

PROJECT REPORT TEMPLATE



BUILD AN EVENT MANAGEMENT



1 INTRODUCTION

1.1 Overview

A project aim is to provide real time knowledge for all the students who have basic knowledge to salesforce and looking for a real time project. The project will also help to those professional who are in cross technology and wanted to switch to salesforce with the help of this project they will gain knowledge and can include into their resume as well.

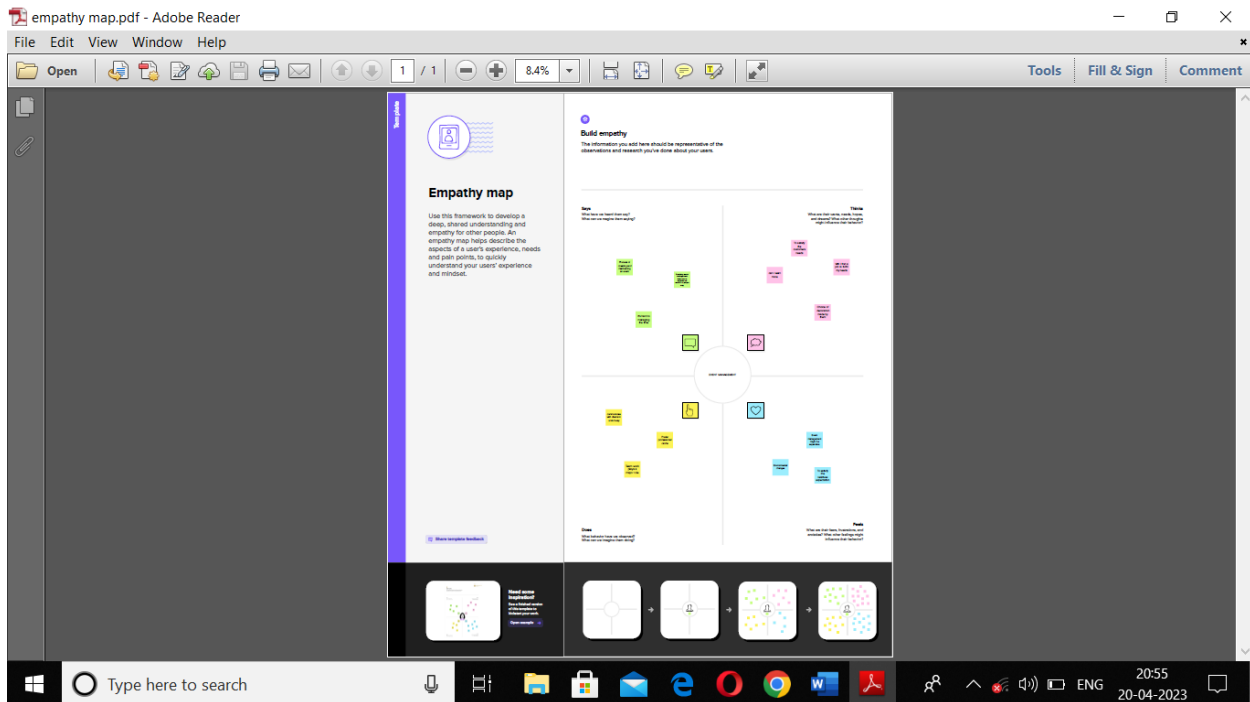
1.2 Purpose

At the start an event management makes planning decision such as the time, location and theme of their event. During an event, event managements are tasked with reviewing event data, submitted KPI and ROI finding, and staying on the ball for any post event offerings.

