

BUILD AN EVENT MANAGEMENT SYSTEM USING SALESFORCE

1. INTRODUCTION

1.1. OVERVIEW

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.

Salesforce is the one of the best options to make any projects like build an even management system, CRM projects and so on. In Salesforce we make any projects easily, because there is almost every function needed to create an event, management and etc. are built in.

Anyone can create this project, this is the most important thing to make this project in Salesforce.

1.2. PURPOSE

The purpose of an event management system is to help individuals and organizations plan, organize, and execute events more efficiently and effectively. Event management systems offer a range of tools and features that facilitate the entire event lifecycle, from planning and registration to post-event analysis.

The primary objectives of an event management system are to:

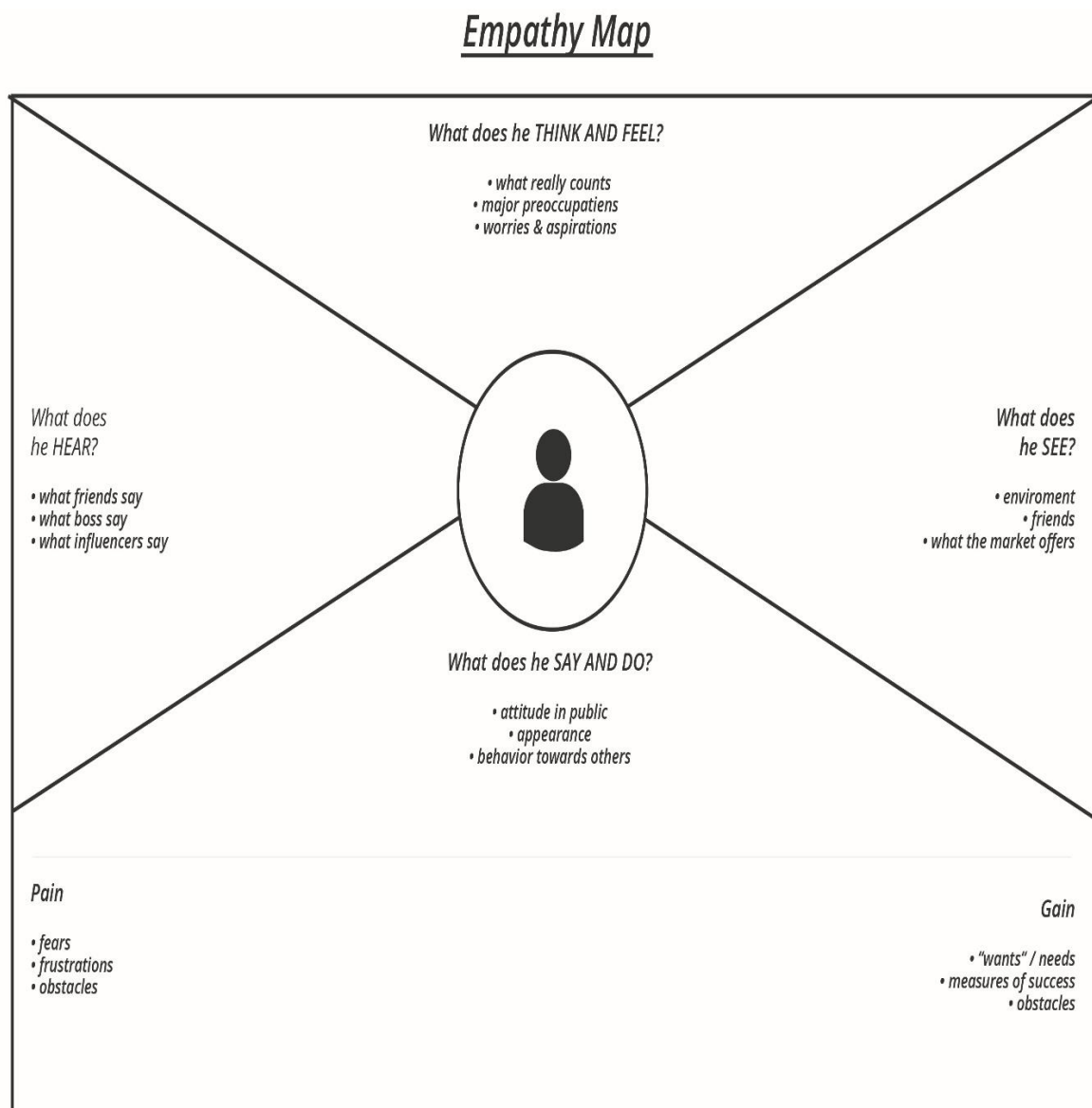
- Simplify the event planning process: Event management systems provide users with easy-to-use tools and templates to help them plan and execute events with minimal effort.
- Automate time-consuming tasks: An event management system automates many manual and time-consuming tasks such as sending event invitations, tracking registrations, and managing payments.
- Streamline communication: Event management systems help to streamline communication between event organizers and attendees, with features such as automated email reminders, event updates, and chatbots.
- Enhance attendee engagement: An event management system can enhance attendee engagement by providing personalized event experiences, including tailored schedules, networking opportunities, and event feedback.
- Provide actionable insights: Event management systems capture valuable data on event attendance, engagement, and ROI. This data can be used to optimize future events and improve overall event performance.

Overall, the purpose of an event management system is to make event planning and execution more efficient, engaging, and successful.

2. PROBLEM DEFINITION AND DESIGN THINKING

2.1. EMPATHY MAP

An empathy map is a square divided into four quadrants with the user or client in the middle. Each of the four quadrants comprises a category that helps us delve into the mind of the user. The four empathy map quadrants look at what the user says, thinks, feels, and does.





WHO are we empathizing with?

Who is the person we want to understand?
What is the situation they are in?
What is their role in the situation?

The persons
whose are
trying to get
themselves
from us

Some
financial
situation....

Steps
forward and
never give
up



What do they HEAR?

What are they hearing others say?
What are they hearing from friends?
What are they hearing from colleagues?
What are they hearing second-hand?

That are
easyor
that are not
easy

Motives and
Encouragements

Available
opportunities
for
Employment

Improvements

EDUCATION

Does not
want to
waste time

Be positive

What do they THINK and FEEL?

What other thoughts and feelings might influence their behavior?

Memories of
our family
while studying
abroad

Lack of
teaching



What do they SAY?

What have we heard them say?
What can we imagine them saying?

We can do it

Spread
advanced
technics

PAINS

What are their fears,
frustrations, and anxieties?



About the
feelings of
uneducated
people

No time to eat
and purchase
with their
family



What do they DO?

What do they do today?
What behavior have we observed?
What can we imagine them doing?

Practice
themselves
for exams

Good
behaviour

Say
goodluck
and wishes
them



GAINS

What are their wants,
needs, hopes, and dreams?

Want to be
an IAS
officer

Hoping
bright and a
peaceful life

What do they need to DO?

What do they need to do differently?
What job(s) do they want or need to get done?
What decision(s) do they need to make?
How will we know they were successful?



Self Study

Assessment
from
peer

Decision
Based on
Experiences

From their
performance



What do they SEE?

What do they see in the marketplace?
What do they see in their immediate environment?
What do they see others saying and doing?
What are they watching and reading?

Saying is
good but
Doing is not
very well

Inflation


Disturbances
occurring in the
villages through
lack of current
and water

Current
Affairs

2.2. IDEATION AND BRAINSTORMING MAP




An idea map is a visual representation of your thinking process. It's a tool for planning and organizing your ideas visually that doesn't rely on traditional note-taking. Traditional linear pages of notes can slow down the process of planning a project, but an idea map lays everything out in a clear way that's easy for anyone to understand.

Template




Brainstorm & idea prioritization

Use this template in your own brainstorming sessions so your team can unleash their imagination and start shaping concepts even if you're not sitting in the same room.


 10 minutes to prepare
 1 hour to collaborate
 2-8 people recommended

[Share template feedback](#)



Before you collaborate

A little bit of preparation goes a long way with this session. Here's what you need to do to get going.

 10 minutes

A

Team gathering

Define who should participate in the session and send an invite. Share relevant information or pre-work ahead.

