

BUILD AN EVENT MANAGEMENT SYSTEM USING SALES FORCE

1 INTRODUCTION

1.1 Overview

Event management is the process beyond planning, executing and evaluating , corporate , association social events , the event manager is responsible for operation at a rented event or entertainment venue as they coordinate with property owner. It involves studying the brand, identifying its targeting audience, devising the event concept .

1.2 Purpose

1. To promote the launch of new product
2. To motivate people by organizing awards function
3. To introduce new scheme
4. conducting the successful event

Problem Definition & Design Thinking

2.1 Empathy Map



2.2 Ideation & Brainstorm Map

Person 1

customer satisfaction	measuring the satisfaction	designing a 100 response the management
handling smoothly		

Person 2

to check up the on site management	beginners to improve our skill	follow up the tool
to success the all events		

Person 3

customer and customer experience is very important	to convince the customers	select the events and improve our skill
to collect the data		

Person 4

improve customer response skills	most work is very important	select is for experienced
select the event to gather		

Person 5

Person 6

Person 7

Person 8

Result

3.1 Data model

Object name	Fields in the object	
obj1		
	Field label	Data type
	Label	Event
	Plural Label	Events
	Record Name	Event Name
obj2		
	Field Label	Data type
	Label	Attendee
	Plural Label	Attendees
	Record Name	Attendee Name
obj3		
	Field label	Data type
	Label	Speaker
	Plural Label	Speakers
	Record Name	Speaker Name

obj4		
	Field label	Data type
	Label	Vendor
	Plural Label	Vendors
	Record Name	Vendor Name

3.2 Activity & screenshot

Milestone : 1

Create your salesforce account :

Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

Sign up for your Salesforce Developer Edition
A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name*
Your first name

