PROJECT REPORT ON

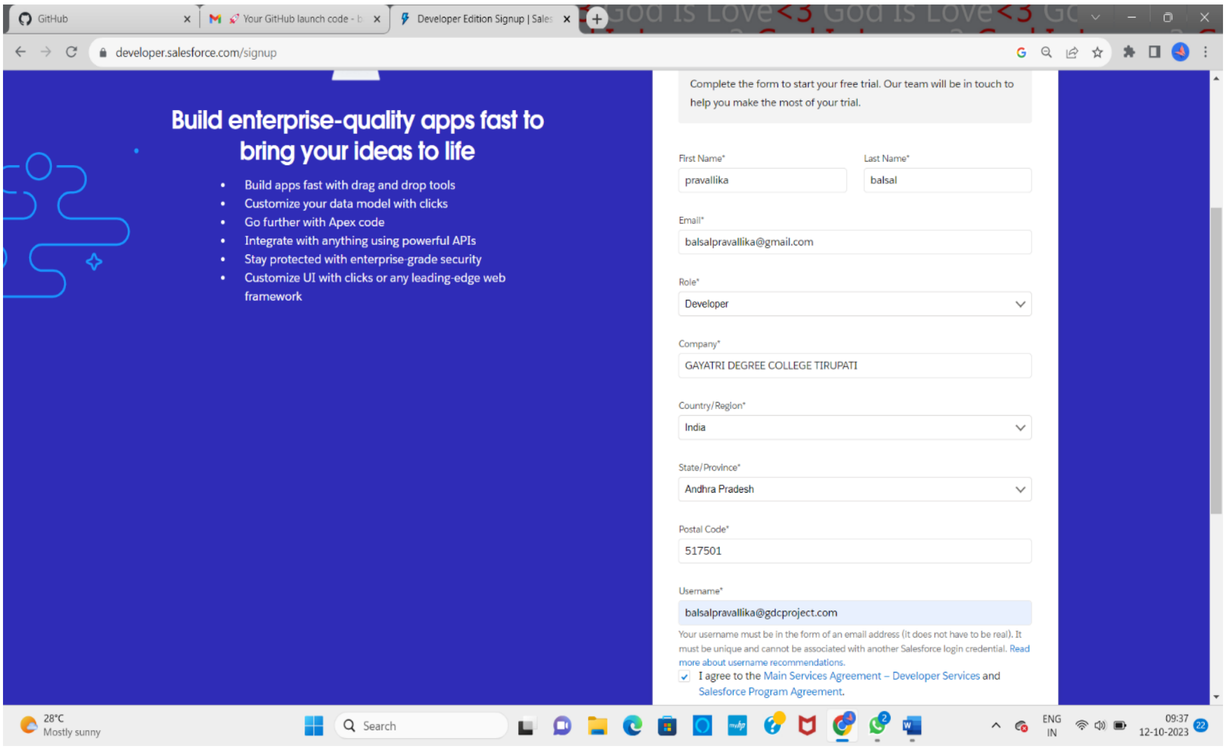
Build An Event Management System Using Salesforce - (Developer)

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
    - ➢ Click on sign up
    - ➢ On the signup form, enter the following details:
    - ➢ First name & Last name: PRAVALLIKA & BALSAL
    - ➢ Email: balsalpravallika@gmail.com
    - ➢ Role: SALESFORCE DEVELOPER
    - ➢ Company: College Name - GAYATRI DEGREE COLLEGE – TIRUPATI
    - ➢ Country: India
    - ➢ Postal Code: pin code – 517501
    - ➢ Username:balsalpravallika@gdcproject.com