B

Set the goal

Think about the problem you'll be focusing on solving in the brainstorming session.

C

Learn how to use the facilitation tools


Use the Facilitation Superpowers to run a happy and productive session.

[Open article](#) →

1


Define your problem statement

What problem are you trying to solve? Frame your problem as a How Might We statement. This will be the focus of your brainstorm.

 5 minutes


PROBLEM


How might we [your problem statement]?





Key rules of brainstorming


To run an smooth and productive session


 Stay in topic.


 Encourage wild ideas.

 Defer judgment.

 Listen to others.

 Go for volume.

 If possible, be visual.



Need some inspiration?
See a finished version of the template to kickstart your work.

[Open example](#) →

Brainstorm

JEYA LAKSHMI V P R

Building an even management system using Salesforce is a great way to streamline our event planning process, manage event details and track attendee information.

Salesforce is a powerful customer relationship management platform that can be customized to fit our specific event management needs.

1. First we need to identify our event management needs and determining the features we want to include in our system.

2. Then we need to create custom objects to store event details, locations and registration information.

3. Using Salesforce we can build workflows and automative repetitive tasks.

4. For example, we can set up automated email reminders to be sent to attendees before an event.

5. Salesforce can be integrated with other systems, such as marketing automation platforms, ticketing systems and social media platforms.

6. By streamlining the event planning process, the system can help to reduce the time and costs involved in planning and executing events.

7. By automating many of the manual tasks involved in event planning, the system can help to reduce the potential for human error and increase the efficiency of event planning processes.

DHIVYAPRABA S G

There are several applications found in our Salesforce platform.

1. We can add fields to the custom object to capture relevant information about the events, such as attendees, speakers, sponsors and sessions.

2. By using this event management project we can create page layouts to display information about the events in an easy-to-understand manner.

3. One of the important uses is automate processes related to events, such as sending confirmation emails to attendees, scheduling reminders, and updating the event status.

4. We can create reports and dashboards to track event performance, such as registration numbers, attendance raters, and feedback from attendees.

5. We can use Salesforces reporting and analytics tools to monitor the performance of your events.

6. We can generate reports on attendance, ticket sales, and other key metrics to help you make data-driven decisions.

7. It is very important to continuously improve our event management system.

8. We can use feedback from attendees and event data to identify areas for improvement and make changes to your system accordingly.

GOKILA K

Generally, the Event Management Software for most commonly used in the field of entertainment, sports, trade shows, and special events.

1. It is a software tool that allows event planners to manage the entire event process, from planning and booking to event coordination and execution.

2. In the management business, we need to handle lots of data.

3. Without the software we will have to maintain all that with papers, which is a little difficult.

4. So, the software will allow us to access and upgrade the data anytime, from anywhere.

5. There are different kinds of data, such as seating charts, lists of names and other information.

6. By using the software, we will arrange all the kinds of data without paper.

7. The software will give real-time analysis. It will also help us to allot the approximate budget as the best event management software.

8. With the event management software development, it will be easier the track of what and when we need to do the tasks and will remind us at the right time.

JANANI P

The built-in website will make us more comfortable and give you accurate data.

1. We can collect the needed information to make the event successful through the website.

2. Our entire online management team can use the platform to collaborate, track engagement, conduct outreach and all the other little tasks that go in our event.

3. We don't have to vet multiple solutions for every phase of our event.

4. During the meeting or any conference, we can use interactive tools to collect questions, poll answers, or shout-outs.

5. After the event is over, our event management software can keep the conversation going.

6. Speaking of improvement, event planning software helps us decide where to make changes to our events based on data, not hunches.

7. Display a greater level of professionalism.

8. In the era of hybrid and virtual events, using purpose-built tools for these events style can help us to maximize our event's potential.

Group ideas

Event
infrastructure
is must be
good.

Target
audience
and clients.

Understand
the objective
of the event.

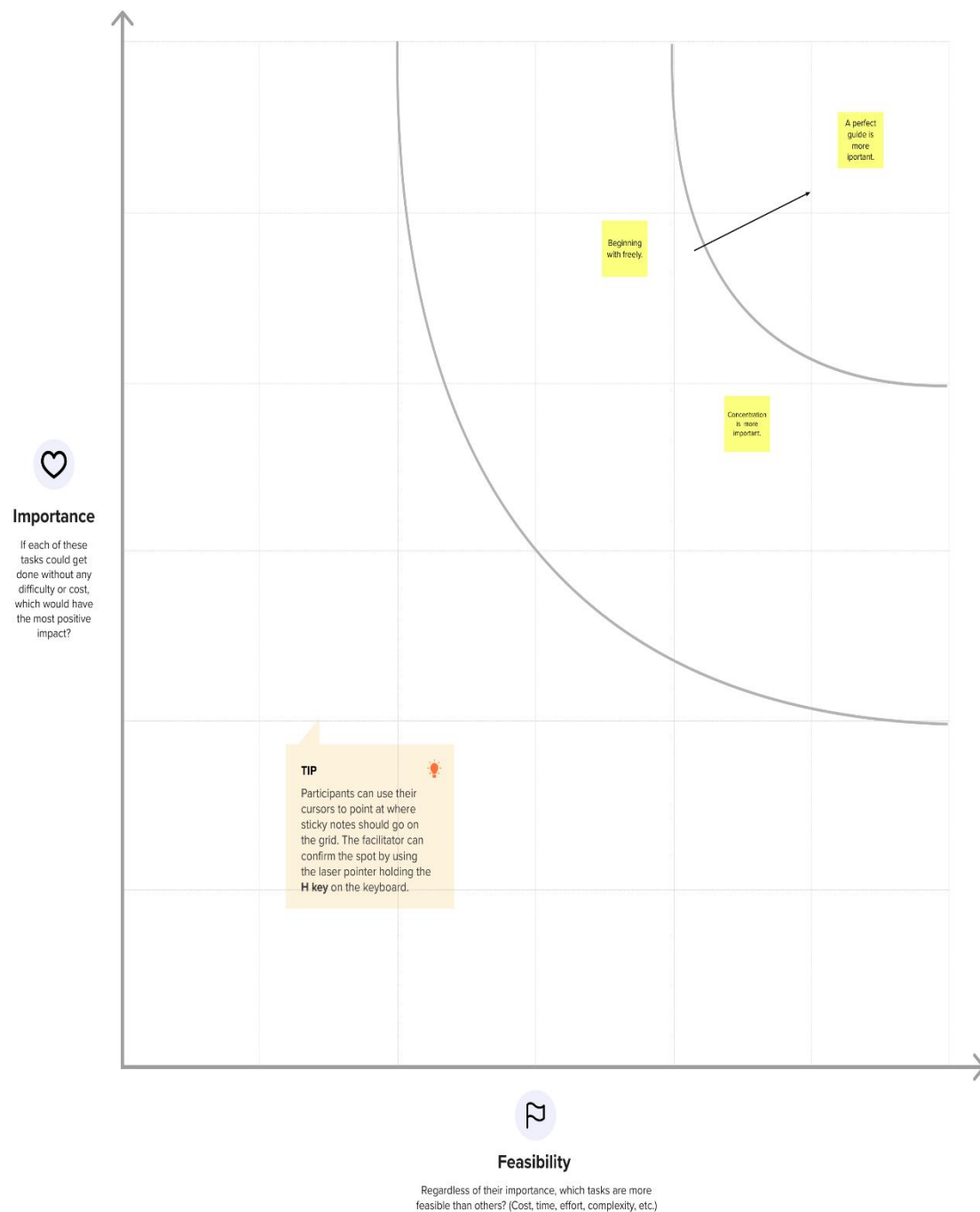
Suitable
timing is
more
important.

4

Prioritize

Your team should all be on the same page about what's important moving forward. Place your ideas on this grid to determine which ideas are important and which are feasible.

