Build An Event Management System Using Salesforce - (Developer)

MILESTONE-01:

Salesforce

Creating A Salesforce Developer Org

A Developer org has all the features and licenses you need to get started with Salesforce.

1.Go to developer.salesforce.com

2.Click on signup.

3.On the sign up form, enter the following details

a. First name & Last name – Galigutta Maruthi Kumar Reddy

b. Email – maruthireddy7720700@gmail.com

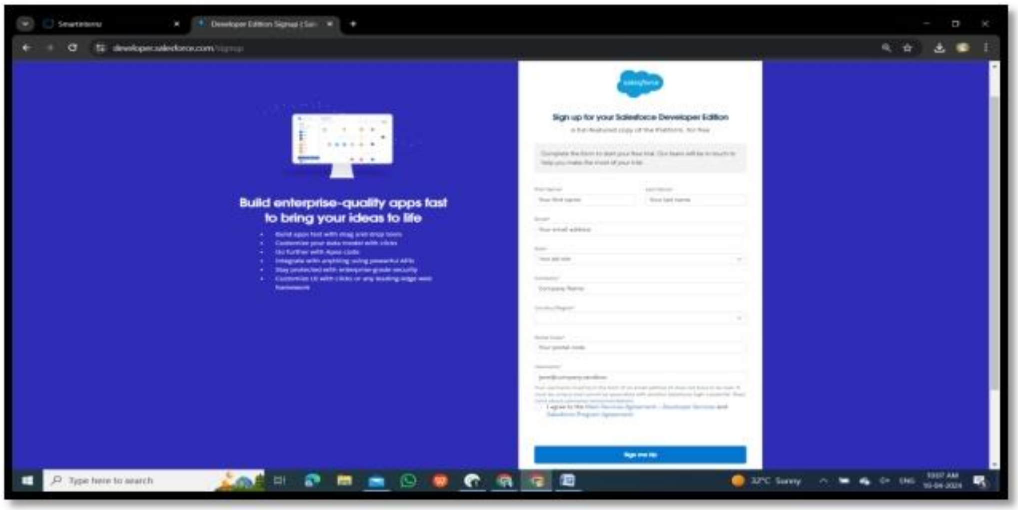
c. Role – Developer

d. Company – GAYATRI DEGREE COLLEGE – TIRUPATI

e. Country – India

f. Postal code – 517501

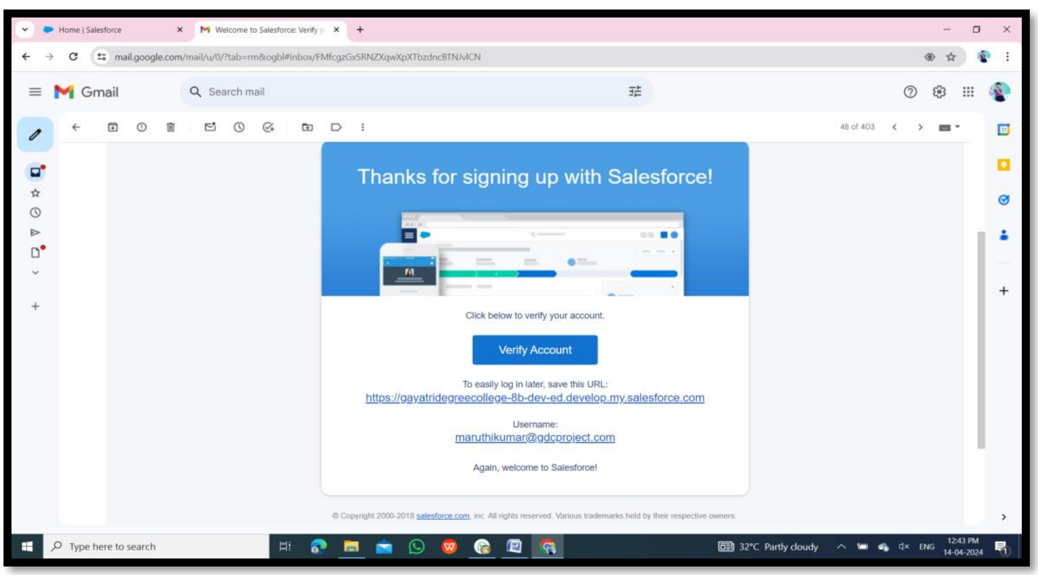
g. Username – maruthikumar@gdcproject.com



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.

MILESTONE-02:

Object

Creation Of Objects For Event Management

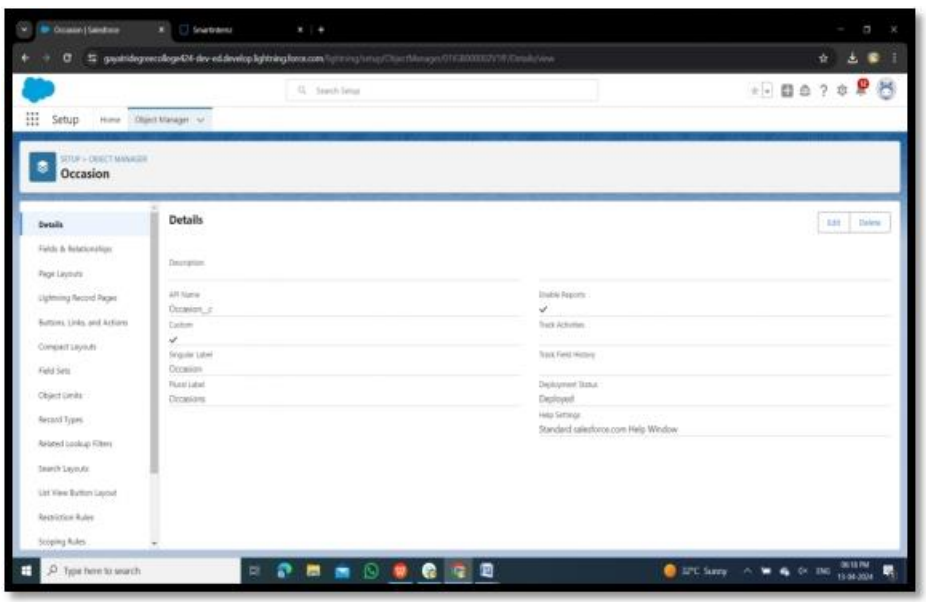
For this Event management we need to create 4 objects i.e Occasion, Attendees, Speakers and vendors. The below steps will assist you in creating those objects.

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

2. 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: Occasion
- Plural Label: Occasions
- Record Name: Event Name
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save.



Creation Of Attendees Object

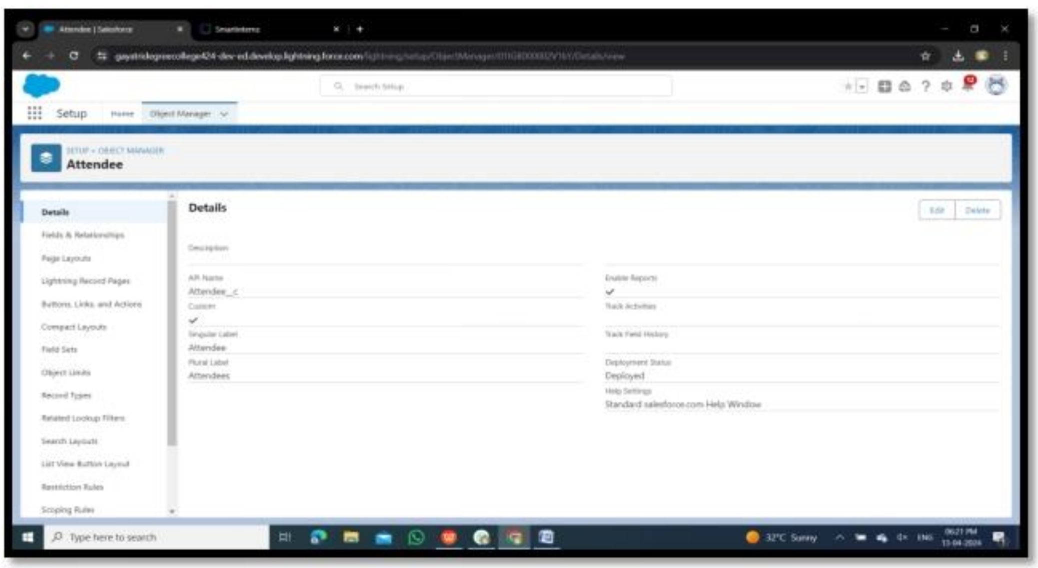
1. Click on the gear icon and then select Setup.