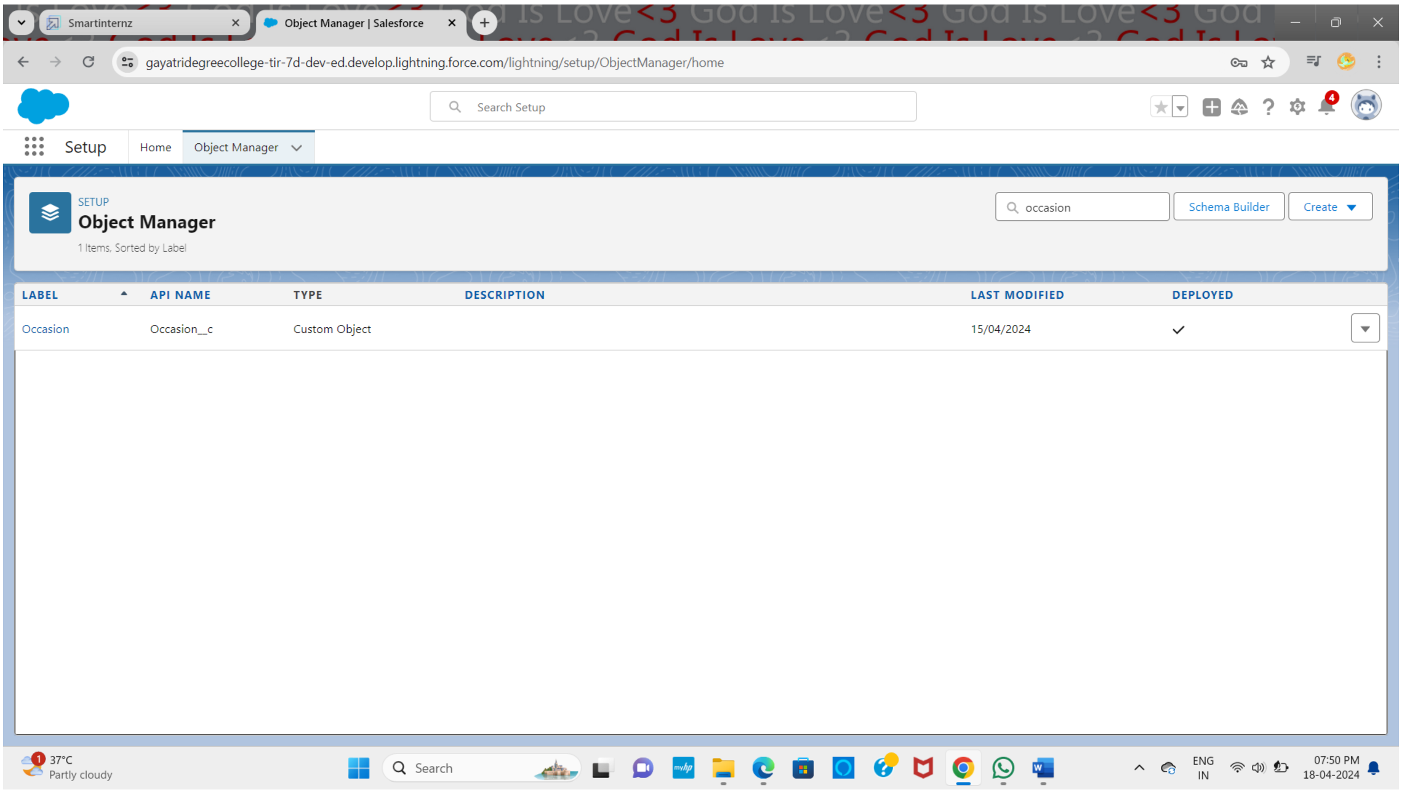
Milestone – 02- Objects Creation

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

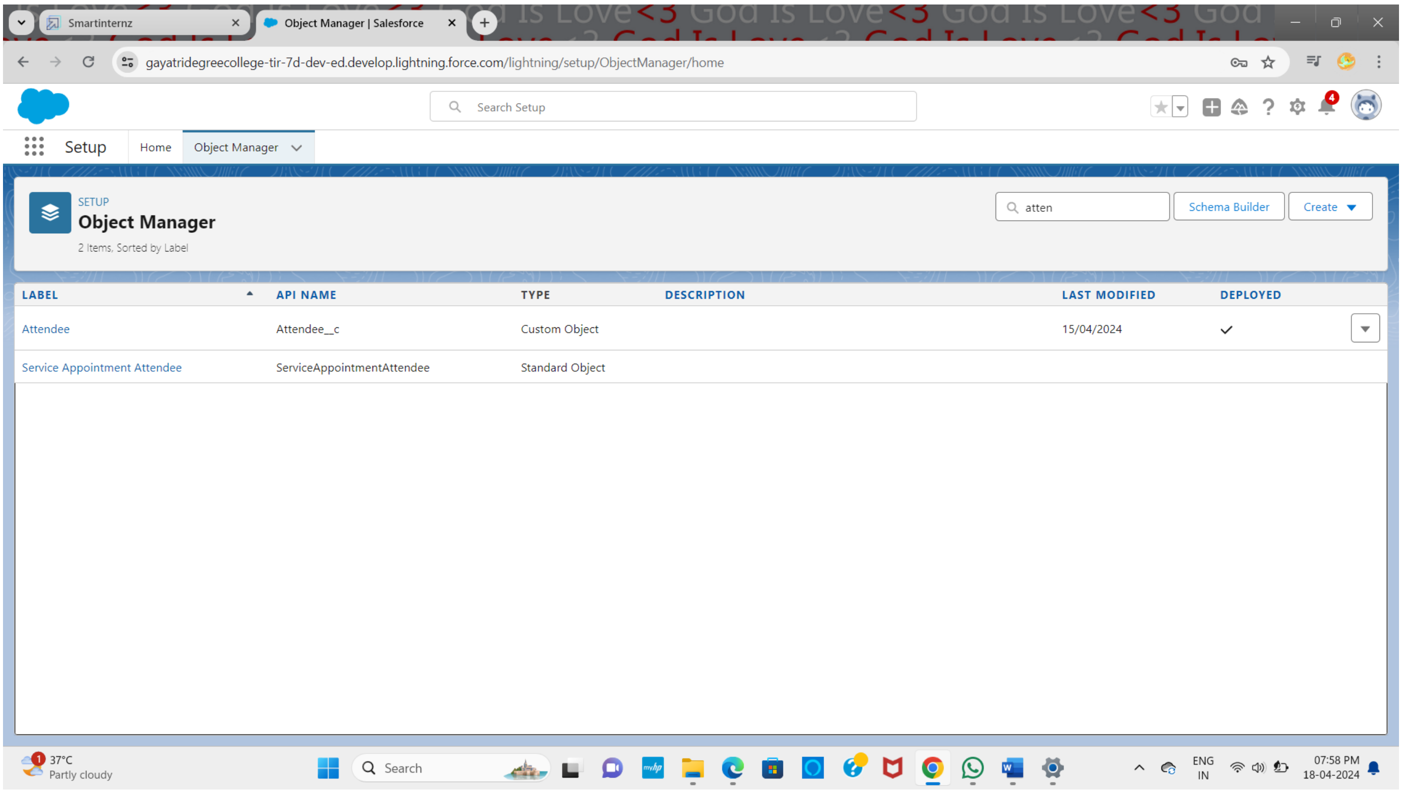
Creation Of Custom Object Occasion:

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: Event Name
8. Check the Allow Reports checkbox
9. Check the Allow Search checkbox
10. Click Save.