🕒 20 minutes



3. RESULT

3.1. DATA MODEL

OBJECT NAME	FIELDS IN THE OBJECT	
Event	FIELD LABEL	DATA TYPE
	City	Text
	Start Date	Date\time
	End Date	Date\time
	Event Name	Master-detail relationship
	Event Name	Look-up relationship
Attendee	FIELD LABEL	DATA TYPE
	Id	Auto number
	Phone	phone
	Email	Email
Speaker	FIELD LABEL	DATA TYPE
	Bio	Text Area
	e-mail	Email
Vendor	FIELD LABEL	DATA TYPE
	e-mail	Email
	Phone	phone
	Service Provider	Text
	Event Name	Look-up Relationship
Student	FIELD LABEL	DATA TYPE
	Tickets	Picklist

3.2. ACTIVITY AND SCREENSHOTS

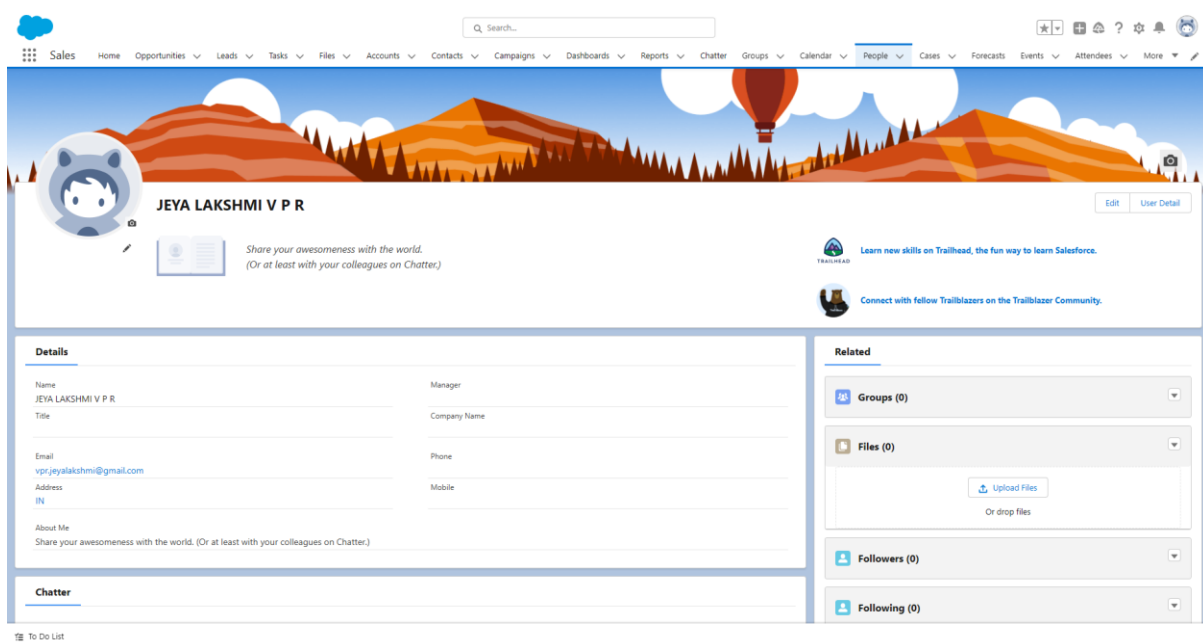
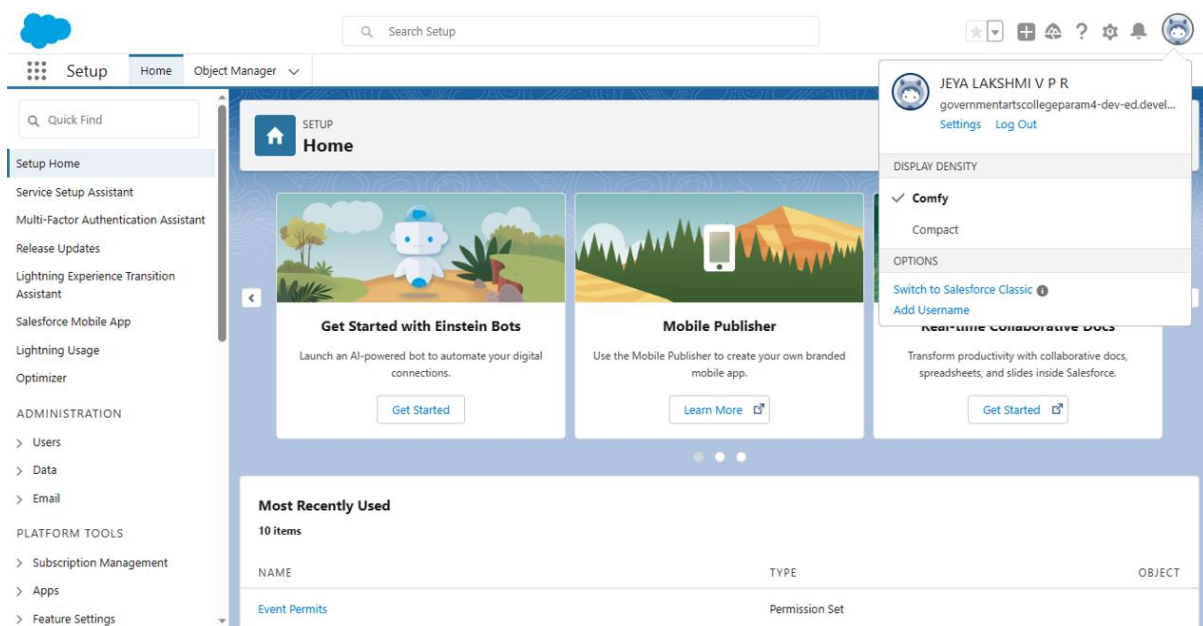
Milestone 1

Activity

Salesforce

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

Creation of Salesforce Organization



Milestone 2

Activity 1

Object

objects are database tables that permit you to store data that is specific to an organization. It consists of fields (columns) and records (rows).