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.

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

- Label: Attendee
- Plural Label: Attendees
- Record Name: Attendee Name
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save.



Creation Of Speaker Object

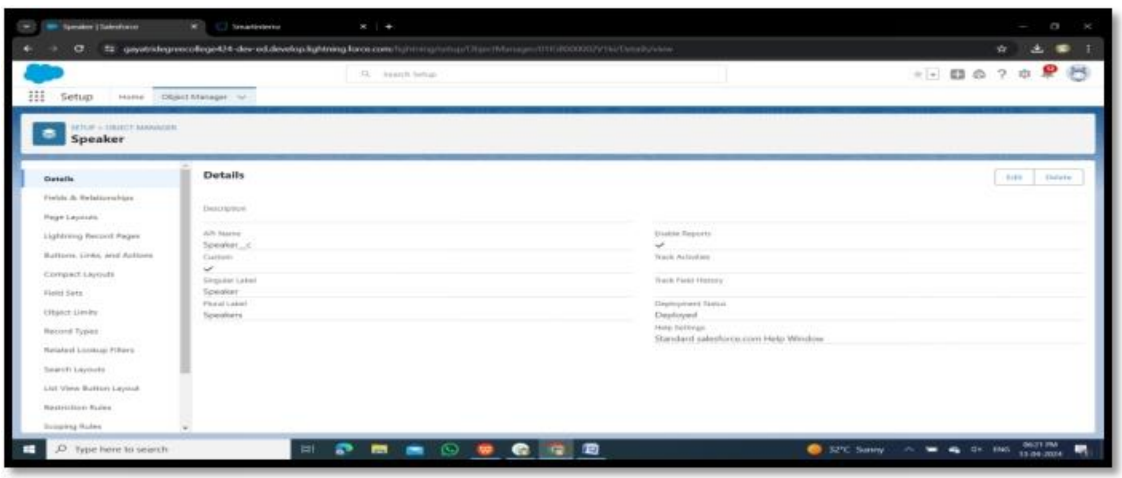
1. Click on the gear icon and then select Setup.

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.

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

- Label: Speaker
- Plural Label: Speakers
- Record Name: Speaker Name
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save.



Creation Of Vendors Object

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

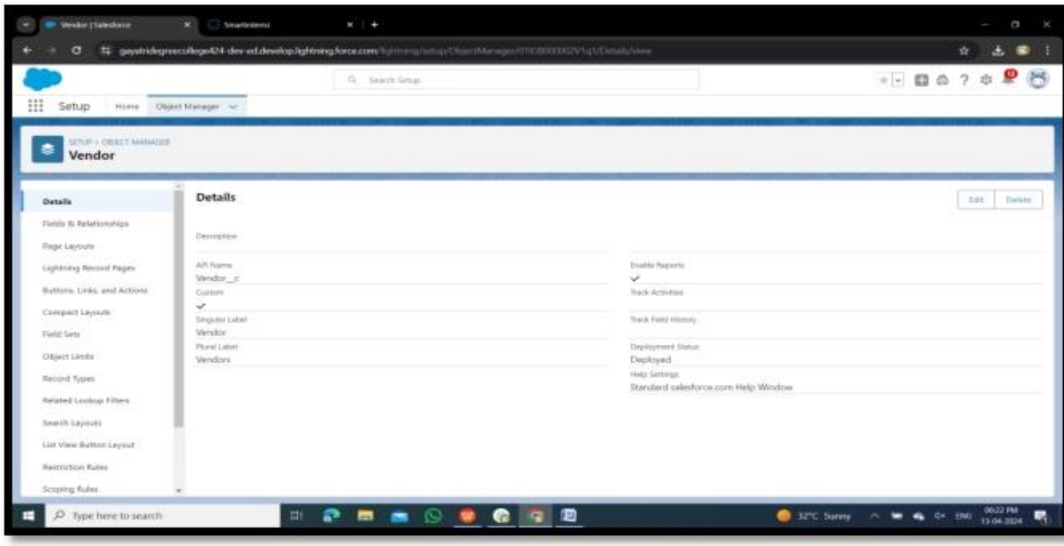
2. Click on the object manager tab just beside the home tab.

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.

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

- Label: Vendor
- Plural Label: Vendors
- Record Name: Vendor Name

- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save.



Creation Of Event Service Object

Salesforce Junction Objects give you a way to create a many-to-many relationship between Salesforce objects. They are created using a custom object to relate two other objects via two master-detail relationships.

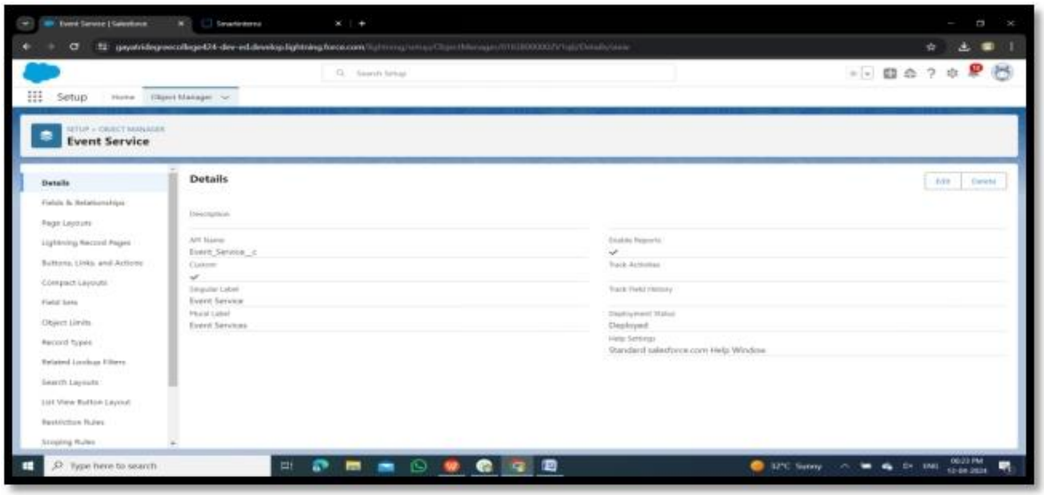
1. Click on the gear icon and then select Setup.

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 Service
- Plural Label: Event Services
- Record Name: Event Services Name
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save



MILESTONE-03:

Tab

Creation Of Occasion Tab

Now create a custom tab.

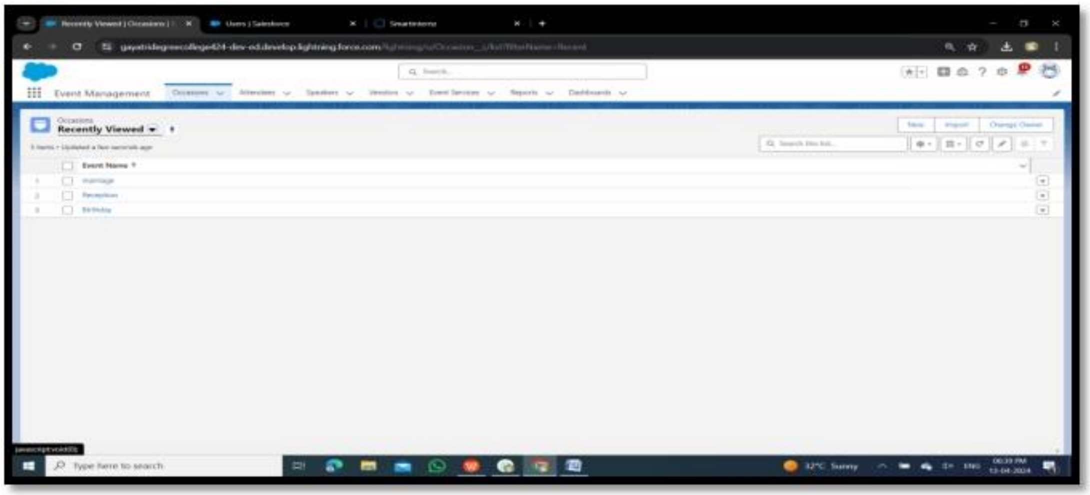
1. Click on Home tab, enter Tabs in Quick Find and select Tabs.

