Project Report Template

1 Introduction

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. 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, you could be in 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.*

1.1 Overview

A brief decription about your project

1. *Real Time Salesforce Project*
2. *Object & Relationship in Salesforce*

3. Create Salesforce Org:

1.2 Purpose

The use of the project.what can be achived using this,

Milestone 1 - Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

https://youtu.be/r9EX3lGde5k There are 5 types of salesforce *editions: 1. Essentials: Designed for small businesses getting started with CRM to boost sales or service productivity. It includes a setup assistant and administration tools to customize your deployment as you grow. 2. Professional: Designed for businesses requiring full-featured CRM functionality. It includes straightforward and easy-to-use customization, integration, and administration tools to facilitate any small to midsize deployment. 3. Enterprise: Meets the needs of large and complex businesses. It gives you advanced customization and administration tools, in addition to all the functionality available in Professional Edition, that can support large-scale deployments. Enterprise Edition also includes access to Salesforce APIs, so you can easily integrate with back-office systems. 4. Unlimited: Maximizes your success and extends it across the entire enterprise through the Lightning Platform. It gives you new levels of platform flexibility for managing and sharing all your information on demand. Includes all Enterprise Edition functionality, Premier Support, full mobile access, unlimited custom apps, increased storage limits, and other features. 5. Developer: Provides access to the Lightning Platform and APIs. It lets developers extend Salesforce, integrate with other applications, and develop new tools and applications. Developer Edition also provides access to many of the features available in Enterprise Edition.*

NOTE: *Salesforce doesnt provide technical support for Developer Edition. But you can ask for help from developer community message boards after you register for the Lightning Platform developer website: developer.salesforce.com.*

2 Problem Defination & Design Thinking

A design thinking problem statement is a concise and actionable sentence or question that defines your UX purpose and direction. Product teams using design thinking develop problem statements to simplify complex problems and identify the gap between what your product has and what your users need.

2.1 <u>Empathy map</u>

paste empathy map screenshot:

***<u>Summary</u>:** Visualizing user attitudes and behaviors in an empathy map helps UX teams align on a deep understanding of end users. The mapping process also reveals any holes in existing user data.*

As UX professionals, it is our job to advocate on behalf of the user. However, in order to do it, not only must we deeply understand our users, but we must also help our colleagues understand them and prioritize their needs. Empathy maps, widely used throughout agile and design communities, are a powerful, fundamental tool for accomplishing both.

***Definition**: An empathy map is a collaborative visualization used to articulate what we know about a particular type of user. It externalizes knowledge about users in order to*

1) create a shared understanding of user needs, and

2) aid in decision making.

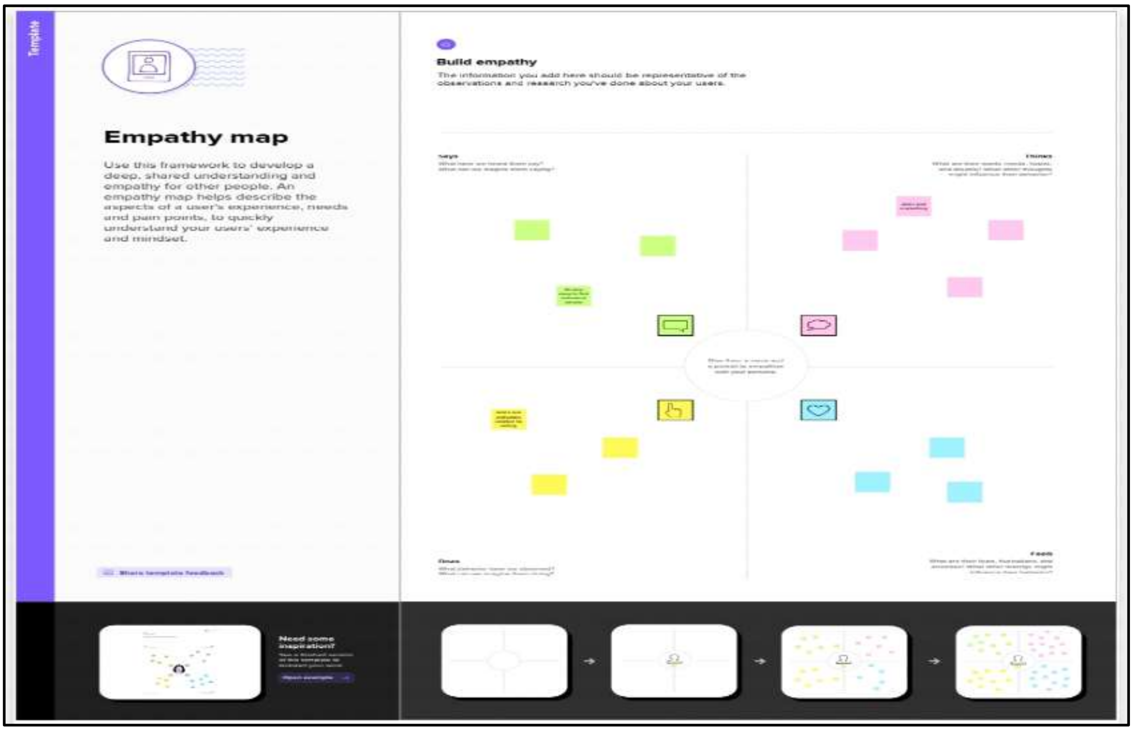
This article is a guide to empathy mapping and its uses.

