

BUILD AN EVENT MANAGEMENT SYSTEM USING SALESFORCE

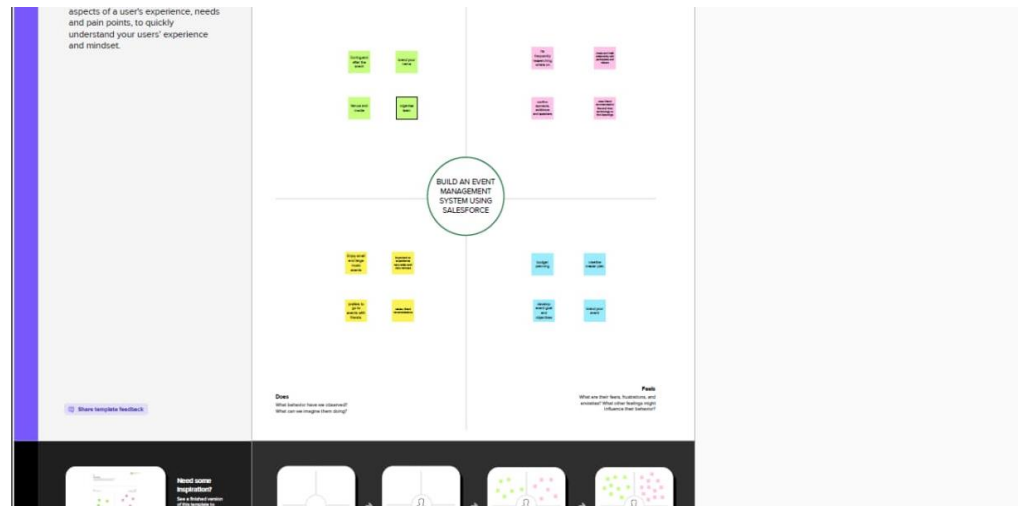
1 INTRODUCTION

1.1 Overview -Create and manage event schedules ,agendas, and speaker lists. Register attendees and collect payment for events. Manage event logistics ,such as booking venues and coordinating travel and accommodation for attendees and speakers.

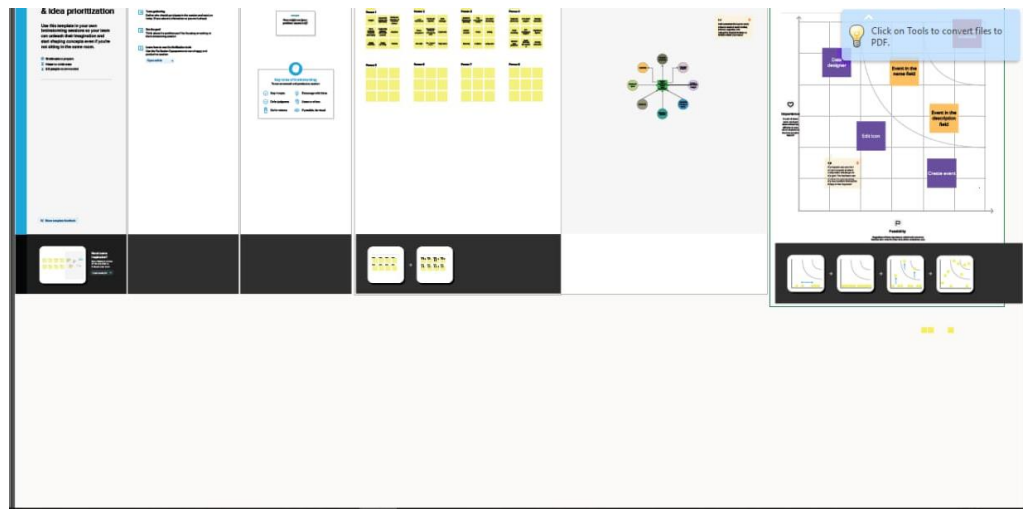
1.2 Purpose -Manage events throughout their lifecycle.