2. Under custom object tabs, click New.

3. For Object, select Occasion.

4. For Tab Style, select any icon.

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



Creation Of Attendee Tab

Now create a custom tab.

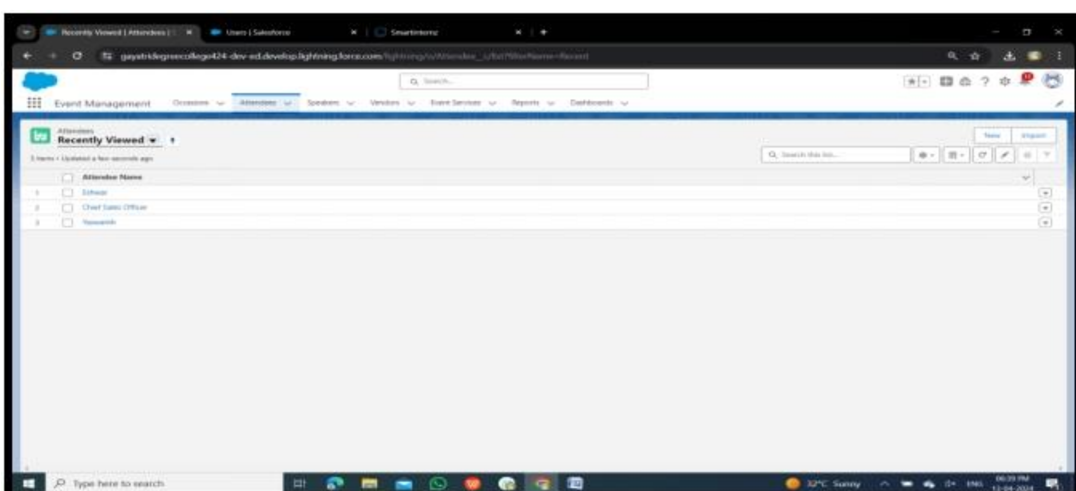
1. Click on Home tab, enter Tabs in Quick Find and select Tabs.

2. Under custom object tabs, click New.

3. For Object, select Attendee.

4. For Tab Style, select any icon.

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



Creation Of Speakers Tab

Now create a custom tab.

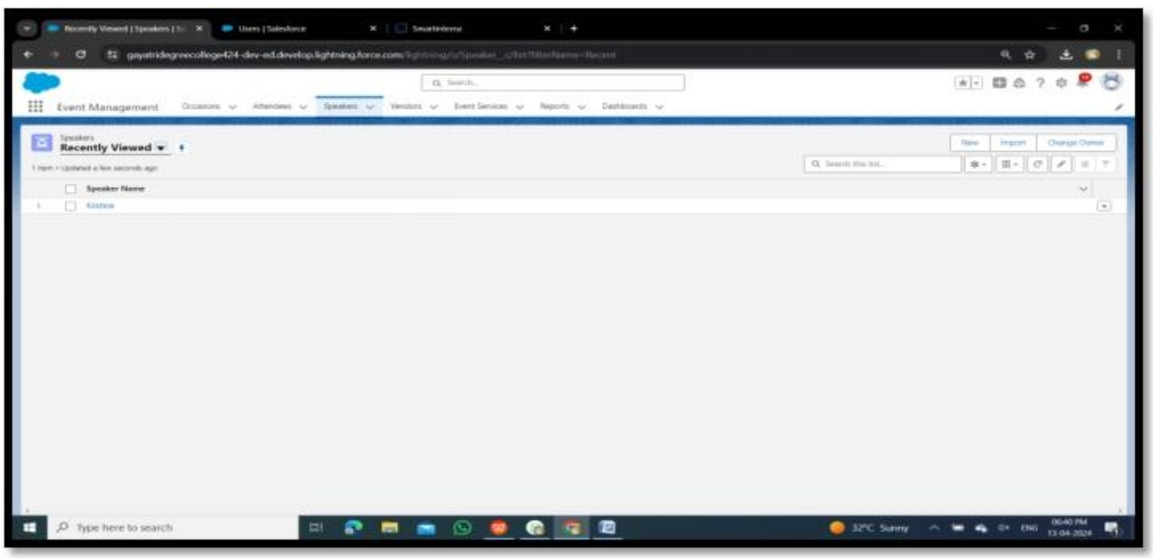
1. Click on Home tab, enter Tabs in Quick Find and select Tabs.

2. Under custom object tabs, click New.

3. For Object, select Speakers.

4. For Tab Style, select any icon.

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



Creation Of Vendor Tab

Now create a custom tab.

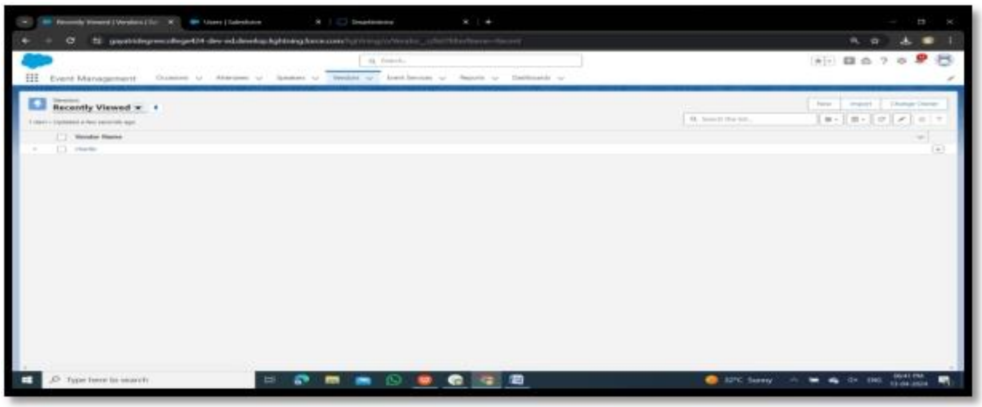
1. Click on Home tab, enter Tabs in Quick Find and select Tabs.

2. Under custom object tabs, click New.

3. For Object, select Vendor.

4. For Tab Style, select any icon.

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



Creation Of Event Service Tab

Now create a custom tab.

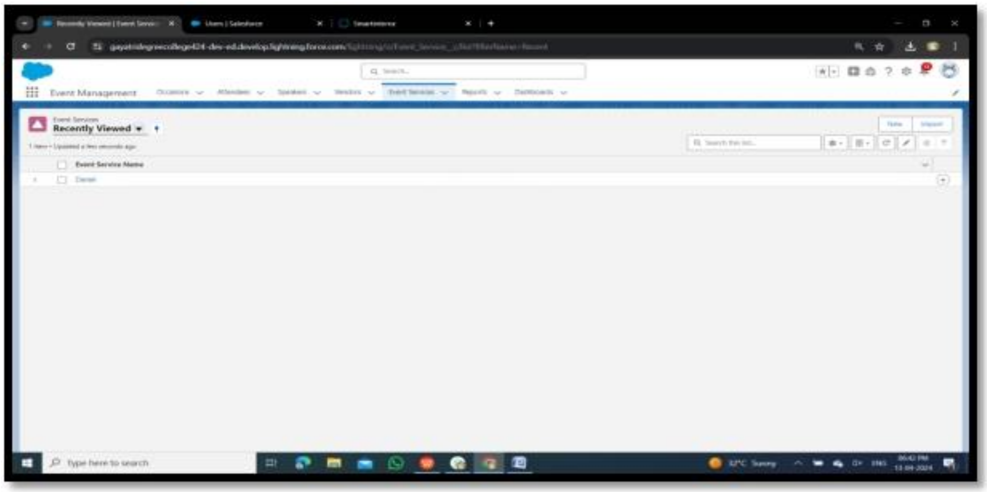
1. Click on Home tab, enter Tabs in Quick Find and select Tabs.