Format

Traditional empathy maps are split into 4 quadrants (Says, Thinks, Does, and Feels), with the user or persona in the middle. Empathy maps provide a glance into who a user is as a whole and are not chronological or sequential.

Why Use Empathy Maps

Empathy maps should be used throughout any UX process to establish common ground among team members and to understand and prioritize user needs. In user-centered design, empathy maps are best used from the very beginning of the design process.



Both the process of making an empathy map and the finished artifact have important benefits for the organization:

Capture who a user or persona is. The empathy-mapping process helps distill and categorize your knowledge of the user into one place. It can be used to:

Categorize and make sense of qualitative research (research notes, survey answers, user-interview transcripts)

Discover gaps in your current knowledge and identify the types of research needed to address it. A sparse empathy map indicates that more research needs to be done.

Create personas by aligning and grouping empathy maps covering individual users

Communicate a user or persona to others: An empathy map is a quick, digestible way to illustrate user attitudes and behaviors. Once created, it should act as a source of truth throughout a project and protect it from bias or unfounded assumptions.

Be sure to keep empathy maps alive by revising and adjusting them as you do more research.

Empathy Map Example Buying a TV

Collect data directly from the user. When empathy maps are filled in directly by users, they can act as a secondary data source and represent a starting point for a summary of the user session. Moreover, the interviewer may glean feelings and thoughts from the interviewee that otherwise would have remained hidden.

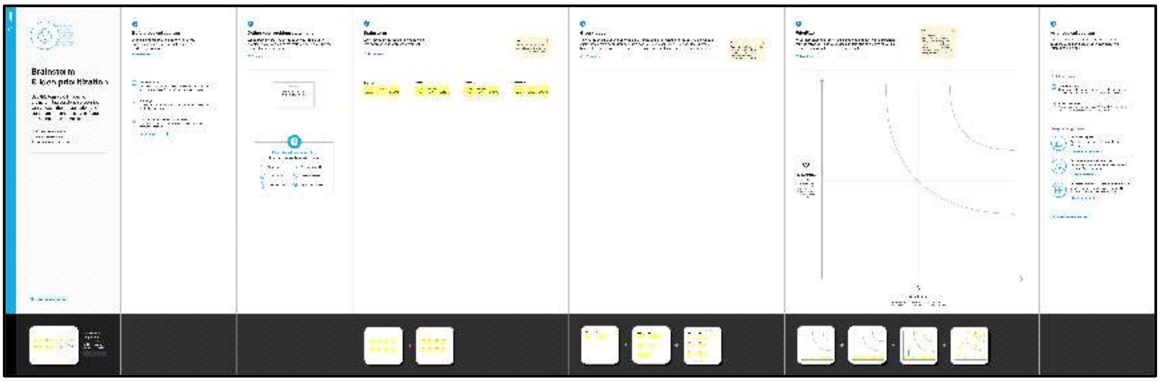
empathy map is suceessfull.

