

# PROJECT REPORT ON

## Build An Event Management System Using Salesforce - (Developer)

### Introduction:

An event management system is a digital tool that streamlines the planning, organization, and execution of events. It encompasses a range of features such as event registration, ticketing, venue selection, scheduling, attendee engagement, and post-event analysis. An event management system within Salesforce allows you to access all relevant data in one centralized location.

### Milestone – 01 - Creating a Developer Edition

→ Go to [developers.salesforce.com](https://developers.salesforce.com)

- Click on sign up
- On the signup form, enter the following details:
  - First name & Last name: Kalavakunta Vishnupriya
  - Email: [parthasaradhisandy0@gmail.com](mailto:parthasaradhisandy0@gmail.com)
  - Role: SALESFORCE DEVELOPER
  - Company, College Name - GAYATRI DEGREE COLLEGE – TIRUPATI
  - Country: India
  - Postal Code: pin code – 517501
  - Username: [priya@gdcproject.com](mailto:priya@gdcproject.com)

Vishnu Priya	Kalavakunta
Email*	
parthasaradhisandy0@gmail.com	
Role*	
Developer	
Company*	
Gayatri Degree College-Tirupati	
Country/Region*	
India	
State/Province*	
Andhra Pradesh	
Postal Code*	
517501	

## Milestone – 02- Objects Creation

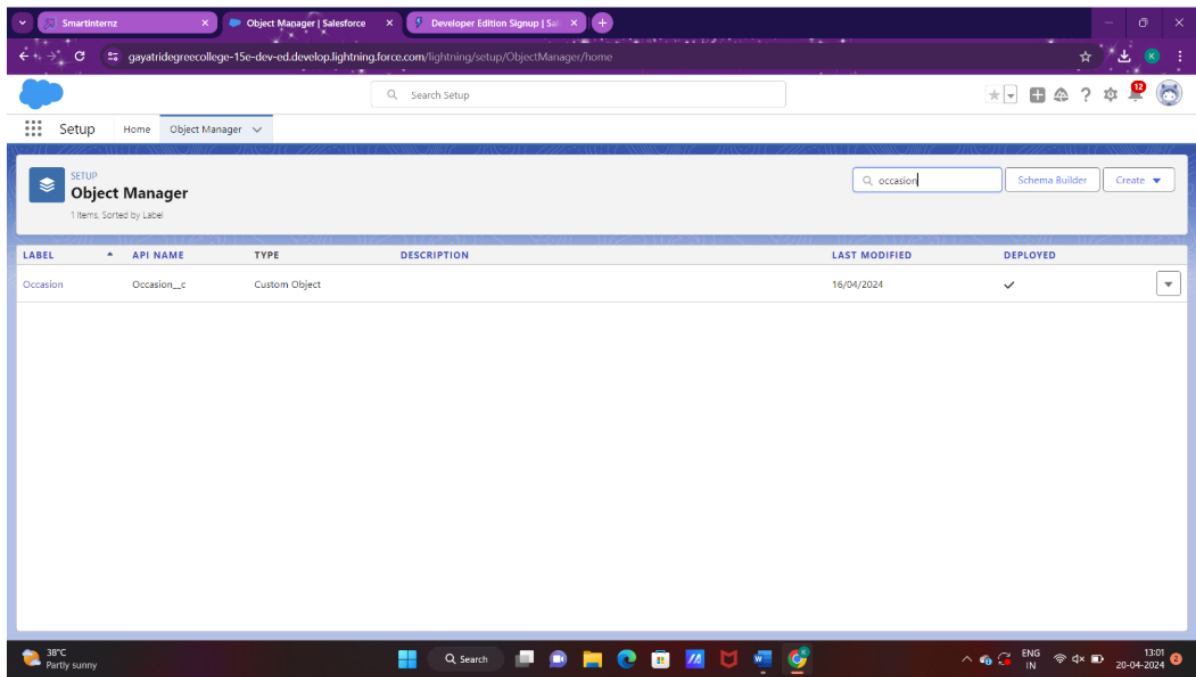
Objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types: 1) Standard object 2) Custom objects

Objects involved in Event Management are: Occasion, Attendees, Speakers and vendors

### Creation Of Custom Object Occasion:

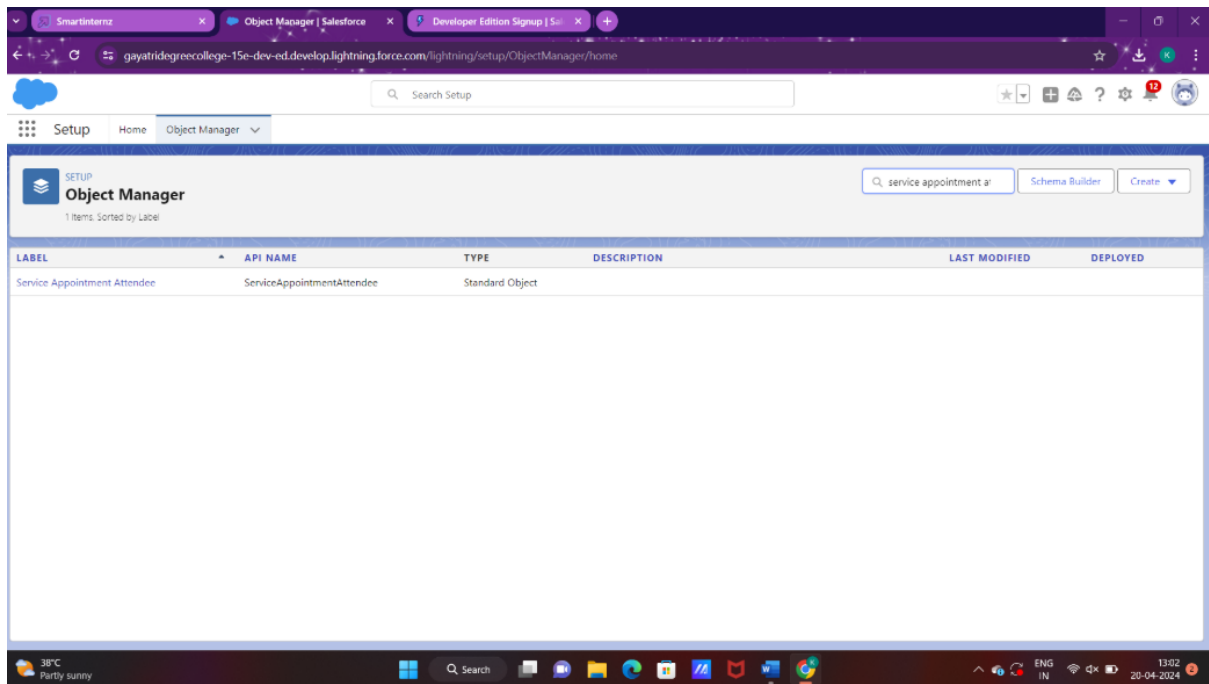
1. on the gear icon and then select Setup.
2. Click have a look on the extreme right you will find a Create Dropdown click on that &
3. select custom object
4. On the Custom Object Definition page, create the object as follows:
5. Label: Occasion
6. Plural Label: Occasions