2. Under custom object tabs, click New.

3. For Object, select Event Service.

4. For Tab Style, select any icon.

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



MILESTONE-04:

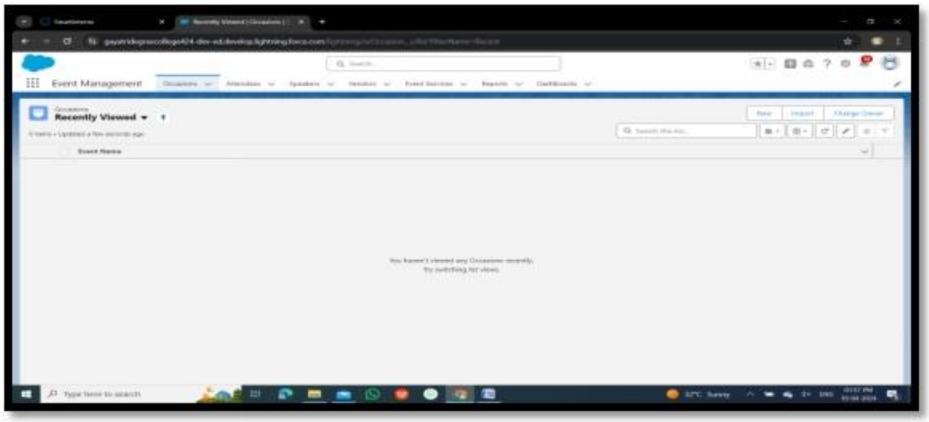
Lightning App

From Setup, enter App Manager in the Quick Find and select App Manager.

- Click New Lightning App. Enter Event Management as the App Name, then click Next
- Under App Options, leave the default selections and click Next.
- Under Utility Items, leave as is and click Next.
- From Available Items, select Occasions, Attendees, speakers, vendors, Event Service, Reports and Dashboards and move them to Selected Items. Click next
- From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.
- To verify your changes, click the App Launcher, type Event Management and select the Event Management app.

Note:

- App Launcher-Displays available apps.
- App Name-Displays the current selected app.
- Navigation menu-Displays the tabs available inside the app.

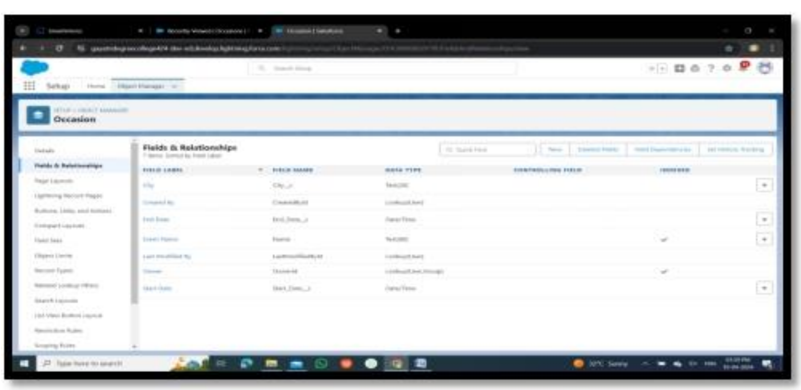


MILESTONE-05:

Fields And Relationships

Creation Of Fields For The Occasion Objects

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Occasion.
4. Select Fields & Relationships from the left navigation, and click New
5. Now we're ready to make a custom field. Let's do this!
6. Select the Text as the Data Type, then click Next.
7. For Field Label, enter City. And length (20).
8. Click Next, Next, then Save & New.
9. Similarly create an End Date field also.

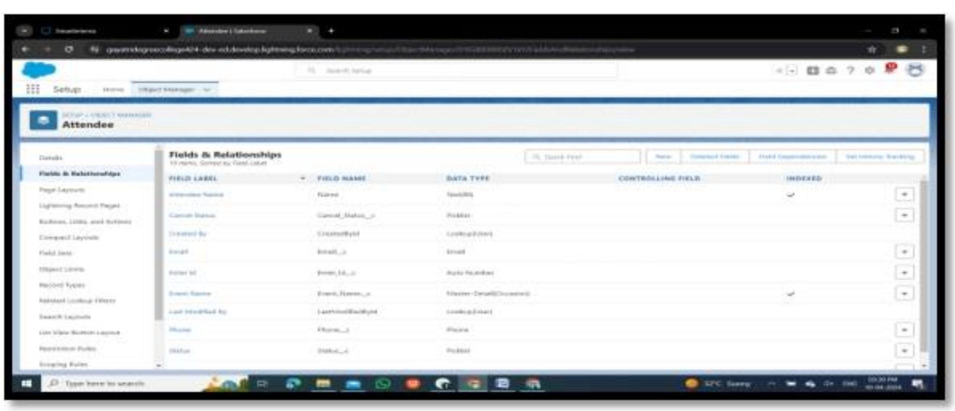


Creation Of Fields For The Attendees Objects

1. Select the Auto number as the Data Type, then click Next. For Field Label, enter Id. & starting number(0001)
    a. Click Next, Next, then Save & New
2. Select the phone as the Data Type, then click Next. For Field Label, Phone.
    a. Click Next, Next, then Save & New.
3. Select the Email as the Data Type, then click Next. For Field Label, enter Email.
    a. Click Next, Next, then Save & New.
4. Select Picklist as the Data Type and click Next.
    a. For Field Label enter Tickets.
    b. Select Enter values, with each value separated by a new line and enter these values:
    c. Premium
    d. Gold
    e. Silver
    f. Click Next, Next, then Save & New

Create picklist field for Attendees object

i. Click on the gear icon and then select Setup.
ii. Click on the object manager tab just beside the home tab.
iii. After the above steps, Select Attendee Object
iv. Now Select Fields and relationships from setup menu of the Attendee object.
v. Click new and select Picklist fields ????next and enter label name(Tickets) and select enter values option(Premium, Gold, Silver),next, next and Save next, next and Save.



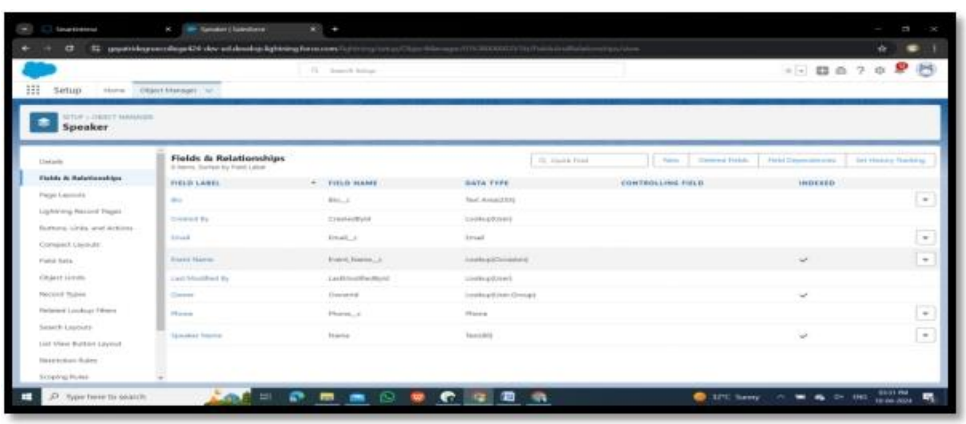
Creation Of Master-Detail Relationship

Let's create a master-detail relationship with Occasion object

- Click fields & relationships and click new
- Select Master relationship & click next
- Choose the related object as Occasion & click next Give the field label(Event Name) & click next, next, next and Save.