2.2 Ideation & Brainstorming Map

Paste the Ideation & brainstorming map screenshot

Mind Mapping for Brainstorming and Task Management

People using Salesforce.com for managing their workflow need an easy-to-use way of capturing ideas and creating tasks for them. Mind mapping is an effective way of supporting non-linear thinking, and is available from online services such as MindMeister. Integration of MindMeister with Salesforce.com would allow the end-to-end process going from idea to execution to be fully captured in a structured way. Such integration should allow users to create tasks from MindMeister, and to get them completed from Salesforce.com.



About the mind map brainstorm template

Mind mapping helps you visualize and understand the connections between concepts, and can often reveal relationships you wouldn't have anticipated — especially when youre building a mind map together. Use this template to get started mind mapping and illustrating the links between variables with your team.

What is a mind map?

Mind mapping is a brainstorming technique that can be used to organize thoughts and ideas. The basic structure of a mind map is a central idea, with branches radiating out from the center. Each branch can then be further divided into smaller branches, creating a hierarchical structure.

Mind maps are often used to brainstorm ideas, as they can help to visually organize thoughts and connect related concepts. Additionally, mind maps can be used to plan projects or presentations, as they can provide a clear overview of the material. Ultimately, mind maps are versatile tools that can be used in a variety of ways.

How to create a Mind map brainstorm template

1. *Choose a topic.*

The first step in using a mind map to brainstorm is to choose a topic. The topic can be anything that you want to brainstorm ideas about. For example, if you are planning a new feature, you could brainstorm ideas for related tools and other product and design considerations.

2. *Place your topic at the center of the mind map.*

Now that you've defined your brainstorming topic, place it in the center of the diagram so that all the branches radiate outward from the main concept.

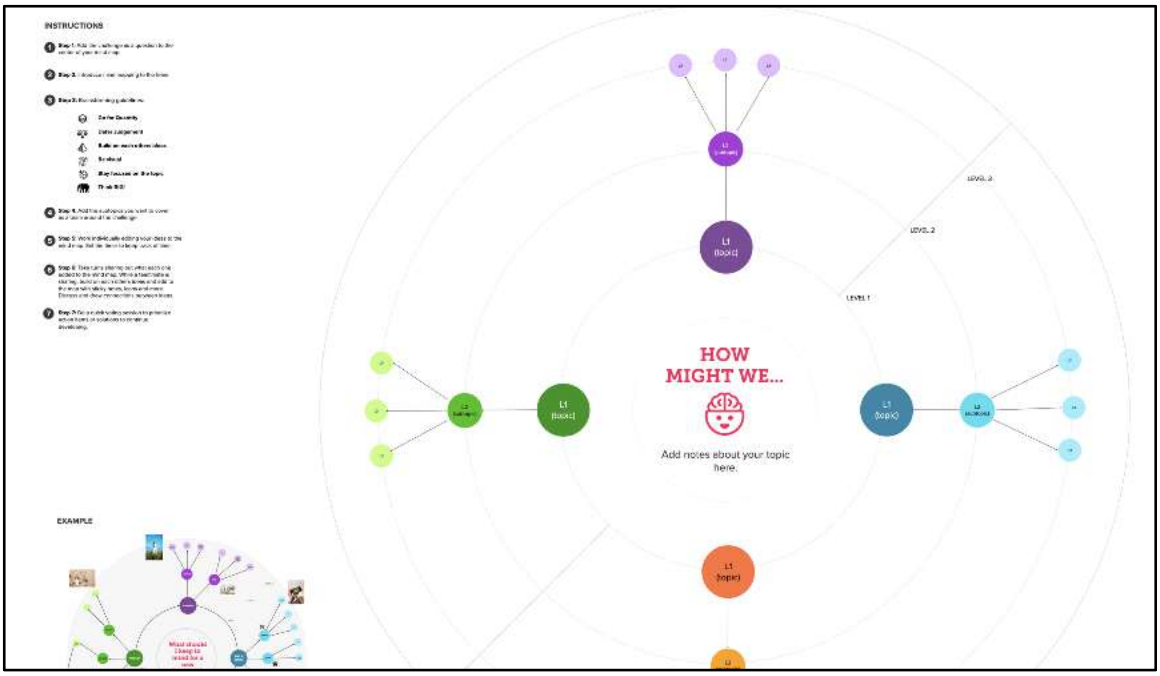
3. Brainstorm related ideas and concepts.