7. Record Name, and Event Name
8. Check the Allow Reports checkbox
9. Check the Allow Search checkbox
10. Click Save.



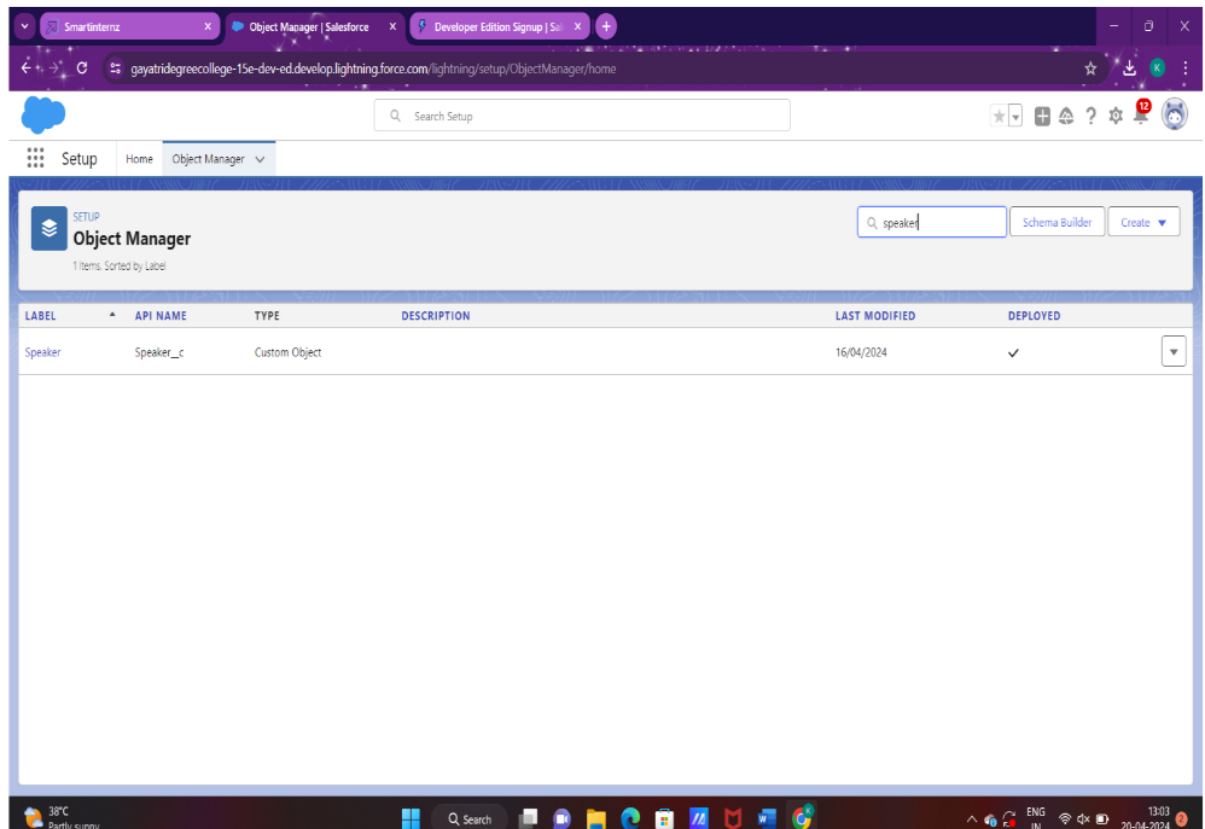
## → Creation Of Custom Object Attendees

- : 1. Click on the gear icon and then select Setup
- . 2. have a look on the extreme right you will find a Create Dropdown click on that &
3. select custom object
4. On the Custom Object Definition page, create the object as follows
- : 5. Label: Attendee
6. Plural Label: Attendees
7. Record Name: Attendee Name
8. Check the Allow Reports checkbox
9. Check the Allow Search checkbox
10. Click Save.



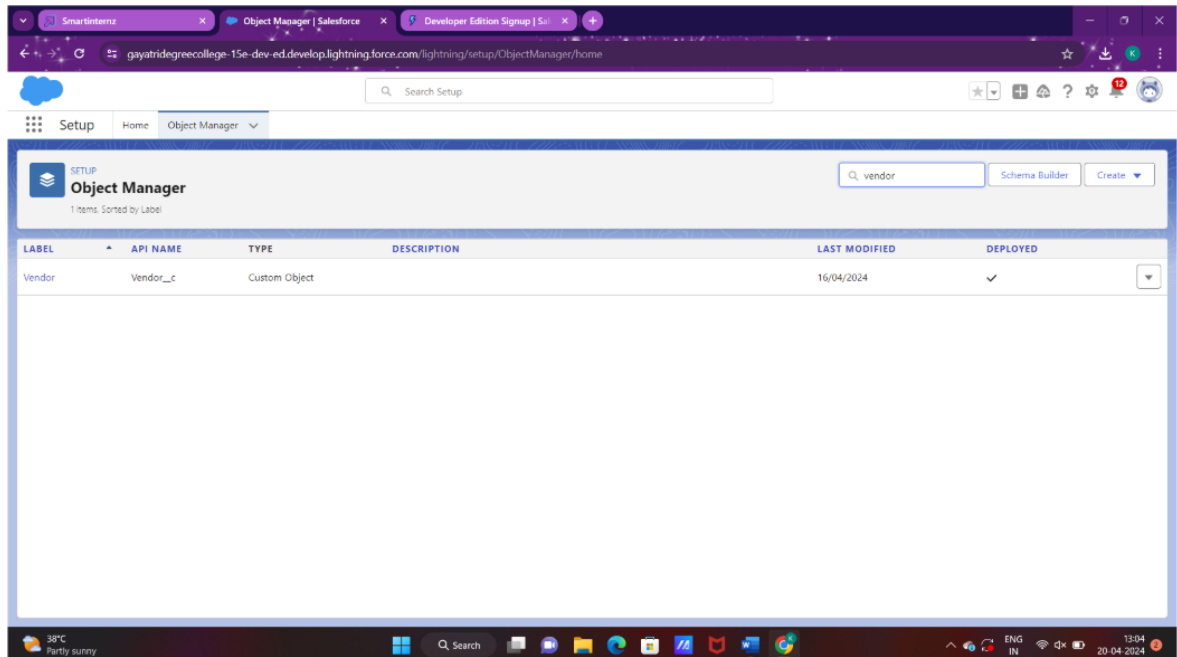
## → Creation Of Custom Object Speakers:

1. Click on the gear icon and then select Setup
2. . have a look on the extreme right you will find a Create Dropdown click on that &
3. . select custom object
4. On the Custom Object Definition page, create the object as follows:
5. . Label: Speaker
6. . Plural Label: Speakers
7. . Record Name: Speakers Name
8. . Check the Allow Reports checkbox
9. . Check the Allow Search checkbox
10. Click save



→ Creation Of Custom Object vendors:

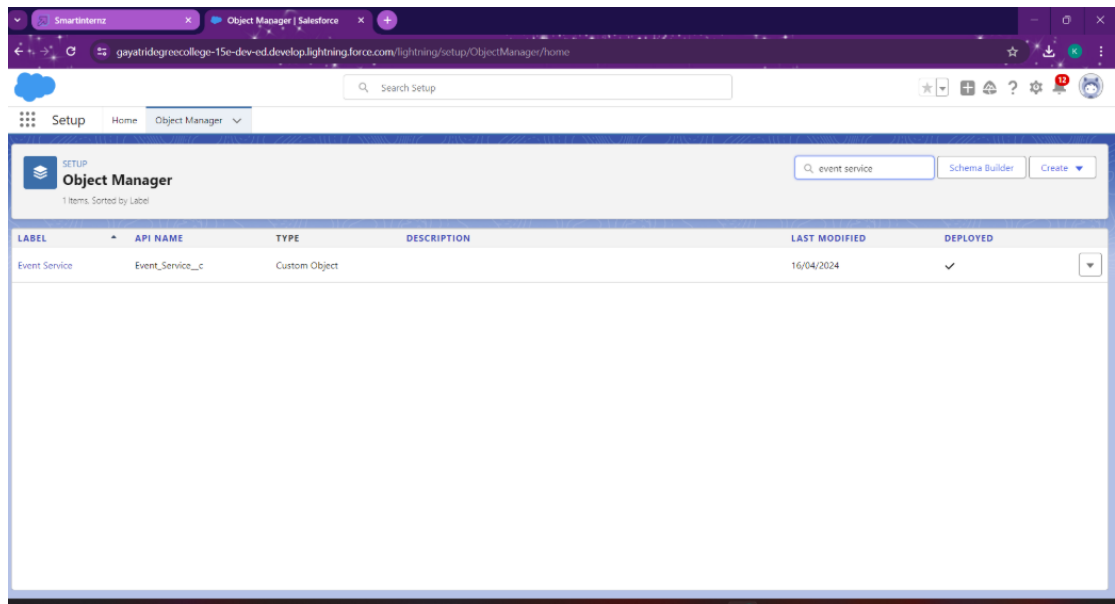
1. Click on the gear icon and then select Setup.
2. have a look on the extreme right you will find a Create Dropdown click on that &
3. select custom object
4. On the Custom Object Definition page, create the object as follows:
5. Label: Speaker
6. Plural Label: Speakers
7. Record Name: Speakers Name
8. Check the Allow Reports checkbox
9. Check the Allow Search checkbox
10. Click Save.