Creation Of Fields For The Speakers Objects

- Select the Text Area as the Data Type, then click Next. For Field Label, enter Bio.
- Click Next, Next, then Save & New.
- Select the Email as the Data Type, then click Next. For Field Label, Email.
- Click Next, Next, then Save & New
- Select the Phone as the Data Type, then click Next.
- For Field Label, Phone.
- Click Next, Next, then Save & New

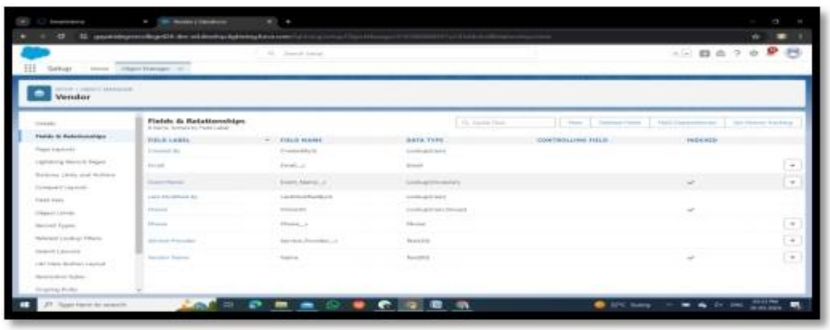


Let's create a Lookup relationship with Occasion object

- Click fields & relationships and click new
- Select Lookup relationship & click next
- Choose the related object as Occasion & click next
- Give the field label(Event Name) & click next, next, next and Save

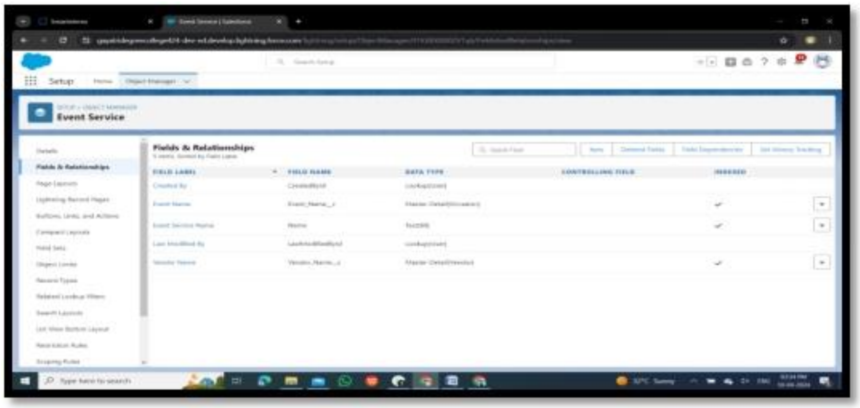
Creation Of Fields For The Vendors Objects:

- Select the phone as the Data Type, then click Next. For Field Label, Phone.
- Click Next, Next, then Save & New.
- Select the Email as the Data Type, then click Next. For Field Label, Email.
- Click Next, Next, then Save & New
- Select the Text as the Data Type, then click Next.
- For Field Label, enter Service Provider and length (30). Click Next, Next, then Save & New.
- Select Lookup Relationship as the Data Type and click Next. For Related to, enter Occasion.
- Click Next and For Field Label Event Name. Click Next, Next, Next and Save.



Creation Relationship On Event Service Objects

- Let's create a Master-Detail relationship with Event Service object
- Click fields & relationships and click new
- Select Master-Detail relationship & click next
- Choose the related object as Occasion & click next Give the field label(Event Name) & click next, next, next and Save
- Let's create a Master-Detail relationship with Event Service object
- Click fields & relationships and click new
- Select Master-Detail relationship & click next
- Choose the related object as Vendor & click next Give the field label(Vendor Name) & click next, next, next and Save



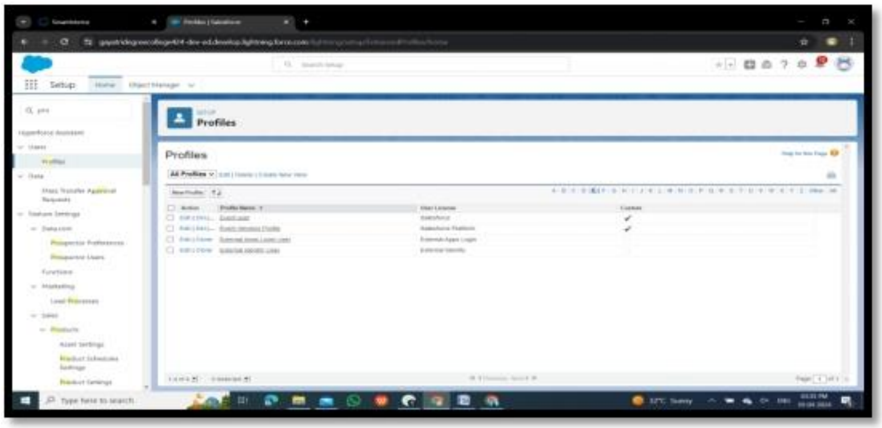
MILESTONE-06:

Profile

- From Setup enter Profiles in the Quick Find box, and select Profiles.
- From the list of profiles, find Standard User.
- Click Clone.
- For Profile Name, enter Event user profile.
- Click Save.
- While still on the Event profile page, then click Edit.
- Scroll down to Custom Object Permissions and Give view all access permissions to the Attendees, speakers and vendors.

Create A Profile With The Profile Name As “Event Vendors Profile”

- From Setup enter Profiles in the Quick Find box, and select Profiles.
- From the list of profiles, find Standard User.
- Click Clone.
- For Profile Name, enter Event vendors profile.
- Click Save.
- While still on the Event profile page, then click Edit.
- Scroll down to Custom Object Permissions and Give view all access permissions to the Attendees, speakers and vendors.



MILESTONE-07:

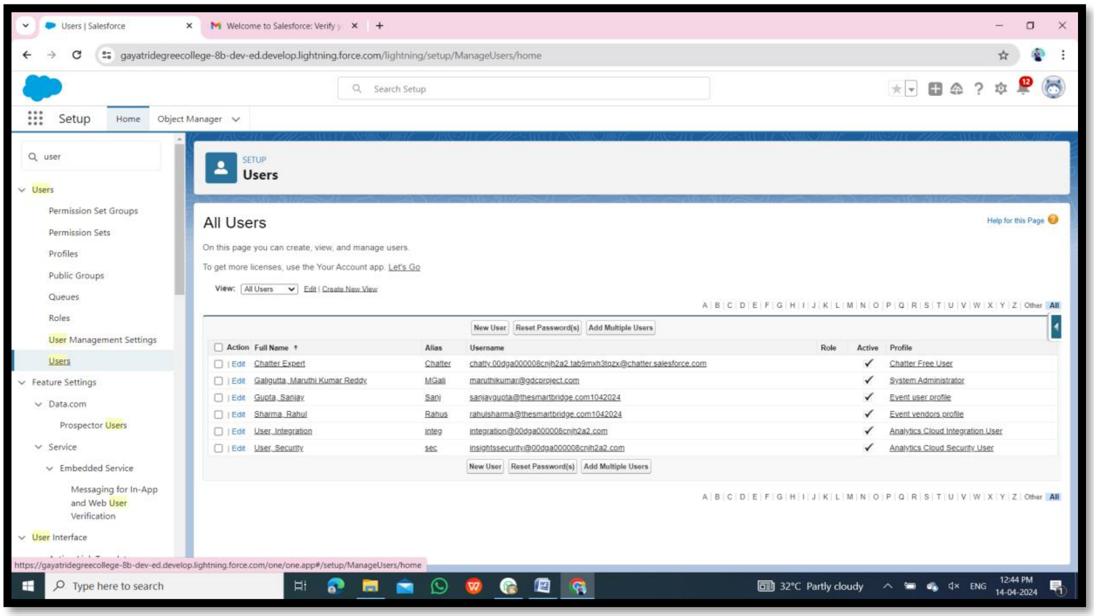
User

- From setup type “users” in quick find and select users, then click New User
- First Name: Sanjay
- Last Name: Gupta
- Alias: Sanj
- Email: provide your personal email id for future reference
- Username: sanjaygupta@thesmartbridge.com
- Nickname: Sanju
- Role: leave it as default
- User License: Salesforce
- Profile: Event User Profile
- Click on save.