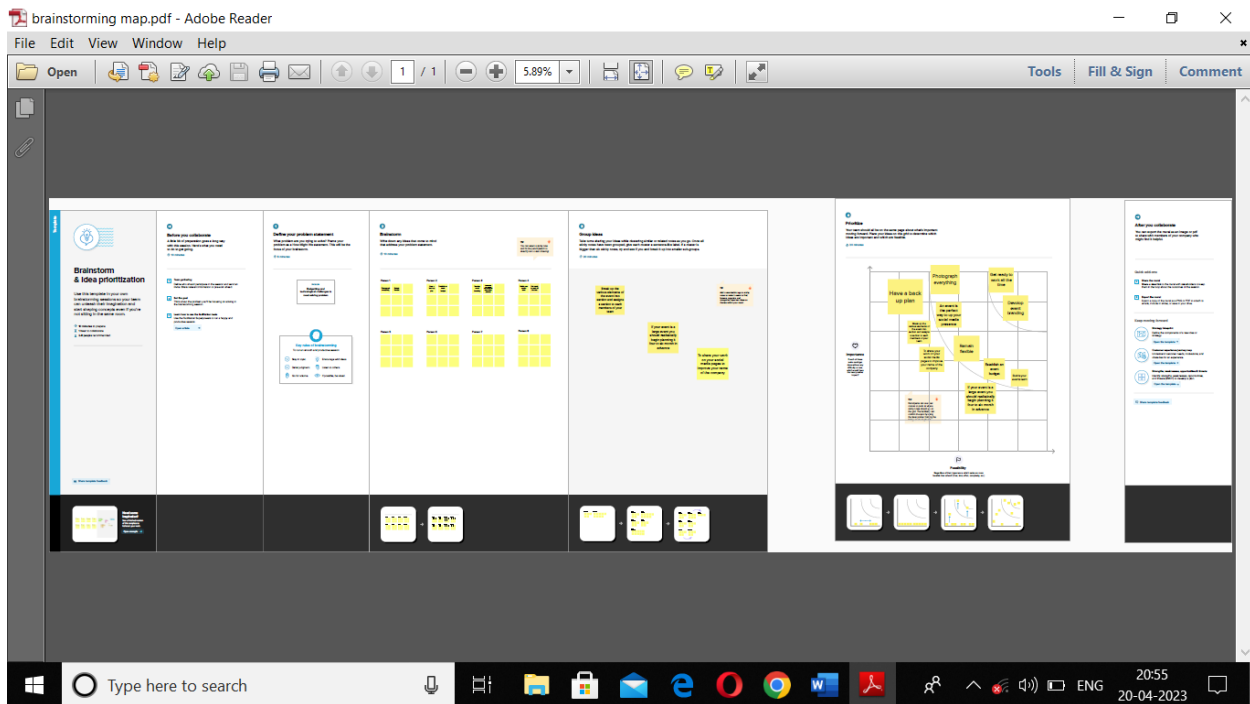
2 Problem definition and design thinking

Various types of sourcing, desinging, regulation checks and on site management.