### → Creation Of Custom Object Event Service:

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 masterdetail relationships.

1. Click on the gear icon and then select Setup
2. . 2. have a look on the extreme right you will find a Create Dropdown click on that &
3. select custom object
4. On the Custom Object Definition page, create the object as follows:
5. Label: Event Service
6. Plural Label: Event Services
7. Record Name: Event Services Name
8. Check the Allow Reports checkbox
9. Check the Allow Search checkbox
10. Click Save.



## Milestone – 03- Tabs

A tab is like a user interface that used to build records for objects and to view the records in the objects. Tabs basically categorize into 4 different sections-

### ❖ Standard Object Tab

Standard object tabs display data related to standard objects.

### ❖ Custom Object Tab:

Custom object tabs display data related to custom objects.

These tabs look and function just like standard tabs.

### ❖ Web Tabs:

Web Tabs display any external Web-based application or Web page in a Salesforce tab.

### ❖ Visualforce Tabs:

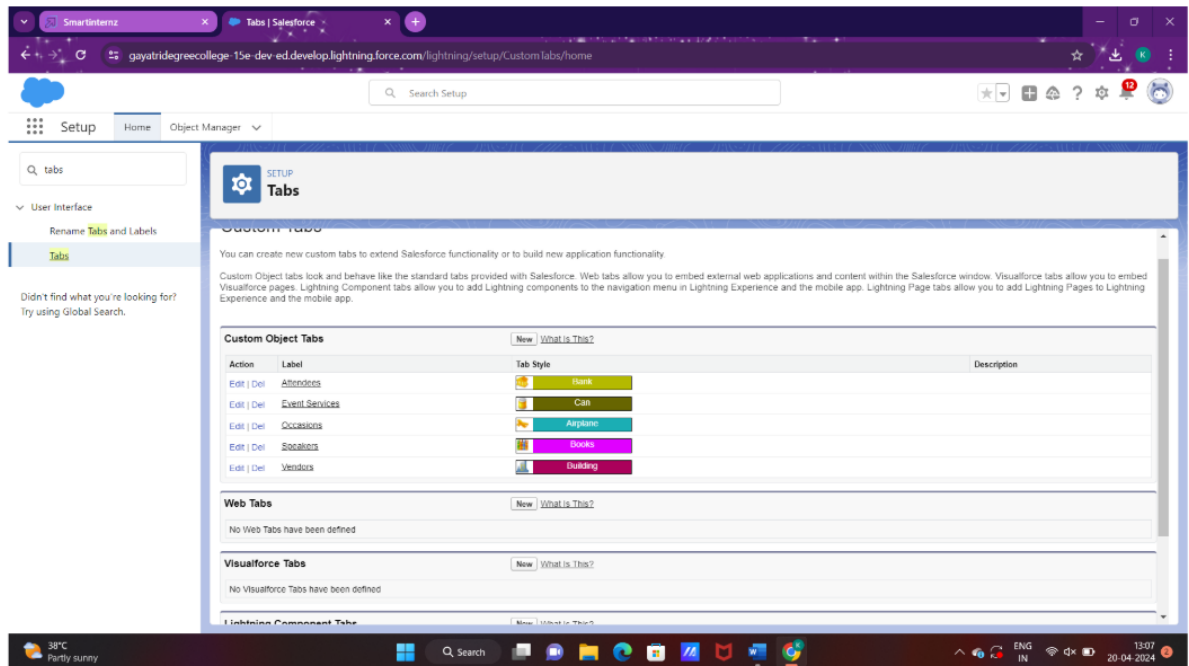
Visualforce Tabs display data from a Visualforce Page.

## ➔ Creation Of Custom Tab- Occasion, Attendee, Speaker, Vendor, Event service

1. Navigate to setup and home
2. Enter Tabs in Quick Find Box and select Tabs
3. Under Custom Object Tabs, click New
4. For Object, select occasion
5. For Tab Style, select any icon

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

7. Now create custom Tabs for Attendee, Speaker, Vendor, Event service by following above steps.



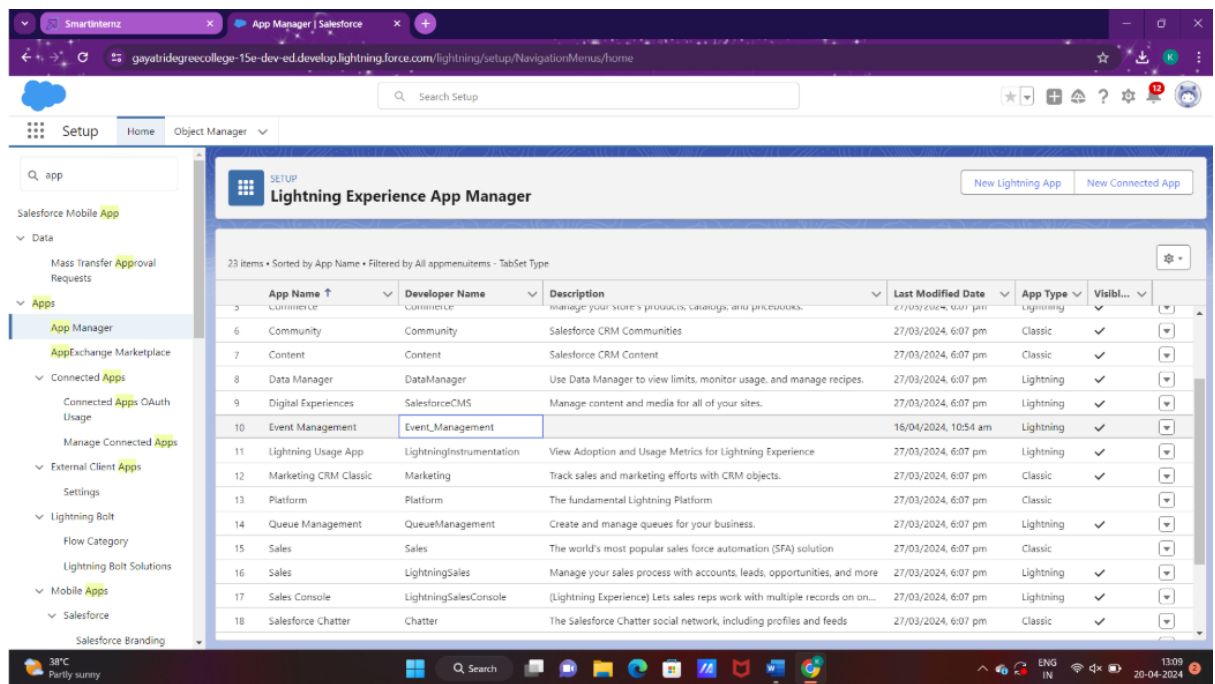
## Milestone – 04- Lightning App

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. There are 2 types of Salesforce applications: 1) Standard Apps 2) Custom Apps

### ❖ Creation Of Event Management App

1. Navigate to setup and home
2. enter App Manager in the Quick Find and select App Manager
3. Click New Lightning App. Enter Event Management as the App Name, then click Next.
4. Under App Options, leave the default selections and click Next
5. Under Utility Items, leave as is and click Next.
6. From Available Items, select Occasions, Attendees, speakers, vendors, Event Service,
7. Reports and Dashboards and move them to Selected Items. Click next
8. From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save &