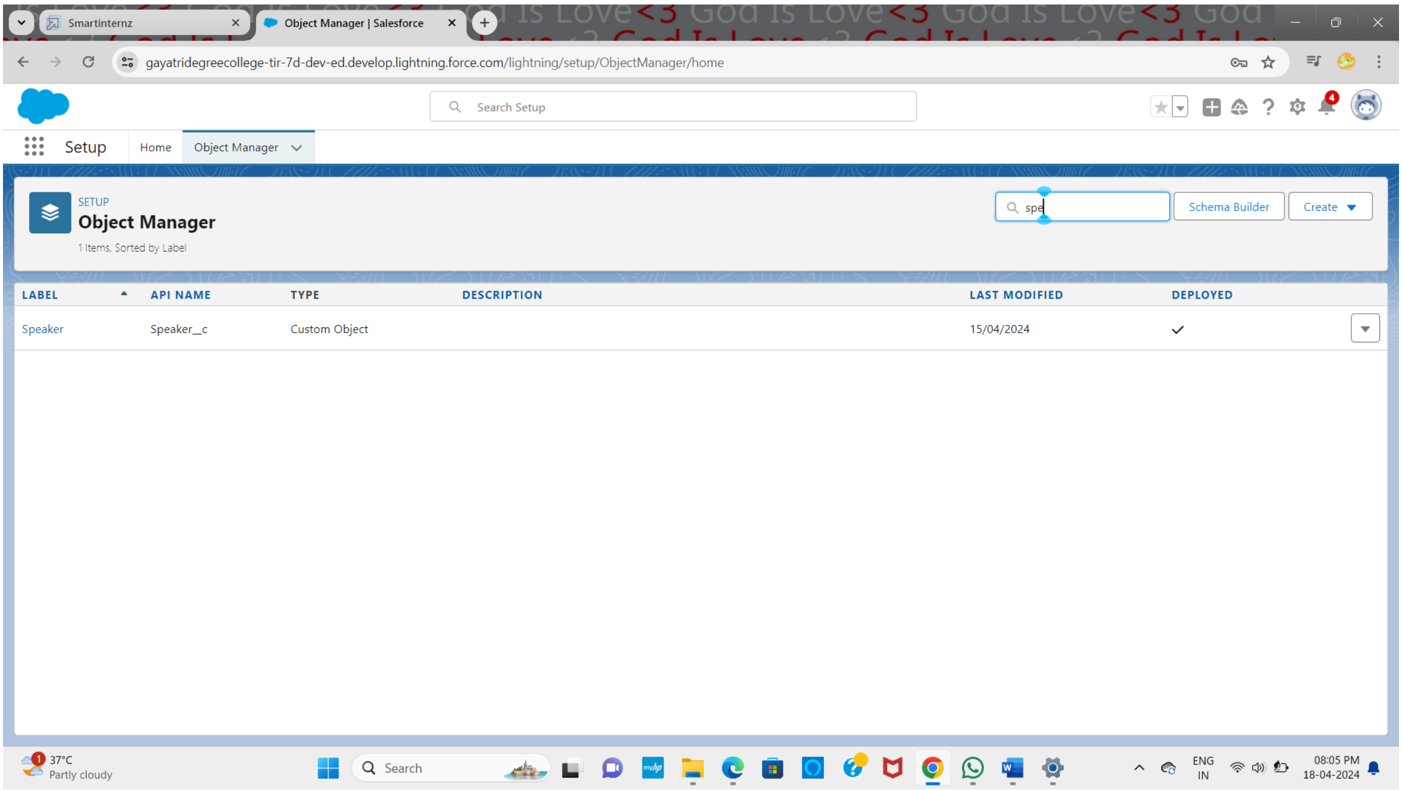
➔ Creation Of Custom Object **Attendees**:

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.



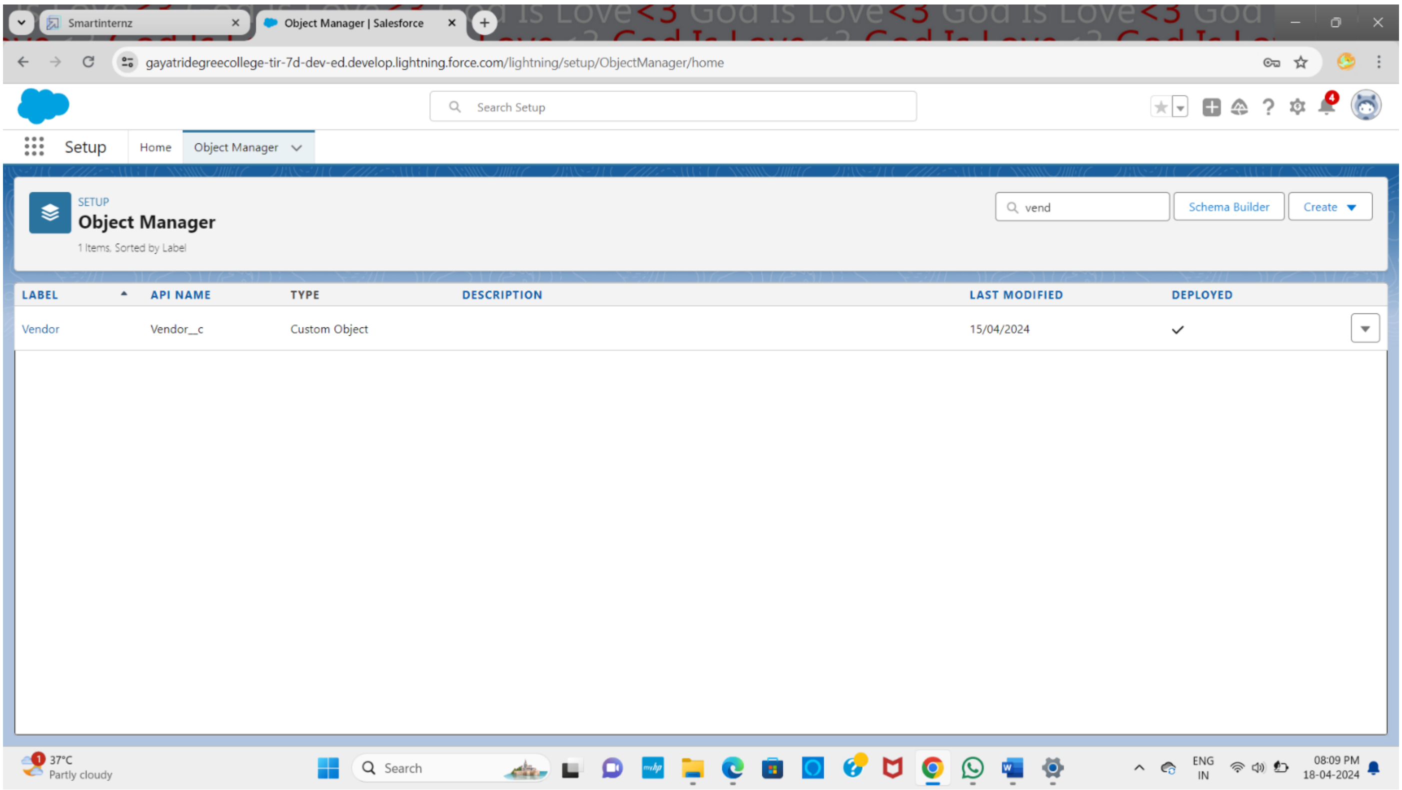
➔ Creation Of Custom Object **Speakers**:

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**:

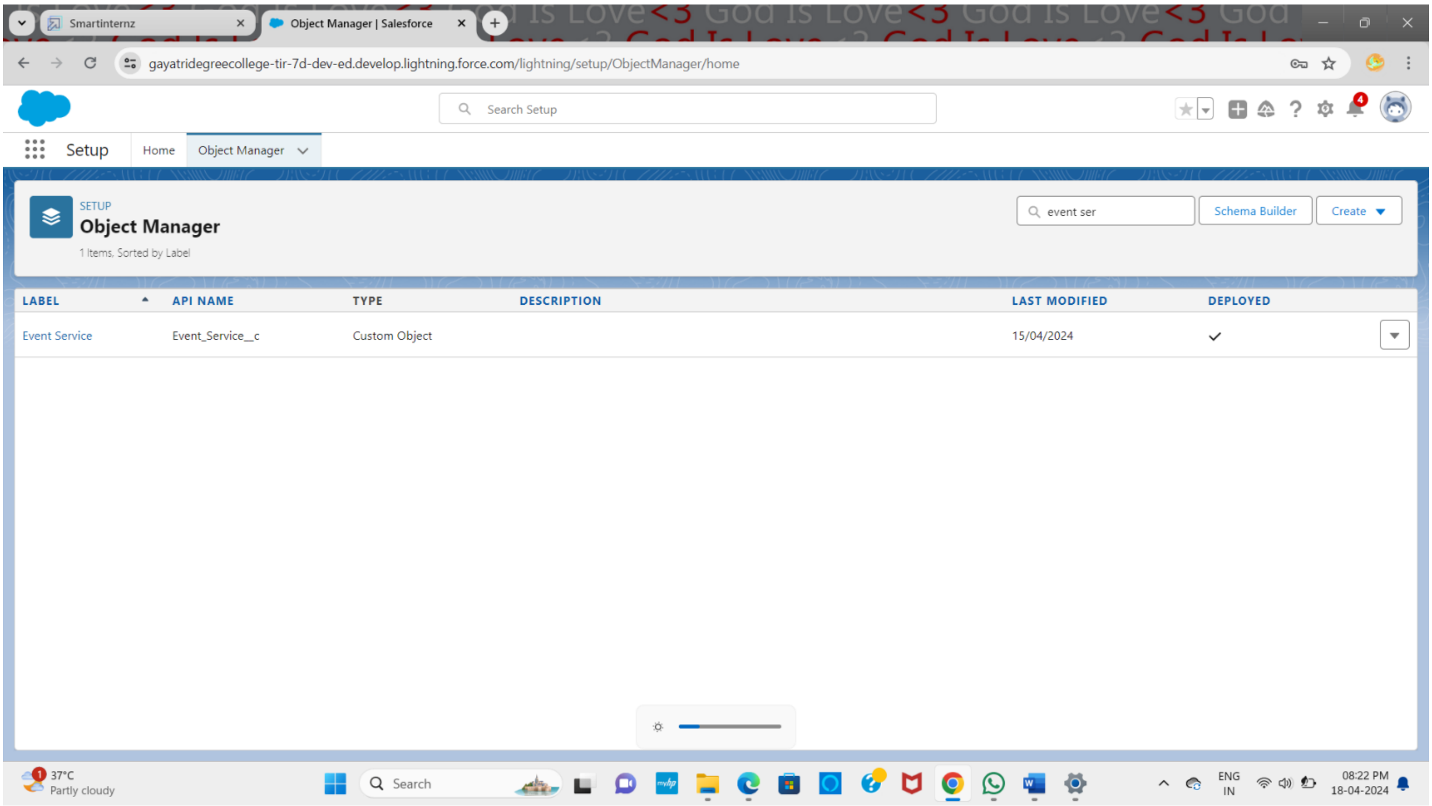
1. Click on the gear icon and then select Setup.
2. have a look on the extreme right you will find a Create Dropdown click on that &
3. select custom object
4. On the Custom Object Definition page, create the object as follows:
5. Label: Speaker
6. Plural Label: Speakers
7. Record Name: Speakers Name
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 master-detail relationships.