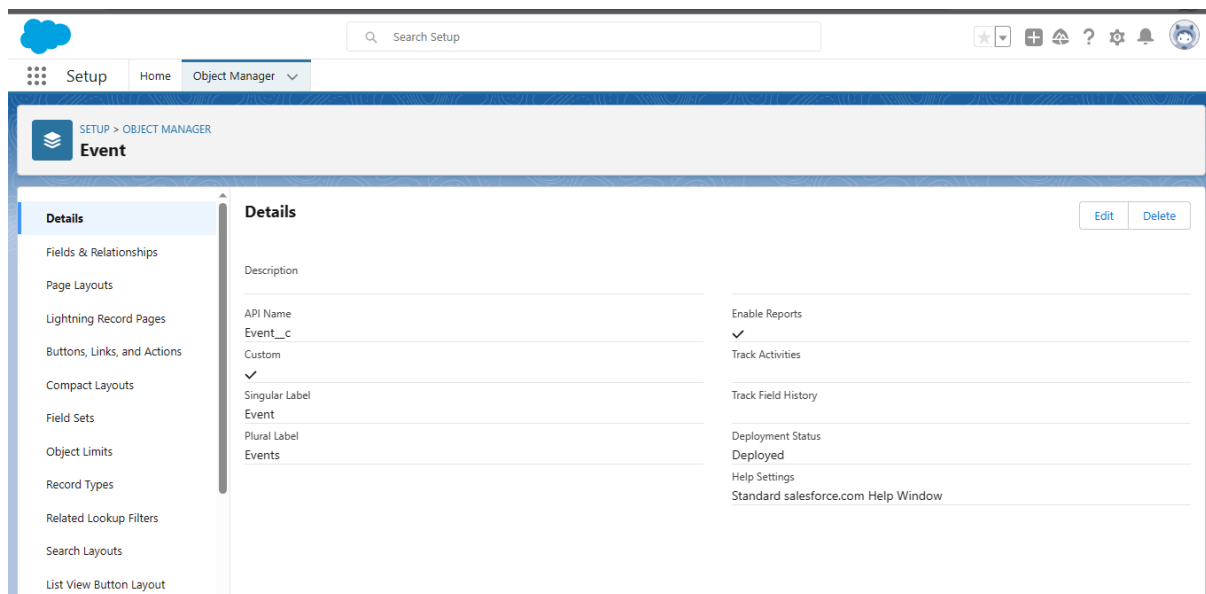
Creation of Custom Objects

Creation of Event Object

Label: Event

Plural Label: Events

Record Name: Event Name

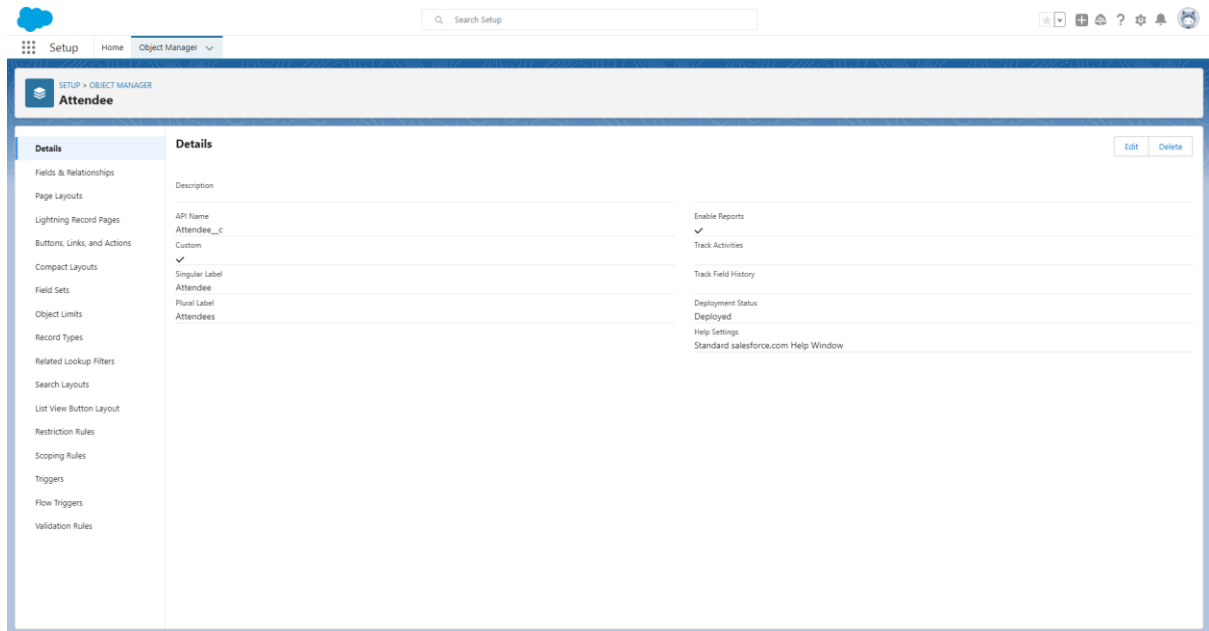


Activity 2: Creation of Attendees Object

Label: Attendee

Plural Label: Attendees

Record Name: Attendee Name



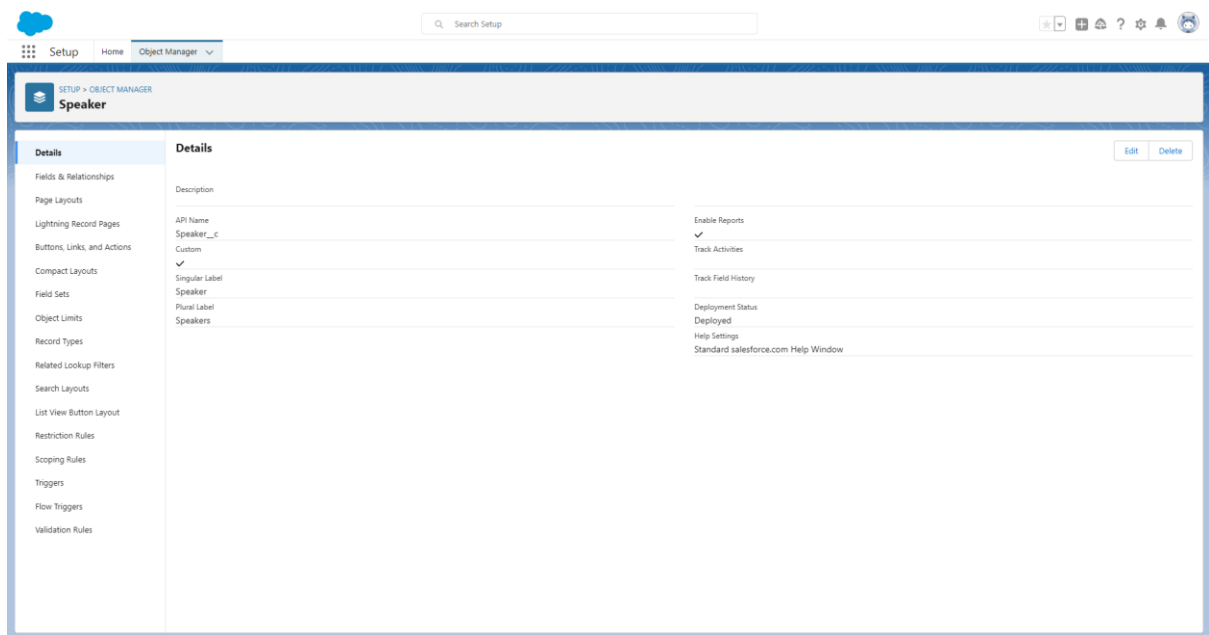
Activity 3

Creation of Speaker object

Label: Speaker

Plural Label: Speakers

Record Name: Speaker Name



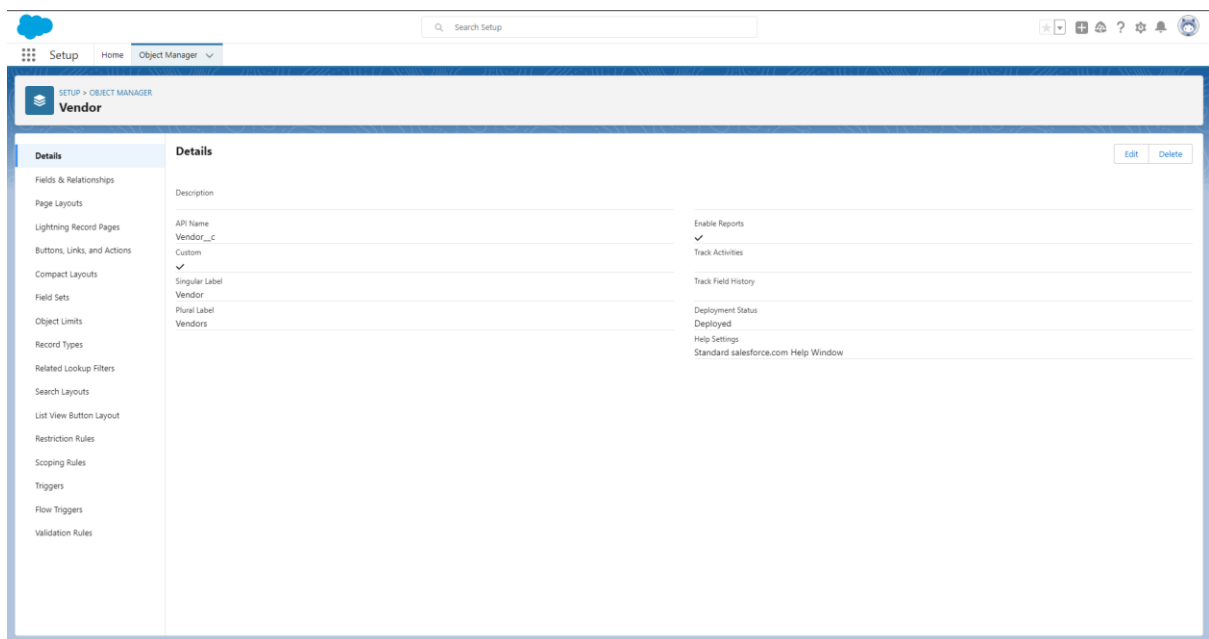
Activity 4

Creation of Vendors object

Label: Vendor

Plural Label: Vendors

Record Name: Vendor Name



Milestone 3 – Tab

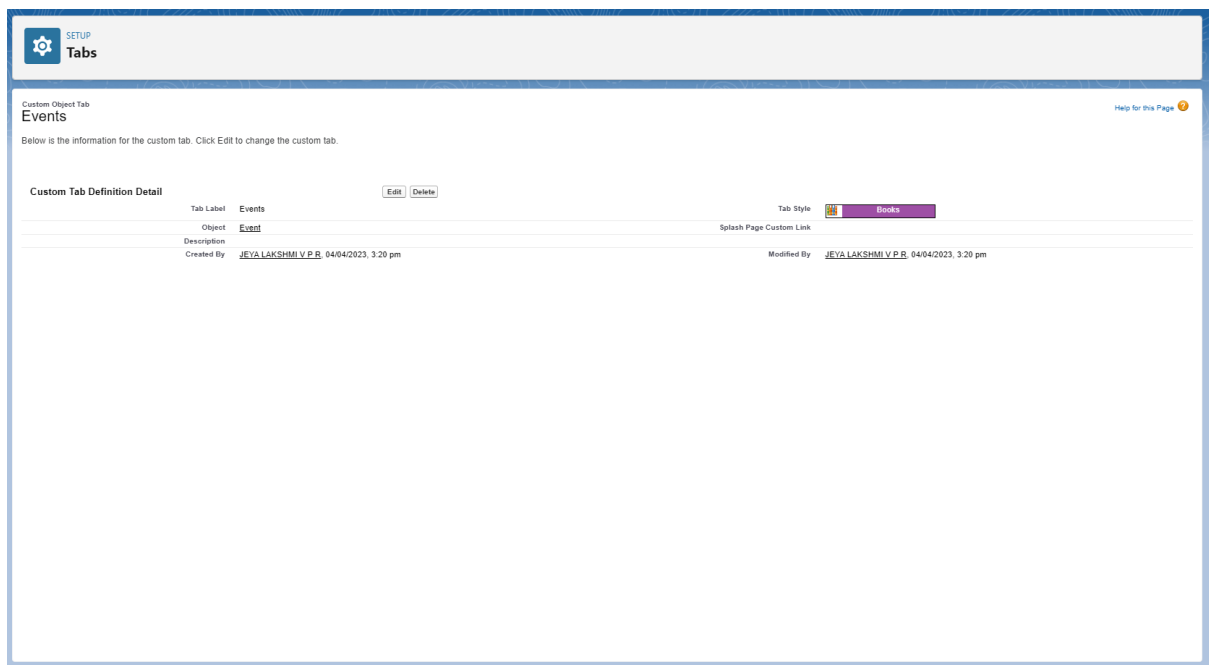
Tab

Tabs in Salesforce help users view the information at a glance. It displays the data of objects and other web content in the application.

Creation of custom tabs

Activity 1

Creation of Event tab



Related with event object, tab style is book

Activity 2:

Creation of Attendee tab:

SETUP
Tabs


Custom Object Tab
Attendees

Help for this Page

Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail

EditDelete

Tab Label	Attendees	Tab Style	 Presenter
Object	Attendee	Splash Page Custom Link	
Description			
Created By	JEEVA LAKSHMI V.P.B. 04/04/2023, 3:26 pm	Modified By	JEEVA LAKSHMI V.P.B. 04/04/2023, 3:26 pm

Related with attendee object, tab style is presenter.

Activity 3

Creation of Speakers tab:

SETUP
Tabs


Custom Object Tab
Speakers

Help for this Page

Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail


EditDelete

Tab Label	Speakers	Tab Style	 Microphone
Object	Speaker	Splash Page Custom Link	
Description			
Created By	JEEVA LAKSHMI V.P.B. 04/04/2023, 3:27 pm	Modified By	JEEVA LAKSHMI V.P.B. 04/04/2023, 3:27 pm

Related with speaker object, tab style is microphone.

Activity 4

Creation of Vendor tab

 **SETUP**
Tabs

Custom Object Tab

Vendors

Below is the information for the custom tab. Click Edit to change the custom tab.