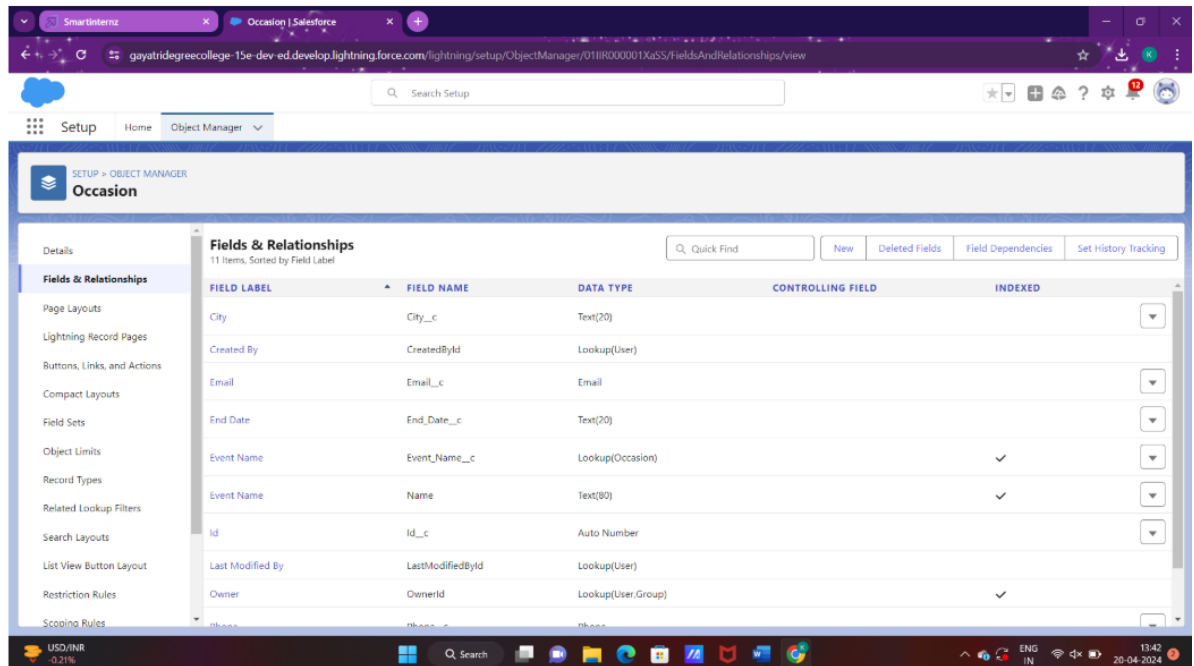


## Milestone – 05- Fields & Relationships

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. There are 2 types of fields in salesforce: 1) Standard fields 2) Custom fields

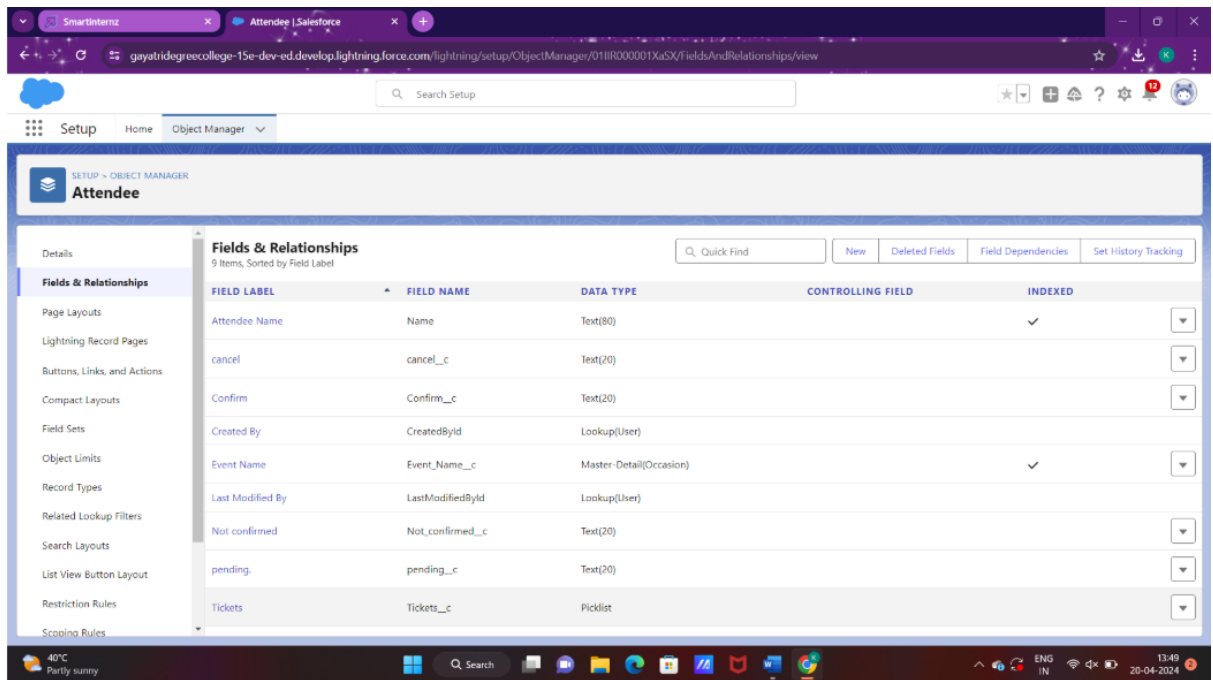
### ❖ Creation Of Fields for the Occasion Object

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 Next
5. Select the Text as the Data Type, then click Next.
6. For Field Label, enter City. And length (20).
7. Click Next, Next, then Save & New.
8. Similarly create an End Date field also



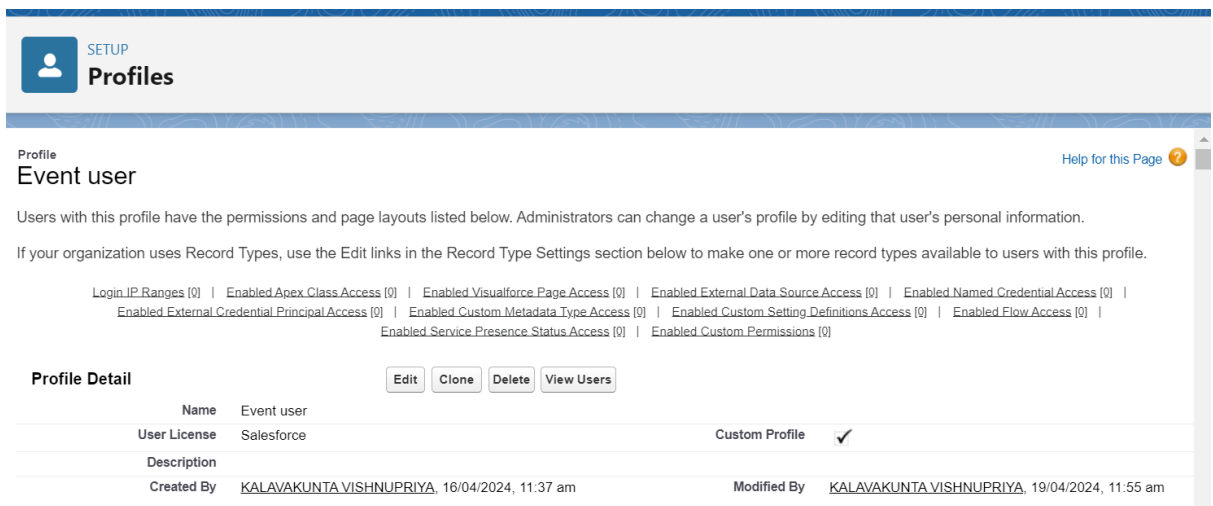
## ❖ Creation Of Fields for the Attendee Object

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, Select Attendee Object
4. Now Select Fields and relationships from setup menu of the Attendee object.
5. Click new and select picklist fields
6. Next enter label name Tickets and select enter values option (Premium, Gold, Silver)
7. Next, Next and Save