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: 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

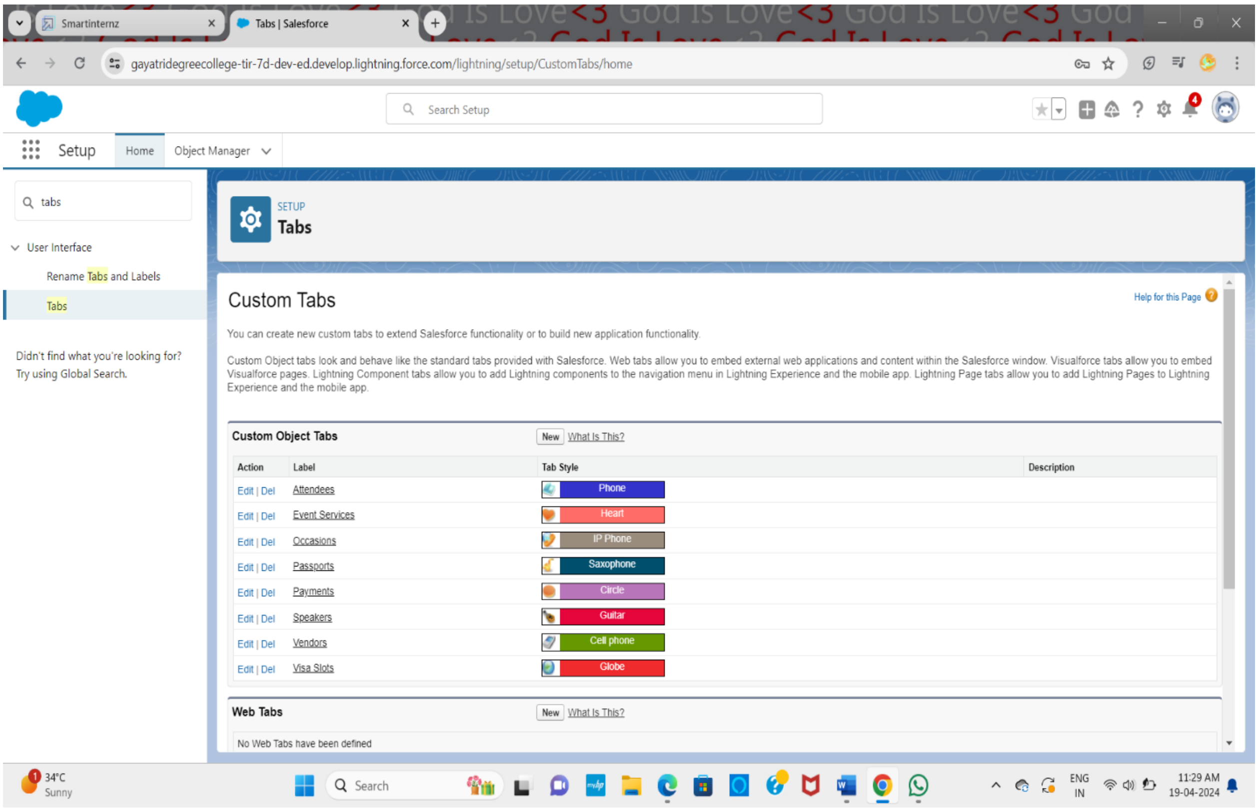
3. Under Custom Object Tabs, click New

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

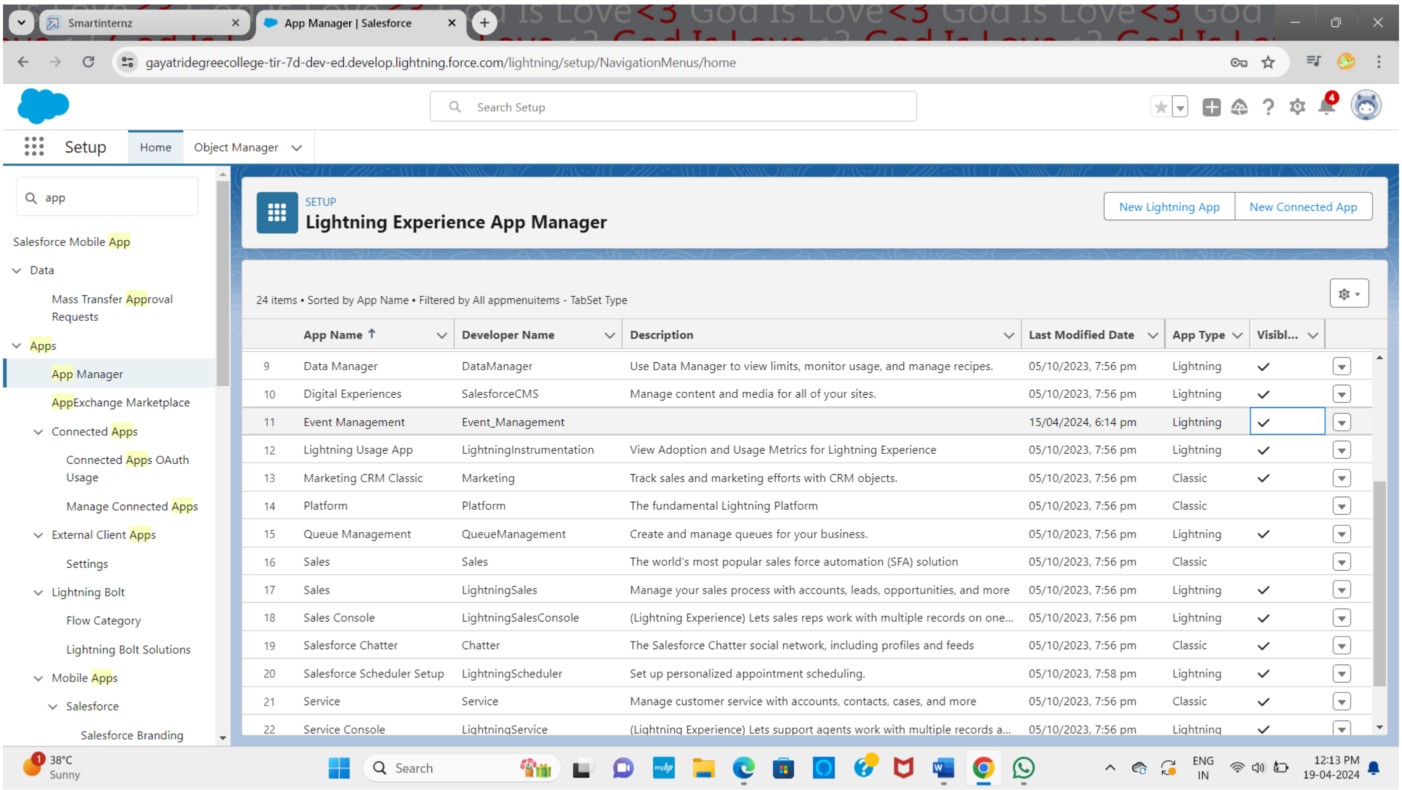
4.Under App Options, leave the default selections and click Next.