Problem Definition & Design Thinking

2.1 Empathy Map



2.2 Ideation & Brainstorming Map



3 RESULT

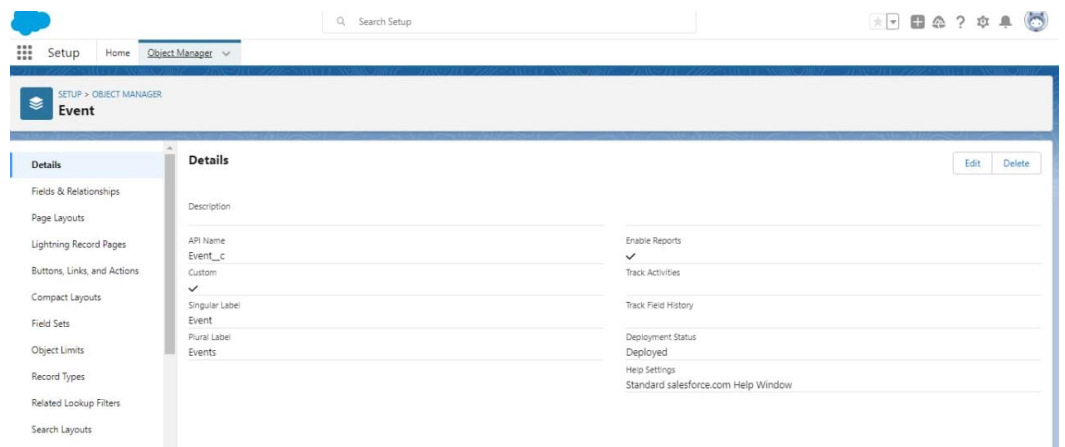
3.1 Data Model:

| Object name | Fields in the Object | |
|-------------|----------------------|-----------|
| obj1 | Field label | Data type |
| | EVENT | TEXT |
| | ATTENDEES | PHONE |
| obj2 | Field label | Data type |
| | SPEAKERS | EMAIL |
| | VENDORS | PHONE |

3.2 Activity & Screenshot

OBJECTS:

Event



Attendees

Setup

Home

Object Manager

Attendee

Details

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

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

EditDelete

Speakers

Setup

Home

Object Manager

Speaker

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

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Object Limits

Record Types

Related Lookup Filters

Search Layouts

Details

Description

API Name

Speaker__c

Custom

Singular Label

Speaker

Plural Label

speakers

Enable Reports

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

EditDelete

Vendors

Setup

Home

Object Manager

Vendor

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Details

Description

API Name

Vendor__c

Custom

Singular Label

Vendor

Plural Label

Vendors

Enable Reports

Track Activities

Track Field History

Deployment Status

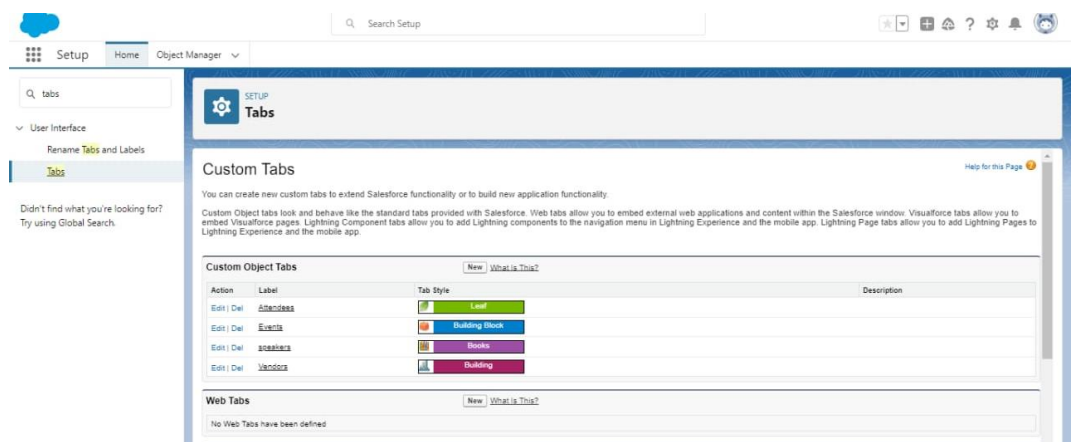
Deployed

Help Settings

Standard salesforce.com Help Window

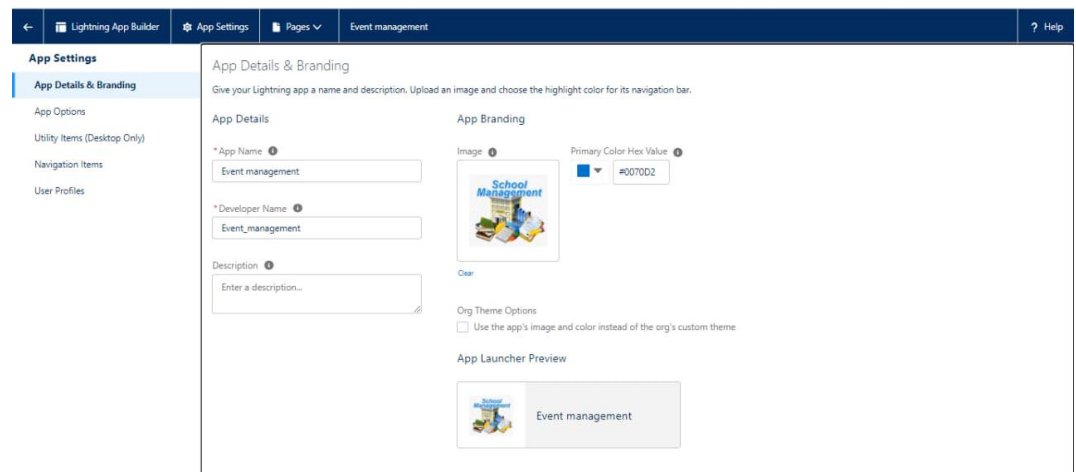
EditDelete

TAB:



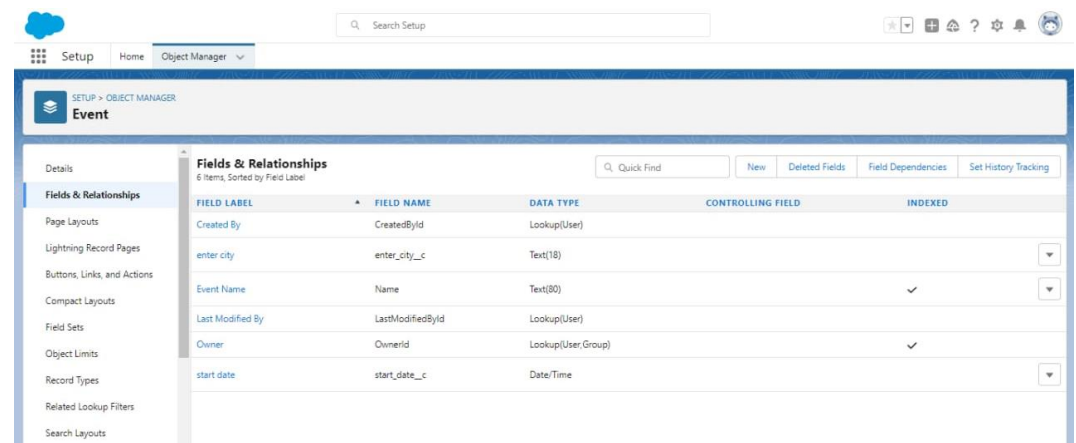
APP MANAGER:

App details and branding



FIELDS:

Field and relationship – event



Field and relationship – attendees

Setup Home Object Manager

Search Setup

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) | | |
| enter_email | enter_email__c | Email | | |
| enter_id | enter_id__c | Auto Number | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Owner | OwnerId | Lookup(User,Group) | | ✓ |
| Phone | Phone__c | Phone | | |

Field and relationship – speakers

Setup Home Object Manager

Search Setup

Speaker

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) | | |
| email | email__c | Email | | |
| enter_bio | enter_bio__c | Text Area(255) | | |
| Event name | Event_name__c | Lookup(Event) | | ✓ |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Owner | OwnerId | Lookup(User,Group) | | ✓ |
| Speaker Name | Name | Text(80) | | ✓ |

Field and relationship – vendors

Setup Home Object Manager

Search Setup

Vendor

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 | | |
| enter service provider | enter_service_provider__c | Text(18) | | |
| Event name | Event_name__c | Lookup(Event) | | ✓ |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Owner | OwnerId | Lookup(User,Group) | | ✓ |
| Phone | Phone__c | Phone | | |
| Vendor Name | Name | Text(80) | | ✓ |

PROFILES:

Setup

Home

Object Manager

Q Search Setup

Q profiles

Users

Profiles

Didn't find what you're looking for?

Try using Global Search.

SETUP

Profiles

Profile

DivyaR

Help for this Page

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.