## ❖ Creation Of Master-Detail Relationship

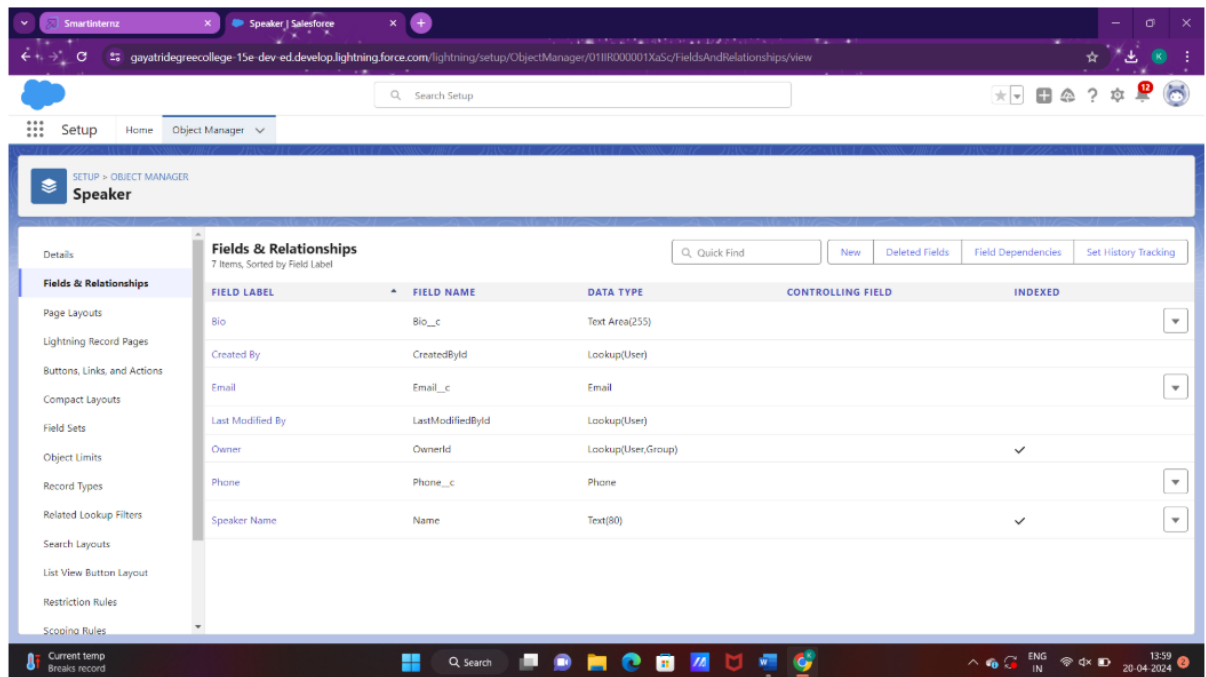
1. Click fields & relationships and click new
2. Select Master relationship & click next
3. choose the related object as Occasion & click next
4. Give the field label (Event Name) & click next, next, next and save



## ❖ Creation Of Fields for the Speaker object .

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

3. Select the Phone as the Data Type, then click Next. For Field Label, Phone. 4. Click Next, next the save and New



### ❖ Creation Of Fields for the Vendor object

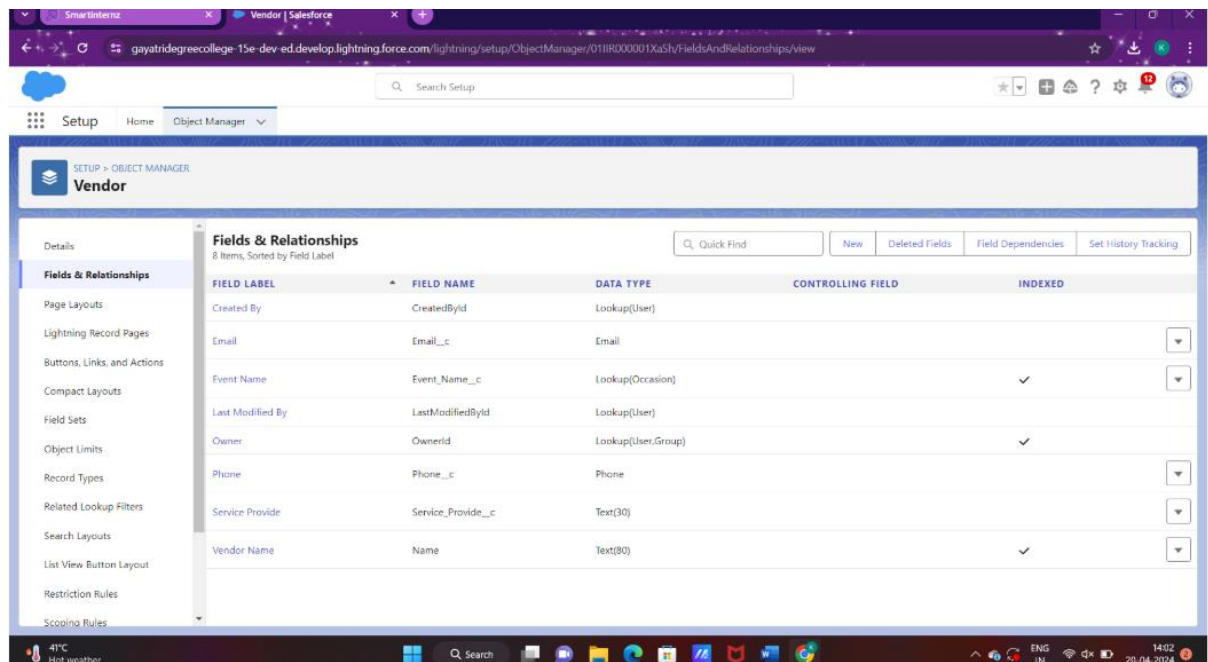
1. Select the phone as the Data Type, then click Next. For Field Label, Phone. Click Next, Next, then Save & New.

2. Select the Email as the Data Type, then click Next. For Field Label, Email. Click Next, Next, then Save & New

3. 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.

4. Select Lookup Relationship as the Data Type and click Next. For Related to, enter Occasion.

5. Click Next and for the Field Label Name. Click Next, next , next and save



## ❖ Creation Relationship on Event Service object

1. Let's create a Master-Detail relationship with Event Service object

a. Click fields & relationships and click new

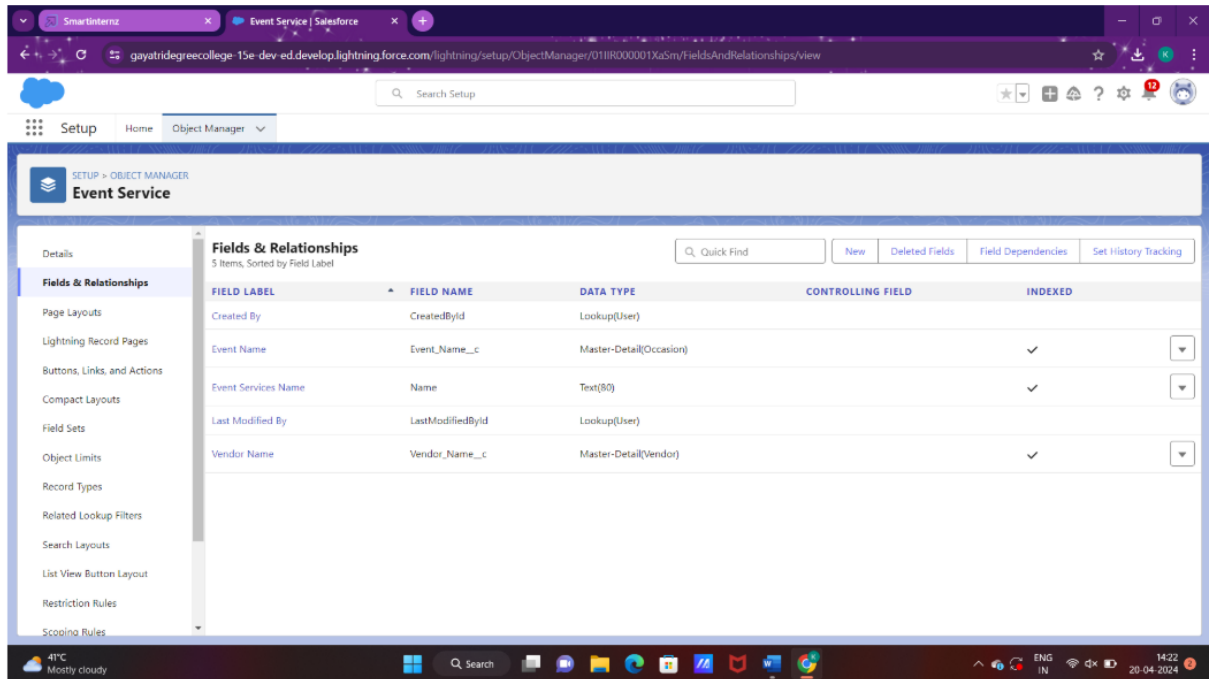
b. Select Master-Detail relationship & click next c. Choose the related object as Occasion & click next Give the field label(Event Name) & click next, next, next and Save