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 & Finish.



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.

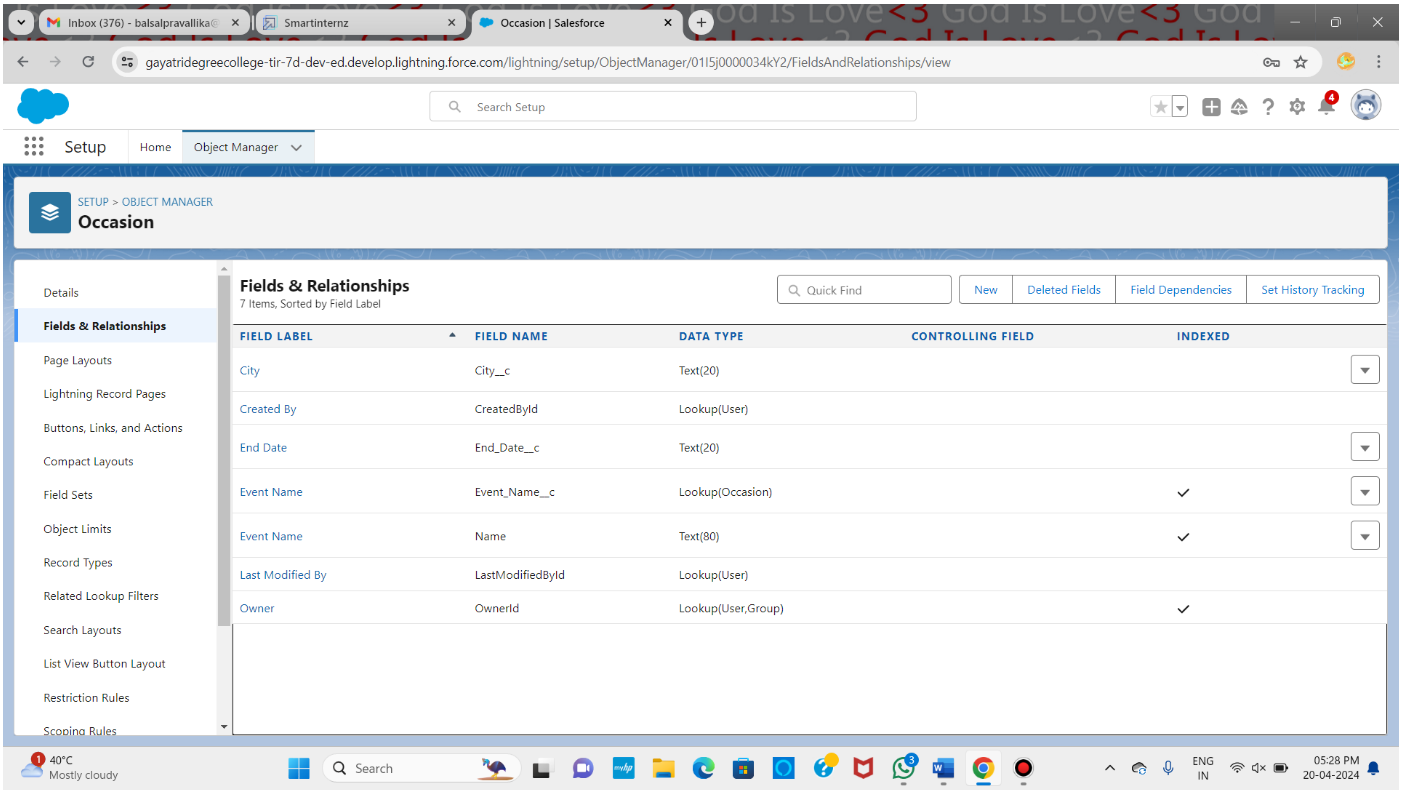
3. Select Occasion.

4. Select Fields & Relationships from the left navigation, and click New

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.