2.1 Empathy map



Brainstorming map



3 Result

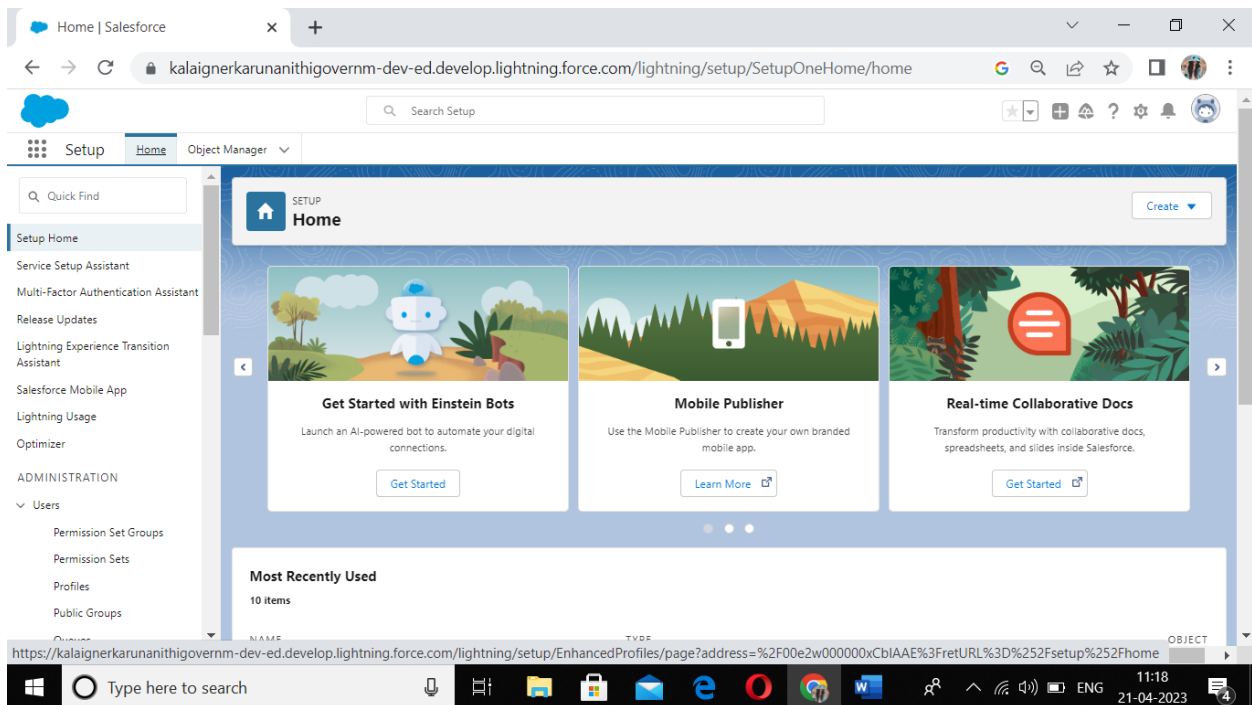
3.1 Data Model

Objecct name	Fields in the object	
Event	Field label	Data type
	city	text
	Phone number	phone
Attendies	Field label	Data type
	ID	Auto number
	Phone	Phone
Speakers	Field label	Data type
	Bio	Text area
	e-mail	Email
Vendors	Field label	Data type
	e-mail	Email
	phone	phone

3.2 Activity&Screenshot

MILESTONE-1

- Search Developer.salesforce.com
- Enter the following details like first name, last name, email, role, company, country/region, postal code and username must be unique.
- click sign me up, after a few min you will receive a mail salesfor org and by using the verify account link you can create your new password.
- click save
- search login.salesforce.com
- by using username and password you into the salesforce org.
- the setup page will appear as below



MILESTONE-2

***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.

Creation of Attendees object:

- **click on the clear icon and then select setup.**
- **click on the object manager tab just beside the home tab.**
- **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 custom object definition page, create the object as follows:

label: Attendees

Plural label: Attendees

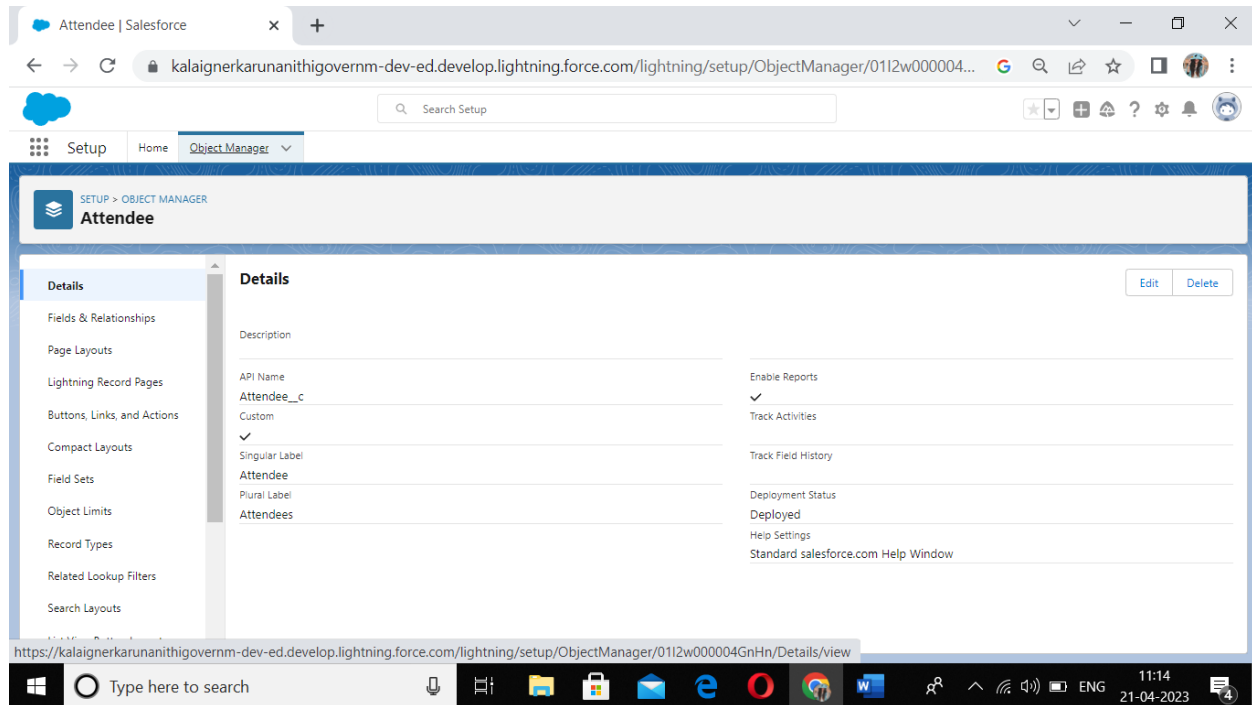
Record name: Attendee name

Check the allow reports checkbox

check the allow search checkbox

click save.

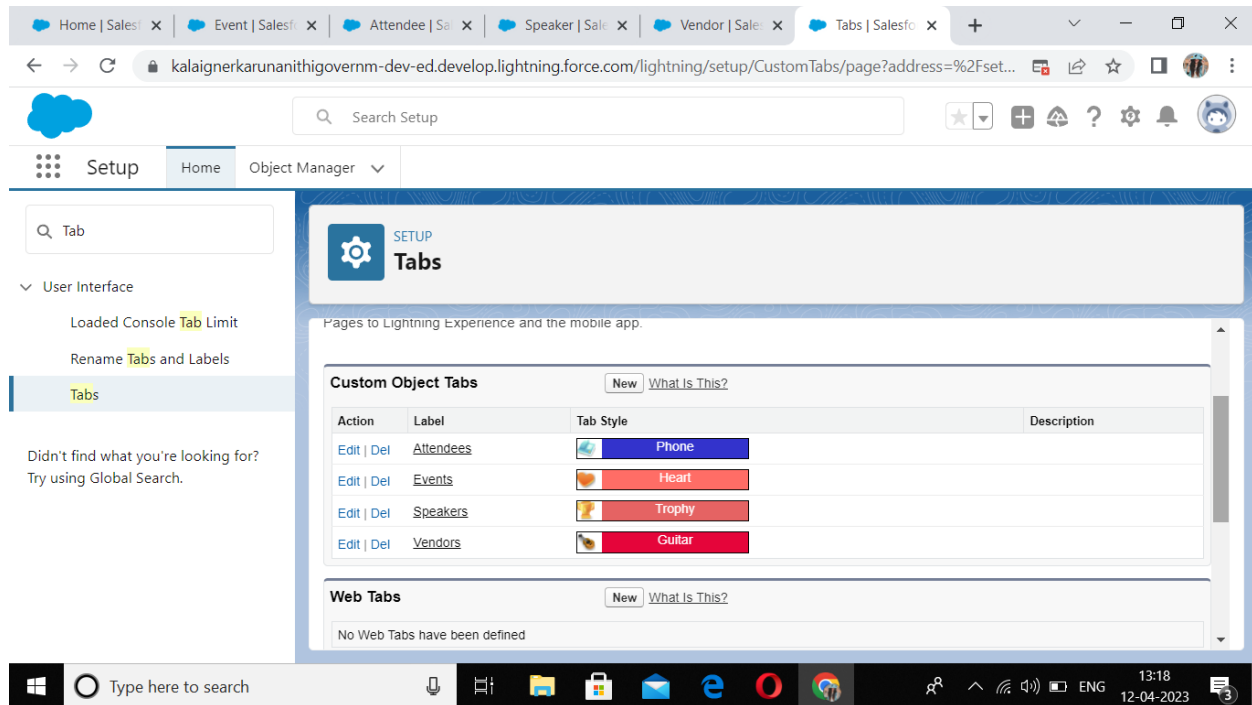
Similarly I have finished all the activity event, vendors and speaker.