Once you have written the main idea in the center of the diagram, add branches and related concepts. These branches will represent different ideas that relate to the main idea. For example, if you are brainstorming ideas for a new feature, you might have branches for user interface design, developer timelines, and components.

5. Continue to build outward so you include as many related variables as possible.

Finally, on each of the branches, write down specific ideas that relate to that branch. It can help to brainstorm the concepts within a category and visualize the connections afterward, in order to keep from limiting the discussion.

This template includes a radar diagram so that as you build out the variables for each related concept, you can also map their levels of influence over the main concept at the center of your mind map.



mind map complete the process.

3 RESULT

3.1 Activity & Screenshot

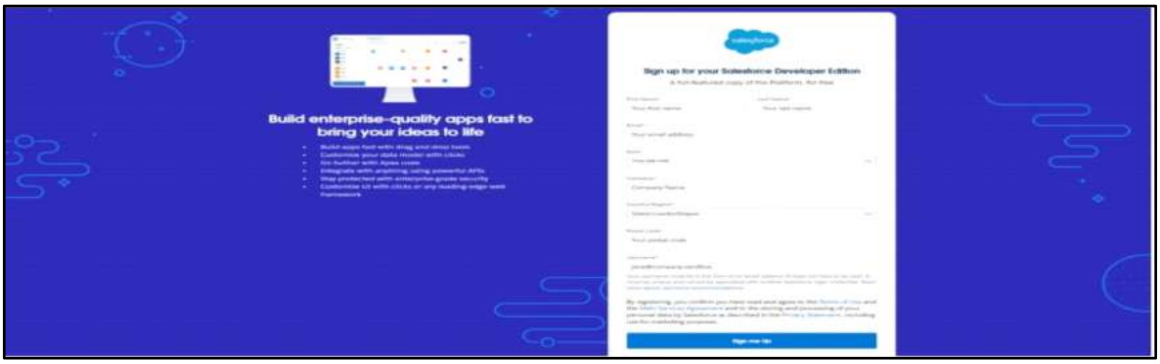
Attach the screenshots of your project activity along with the description

Creating a Salesforce Developer Org:

A Developer org has all the features and licenses you need to get

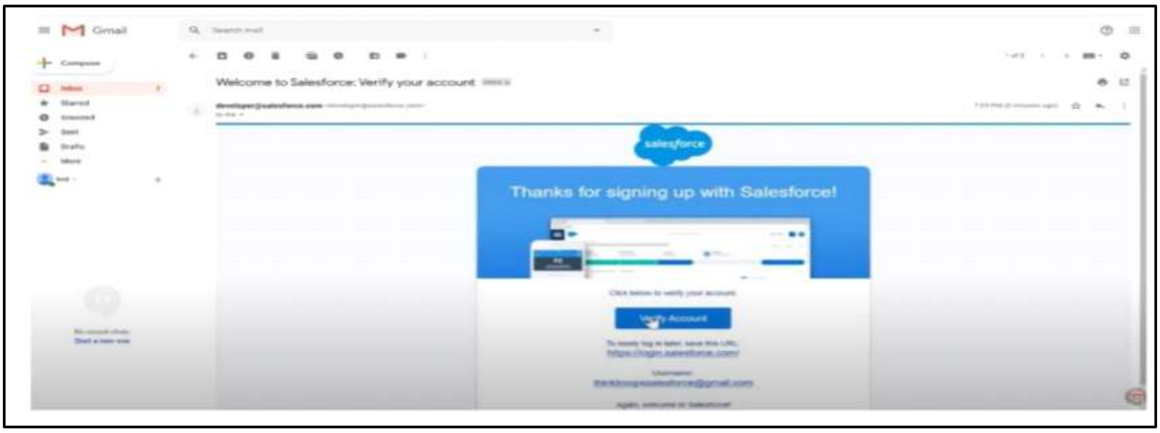
started with Salesforce.