❖ Creation Of Fields for The Attendees Objects

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

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

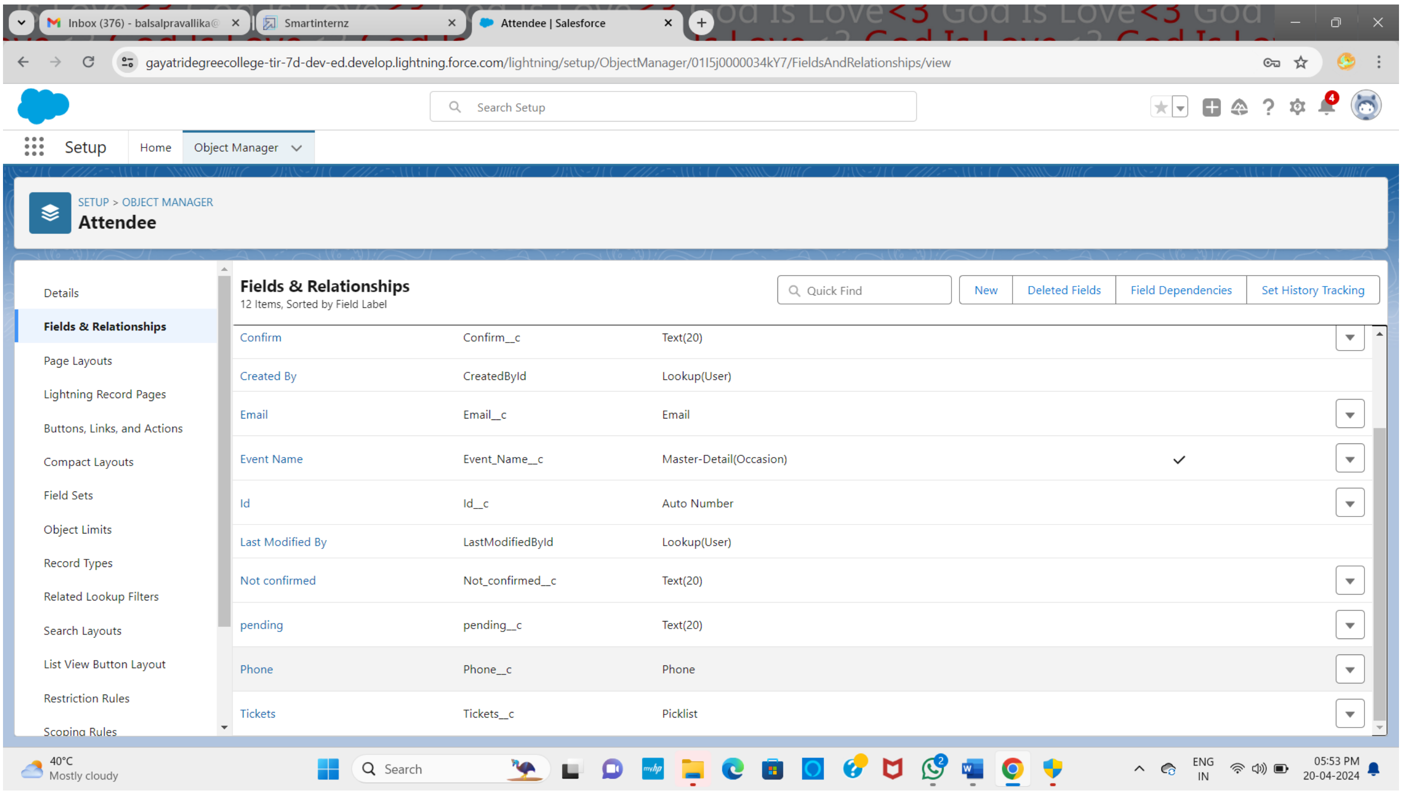
3. After the above steps, Select Attendee Object

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 (Prememium, Gold, Silver)

7.click next, next, save.



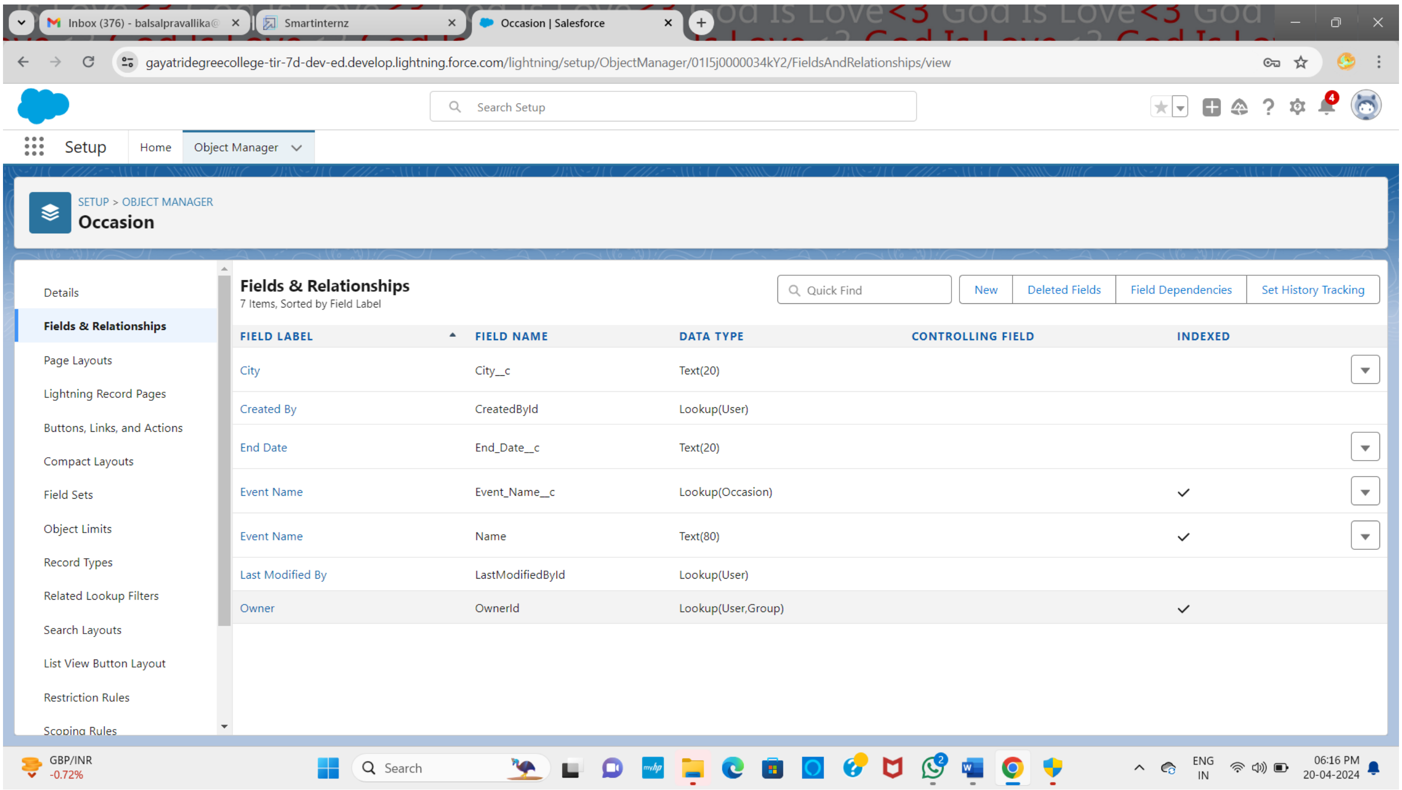
❖ Creation Of Master-Detail Relationship