MILESTONE-3

***Click on home tab, enter tabs in quick find and select tabs.**

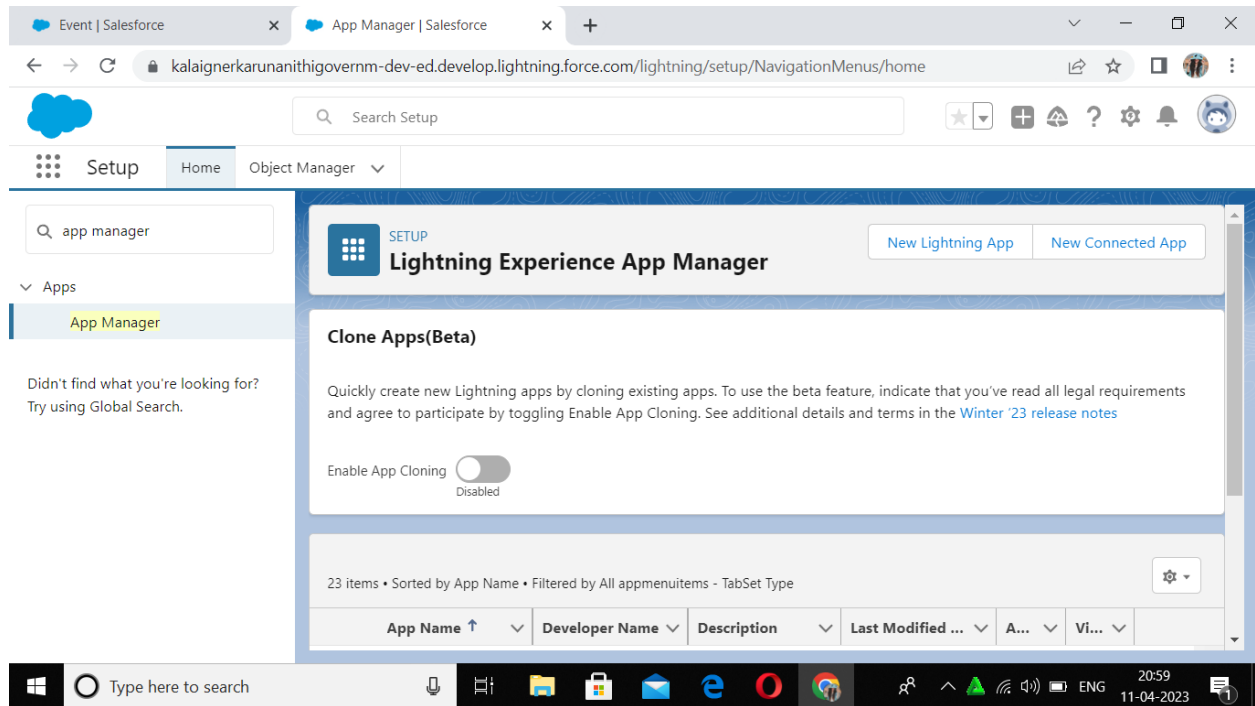
- ❖ **Under custom object tabs, click new.**
- ❖ **For object select event.**
- ❖ **For tab style ,select any icon.**
- ❖ **Leave all defaults as is.click next,next and save.**