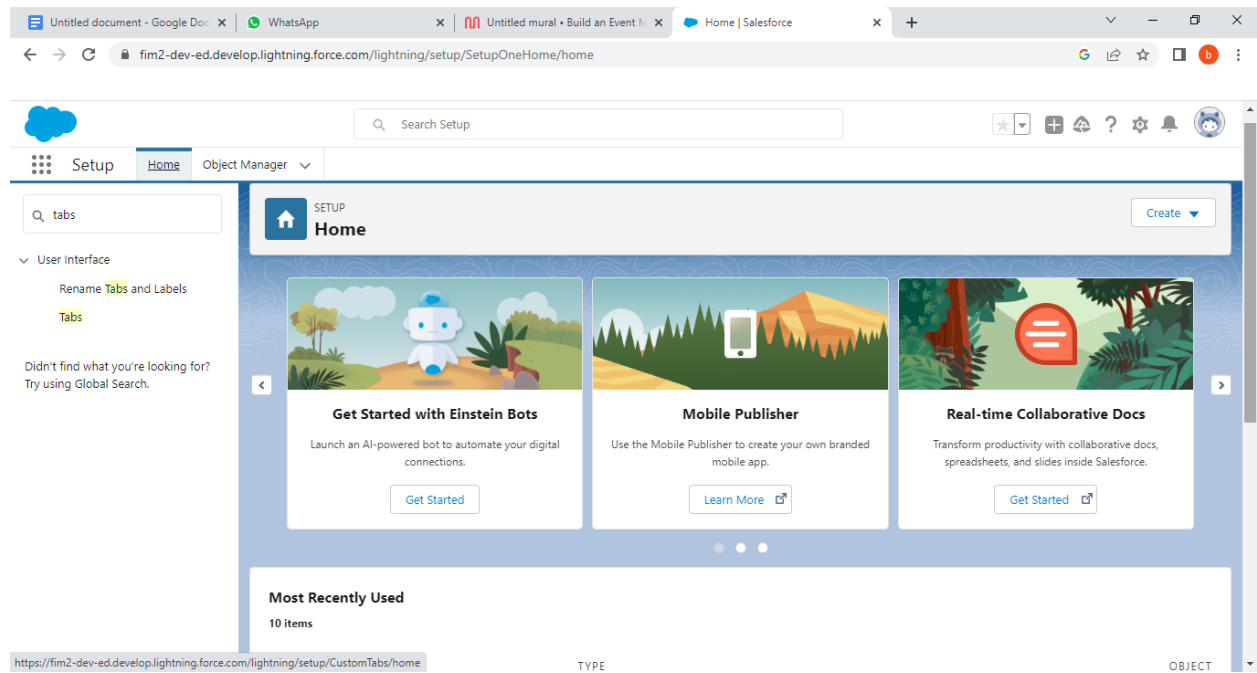
Last Name*
Your last name

Email*
Your email address

Role*
Your job role

enter a valid Open salesforce developer sign in page and details

Salesforce account login:



This is a home page of my developer sales force account

Milestone :2

Object :1

EVENT

Untitled document - Google Doc: x Event | Salesforce x +

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Setup Home Object Manager

SETUP > OBJECT MANAGER
Event

Details Edit Delete

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Details

Description
Audio launch event : Audio launch and movie promotion we put together an experience that applauds talent while leaving the audience in eager anticipation of the release

API Name
Event__c

Custom
✓

Singular Label
Event

Plural Label
Events

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Object:2

ATTENDEE

Untitled document - Google Doc: x Attendee | Salesforce x +

← → ↺ fim2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000040lln/Details/view G ↗ ☆ □ b ⋮

Setup Home Object Manager

SETUP > OBJECT MANAGER
Attendee

Details Edit Delete

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Details

Description
In the audio launch celebrity like music director, movie director ,lyricist , actor and actress and audiences come to the event

API Name
Attendee__c

Custom
✓

Singular Label
Attendee

Plural Label
Attendees

Enable Reports
✓

Track Activities

Track Field History

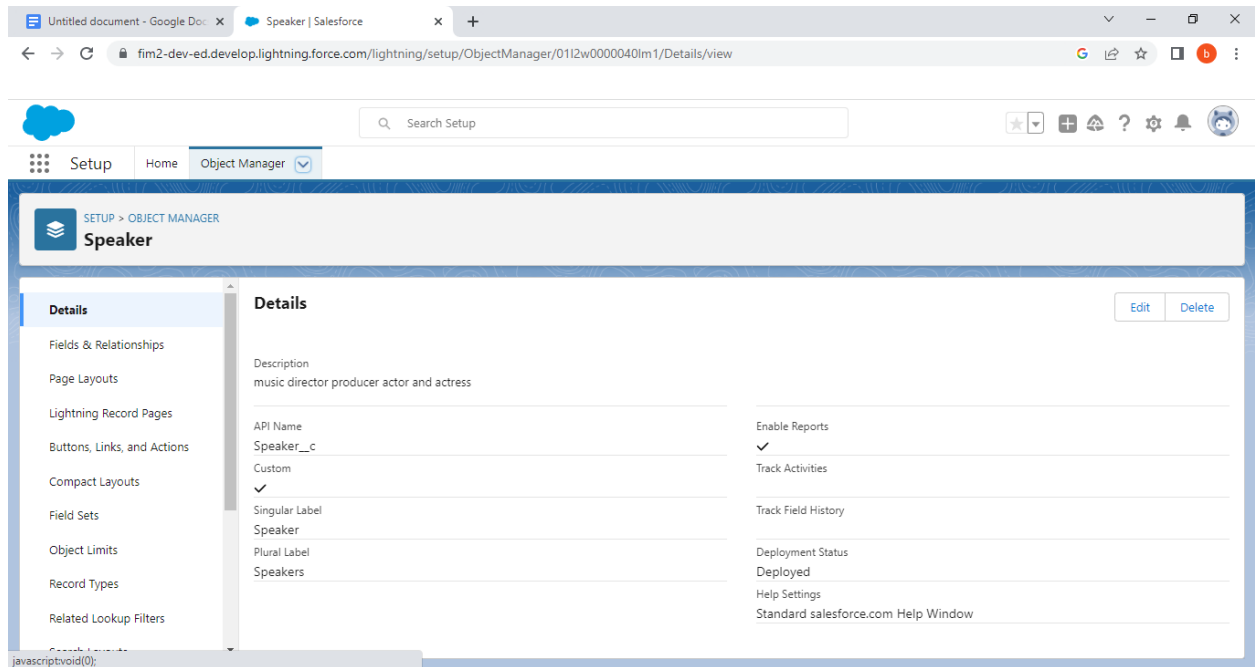
Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

