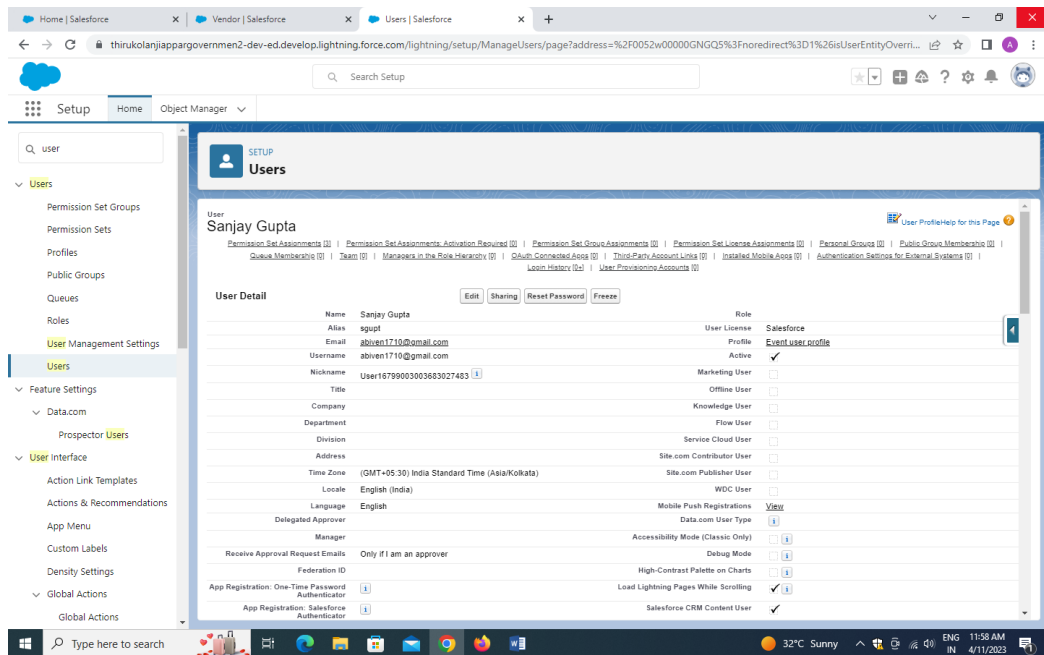
Name	Event vendor profile
User License	Salesforce
Description	
Created By	Ms ABLY 27/03/2023, 11:11 am
Modified By	Ms ABLY 03/04/2023, 10:11 am

The 'Page Layouts' section displays a table of standard object layouts:

Standard Object Layouts	Global	Object Milestone
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Appointment Invitation	Alternative Payment Method Layout (View Assignment)	Order Layout (View Assignment)
Asset	Appointment Invitation Layout (View Assignment)	Order Product Layout (View Assignment)
Asset Action	Asset Layout (View Assignment)	Payment Layout (View Assignment)
	Asset Action Layout	Payment Authorization Layout

Milestone 6:- User

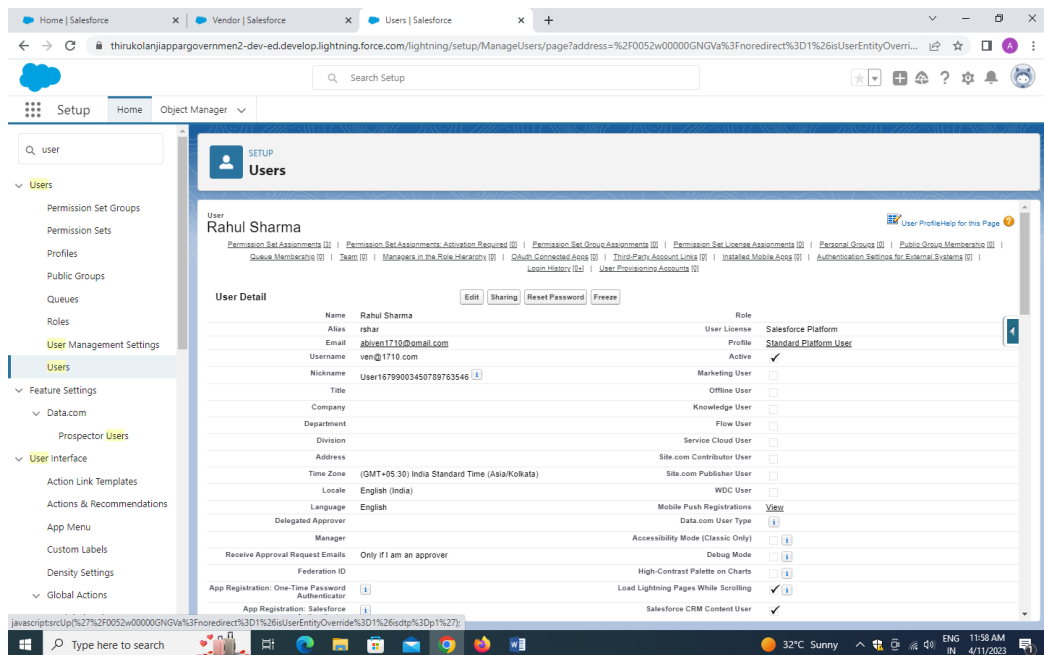
Activity 1: Creating a User with username as Sanjay Gupta