Custom Tab Definition Detail

Tab Label

Vendors

EditDelete

Tab Style

 Train

Object

Vendor

Splash Page Custom Link

Description

Created By

JEYA LAKSHMI V.P.R. 04/04/2023, 3:28 pm

Modified By

JEYA LAKSHMI V.P.R. 04/04/2023, 3:28 pm

Related with vendor object, tab style is train.

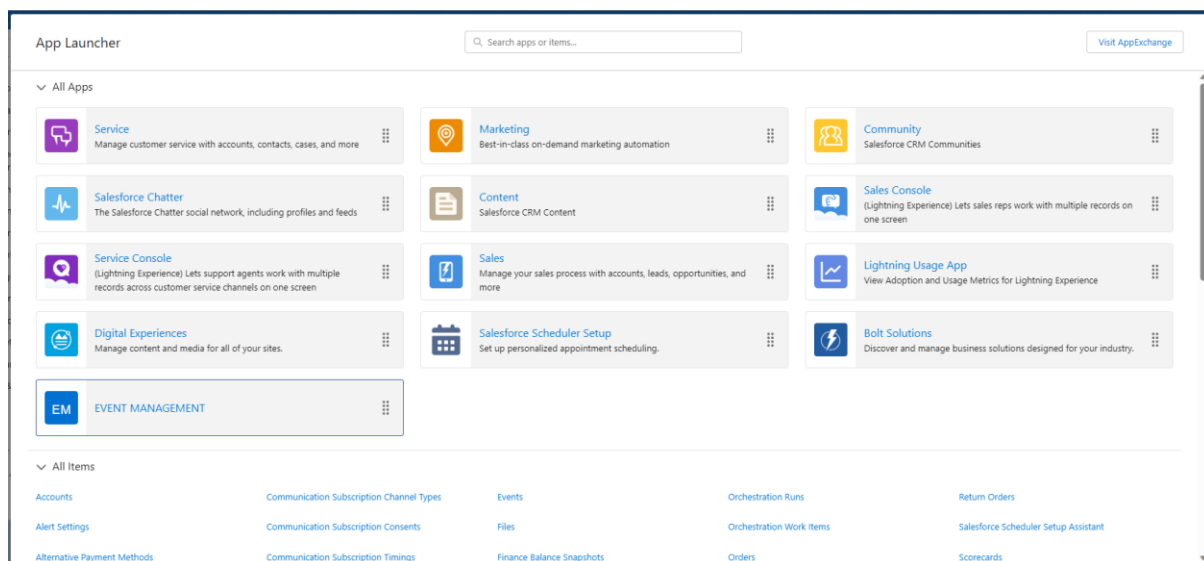
Milestone 3 – Application

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.

Creation of custom app

Creation of event management app



EVENT MANAGEMEN... Attendees ▾ Speakers ▾ Vendors ▾ Reports ▾ Dashboards ▾

Report: Accounts
Attendees with event

Total Records
13

	Last Activity ▾	Account Owner ▾	Account Name ▾	Billing State/Province ▾	Type ▾	Rating ▾	Last Modified Date ▾
1	-	JEYA LAKSHMI V P R	GenePoint	CA	Customer - Channel	Cold	15/03/2023
2	-	JEYA LAKSHMI V P R	United Oil & Gas, UK	UK	Customer - Direct	-	15/03/2023
3	-	JEYA LAKSHMI V P R	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	15/03/2023
4	-	JEYA LAKSHMI V P R	Edge Communications	TX	Customer - Direct	Hot	15/03/2023
5	-	JEYA LAKSHMI V P R	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	15/03/2023
6	-	JEYA LAKSHMI V P R	Pyramid Construction Inc.	-	Customer - Channel	-	15/03/2023
7	-	JEYA LAKSHMI V P R	Dickenson plc	KS	Customer - Channel	-	15/03/2023
8	-	JEYA LAKSHMI V P R	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	15/03/2023
9	-	JEYA LAKSHMI V P R	Express Logistics and Transport	OR	Customer - Channel	Cold	15/03/2023
10	-	JEYA LAKSHMI V P R	University of Arizona	AZ	Customer - Direct	Warm	15/03/2023
11	-	JEYA LAKSHMI V P R	United Oil & Gas Corp.	NY	Customer - Direct	Hot	15/03/2023
12	-	JEYA LAKSHMI V P R	sForce	CA	-	-	15/03/2023
13	-	Automated Process	Sample Account for Entitlements	-	-	-	15/03/2023

Milestone 4 – Fields

Fields

Fields in Salesforce represents what the columns represent in relational databases. It can store data values which are required for a particular object in a record.