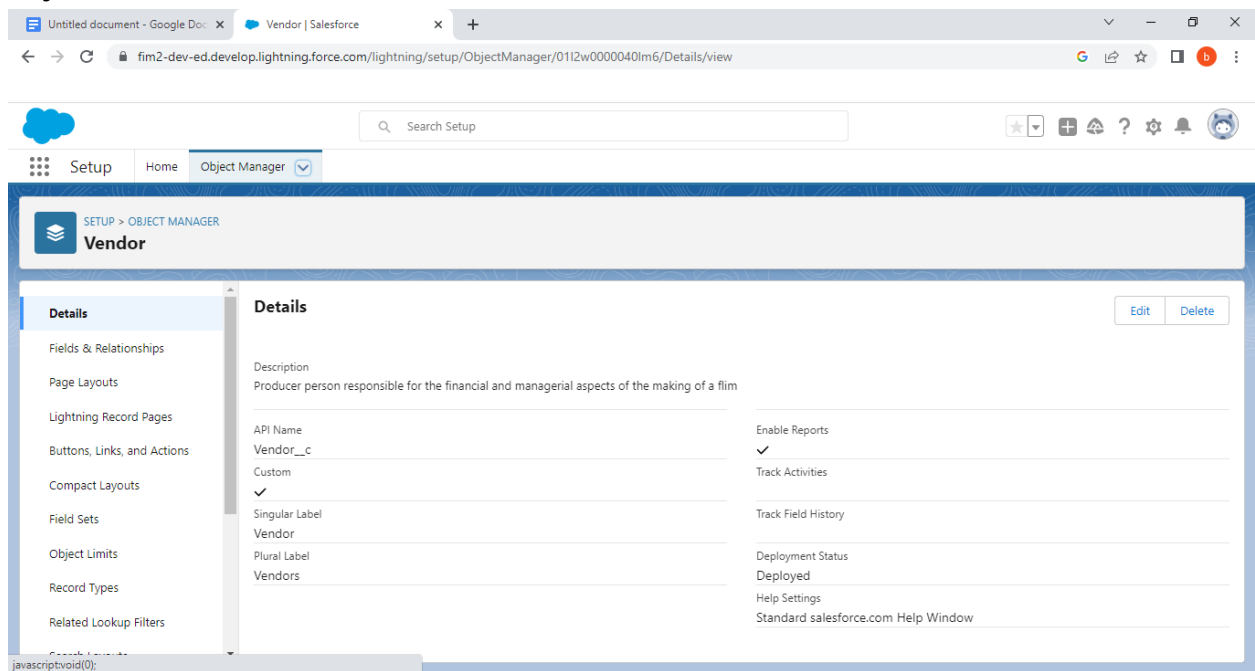
javascript:void(0);