2. Let's create a Master-Detail relationship with Event Service object

a. click fields & relationships and click next

b. Select Master- Detail relationships and click new

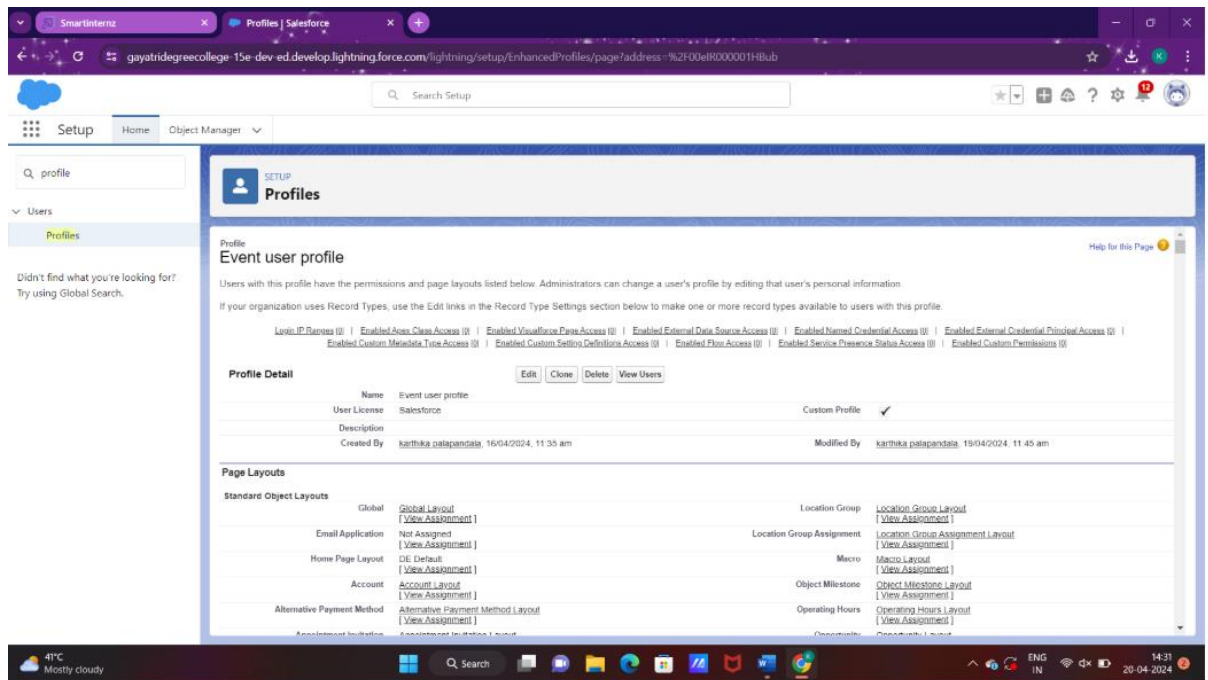
c. Choose the related object as Vendor & click next and Give the field label (Vendor Name) & click next,next,next and save



## Milestone – 06 – Profile

### ❖ Creation Of profile

1. From Setup enter Profiles in the Quick Find box, and select Profiles.
2. From the list of profiles, find Standard User.
3. Click Clone.
4. For Profile Name, enter Event User profile.
5. Click Save.
6. While still on the Event profile page, then click Edit
7. 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 “Even Vendors Profile”

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

Profile Help for this Page ?

### Event vendors

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 [0] | Enabled Apex Class Access [0] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] | Enabled External Credential Principal Access [0] | Enabled Custom Metadata Type Access [0] | Enabled Custom Setting Definitions Access [0] | Enabled Flow Access [0] | Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]

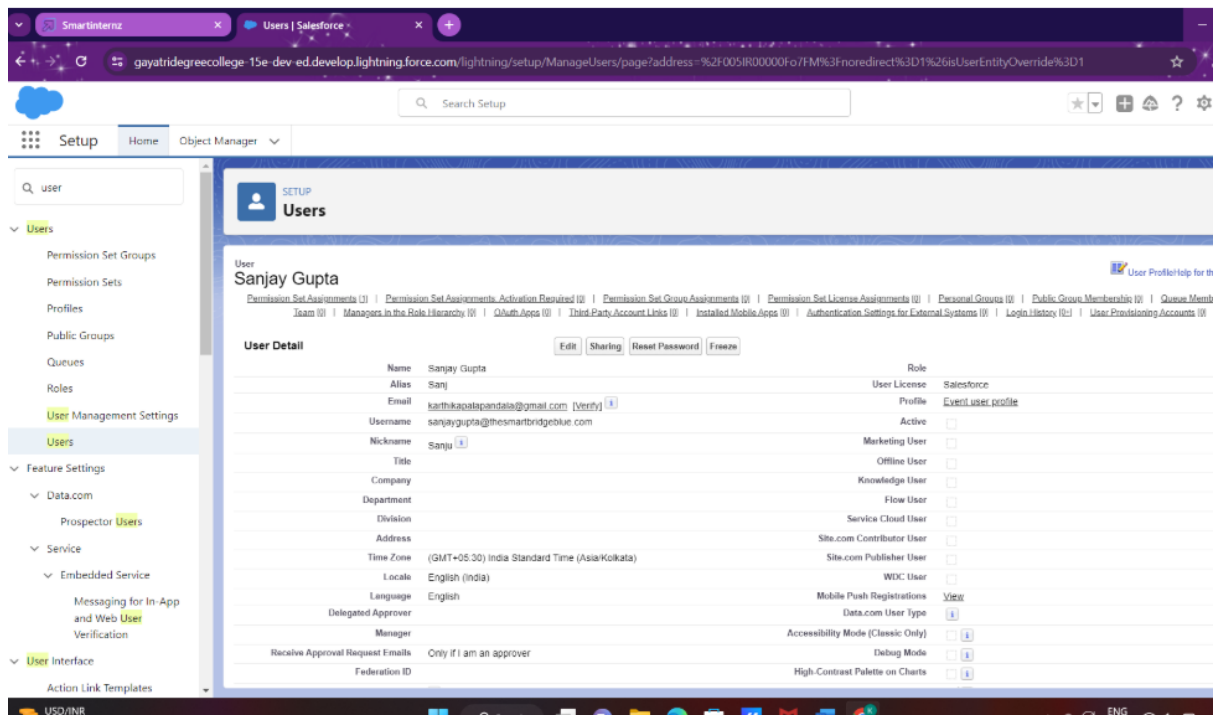
**Profile Detail** Profile: Event vendors ~ Salesforce - Developer Edition iw Users

Name	Event vendors	Custom Profile	<input checked="" type="checkbox"/>
User License	Salesforce		
Description			
Created By	KALAVAKUNTA VISHNUPRIYA, 16/04/2024, 11:41 am	Modified By	KALAVAKUNTA VISHNUPRIYA, 19/04/2024, 11:55 am

## Milestone – 07– User

### ❖ Creating an user

1. From setup type “users” in quick find and select users, then click New User
2. First Name: Sanjay
3. Last Name: Gupta Alias: Sanj
4. Email: provide your personal email id for future reference Username: [sanjaygupta@thesmartbridge.com](mailto:sanjaygupta@thesmartbridge.com)
5. Nickname: Sanju
6. Role: leave it as default
7. User License: Salesforce
8. Profile: Event User Profile
9. Click on save.



#### ❖ Creating another user

1. 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 Use
2. First Name: Rahul
3. Last Name: Sharma
4. Alias: Rahu
5. Email: provide your personal email id for future reference
6. Username: [rahulsharma@thesmartbridge.com](mailto:rahulsharma@thesmartbridge.com)
7. Nickname: Rahu
8. Role: leave it as default
9. User License: Salesforce Platform
10. Profile: Event Vendors profile

## Milestone – 08– Permission Sets



## ❖ Creating a Permission Set

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

The screenshot shows the 'Permission Sets' setup page in Salesforce. The page title is 'Permission Sets' with a 'SETUP' icon. Below the title, the specific permission set 'Event Permits' is selected. A search bar 'Find Settings...' is present, along with buttons for 'Clone', 'Edit Properties', 'Manage Assignments', and 'View Summary (Beta)'. The 'Permission Set Overview' section displays the following details:

Description	API Name
Event Permits	Event_Permits
License	Namespace Prefix
Session Activation Required <input type="checkbox"/>	Created By KALAVAKUNTA VISHNUPRIYA, 16/04/2024, 12:02 pm
Permission Set Groups Added To 0	Last Modified By KALAVAKUNTA VISHNUPRIYA, 16/04/2024, 12:02 pm

The 'Apps' section is visible below the overview, with a sub-section 'Assigned Apps' and a description: 'Settings that specify which apps are visible in the app menu'.