Create a user with a username as “Rahul Sharma”, and assign him the sales executive profile. From setup type “users” in quick find and select users, then click New User

- First Name: Rahul
- Last Name: Sharma
- Alias: Rahus
- Email: provide your personal email id for future reference
- Username: rahulsharma@thesmartbridge.com
- Nickname: Rahu

- Role: leave it as default
- User License: Salesforce Platform
- Profile: Event vendors profile

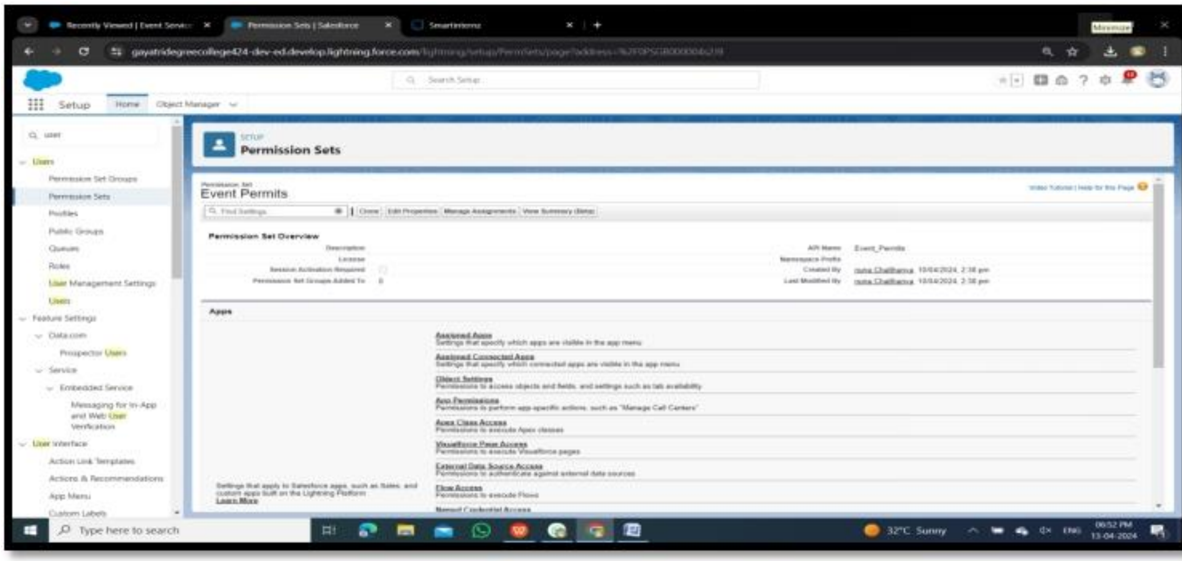


MILESTONE-08:

Permission Sets

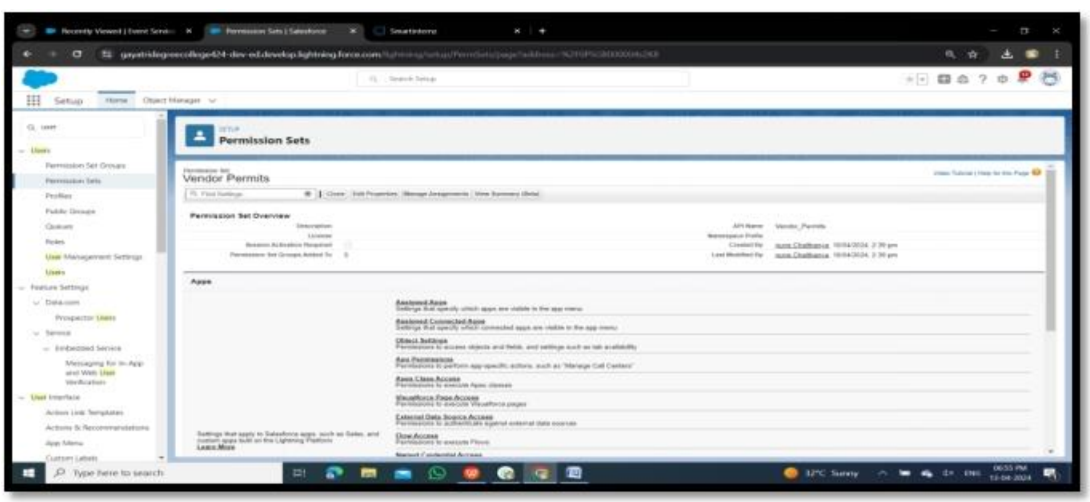
Creating A Permission Set

- From setup search “permission sets” in quick find and select permission set then click on New
- Enter label as: Event Permits and Save.
- After saving the permission click on the Manage assignment
- Now click on the Add Assignment
- Now select the users which you create and click on next Assign ,Done



Creating A Another Permission Set

- From setup search “permission sets” in quick find and select permission set then click on New
- Enter label as: Vendor Permits and Save.
- After saving the permission click on the Manage assignment
- Now click on the Add Assignment
- Now select the users and click on next Assign ,Done

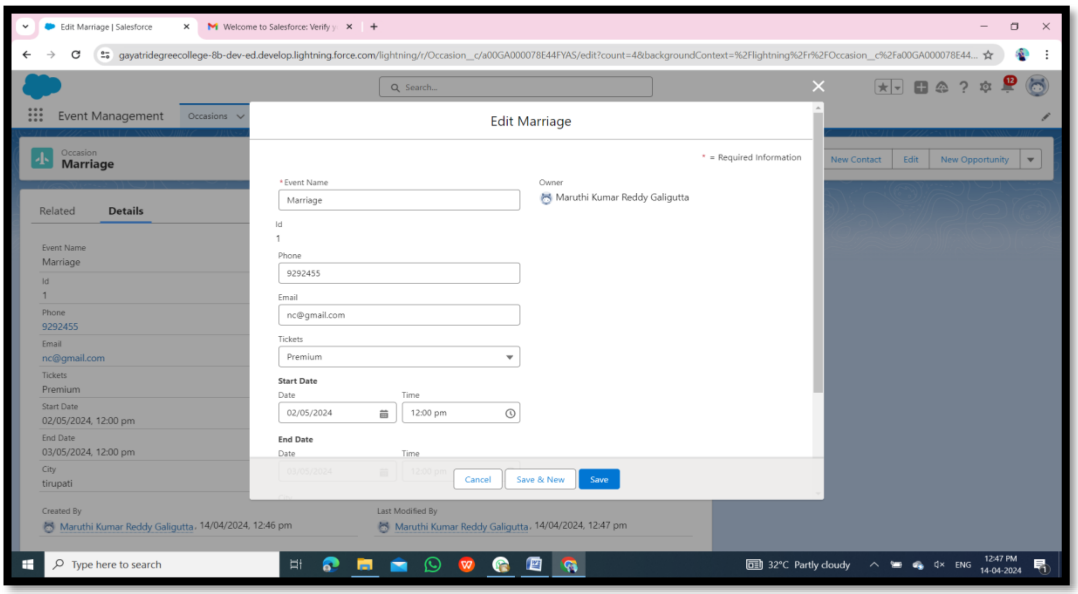


MILESTONE-09:

User Adoption

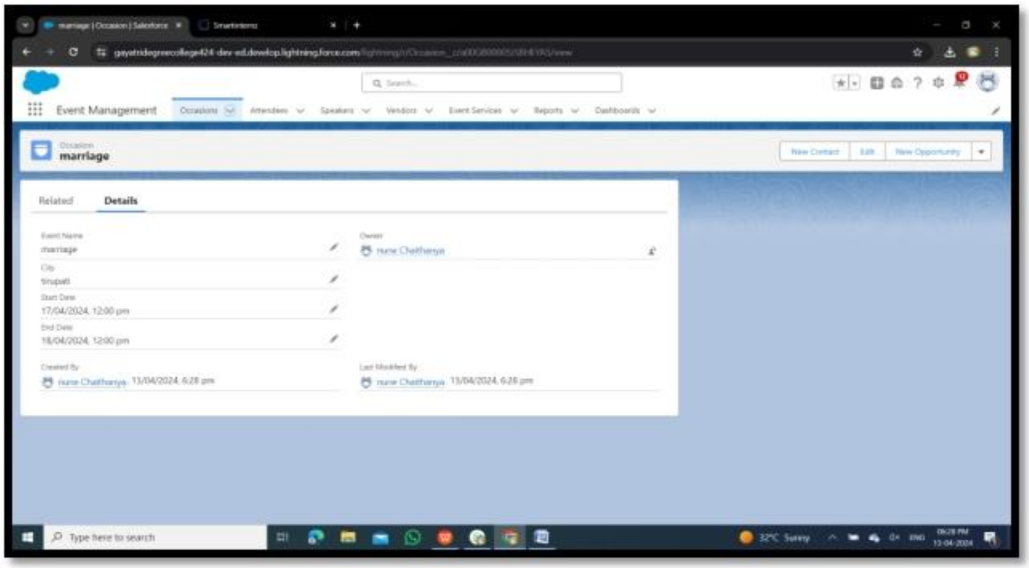
Create A Record (Occasion)

- Click on App Launcher on left side of screen.
- Search Event Management & click on it.
- Click on Occasion Tab.
- Click new and fill details & Save



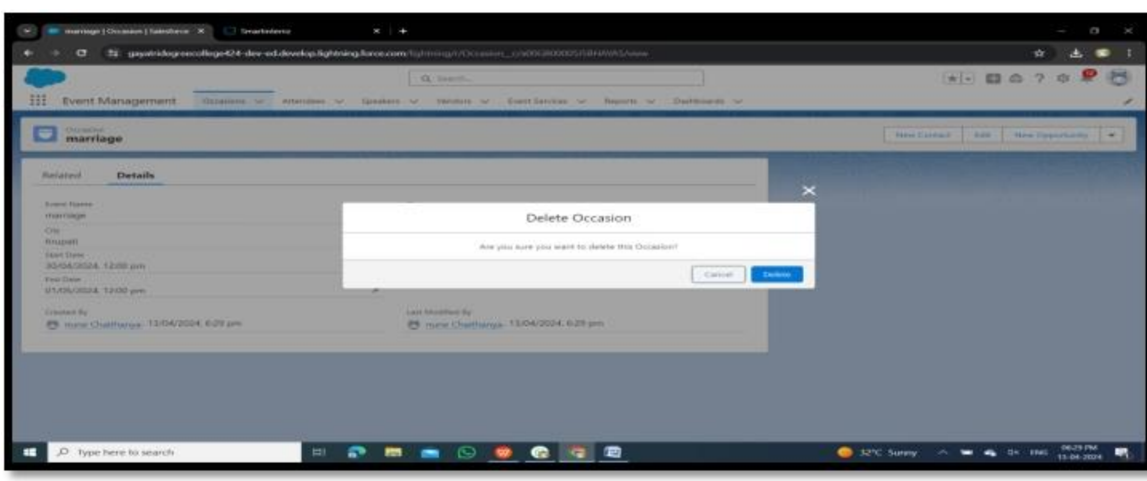
View A Record(Occasion)

- Click on App Launcher on left side of screen.
- Search Event Management & click on it.
- Click on Occasion Tab.
- Click on any record name. you can see the details of the Event



Delete A Record(Occasion)

- Click on App Launcher on left side of screen.
- Search Event Management & click on it.
- Click on Occasion Tab.
- Click on Arrow at right hand side on that Particular record.
- Click delete and delete again.



MILESTONE-10:

Reports

Creating A Report

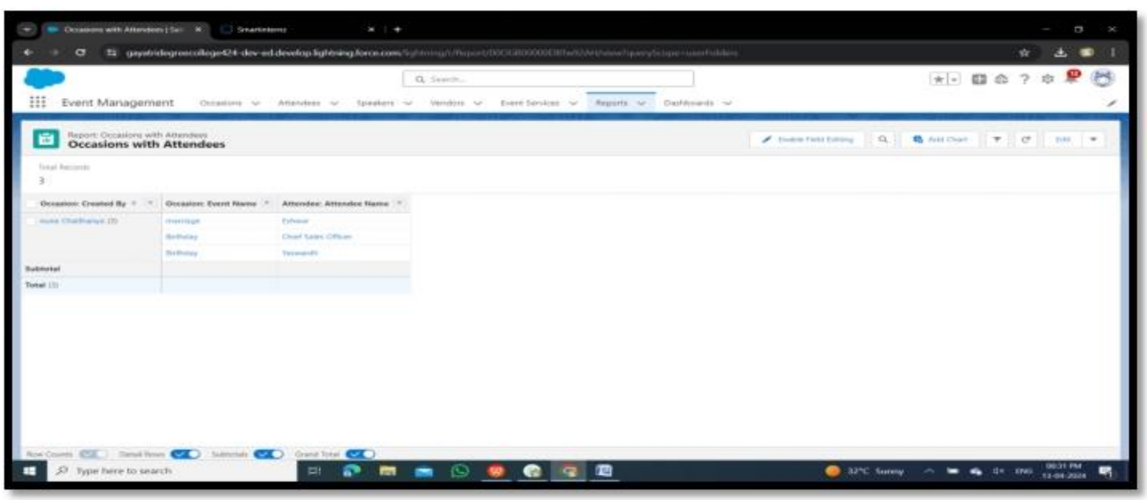
1. From the Reports tab, click New Report.

2. Select the report type Occasions with Attendees for the report, and click Create.

3. Customize your report accordingly and include all fields,

   Reports needs to be Grouped by one field. (ex - Created by)(require to enable add chart)

   then save(Occasions with Attendees) or run it.



MILESTONE-11:

Dashboard

Create A Dashboard

1. Click the Dashboards tab.

2. Click New Dashboard.

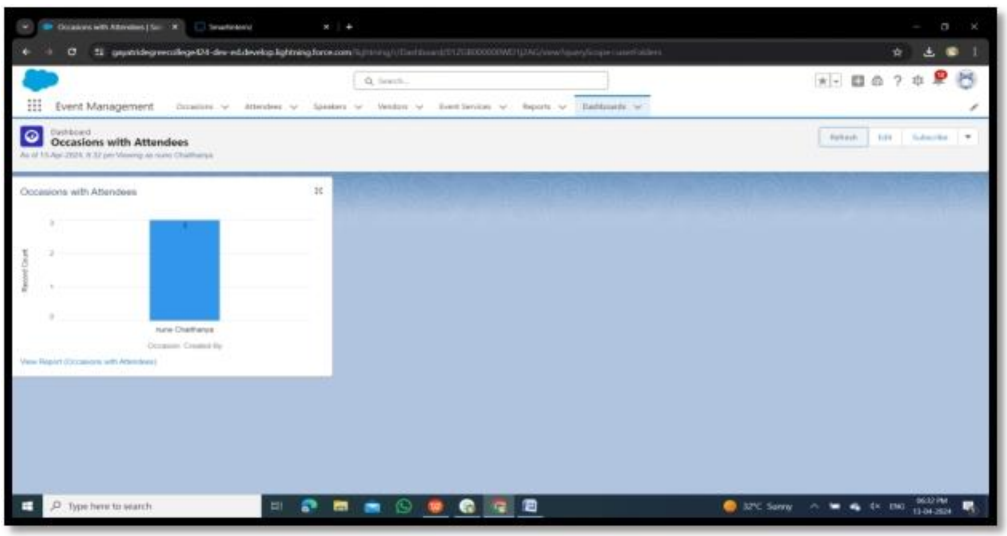
3. Name the dashboard Occasions with Attendees and click Create.