Object: 3

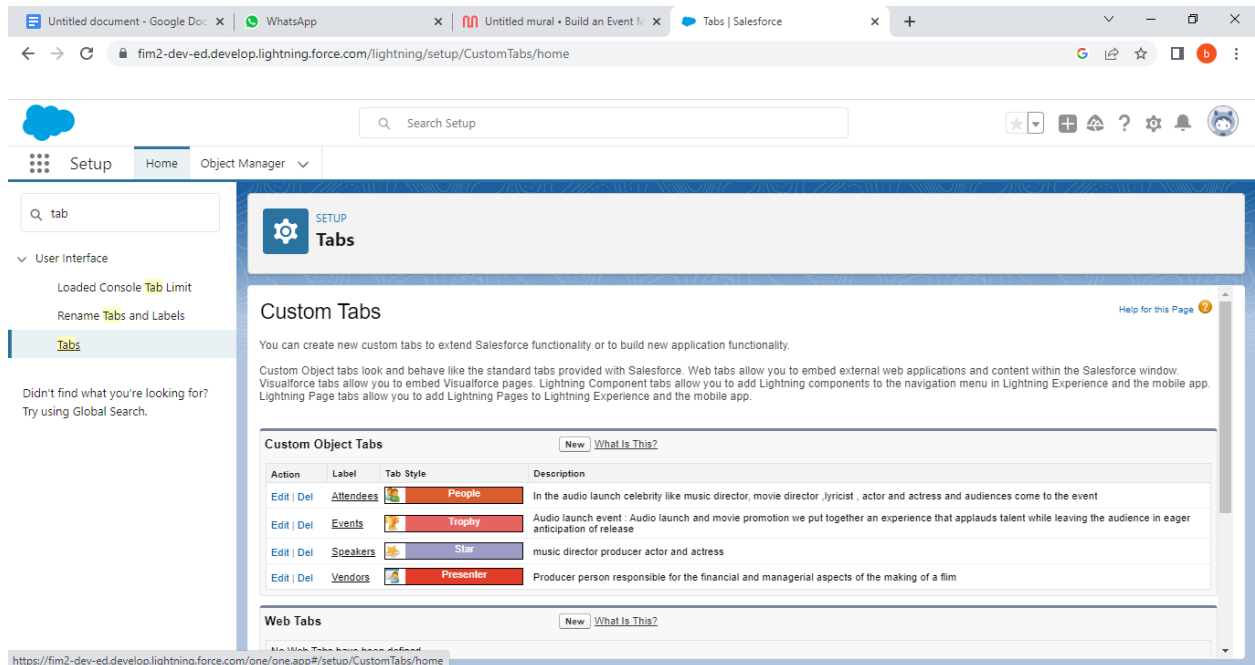
SPEAKER



Object: 4 **VENDOR**



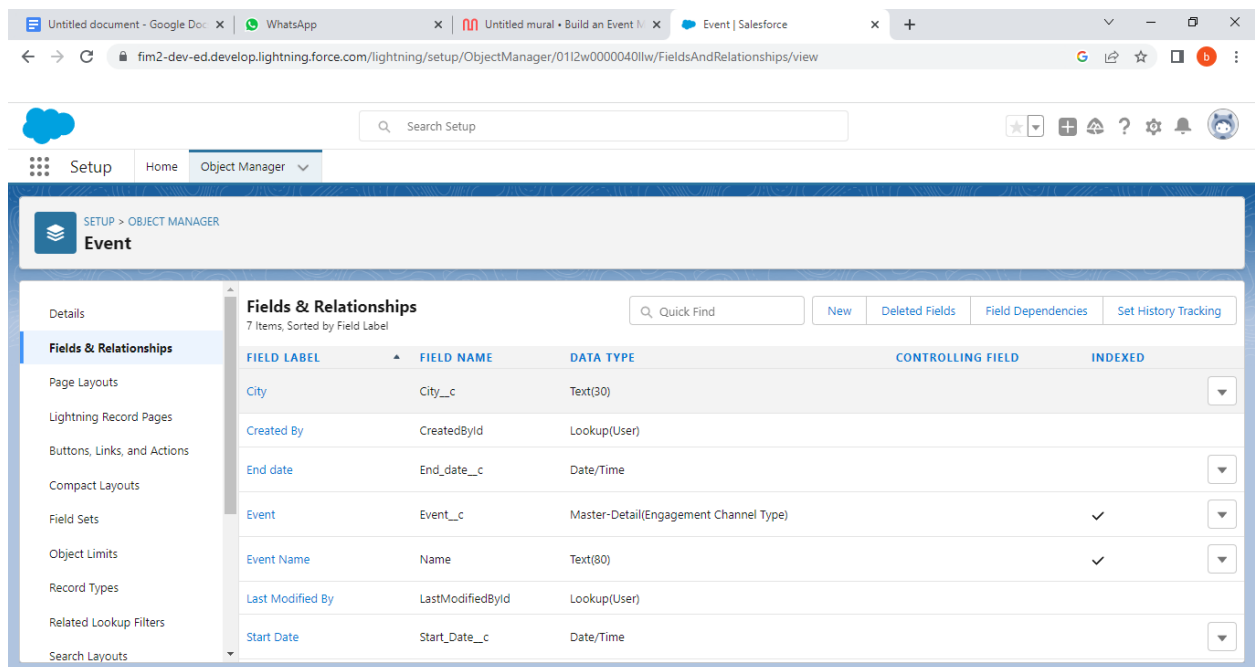
Milestone :3 To create a tab



I created the four tabs in the name of Event , Attendee ,Speaker , Vendor.

Milestone : 4 Creation of fields

Activity :1 CREATION OF FIELDS FOR THE EVENT OBJECT



the home page and event to the field select theSelect page button to the related one

Activity : 2 CREATION OF FIELD FOR ATTENDEE OBJECT

Untitled document - Google Doc x Attendee | Salesforce x +

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Setup Home Object Manager

SETUP > OBJECT MANAGER
Attendee

Details

Fields & Relationships
7 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Attendee Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Id	Id__c	Number(18, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User, Group)		✓
Phone	Phone__c	Phone		

Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts

Activity : 3 CREATION OF FIELD FOR SPEAKER OBJECT

Untitled document - Google Doc x Speaker | Salesforce x +

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Setup Home Object Manager

SETUP > OBJECT MANAGER
Speaker

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
Bio	Bio__c	Email		
Created By	CreatedById	Lookup(User)		
e-mail	e_email__c	Email		
Event	Event__c	Lookup(Event)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User, Group)		✓
Speaker Name	Name	Text(80)		✓

Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts

<https://fim2-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/0112w0000040lm1/FieldsAndRelationships/view>

Activity : 4 CREATION OF FIELD FOR VENDOR OBJECT

Untitled document - Google Doc x Vendor | Salesforce x +

fim2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000040lm6/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Vendor