1. Search Developer.salesforce.com



2.Enter the following details like First name, last name, Email, Role, Company, Country/Region, Postal code, and Username must be unique.

3. Click sign me up, after a few min you will reserve a mail salesforce org and by using the verify account link you can create your new password.

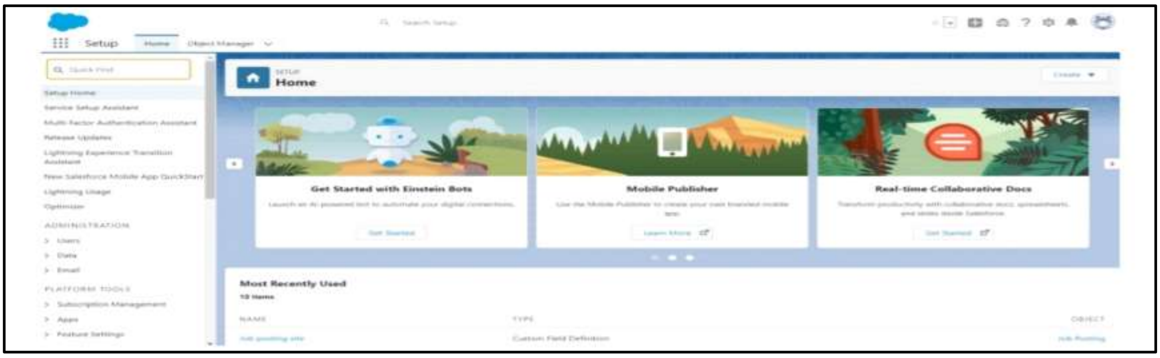


4. Click save.

5. Search login.salesforce.com

6. By using username and password you can into the salesforce org.

The setup page will appear as below.



Milestone 2 — Object:

What is an object?

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*

Activity 1:

Creation of Objects for Event Management:

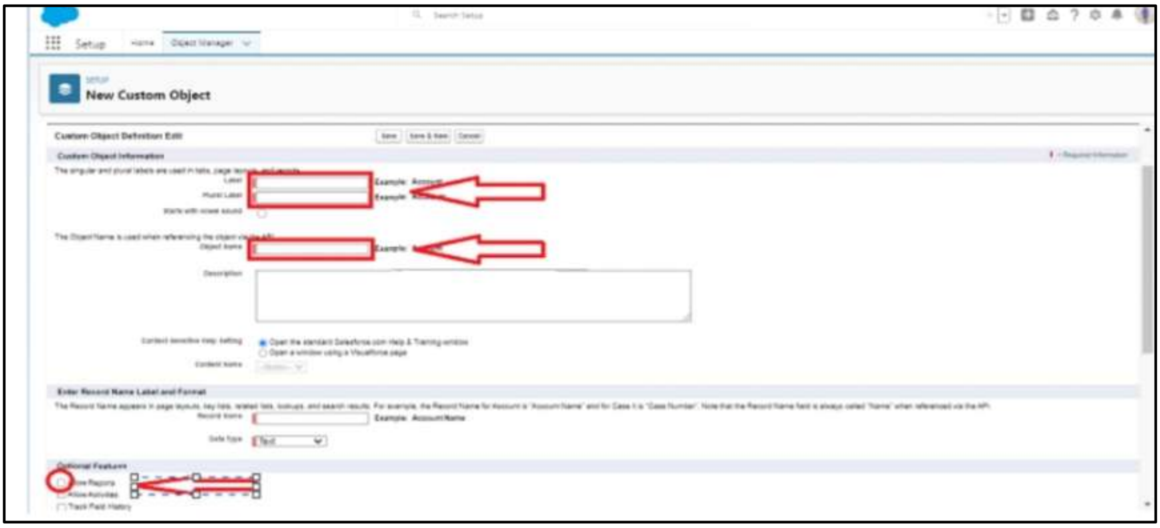
For this Event management we need to create 4 objects i.e Events, Attendees, Speakers and vendors. The below steps will assist you in creating those objects.