MILESTONE-3

- ❖ Fome 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 seleccions and click next.
- ❖ under utility items leave as is and click next.
- ❖ from available items, select events attendees, speakers, vendors,reports,and dashboard and move them to selected items. click next.
- ❖ available profile, select system administrator and move it to selected profile.click save&finish.

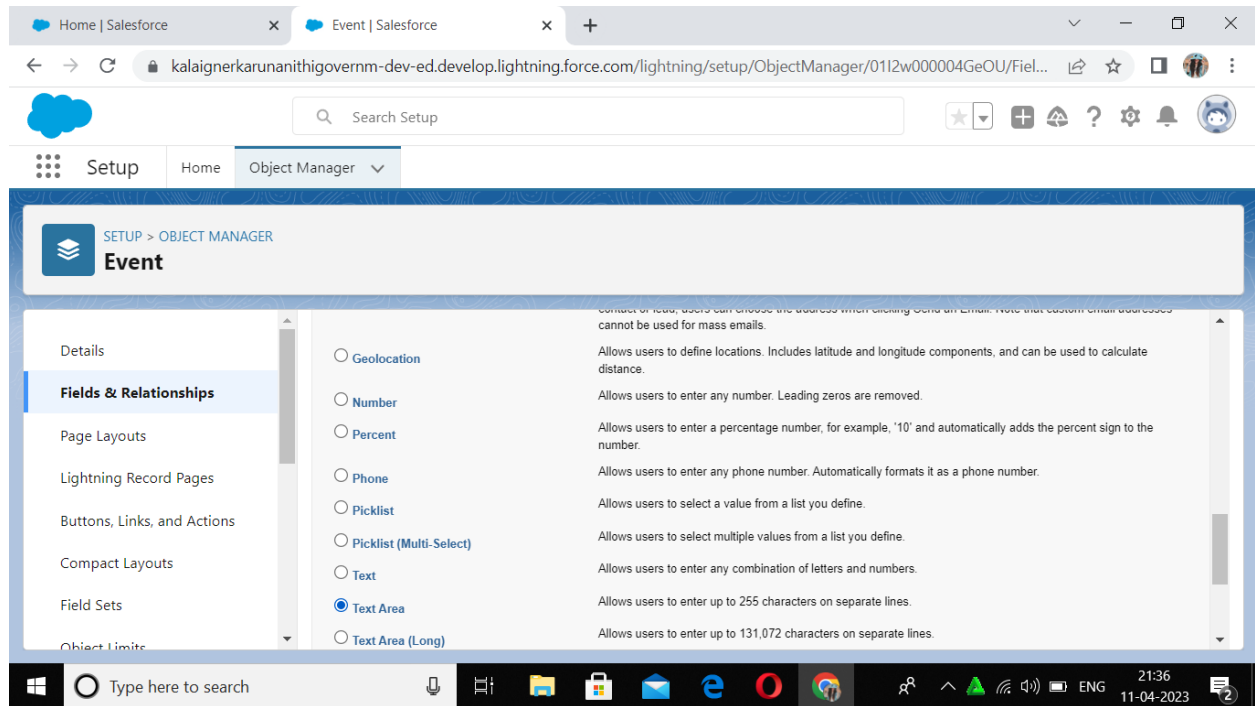
❖ to verify your changes, click the app launcher, type school management and select the school management app.



MILESTONE-4

- gear icon and select setup. this launchers setup in a new tab.
- click the object manager tab next to home.
- select Click event.
- select the fields&relationship from the left navigation,and click new.
- select the text as the date type, then click next.
- for field label, enter city.