The screenshot shows the Salesforce Setup interface with the 'Users' section selected. The user profile for Sanjay Gupta is displayed. The left sidebar shows the navigation menu with 'Users' and 'User Management Settings' expanded. The main content area shows the user details and various settings.

User Detail		Role
Name	Sanjay Gupta	Salesforce
Alias	sgupta	User License
Email	ajbiven1710@gmail.com	Profile
Username	ajbiven1710@gmail.com	Event user profile
Nickname	User16799003003603027403	Active
Title		Marketing User
Company		Offline User
Department		Knowledge User
Division		Flow User
Address		Service Cloud User
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Contributor User
Locale	English (India)	Site.com Publisher User
Language	English	WDC User
Delegated Approver		Mobile Push Registrations
Manager		Data.com User Type
Receive Approval Request Emails	Only if I am an approver	Accessibility Mode (Classic Only)
Federation ID		Debug Mode
App Registration: One-Time Password Authenticator		High-Contrast Palette on Charts
App Registration: Salesforce Authenticator		Load Lightning Pages While Scrolling
		Salesforce CRM Content User

Activity 2: Creating a User with username as Rahul Sharma



The screenshot shows the Salesforce Setup interface with the 'Users' section selected. The user profile for Rahul Sharma is displayed. The left sidebar shows the navigation menu with 'Users' and 'User Management Settings' expanded. The main content area shows the user details and various settings.

User Detail		Role
Name	Rahul Sharma	Salesforce Platform
Alias	rshar	User License
Email	ajbiven1710@gmail.com	Profile
Username	ven@1710.com	Standard Platform User
Nickname	User16799003450769763546	Active
Title		Marketing User
Company		Offline User
Department		Knowledge User
Division		Flow User
Address		Service Cloud User
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Contributor User
Locale	English (India)	Site.com Publisher User
Language	English	WDC User
Delegated Approver		Mobile Push Registrations
Manager		Data.com User Type
Receive Approval Request Emails	Only if I am an approver	Accessibility Mode (Classic Only)
Federation ID		Debug Mode
App Registration: One-Time Password Authenticator		High-Contrast Palette on Charts
App Registration: Salesforce Authenticator		Load Lightning Pages While Scrolling
		Salesforce CRM Content User

Milestone 7:- Permission Sets

Activity 1:

The screenshot shows the Salesforce Setup interface for a permission set named "Event Permits and Save". The left sidebar contains navigation links for Users, Permission Set Groups, Permission Sets, Custom Code, and Custom Permissions. The main content area displays the "Permission Set Overview" for "Event Permits and Save", including fields for Description, License, Session Activation Required, Last Modified By, API Name, Namespace Prefix, and Created By. Below the overview, there is a section for "Apps" with links to various permission categories: Assigned Apps, Assigned Connected Apps, Object Settings, App Permissions, Apex Class Access, Visualforce Page Access, External Data Source Access, and Flow Access. The bottom of the screen shows a Windows taskbar with various application icons and system information.

Activity 2:

The screenshot shows the Salesforce Setup interface for a permission set named "Vendor Permits and Save". The left sidebar contains navigation links for Users, Permission Set Groups, Permission Sets, Custom Code, and Custom Permissions. The main content area displays the "Permission Set Overview" for "Vendor Permits and Save", including fields for Description, License, Session Activation Required, Last Modified By, API Name, Namespace Prefix, and Created By. Below the overview, there is a section for "Apps" with links to various permission categories: Assigned Apps, Assigned Connected Apps, Object Settings, App Permissions, Apex Class Access, Visualforce Page Access, External Data Source Access, and Flow Access. The bottom of the screen shows a Windows taskbar with various application icons and system information.

Milestone 8:- Reports

Creating a Report:

Home | Salesforce x Vendor | Salesforce x New Attendee with event Report x

thirukolanjappargovemen2-dev-ed.develop.lightning.force.com/lightning/r/Report/00Q2w00000E8RzZEAU/view

Search...