Activity 1

Creation of fields for the Event objects

Activity 3

Create a master-detail relationship with Event object

Sub-division of activity 4

Create a Look-up relationship with Event object

Event	FIELD LABEL	DATA TYPE
	City	Text
	Start Date	Date\time
	End Date	Date\time
	Event Name	Master-detail relationship
	Event Name	Look-up relationship

SETUP > OBJECT MANAGER				
Event				
Details	Fields & Relationships			
	8 Items, Sorted by Field Label			
	Q Quick Find New Deleted Fields Field Dependencies Set History Tracking			
Fields & Relationships	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD INDEXED
Page Layouts	City	City__c	Text(4)	
Lightning Record Pages	Created By	CreatedById	Lookup(User)	
Buttons, Links, and Actions	End Date	End_Date__c	Date/Time	
Compact Layouts	Event Name	Event_Name__c	Lookup(Event)	✓
Field Sets	Event Name	Event_Name__c	Master-Detail(Engagement Channel Type)	✓
Object Limits	Event Name	Name	Text(80)	✓
Record Types	Last Modified By	LastModifiedById	Lookup(User)	
Related Lookup Filters	Start Date	Start_Date__c	Date/Time	
Search Layouts				
List View Button Layout				
Restriction Rules				
Scoping Rules				
Triggers				
Flow Triggers				
Validation Rules				

Activity 2

Creation of fields for the Attendees objects

Attendee	FIELD LABEL	DATA TYPE
	Id	Auto number
	Phone	phone
	Email	Email

Attendee					
Fields & Relationships					
8 items, sorted by Field Label					
Q, Quick Find					
New Deleted Fields Field Dependencies Set History Tracking					
Details	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Fields & Relationships	Attendee Name	Name	Text(80)		✓
Page Layouts	Created By	CreatedById	Lookup(User)		
Lightning Record Pages	Email	Email__c	Email		
Buttons, Links, and Actions	Event Name	Event_Name__c	Master-Detail(Event)		✓
Compact Layouts	Id	Id__c	Auto Number		
Field Sets	Last Modified By	LastModifiedById	Lookup(User)		
Object Limits	Phone	Phone__c	Phone		
Record Types	Tickets	Tickets__c	Picklist		
Related Lookup Filters					
Search Layouts					
List View Button Layout					
Restriction Rules					
Scoping Rules					
Triggers					
Flow Triggers					
Validation Rules					

Sub-division of activity 2

Creation of field for the student object

Student	FIELD LABEL	DATA TYPE
	Tickets	Picklist

SETUP > OBJECT MANAGER

Student

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

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Fields & Relationships

5 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User.Group)		✓
Student Name	Name	Text(80)		✓
Tickets	Tickets_c	Picklist		

Activity 4

Creation of fields for the Speakers objects

Speaker		
	FIELD LABEL	DATA TYPE
	Bio	Text Area
	e-mail	Email

Details	Fields & Relationships <div>7 Items, Sorted by Field Label</div> <div><input type="text" value="Quick Find"/> New Deleted Fields Field Dependencies Set History Tracking</div>				
Fields & Relationships	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Bio	Bio_c	Text Area(255)		<input type="checkbox"/>
Lightning Record Pages	Created By	CreatedById	Lookup(User)		
Buttons, Links, and Actions	e-mail	e_mail__c	Email		<input type="checkbox"/>
Compact Layouts	Event Name	Event_Name__c	Lookup(Event)		<input checked="" type="checkbox"/>
Field Sets	Last Modified By	LastModifiedById	Lookup(User)		
Object Limits	Owner	OwnerId	Lookup(User Group)		<input checked="" type="checkbox"/>
Record Types	Speaker Name	Name	Text(80)		<input checked="" type="checkbox"/>
Related Lookup Filters					
Search Layouts					
List View Button Layout					
Restriction Rules					
Scoping Rules					
Triggers					
Flow Triggers					
Validation Rules					

Activity 5

Creation of fields for the Vendors objects

Vendor	FIELD LABEL	DATA TYPE
	e-mail	Email
	Phone	phone
	Service Provider	Text
	Event Name	Look-up Relationship

SETUP > OBJECT MANAGER					
Vendor					
Details	Fields & Relationships				
	8 Items, Sorted by Field Label				
	<input type="text" value="Quick Find"/> <input type="button" value="New"/> <input type="button" value="Deleted Fields"/> <input type="button" value="Field Dependencies"/> <input type="button" value="Set History Tracking"/>				
Fields & Relationships	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Created By	CreatedById	Lookup(User)		
Lightning Record Pages	e-mail	e_mail__c	Email		▼
Buttons, Links, and Actions	Event	Event__c	Lookup(Event)		▼
Compact Layouts	Last Modified By	LastModifiedById	Lookup(User)		
Field Sets	Owner	OwnerId	Lookup(User,Group)		▼
Object Limits	Phone	Phone__c	Phone		▼
Record Types	Service Provider	Service_Provider__c	Text(16)		▼
Related Lookup Filters	Vendor Name	Name	Text(80)		▼
Search Layouts					
List View Button Layout					
Restriction Rules					
Scoping Rules					
Triggers					
Flow Triggers					
Validation Rules					

Milestone 5 – Profile

Profile

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges.

Activity 1

Creation of event user profile

The screenshot shows the Salesforce 'Profile' page for 'Event user profile'. The page includes a header with navigation links, a sub-header 'Event user profile', and a description of the profile's purpose. Below this, there is a 'Profile Detail' section with fields for Name, User License, Description, Created By, and Modified By. The 'Page Layouts' section is the most prominent, displaying a grid of layouts for various objects. Each layout is listed with its name and a 'View Assignment' link. The layout assignments are as follows:

Object	Layout
Global	Global Layout
Email Application	Not Assigned
Home Page Layout	DC Default
Account	Account Layout
Alternative Payment Method	Alternative Payment Method Layout
Appointment Invitation	Appointment Invitation Layout
Asset	Asset Layout
Asset Action	Asset Action Layout
Asset Action Source	Asset Action Source Layout
Asset Relationship	Asset Relationship Layout
Asset State Period	Asset State Period Layout
Assigned Resource	Assigned Resource Layout
Authorization Form	Authorization Form Layout
Authorization Form Consent	Authorization Form Consent Layout
Authorization Form Data Use	Authorization Form Data Use Layout
Object Milestone	Object Milestone Layout
Operating Hours	Operating Hours Layout
Opportunity	Opportunity Layout
Opportunity Product	Opportunity Product Layout
Order	Order Layout
Order Product	Order Product Layout
Payment	Payment Layout
Payment Authorization	Payment Authorization Layout
Payment Authorization Adjustment	Payment Authorization Adjustment Layout
Payment Gateway	Payment Gateway Layout
Payment Gateway Log	Payment Gateway Log Layout
Payment Group	Payment Group Layout
Payment Line Invoice	Payment Line Invoice Layout
Price Book	Price Book Layout
Price Book Entry	Price Book Entry Layout

Activity 2

Creation of Event vendors profile

Profile

Event vendors profile

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.