- **click next, next, then save & new.**



MILESTONE-5

- **From setup enter profiles in the quick find box, and select profiles.**
- **from the list of profile, 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.

The screenshot shows the Salesforce Setup interface for the 'Event Vendors Profile'. The left sidebar contains navigation options like 'Setup Home', 'Service Setup Assistant', 'Multi-Factor Authentication Assistant', 'Release Updates', 'Lightning Experience Transition Assistant', 'Salesforce Mobile App', 'Lightning Usage', 'Optimizer', and 'ADMINISTRATION'. Under 'ADMINISTRATION', 'Users' is expanded, showing 'Permission Set Groups', 'Permission Sets', 'Profiles' (selected), 'Public Groups', and 'Queues'.

The main content area displays the 'Event Vendors Profile' configuration. It includes a 'Profile Detail' section with fields for Name, User License, Description, and Created By. Below this is the 'Page Layouts' section, which lists standard object layouts and their assigned page layouts.

Profile Detail			
Name	Event Vendors Profile		
User License	Salesforce		
Description			
Created By	Gokilesvari Rengaraj	12/04/2023, 9:01 pm	Modified By: Gokilesvari Rengaraj, 12/04/2023, 9:02 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	Opportunity Product	Opportunity Product Layout

MILESTONE-6

- From setup “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

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'users' entered and a list of navigation items: Users, Feature Settings, and Data.com. The main content area is titled 'New User' and contains a 'User Edit' form. The form has tabs for 'General Information', 'Permissions', and 'Advanced Settings'. The 'General Information' tab is active, showing fields for First Name, Last Name, Alias, Email, Username, Nickname, Role, User License, Profile, Active, Marketing User, and Offline User. The values entered are: First Name: Gokileswari, Last Name: Rengaraj, Alias: greng, Email: gunarengarajguna@gmail.c, Username: gunarengarajguna@gmail.c, Nickname: goki, Role: <None Specified>, User License: Salesforce, Profile: Event user profile, Active: checked, Marketing User: unchecked, and Offline User: unchecked. The bottom of the screen shows the Windows taskbar with the search bar and various application icons.

Home | Salesforce x Profiles | Salesforce x Profiles | Salesforce x Users | Salesforce x

← → ↻ kalignerkarunanithigovernm-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2...