Details

Fields & Relationships

7 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)		
e-mail	e_mail__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
phone	phone__c	Phone		
Service Provider	Service_Provider__c	Lookup(Event)		✓
Vendor Name	Name	Text(80)		✓

Milestone :5 To create a Profile

Untitled document - Google Doc x WhatsApp x x x +

fim2-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home

Search Setup

Setup Home Object Manager

profile

Users

Profiles

Profiles

Help for this Page

All Profiles Edit Delete Create New View

New Profile

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter External User	Chatter External	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Contract Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Custom: Marketing Profile	Salesforce	<input checked="" type="checkbox"/>

1-25 of 41 0 Selected

Page 1 of 2

I have created the profile. The profiles are shown above

Milestone:6 To create the User

The screenshot shows the Salesforce Setup interface with the 'Users' section selected. The 'All Users' view is active, displaying a table of users. The table includes columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. The following table represents the data shown in the screenshot:

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty_00d2w00000r6upeat.bmlbkekoj34@chatter.salesforce.com		✓	Chatter Free User
Edit	Pandian Barath	BPand	barath@fim-company		✓	System Administrator
Edit	Pandian Barath	Bar	barath01062003@gmail.com		✓	Event vendors profile
Edit	Pandian Barath	Bar	barathpandian77@gmail.com		✓	Standard Platform User
Edit	User Integration	integ	integration@00d2w00000r6upeat.com		✓	Analytics Cloud Integration User
Edit	User Security	sec	insightssecurity@00d2w00000r6upeat.com		✓	Analytics Cloud Security User