## ❖ Creating another Permission Set:

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

The screenshot shows the 'Permission Sets' setup page in Salesforce for a new permission set. The page title is 'Permission Sets' with a 'SETUP' icon. Below the title, the specific permission set 'Vendor Permits and Save' is selected. A search bar 'Find Settings...' is present, along with buttons for 'Clone', 'Edit Properties', 'Manage Assignments', and 'View Summary (Beta)'. The 'Permission Set Overview' section displays the following details:

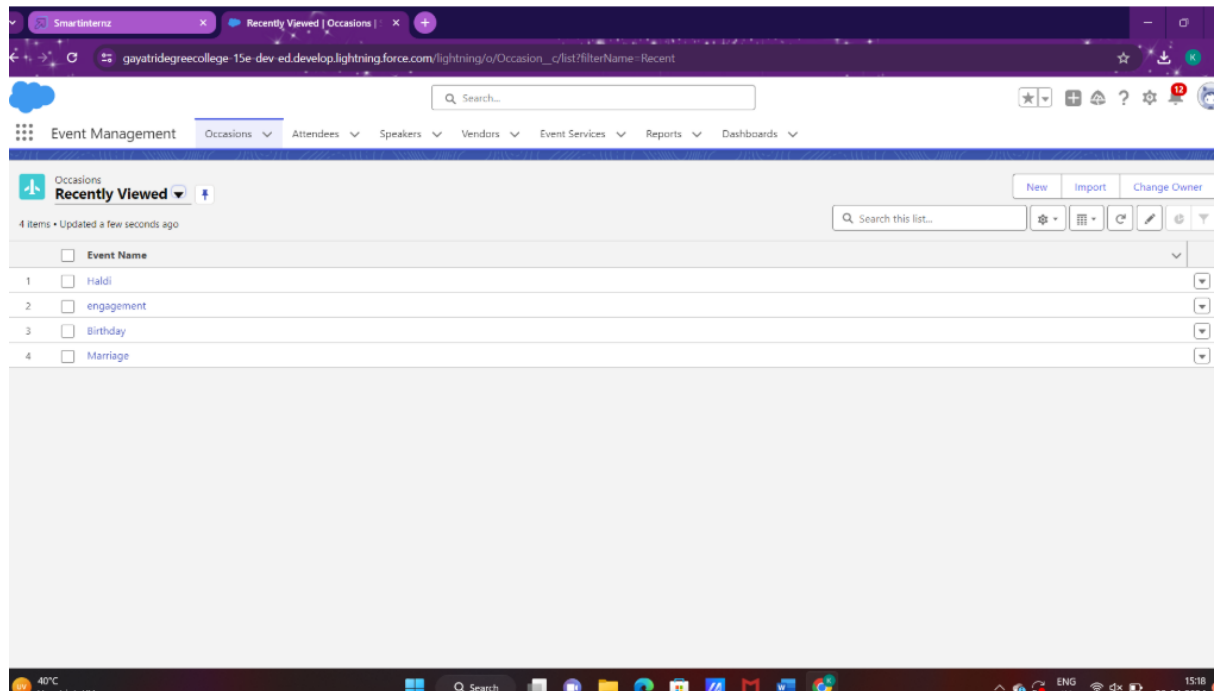
Description	API Name
Vendor Permits and Save	Vendor_Permits_and_Save
License	Namespace Prefix
Session Activation Required <input type="checkbox"/>	Created By KALAVAKUNTA VISHNUPRIYA, 16/04/2024, 12:10 pm
Permission Set Groups Added To 0	Last Modified By KALAVAKUNTA VISHNUPRIYA, 16/04/2024, 12:10 pm

The 'Apps' section is visible below the overview, with a sub-section 'Assigned Apps' and a description: 'Settings that specify which apps are visible in the app menu'.

## Milestone – 08– User Adoption

### ❖ Create a Record (Occasion)

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



### ❖ View a Record (Occasion)

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

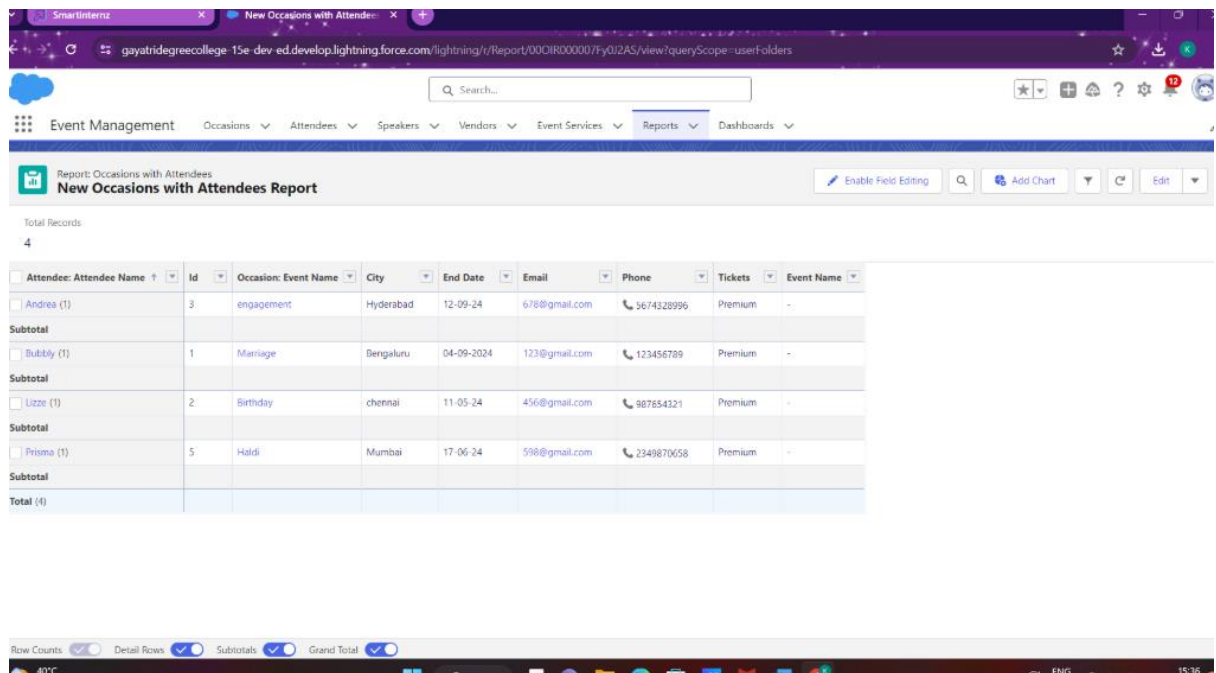
### ❖ Delete a Record (Occasion)