Search Setup

Setup Home Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

SETUP Users

New User Help for this Page

User Edit Save Save & New Cancel

General Information ⓘ = Required Information

First Name Gokileswari Role <None Specified> ⓘ

Last Name Rengaraj User License Salesforce

Alias greng Profile Event user profile ⓘ

Email gunarengarajguna@gmail.c Active ☒

Username gunarengarajguna@gmail.c Marketing User ☐

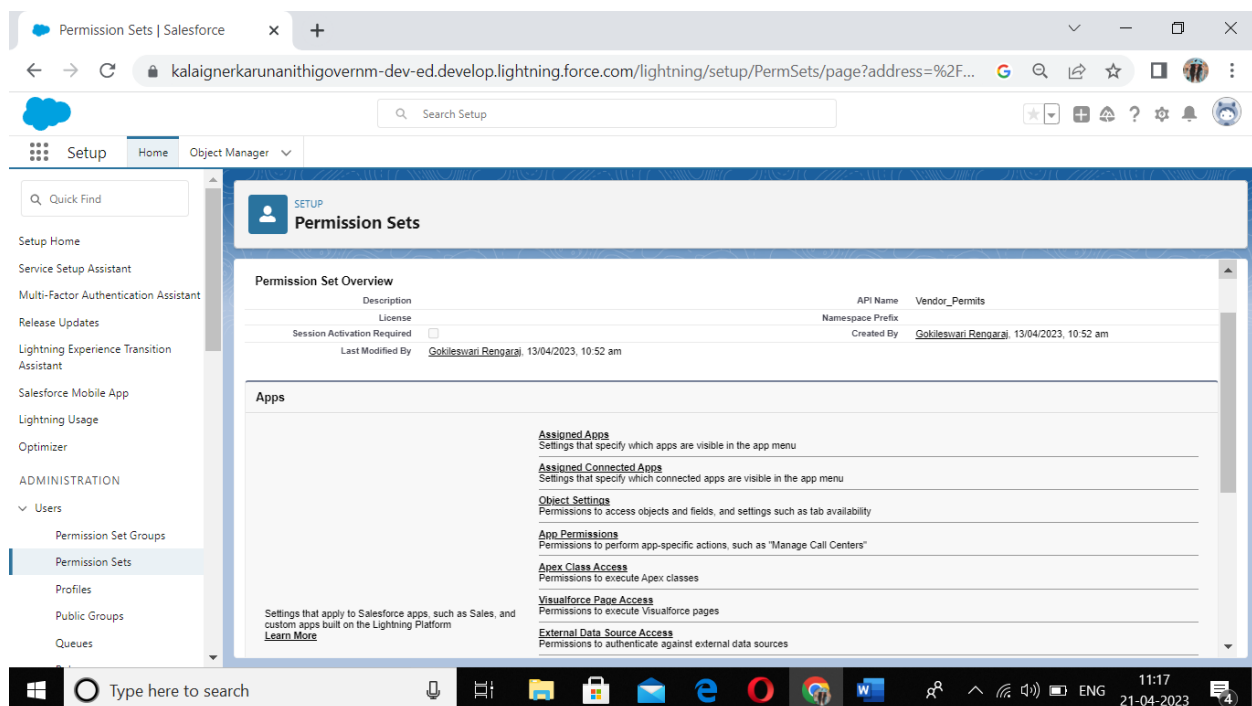
Nickname goki Offline User ☐

Type here to search

21:13 12-04-2023

MILESTONE-7

- From setup search “permission set” 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 and click on save.



MILESTONE-8

- From the report tab, click new report.
- select the report type attendees with events for the report, and click create.

- customize your report accordingly and include all fields, then save or run it.

Report: Events with Attendees
New Events with Attendees Report

Total Records: 4

Event: Owner Name	Event: Event Name	Attendee: Attendee Name	Attendee: Last Modified Date
Gokleswari Rengaraj (4)	birthday	ajith	13/04/2023
	business party	sheik	13/04/2023
	farewell party	salman	13/04/2023
	reunion function	maddy	13/04/2023
Subtotal			
Total (4)			

Row Counts: ☒ Detail Rows: ☒ Subtotals: ☒ Grand Total: ☒

Trailhead Profile public URL

Team Lead - <https://trailblazer.me/id/ggayathri40>

Team member 1 - <https://trailblazer.me/id/grengaraj1>

Team member 2 - <https://trailblazer.me/id/jmahalingam4>

Team member 3 - <https://trailblazer.me/id/kangc7>

5 ADVANTAGES & DISADVANTAGES

ADVANTAGES

- * Reduces uncertainty**
- * Focus on objectives/ goals**
- * Economical operation**
- * Facilities control**
- * Encourages innovation and creativity**
- * Improves motivation**
- * Avoids random activity**
- * Improves competitive strength**

DISADVANTAGES

- Lack of reliable data**
- Rigidity**
- Time consuming process**
- Costly process**
- Rapid change**
- Internal inflexibility**
- External inflexibility**

APPLICATIONS

Event management is the application of project management to the creation and development of small and/or large-scale personal or corporate events such as festivals, conference, ceremonies, weddings, formal parties, concerts, or conventions.

It involves studying the brand, identifying its target audience, devising the event concept, and coordinating the technical aspects before actually launching the event.

CONCLUSION

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

FUTURE SCOPE

- Developing and designing the national fair concept.**
- Putting together the respective places.**
- Execute, promote and supervise the activities of the fair.**
- Provide an evaluation report on the event.**