Login IP Ranges

Enabled Apex Class Access

Enabled Visualforce Page Access

Enabled External Data Source Access

Enabled Named Credential Access

Enabled Custom Metadata Type Access

Enabled Custom Settings Definitions Access

Enabled Flow Access

Enabled Service Presence Status Access

Enabled Custom Permissions

Profile Detail

EditCloneDeleteView Users

Name	Event vendors profile
User License	Salesforce
Description	Custom Profile
Created By	JEVA LAKSHMI V P B 08/04/2023, 8:55 pm
Modified By	JEVA LAKSHMI V P B 12/04/2023, 7:26 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)
	Alternative Payment Method	Alternative Payment Method Layout (View Assignment)	Order	Order Layout (View Assignment)
	Appointment Invitation	Appointment Invitation Layout (View Assignment)	Order Product	Order Product Layout (View Assignment)
	Asset	Asset Layout (View Assignment)	Payment	Payment Layout (View Assignment)
	Asset Action	Asset Action Layout (View Assignment)	Payment Authorization	Payment Authorization Layout (View Assignment)
	Asset Action Source	Asset Action Source Layout (View Assignment)	Payment Authorization Adjustment	Payment Authorization Adjustment Layout (View Assignment)
	Asset Relationship	Asset Relationship Layout (View Assignment)	Payment Gateway	Payment Gateway Layout (View Assignment)
	Asset State Period	Asset State Period Layout (View Assignment)	Payment Gateway Log	Payment Gateway Log Layout (View Assignment)
	Assigned Resource	Assigned Resource Layout (View Assignment)	Payment Group	Payment Group Layout (View Assignment)
	Authorization Form	Authorization Form Layout (View Assignment)	Payment Line Invoice	Payment Line Invoice Layout (View Assignment)
	Authorization Form Consent	Authorization Form Consent Layout (View Assignment)	Price Book	Price Book Layout (View Assignment)
	Authorization Form Data Use	Authorization Form Data Use Layout (View Assignment)	Price Book Entry	Price Book Entry Layout (View Assignment)

Milestone 6 – User

User

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

Activity 1

Creating a User

- First Name: Sanjay
- Last Name: Gupta
- Alias: Sanj
- Email: vpr.jeyalakshmi@gmail.com
- Username: sanjaygupta22@thesmartbridge.com
- Nickname: Sanju
- Role: leave it as default
- User License: Salesforce
- User Profile: event user profiles

The screenshot shows the 'User Detail' page for a user named Sanjay Gupta. The page is divided into two main sections: 'User Detail' on the left and 'Role' on the right. The 'User Detail' section contains fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, Receive Approval Request Emails, Federation ID, App Registration: One-Time Password Authenticator, App Registration: Salesforce Authenticator, Security Key (U2F or WebAuthn), Lightning Login, and Temporary Verification Code. The 'Role' section contains fields for User License, Profile, Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, Data.com User Type, Accessibility Mode (Classic Only), Debug Mode, High-Contrast Palette on Charts, Load Lightning Pages While Scrolling, Salesforce CRM Content User, Receive Salesforce CRM Content Email Alerts, Receive Salesforce CRM Content Alerts as Daily Digest, Make Setup My Default Landing Page, Allow Forecasting, Call Center, Phone, Extension, Fax, Mobile, Email Encoding, Employee Number, and Used Data Space. The 'User License' is set to 'Salesforce' and the 'Profile' is set to 'Event user profile'. The 'Active' checkbox is checked. The 'Marketing User' checkbox is unchecked. The 'Offline User' checkbox is unchecked. The 'Knowledge User' checkbox is unchecked. The 'Flow User' checkbox is unchecked. The 'Service Cloud User' checkbox is unchecked. The 'Site.com Contributor User' checkbox is unchecked. The 'Site.com Publisher User' checkbox is unchecked. The 'WDC User' checkbox is unchecked. The 'Mobile Push Registrations' checkbox is checked. The 'Data.com User Type' checkbox is checked. The 'Accessibility Mode (Classic Only)' checkbox is checked. The 'Debug Mode' checkbox is checked. The 'High-Contrast Palette on Charts' checkbox is checked. The 'Load Lightning Pages While Scrolling' checkbox is checked. The 'Salesforce CRM Content User' checkbox is checked. The 'Receive Salesforce CRM Content Email Alerts' checkbox is checked. The 'Receive Salesforce CRM Content Alerts as Daily Digest' checkbox is checked. The 'Make Setup My Default Landing Page' checkbox is unchecked. The 'Allow Forecasting' checkbox is unchecked. The 'Call Center' checkbox is unchecked. The 'Phone' checkbox is unchecked. The 'Extension' checkbox is unchecked. The 'Fax' checkbox is unchecked. The 'Mobile' checkbox is unchecked. The 'Email Encoding' is set to 'Unicode (UTF-8)'. The 'Employee Number' is set to '0 B'. The 'Used Data Space' is set to '0 B'. The page also includes a navigation bar at the top with links to various Salesforce features and a 'User Profile Help for this Page' link.

User Detail		Role	
Name	Sanjay Gupta	User License	Salesforce
Alias	Sanj	Profile	Event user profile
Email	vpr.jeyalakshmi@gmail.com	Active	<input checked="" type="checkbox"/>
Username	sanjaygupta22@thesmartbridge.com	Marketing User	<input type="checkbox"/>
Nickname	Sanju	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
Address	India	Site.com Publisher User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	WDC User	<input type="checkbox"/>
Locale	English (India)	Mobile Push Registrations	<input checked="" type="checkbox"/>
Language	English	Data.com User Type	<input checked="" type="checkbox"/>
Delegated Approver		Accessibility Mode (Classic Only)	<input checked="" type="checkbox"/>
Manager		Debug Mode	<input checked="" type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	High-Contrast Palette on Charts	<input checked="" type="checkbox"/>
Federation ID		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
App Registration: One-Time Password Authenticator	<input checked="" type="checkbox"/>	Salesforce CRM Content User	<input checked="" type="checkbox"/>
App Registration: Salesforce Authenticator	<input checked="" type="checkbox"/>	Receive Salesforce CRM Content Email Alerts	<input checked="" type="checkbox"/>
Security Key (U2F or WebAuthn)	<input checked="" type="checkbox"/>	Receive Salesforce CRM Content Alerts as Daily Digest	<input checked="" type="checkbox"/>
Lightning Login	<input checked="" type="checkbox"/>	Make Setup My Default Landing Page	<input type="checkbox"/>
Temporary Verification Code (Expires in 1 to 24 Hours)	<input checked="" type="checkbox"/>	Allow Forecasting	<input type="checkbox"/>
		Call Center	<input type="checkbox"/>
		Phone	<input type="checkbox"/>
		Extension	<input type="checkbox"/>
		Fax	<input type="checkbox"/>
		Mobile	<input type="checkbox"/>
		Email Encoding	Unicode (UTF-8)
		Employee Number	0 B
		Used Data Space	0 B

Activity 2

- First Name: Rahul
- Last Name: Sharma
- Alias: Rahus
- Email: vpr.jeyalakshmi@gmail.com
- Username: rahulsharma202@thesmartbridge.com
- Nickname: Rahu
- Role: leave it as default
- User License: Salesforce
- Profile: Event vendors profile

User

Rahul Sharma

[Permission Set Assignments](#) | [Permission Set Assignments Activation Required](#) | [Permission Set Group Assignments](#) | [Permission Set License Assignments](#) | [Personal Groups](#) | [Public Group Membership](#) | [Queue Membership](#) | [Team](#) | [Managers in the Role Hierarchy](#) | [OAuth Connected Apps](#) | [Third-Party Account Links](#) | [Installed Mobile Apps](#) | [Authentication Settings for External Systems](#) | [Login History](#) | [User Provisioning Accounts](#)

User Detail

Edit

Sharing

Reset Password

Freeze

Name	Rahul Sharma	Role	Salesforce
Alias	Rahus	User License	Salesforce
Email	vpr.jeyalakshmi@gmail.com	Profile	Event vendors profile
Username	rahulsharma202@thesmartbridge.com	Active	<input type="checkbox"/>
Nickname	Rahu	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address	India	Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	View
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/>
App Registration: One-Time Password Authenticator	<input type="checkbox"/>	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
App Registration: Salesforce Authenticator	<input type="checkbox"/>	Salesforce CRM Content User	<input checked="" type="checkbox"/>
Security Key (U2F or WebAuthn)	<input type="checkbox"/>	Receive Salesforce CRM Content Email Alerts	<input checked="" type="checkbox"/>
Lightning Login	<input type="checkbox"/>	Receive Salesforce CRM Content Alerts as Daily Digest	<input checked="" type="checkbox"/>
Temporary Verification Code (Expires in 1 to 24 Hours)		Make Setup My Default Landing Page	<input type="checkbox"/>
		Allow Forecasting	<input type="checkbox"/>
		Call Center	
		Phone	
		Extension	
		Fax	
		Mobile	
		Email Encoding	Unicode (UTF-8)
		Employee Number	
		Used Data Space	0 B View

Milestone 7 – Permission sets

Permission set

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles. Create permission sets to grant access among logical groupings of users, regardless of their primary job function. For example, let's say you have several users who must delete and transfer leads. You can create a permission set based on the tasks that these users must perform and include the permission set within permission set groups based on job functions.