1. Click on the gear icon and then select Setup.

2. Click on the object manager tab just beside the home tab.

3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.

- *On the Custom Object Definition page, create the object as follows:*
- *Label: Event*
  - *Plural Label: Events*
  - *Record Name: Event Name*
  - *Check the Allow Reports checkbox*
  - *Check the Allow Search checkbox*
  - *Click Save.*



Activity 2:

Creation of Attendees object:

Activity 3:

activity one compainng

Creation of Speaker object:

activity one compainng

Activity 4:

Creation of Vendors object:

1. Click on the gear icon and then select Setup.

2. Click on the object manager tab just beside the home tab.

3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.

a. On the Custom Object Definition page, create the object as follows:

b. Label: Vendor

c. Plural Label: Vendors

d. Record Name: Vendor Name

e. Check the Allow Reports checkbox

f. Check the Allow Search checkbox

g. Click Save.

Milestone 3 — Tab:

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.

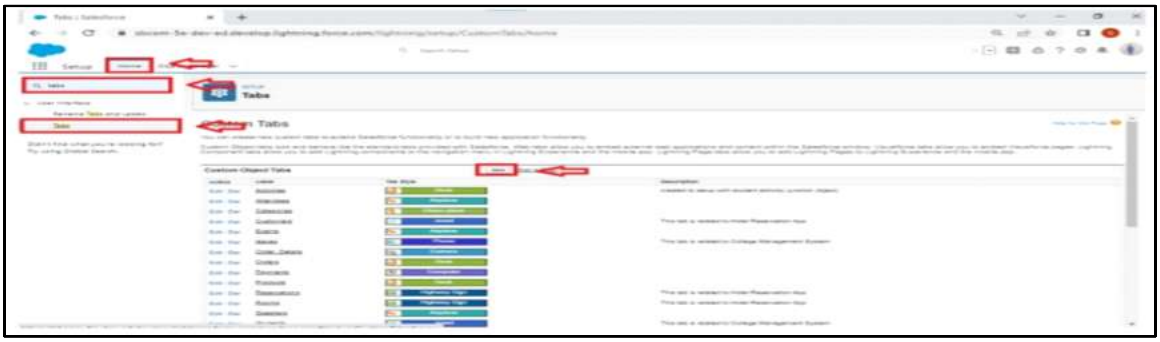
NOTE: *we wont be dealing with web tabs and visualforce tabs later.*

Activity 1:

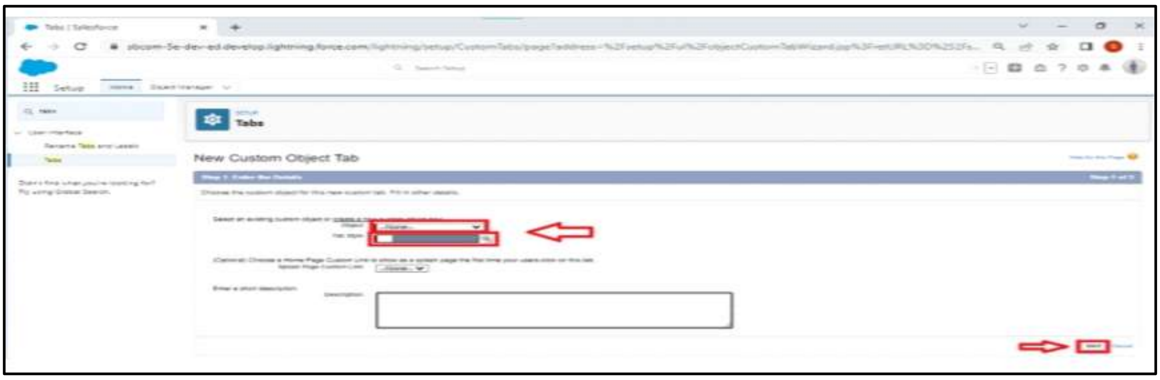
Creation of Event tab:

Now create a custom tab.