Event management Attendees Dashboards Reports Speakers Vendors Events Accounts Work Types Work Type Groups More

Report: Attendee with event
New Attendee with event Report

Enable Field Editing Add Chart Edit

Total Records: 13 Total Annual Revenue: ₹8,56,90,00,000 Total Employees: 2,41,965

	Account Name	Account ID	Account Number	Account Owners: Full Name	Account Site	Account Source	Active	Annual Revenue	Employees	Billing Address
1	GenePoint	0012w00001OPSKg	CC978213	Ms ABLV	-	-	Yes	₹3,00,00,000	265	345 Shoreline Park Moun
2	United Oil & Gas, UK	0012w00001OPSKq	CD355119-A	Ms ABLV	-	-	Yes	-	24,000	Kings Park, 17th Avenue, Team
3	United Oil & Gas, Singapore	0012w00001OPSKr	CD355120-B	Ms ABLV	-	-	Yes	-	3,000	9 Tagore Lane Singapore,
4	Edge Communications	0012w00001OPSKj	CD451796	Ms ABLV	-	-	Yes	₹13,90,00,000	1,000	312 Constitution Place Al
5	Burlington Textiles Corp of America	0012w00001OPSKj	CD656092	Ms ABLV	-	-	-	₹35,00,00,000	9,000	525 S. Lexington Ave, Burlingt
6	Pyramid Construction Inc.	0012w00001OPSKk	CC213425	Ms ABLV	-	-	Yes	₹95,00,00,000	2,680	2 Place Jussieu, Paris, 75251 P
7	Dickenson plc	0012w00001OPSKl	CC634267	Ms ABLV	-	-	Yes	₹5,00,00,000	120	1301 Hoch Drive, Lawrence, K
8	Grand Hotels & Resorts Ltd	0012w00001OPSKm	CD439877	Ms ABLV	-	-	Yes	₹50,00,00,000	5,600	2334 N. Michigan Avenue, Sul
9	Express Logistics and Transport	0012w00001OPSKo	CC947211	Ms ABLV	-	-	Yes	₹95,00,00,000	12,300	620 SW 5th Avenue Suite 400
10	University of Arizona	0012w00001OPSKp	CD736025	Ms ABLV	-	-	Yes	-	39,000	888 N Euclid Halls Cente
11	United Oil & Gas Corp.	0012w00001OPSKn	CD355118	Ms ABLV	-	-	Yes	₹5,60,00,00,000	1,45,000	1301 Avenue of the Americas
12	Sample Account for Entitlements	0012w00001OILPS	-	Automated Process	-	-	-	-	-	-
13	sforce	0012w00001OPSKt	-	Ms ABLV	-	-	-	-	-	The Landmark @ One Market
14								₹8,56,90,00,000	2,41,965	

Type here to search

32°C Sunny 12:05 PM 4/11/2023

4 Trailhead Profile Public URL

TEAM LEAD: ABL.V

<https://trailblazer.me/id/avenkatesan22>

TEAM MEMBER 1: ABL.V

<http://trailblazer.me/id/mabiv>

TEAM MEMBER 2: ALAPPAN. S

<https://trailblazer.me/id/alaps5>

TEAM MEMBER 3: ABINAYA. M

<https://trailblazer.me/id/amani273>

TEAM MEMBER 4: ARCHANA. S

<https://trailblazer.me/id/aselvaraju1>

TEAM MEMBER 5: ANBARASI.A

<https://trailblazer.me/id/aanbarasi>

5 Advantages and Disadvantages

List of Advantages

- ✓ Gaining more experience for your business internal public relation and marketing teams collaborating with professional event planning companies.

- ✓ Reducing the possibility of any incidence that harm the professional atmosphere.
- ✓ It is too easy to focus on the details of the event and forget that the intension is to achieve your objectives.
- ✓ An event management company will help with this.
- ✓ The company will tell you about other things you may not have thought of which could enhance the experience.

List of Disadvantages

- ✓ They will do a risk analysis, create plans and implement procedures.
- ✓ You need to pay them in addition to other event costs.
- ✓ The event Management come any does not know anything about your company unless you tell them.
- ✓ Like many other creative fields, this profession demands long hours of hard works it is not a 9-5 job.
- ✓ Candidates should be able to work at off hours and under pressure to meet the expectations of the clients.
- ✓ This profession requires extra amount of responsibilities.

6 Applications

- Event management provides multiple opportunities to meet and interact with celebrities like actors, actresses, politicians and similar high-profile people.
- This profession provides opportunities for free travel.
- Event Management is a personally rewarding career as it provides job satisfaction.
- It is one of rare professions that requires minimum educations qualification to start a career.
- It involves a lot of research about the brand, target audience and the concept of the event before planning the actual 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

- Event Management is the process of planning various types of events.
- It involves management, creation and development of events such as corporate conferences, wedding, festivities, formal parties etc.

- It involves a lot of research about the brand, target audience and concept of the event before planning the actual event.
- The event industry manages different sizes of events including Olympics to many even small birthday parties etc.
- The process of planning small or large size events is called event planning.