Activity 1

Creation of event permits permission set

The screenshot shows the Salesforce 'Permission Set' configuration page for 'Event Permits'. The page includes a search bar, navigation links (Clone, Edit Properties, Manage Assignments), and a 'Permission Set Overview' section. The overview displays the API Name (Event_Permits), Namespace Prefix, and the creator (JEVA LAKSHMI V P B). Below this, the 'Apps' section lists various permission categories with checkboxes for selection. The 'System' section is partially visible at the bottom.

Permission Set Overview	
Description	API Name: Event_Permits
License	Namespace Prefix
Session Activation Required: <input type="checkbox"/>	Created By: JEVA LAKSHMI V P B, 10/04/2023, 10:13 am
Last Modified By: JEVA LAKSHMI V P B, 10/04/2023, 10:13 am	

Apps	
Assigned Apps Settings that specify which apps are visible in the app menu	<input type="checkbox"/>
Assigned Connected Apps Settings that specify which connected apps are visible in the app menu	<input type="checkbox"/>
Object Settings Permissions to access objects and fields, and settings such as tab availability	<input type="checkbox"/>
App Permissions Permissions to perform app-specific actions, such as "Manage Call Centers"	<input type="checkbox"/>
Apex Class Access Permissions to execute Apex classes	<input type="checkbox"/>
Visualforce Page Access Permissions to execute Visualforce pages	<input type="checkbox"/>
External Data Source Access Permissions to authenticate against external data sources	<input type="checkbox"/>
Flow Access Permissions to execute Flows	<input type="checkbox"/>
Named Credential Access Permissions to authenticate against named credentials	<input type="checkbox"/>
Custom Permissions Permissions to access custom processes and apps	<input type="checkbox"/>
Custom Metadata Types Permissions to access custom metadata types	<input type="checkbox"/>
Custom Setting Definitions Permissions to access custom settings	<input type="checkbox"/>

System	
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Activity 2

Creation of vendor permits permission set

Permission Set

Vendor Permits

Find Settings...CloneEdit PropertiesManage Assignments

Permission Set Overview

Description

License

Session Activation Required

Last Modified By

API Name

Namespace Prefix

Created By

Vendor_Permits

JEVA LAKSHMI V P B

10/04/2023, 10:21 am

Apps

Assigned Apps

Settings that specify which apps are visible in the app menu

Assigned Connected Apps

Settings that specify which connected apps are visible in the app menu

Object Settings

Permissions to access objects and fields, and settings such as tab availability

App Permissions

Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access

Permissions to execute Apex classes

Visualforce Page Access

Permissions to execute Visualforce pages

External Data Source Access

Permissions to authenticate against external data sources

Flow Access

Permissions to execute Flows

Named Credential Access

Permissions to authenticate against named credentials

Custom Permissions

Permissions to access custom processes and apps

Custom Metadata Types

Permissions to access custom metadata types

Custom Settings Definitions

Permissions to access custom settings

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform

Learn More

System


Milestone 8 - Reports

Reports

Reports in Salesforce is a list of records that meet a particular criterion which gives an answer to a particular question. These records are displayed as a table that can be filtered or grouped based on any field.

Activity 1

Report Name: Attendees with event

 Report: Accounts

Attendees with event

Total Records
13

	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	-	JEYA LAKSHMI V P R	GenePoint	CA	Customer - Channel	Cold	15/03/2023
2	-	JEYA LAKSHMI V P R	United Oil & Gas, UK	UK	Customer - Direct	-	15/03/2023
3	-	JEYA LAKSHMI V P R	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	15/03/2023
4	-	JEYA LAKSHMI V P R	Edge Communications	TX	Customer - Direct	Hot	15/03/2023
5	-	JEYA LAKSHMI V P R	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	15/03/2023
6	-	JEYA LAKSHMI V P R	Pyramid Construction Inc.	-	Customer - Channel	-	15/03/2023
7	-	JEYA LAKSHMI V P R	Dickenson plc	KS	Customer - Channel	-	15/03/2023
8	-	JEYA LAKSHMI V P R	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	15/03/2023
9	-	JEYA LAKSHMI V P R	Express Logistics and Transport	OR	Customer - Channel	Cold	15/03/2023
10	-	JEYA LAKSHMI V P R	University of Arizona	AZ	Customer - Direct	Warm	15/03/2023
11	-	JEYA LAKSHMI V P R	United Oil & Gas Corp.	NY	Customer - Direct	Hot	15/03/2023
12	-	JEYA LAKSHMI V P R	sForce	CA	-	-	15/03/2023
13	-	Automated Process	Sample Account for Entitlements	-	-	-	15/03/2023

4. TRAILHEAD PROFILE PUBLIC URL

Team Lead: <https://trailblazer.me/id/jevpr>

Team Member 1: <https://trailblazer.me/id/gokik2>

Team Member 2: <https://trailblazer.me/id/janpa8>

Team Member 3: <https://trailblazer.me/id/sdhivyapraha>

5. ADVANTAGES AND DISADVANTAGES

Advantages

1. Students can gain knowledge to solve a problem and know the solutions.
2. Students will gain communication and team-player skills.
3. Opportunities for creativity.
4. Ability to work on different event.
5. Change to work with diverse clients.
6. Collaborative work environment.
7. High projection for job growth.
8. Lot of knowledge base.
9. Easy to create events and objects

Disadvantages

1. This project needs a system to fulfil it.
2. Sometimes signal is rarely appearing due to server problem.
3. Unconventional work hours.
4. Time away from family and friends.
5. Experience requirements.
6. Multiple events at the same time.
7. High level of responsibility.

6. APPLICATIONS

- Corporate events: Event management systems are commonly used for planning and executing corporate events such as conferences, seminars, and product launches.
- Trade shows: Event management systems can help trade show organizers manage booth reservations, exhibitor registrations, and event logistics.
- Sporting events: Event management systems are used to manage ticket sales, event promotions, and scheduling for sporting events such as marathons, tournaments, and competitions.
- Fundraising events: Event management systems can be used to manage donor registrations, event marketing, and donation processing for fundraising events such as charity galas and benefit concerts.
- Social events: Event management systems can be used to manage guest lists, send invitations, and track RSVPs for social events such as weddings, birthday parties, and reunions.

7. CONCLUSION

In this project we learned about objects, fields, tabs, apps, profile and so on in salesforce. We created events, objects, fields, tabs, apps, profile in salesforce by the knowledge we gained during this project and how to use them. Event management systems are powerful tools that help individuals and organizations plan, organize, and execute events more efficiently and effectively. These systems offer a range of features and functionalities that automate many time-consuming tasks, streamline communication, enhance attendee engagement, and provide valuable insights for future event planning.

8. FUTURE SCOPE

future scope of event management systems is promising, as technology continues to advance and new innovations emerge. Here are some:

- **Hybrid events:** The rise of remote work, hybrid events that combine both in-person and virtual components are likely to become more popular. Event management systems will need to adapt to accommodate this shift, with features for live streaming, virtual networking, and remote attendance.
- **Artificial intelligence:** The use of artificial intelligence (AI) in event management systems can help automate many tasks such as attendee matchmaking, event recommendations, and personalized content delivery.
- **Augmented reality:** Augmented reality (AR) can enhance the attendee experience by providing interactive event displays, real-time translation, and virtual tours.
- **Sustainability:** As the importance of sustainability continues to grow, event management systems can play a crucial role in helping organizers reduce waste, carbon footprint, and energy consumption.
- **Gamification:** Gamification elements such as scavenger hunts, leader boards, and rewards can make events more engaging and interactive for attendees.

Overall, the future scope of event management systems is wide-ranging and exciting, with the potential to revolutionize the way events are planned, executed, and experienced.