I have found the user name . The users are given below

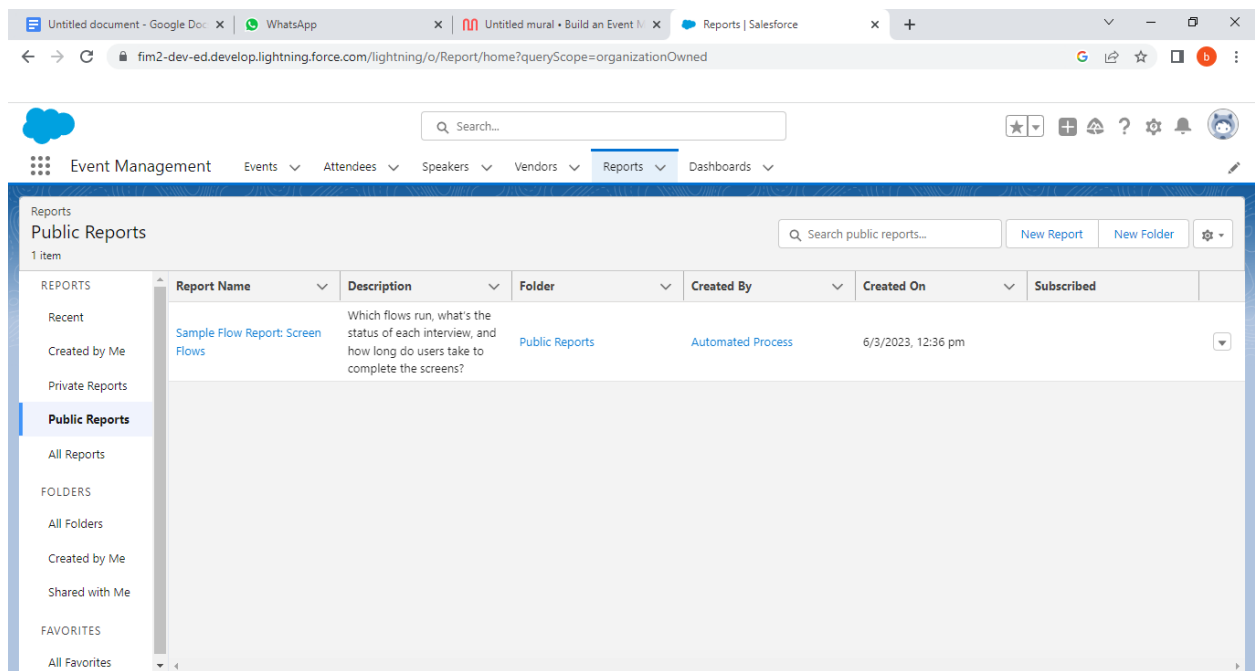
Milestone :7 To create the Permission set

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' section selected. The 'All Permission Sets' view is active, displaying a table of permission sets. The table includes columns for Action, Permission Set Label, Description, and License. The following table represents the data shown in the screenshot:

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 cent...	Service Cloud Voice User
Clone	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact...	Service Cloud Voice User

I have created the permission set . They are given below

Milestone :8 To create the Report



I have created the reports. They are given below

Trailhead Profile Public URL

Team Lead - <https://trailblazer.me/id/bpandian5>

Team Member 1 - <https://trailblazer.me/id/aayyasamy1>

Team Member 2 - <https://trailblazer.me/id/ssanthanakuma>

ADVANTAGES & DISADVANTAGES

- 1.Proactive service.
- 2.Optimized process.
- 3.Customer reputation is poor.
- 4.Expensive

APPLICATIONS

An Event Management System helps to organize plans, execute and report on events, driving success for their business

CONCLUSION

Event management system is a user friendly and cost effective system, it is customized with activities related to event management life cycle.

FUTURE SCOPE

The scope of event management as a career in India is vast. It is a thriving industry and is home to a million people.