Learn IP Review

Enabled Apex Class Access

Enabled Visualforce Page Access

Enabled External Data Source Access

Enabled Named Credential Access

Enabled Custom Metadata Type Access

Enabled Custom Setting Definition Access

Enabled Flow Access

Enabled Service Presence Status Access

Enabled Custom Permissions

Profile Detail

Edit

Clone

Delete

View Users

| | | | |
|--------------|------------------------------|----------------|-------------------------------------|
| Name | DivyaR | Custom Profile | <input checked="" type="checkbox"/> |
| User License | Salesforce | | |
| Description | | | |
| Created By | Divya.B. 08/04/2023, 1:21 pm | Modified By | Divya.B. 20/04/2023, 2:01 pm |

Page Layouts

| | | | | |
|-------------------------|---|--|---------------------|---|
| Standard Object Layouts | Global | Global Layout View Assignment | Object Milestone | Object Milestone Layout View Assignment |
| Email Application | Not Assigned | View Assignment | Operating Hours | Operating Hours Layout View Assignment |
| Home Page Layout | DE Default | View Assignment | Opportunity | Opportunity Layout View Assignment |
| Account | Account Layout View Assignment | | Opportunity Product | Opportunity Product Layout View Assignment |

Setup

Home

Object Manager

Q Search Setup

Q profiles

Users

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SETUP

Profiles

Finance Transactions

Gateway Provider Payment Method Types

Ideas

Images

Incidents

Individuals

Invoices

Leads

Web Cart Documents

Work Orders

Work Plans

Work Plan Templates

Work Step Templates

Work Types

Work Type Groups

Custom Object Permissions

| | Basic Access | | | | Data Administration | | |
|-----------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--|
| | Read | Create | Edit | Delete | View All | Modify All | |
| Attendees | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Events | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| speakers | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |

| | Basic Access | | | | Data Administration | | |
|----------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--|
| | Read | Create | Edit | Delete | View All | Modify All | |
| students | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| Vendors | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |

Session Settings

Session Times Out After

2 hours of inactivity

Session Security Level Required at Login

Setup

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Event vendors profile

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Enabled Named Credential Access

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Enabled Custom Setting Definition Access

Enabled Flow Access

Enabled Service Presence Status Access

Enabled Custom Permissions

Profile Detail

Edit

Clone

Delete

View Users

| | | | |
|--------------|------------------------------|----------------|-------------------------------------|
| Name | Event vendors profile | Custom Profile | <input checked="" type="checkbox"/> |
| User License | Salesforce | | |
| Description | | | |
| Created By | Divya.B. 08/04/2023, 1:30 pm | Modified By | Divya.B. 20/04/2023, 10:28 am |

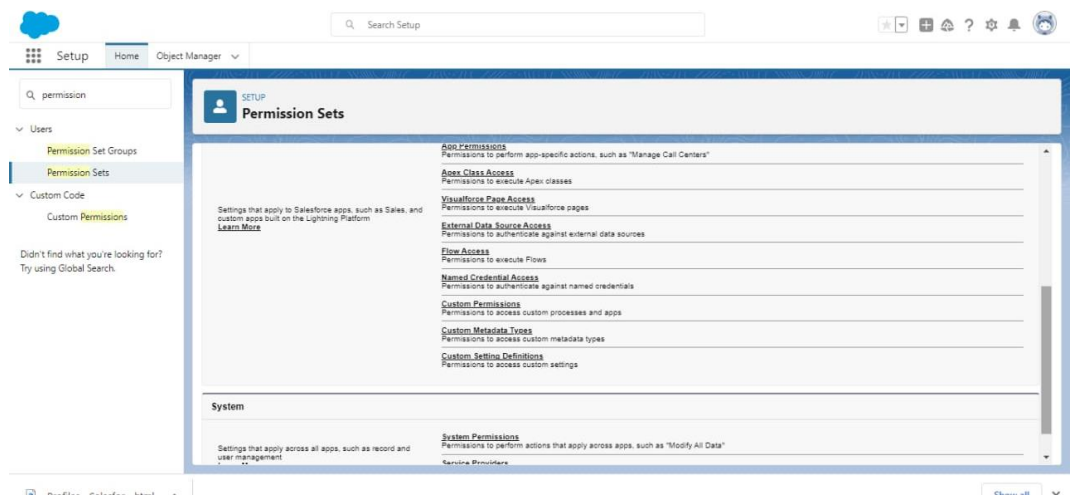
Page Layouts

| | | | | |
|-------------------------|---|--|---------------------|---|
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| Account | Account Layout View Assignment | | Opportunity Product | Opportunity Product Layout View Assignment |