1. Click on Home tab, enter Tabs in Quick Find and select Tabs.



2. Under custom object tabs, click New.



3. For Object, select Event.

4. For Tab Style, select any icon.

5. Leave all defaults as is. Click Next, Next, and Save.

Activity 2:

Creation of Attendee tab: compaining the activity 1

Activity 3:

Creation of Speakers tab: compaining the activity 1

Activity 4:

Creation of Vendor tab: compaining the activity 1

Milestone 3 — Application:

What is an App?

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

Activity Reports

Activity reports are useful for gathering information about open activities, completed activities, multi-person events, or pending approval requests for which you're a delegated approver.

Standard activity reports allow you to select the date range and status of the activities you want included. The standard activity reports list your tasks and appointments for a selected date range or events with all invitees.

You can also create custom reports for activities by clicking the Reports tab, New Report, and choosing Activities as the type of data on which to report.

Note

NOTE Click Show Hierarchy to see your orgs role hierarchy above the report results. You can use the role hierarchy to share report data with people at different levels in the hierarchy. For example, if you see CEO > VP of Global Sales > Sales Operations Director, youre viewing data for the Sales Operations Director role. Click any role name to see and share the data thats visible to people in that role.

Special Features of Activity Reports

Consider the following when running activity reports:

Standard Reports

Choose the HTML Email Status report if you have HTML email tracking enabled. This report covers anything in the HTML Email Status related list of the leads and contacts that you sent.

Choose the Events with Invitees report to include only multi-person events in your report. The standard filters for events with invitees are:

Assigned to...—Shows only multi-person events that you own.

Assigned to the team of...—Shows multi-person events that anyone in your team owns.

Invitee is...—Shows only multi-person events that list you as an invitee.

Invitee is in the team of...—Shows the multi-person events that show anyone on your team as an invitee.

The My Delegated Approval Requests report lists all the approval requests for which you're the approval proxy.

Note

NOTE The All Pending Approval Requests report is listed in the Activity Reports folder.

In Professional, Enterprise, Unlimited, Performance, and Developer Edition organizations, to show the activities for users who report to you, use the Hierarchy links in the Tasks and Appointments report.

Note

NOTE You can view only your own activities and activities owned by users below you in the role hierarchy.

If your organization uses Shared Activities, reports (including custom report types and Tasks and Events reports) display different results depending on your permissions. Say youre reporting on events, and your report results include an event that is related to two or more contacts and also has invitees. If you're an administrator, your report results show an event for the primary contact plus a separate event for each invitee. If you're not an administrator, your report results show just one event, for the primary contact.

A user can access an activitys child event when one of the following guidelines is met:

The user is the owner of the activity or higher up in the hierarchy than the owner.

The user can access the who (parent record or contact) and the who count is one.

Report Types

Using report builder, you can create activity reports that show activities related to another type of record. For example, a custom Activity with Leads report shows activities associated with leads.

Activities with Leads reports don't display data for the Address Line 1, Address Line 2, and Address Line 3 fields.

When shared activities is enabled, custom reports created using Activities—such as Activities with Contact—dont show child event records because the report considers who relations only.

Reports such as Tasks and Events return both parent and child event records because the report considers all records, including child events.

Tips for Activity Reports

Set a search criteria of Event Invitation equals 0 to filter out events that are meeting invites sent to users for a multi-person event.

Archived activities arent included in reports. Events and closed tasks older than a year are archived. However, open tasks arent archived. You can still see archived activities for a record by selecting View All in the Activity History section of a records detail page.

Activities for private contacts are displayed only in reports for the contact owner.

The standard filters for activity reports allow you to limit your report results using the following options. Some of these options arent visible, depending on your edition.

My Activities—Shows activities that you own.

My Delegated Activities—Shows activities that you created but that someone else owns. That owner is in the same role as you, or below, in the role hierarchy.

My Team's Activities—Shows activities owned by users who report to you in the role hierarchy.

All Activities—Shows all activities that you can view, as determined by your sharing model.

If you receive an error message that your activity report has too many results, customize the report to include a filter on a picklist, text, or date field. Alternatively, rerun the report using a different activity data type such as Activities with Accounts or Activities with Opportunities.

Activities that are captured using Einstein Activity Capture aren't included in the reports that you create on the Reports tab. To view the activities that are captured with Einstein Activity Capture, open the Activities dashboard in CRM Analytics