4. Click +Component.

5. Select Occasions with Attendees and click Select.

6. Select the Vertical Bar Chart component and click Add.

7. Click Save and then Done.

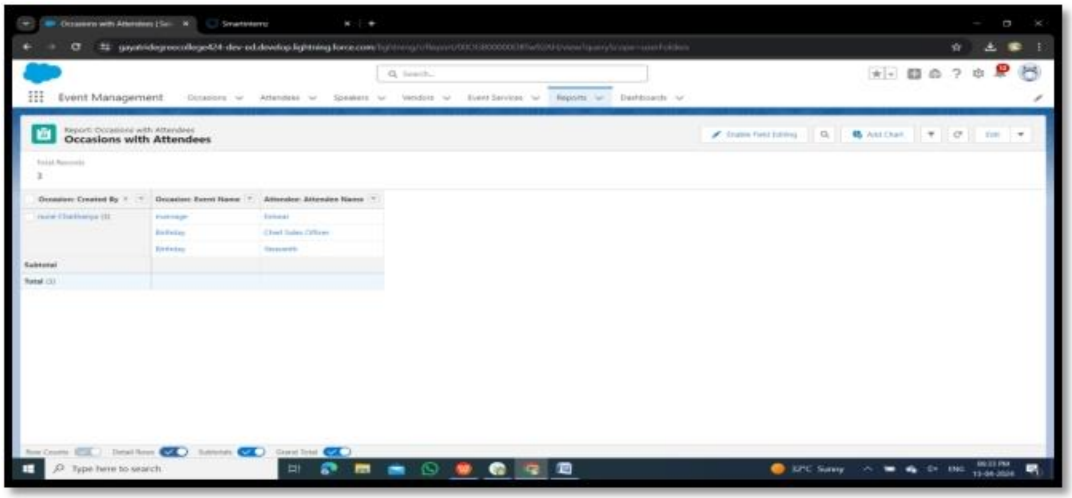


MILESTONE-12:

View Reports And Dashboards

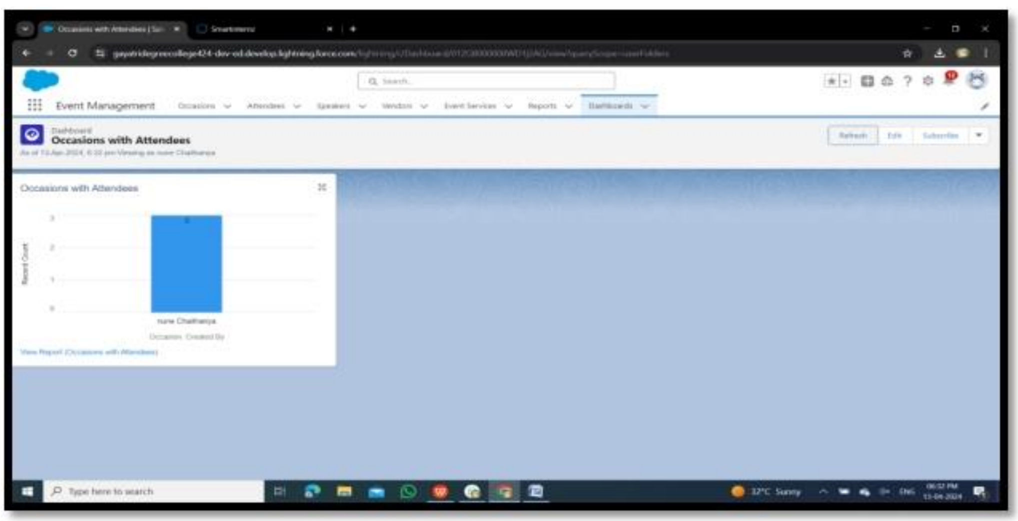
View Report

- Click on App Launcher on left side of screen.
- Search Event Management & click on it.
- Click on Reports Tab.
- Click on Occasions with Attendees & see records



View Dashboard

- Click on App Launcher on left side of screen.
- Search Event management & click on it.
- Click on Dashboard Tab.
- Click on Occasions with Attendees & see records



MILESTONE-13:

Approval Process

- Click Setup and select Setup.

- Select Process Automation | Approval Processes (or use the Quick Find and search for Approval Processes)
- In the Manage Approval Processes For list, select Travel Approval.
- Click Create New Approval Process and select Use Jump Start Wizard.
- Enter the following parameters
- For manage approval process select the attendee from the drop down
- For the process name : Attendee approval process
- Unique name: Attendee_approval_process
- Click on next.
- From the field drop down select cancel and make operator equal and in value keep as true.
- Leave as default
- Leave as default.

Now from fields to display column make sure that the Attendee Name is present

From the submitter type select owner and make sure that the record creator must be present in the allowed submitter section and click on save.

Then there will be dialogue box appear and select the no i will do it later

Now under Initial Submission action:

Click on new and select the field update and give the following details:

- Name: Cancel Status
- Unique Name: Cancel_Status
- Field to update: Cancel Status
- And keep value and pending.
- Now we will see to keep the approval steps.
- Name: Attendee records with cancel checkbox true
- Unique Name:(auto -populated),click on next
- Select enter this is following Criteria is met
- From field drop down Select cancel and from operator drop down select equals and on value make it true

Now select the automatically assign to the approver and select user and keep the user as created user.

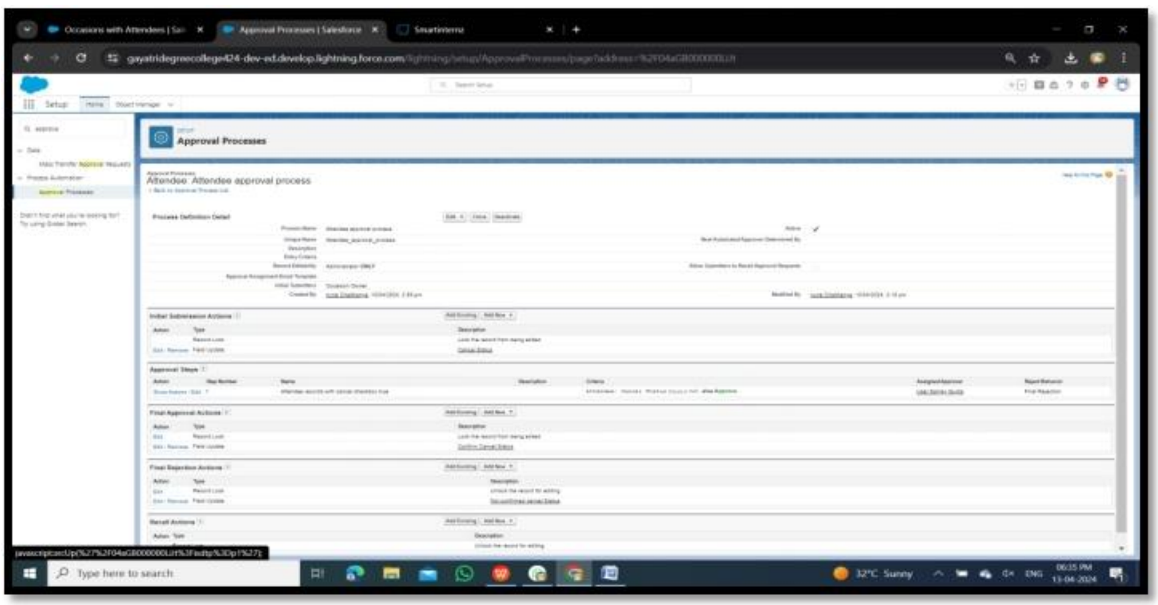
Now lets check the final approval action

- Select the new and select the field update and give the following details.
- Name: Confirm Cancel Status
- Select field to update :Status
- And keep the new value as: Confirm

Now let's check the Final rejection action. click on new and select the field update and enter the following details.

Name: Not confirmed cancel Status

- Field to update: Cancel Status
- keep value as : Not confirmed
- And make the approval Process active.



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