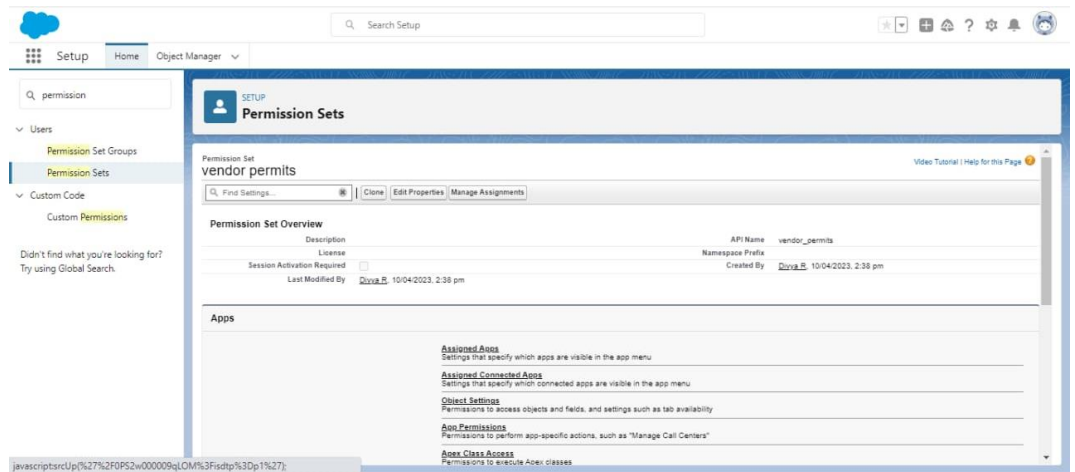
The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Setup, Home, Object Manager, Users, Permission Set Groups, Permission Sets (selected), Custom Code, and Custom Permissions. The main content area is titled 'Permission Sets' and shows a table of existing permission sets. The 'R.Divya' set is highlighted. Below the table, there are links for 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings', 'App Permissions', and 'App Class Access'.

| Permission Set | Description | API Name |
|----------------|-----------------------------|------------------|
| R.Divya | License | R_Divya |
| | Session Activation Required | Namespace Prefix |
| | Last Modified By | Created By |

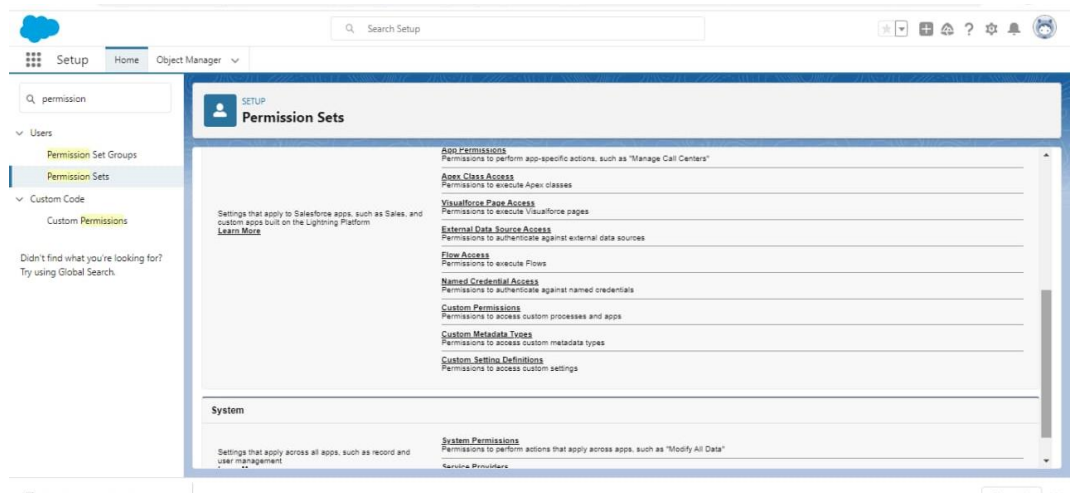
Below the table, there are links for 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings', 'App Permissions', and 'App Class Access'.