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

## Milestone – 09-Reports

### ❖ Creating a Report

1. From the reports tab click on 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



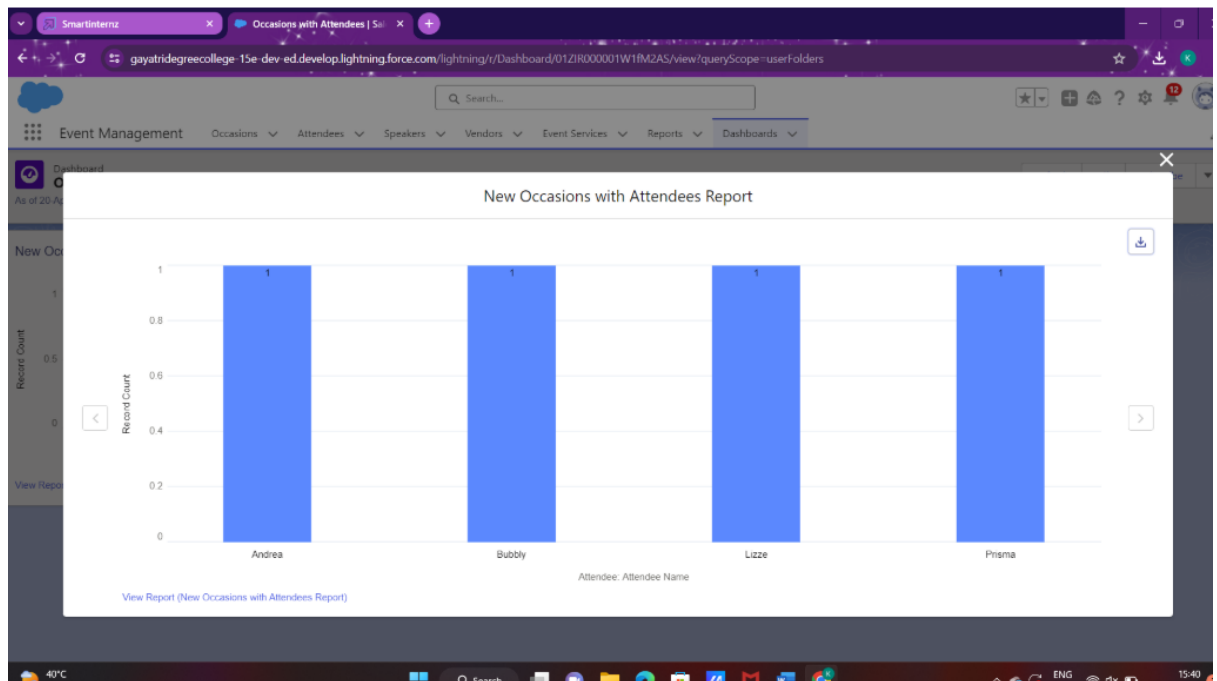
The screenshot displays the Lightning Force Reports interface. At the top, there's a navigation bar with tabs for Event Management, Occasions, Attendees, Speakers, Vendors, Event Services, Reports, and Dashboards. The 'Reports' tab is active, showing a 'New Occasions with Attendees Report'. Below the report title, there's a search bar and buttons for 'Enable Field Editing', 'Add Chart', and 'Edit'. The table below shows 4 total records. The table has columns for Attendee Name, Id, Occasion: Event Name, City, End Date, Email, Phone, Tickets, and Event Name. The data is grouped by Occasion: Event Name.

Attendee: Attendee Name	Id	Occasion: Event Name	City	End Date	Email	Phone	Tickets	Event Name
Andrea (1)	3	engagement	Hyderabad	12-09-24	678@gmail.com	9674328996	Premium	-
Subtotal								
Subbly (1)	1	Marriage	Bengaluru	04-09-2024	123@gmail.com	123456789	Premium	-
Subtotal								
Uzbe (1)	2	Birthday	chennai	11-05-24	456@gmail.com	987654321	Premium	-
Subtotal								
Primo (1)	5	Haldi	Mumbai	17-06-24	598@gmail.com	2349870658	Premium	-
Subtotal								
Total (4)								

## Milestone – 10-Dashboard

### ❖ Creating 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 – 11- View Reports and Dashboards

### ❖ View Report

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

**Report: Occasions with Attendees**  
**New Occasions with Attendees Report**

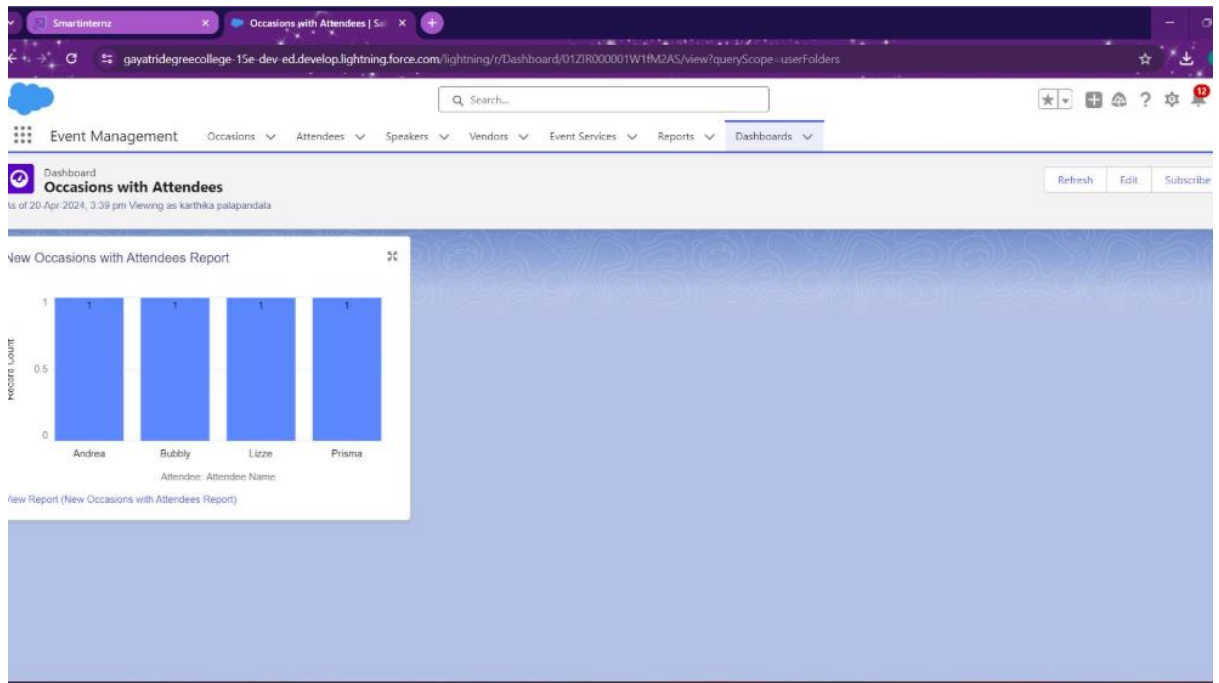
Total Records: 4

Attendee: Attendee Name	Id	Occasion: Event Name	City	End Date	Email	Phone	Tickets	Event Name
Andrea (1)	3	engagement	Hyderabad	12-09-24	678@gmail.com	5674328996	Premium	-
<b>Subtotal</b>								
Bubby (1)	1	Marriage	Bengaluru	04-09-2024	123@gmail.com	123456789	Premium	-
<b>Subtotal</b>								
Lizzie (1)	2	Birthday	chennai	11-05-24	456@gmail.com	987654321	Premium	-
<b>Subtotal</b>								
Prisma (1)	5	Haldi	Mumbai	17-06-24	598@gmail.com	2349870650	Premium	-
<b>Subtotal</b>								
<b>Total (4)</b>								

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

### ❖ View Dashboard

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



## Milestone – 12-Approval Process

### ❖ Approval Process

➔ Click Setup and select Setup.

1. 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.
2. Click Create New Approval Process and select Use Jump Start Wizard.
3. 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
4. Click on next.
5. From the field drop down select cancel and make operator equal and in value keep as true.
6. Leave as default
7. Now from fields to display column make sure that the Attendee Name is present
8. 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.
9. Then there will be dialogue box appear and select the no i will do it later.

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

11. 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.
12. Then there will be a dialogue box appear and select the no i will do it later
13. Now under Initial Submission action:
14. 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.
15. Now we will see to keep the approval steps.  
Name: Attendee records with cancel checkbox true  
Unique Name: (auto-populated), click on next step

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 let's 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.

16. Name: Not confirmed cancel Status  
Field to update: Cancel Status  
keep value as : Not confirmed
17. And make the approval Process active.

 **Approval Processes**

Approval Processes

Attendee: Attendee approval process

[« Back to Approval Process List](#)

Help for this Page ?

**Process Definition Detail**

EditCloneDeactivate

Process Name	Attendee approval process	Active	<input checked="" type="checkbox"/>
Unique Name	Attendee_approval_process	Next Automated Approver Determined By	
Description			
Entry Criteria	Attendee: cancel EQUALS true		
Record Editability	Administrator <b>ONLY</b>	Allow Submitters to Recall	<input type="checkbox"/>
Approval Assignment Email Template	Approval Processes: Attendee: Attendee approval process ~ Salesforce - Developer Edition		
Initial Submitters	Occasion Owner		
Created By	KALAVAKUNTA VISHNUPRIYA, 19/04/2024, 11:41 am		Modified By KALAVAKUNTA VISHNUPRIYA, 19/04/2024, 12:08 pm