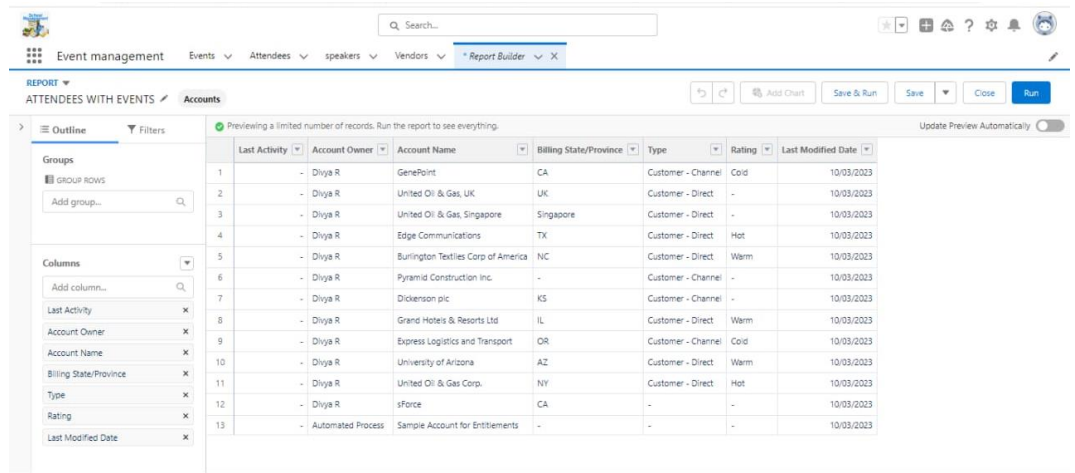
VENDOR PERMITS:



E



REPORTS:



The screenshot shows the Salesforce Event Management Report Builder interface. The top navigation bar includes 'Event management', 'Events', 'Attendees', 'speakers', 'Vendors', and 'Report Builder'. The main section is titled 'REPORT ATTENDEES WITH EVENTS Accounts'. On the left, there are filters for 'Groups' and 'Columns'. The 'Columns' filter is expanded, showing a list of columns: Last Activity, Account Owner, Account Name, Billing State/Province, Type, Rating, and Last Modified Date. The main table displays 13 rows of account data. A message at the top of the table states: 'Previewing a limited number of records. Run the report to see everything.'

| | Last Activity | Account Owner | Account Name | Billing State/Province | Type | Rating | Last Modified Date |
|----|---------------|-------------------|-------------------------------------|------------------------|--------------------|--------|--------------------|
| 1 | - | Divya R | GenePoint | CA | Customer - Channel | Cold | 10/03/2023 |
| 2 | - | Divya R | United Oil & Gas, UK | UK | Customer - Direct | - | 10/03/2023 |
| 3 | - | Divya R | United Oil & Gas, Singapore | Singapore | Customer - Direct | - | 10/03/2023 |
| 4 | - | Divya R | Edge Communications | TX | Customer - Direct | Hot | 10/03/2023 |
| 5 | - | Divya R | Burlington Textiles Corp of America | NC | Customer - Direct | Warm | 10/03/2023 |
| 6 | - | Divya R | Pyramid Construction Inc. | - | Customer - Channel | - | 10/03/2023 |
| 7 | - | Divya R | Dickenson pic | KS | Customer - Channel | - | 10/03/2023 |
| 8 | - | Divya R | Grand Hotels & Resorts Ltd | IL | Customer - Direct | Warm | 10/03/2023 |
| 9 | - | Divya R | Express Logistics and Transport | OR | Customer - Channel | Cold | 10/03/2023 |
| 10 | - | Divya R | University of Arizona | AZ | Customer - Direct | Warm | 10/03/2023 |
| 11 | - | Divya R | United Oil & Gas Corp. | NY | Customer - Direct | Hot | 10/03/2023 |
| 12 | - | Divya R | sforce | CA | - | - | 10/03/2023 |
| 13 | - | Automated Process | Sample Account for Entitlements | - | - | - | 10/03/2023 |

4 Trailhead Profile Public URL

Team Lead R. Divya- <https://trailblazer.me/id/divyr27>

Team Member 1 M. Elanthendral -
<https://trailblazer.me/id/elanm3>

Team Member 2 V. Hemavathi -
<https://trailblazer.me/id/hemav44>

Team Member 3 S.Inbarasi-
<https://trailblazer.me/id/inbas6>



Project Report Template

5 **ADVANTAGES -Planning helps in reducing uncertainties of future as its involves anticipation of future events.**

DISADVANTAGES-Unconventional work hours. Time away from family and friends

6 **APPLICATIONS -Creation and development of small and(or)large -scale personal or corporate events such as festivals conferences, ceremonies, weddings, formal parties, concerts or conventions.**

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

8 **FUTURE SCOPE -It involves management, creation and development of events such as corporate conferences, wedding , festival, formal parties, etc**