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 Speakers Objects

1.Select the Text Area as the Data Type, then click Next. For Field Label, enter Bio.

2.Click Next, Next, then Save & New.

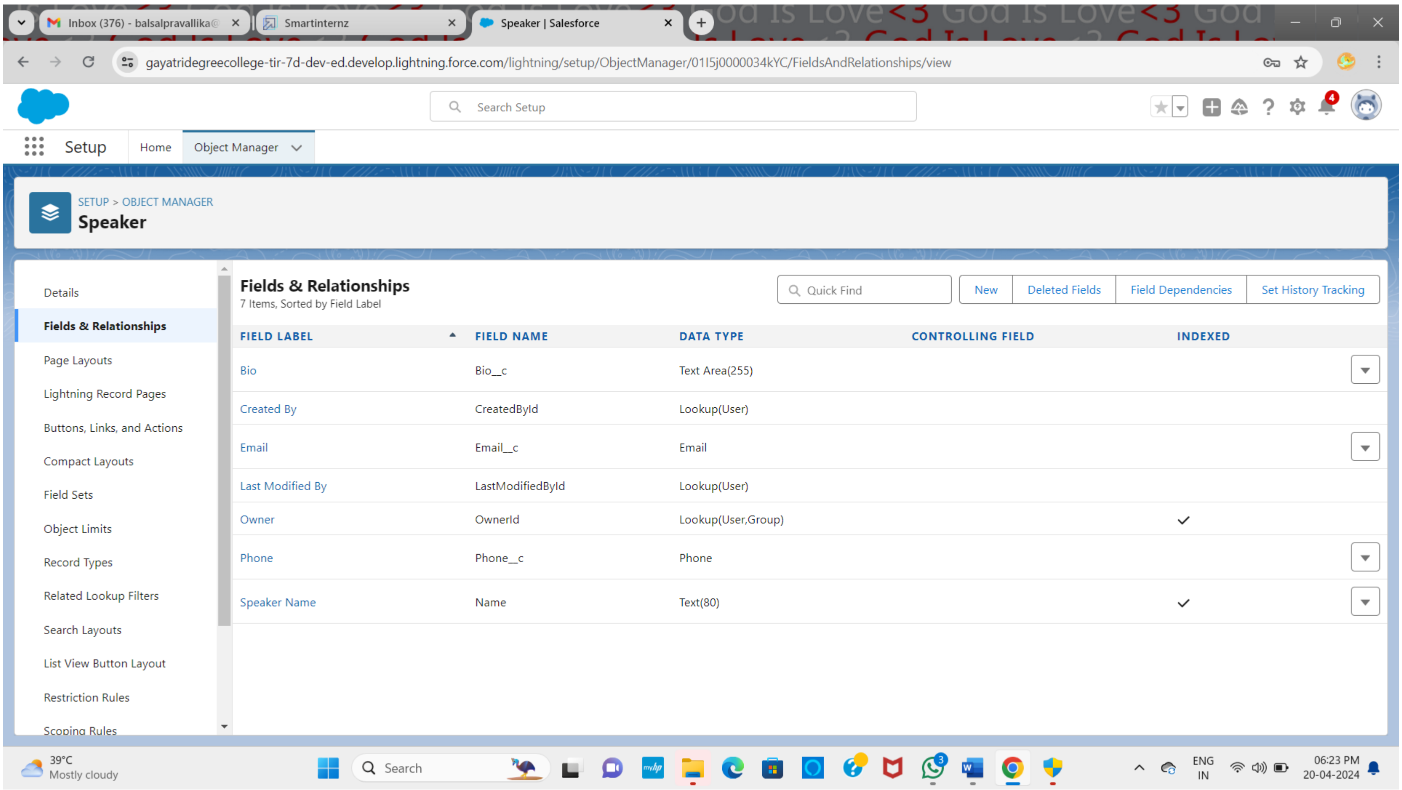
3.Select the Email as the Data Type, then click Next. For Field Label, Email.

4.Click Next, Next, then Save & New

5.Select the Phone as the Data Type, then click Next.

6.For Field Label, Phone.

7.click next, next, save.



❖ Creation Of Fields for The Vendors Objects

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

2. Click Next, Next, then Save & New.

3. Select the Email as the Data Type, then click Next. For Field Label, Email.

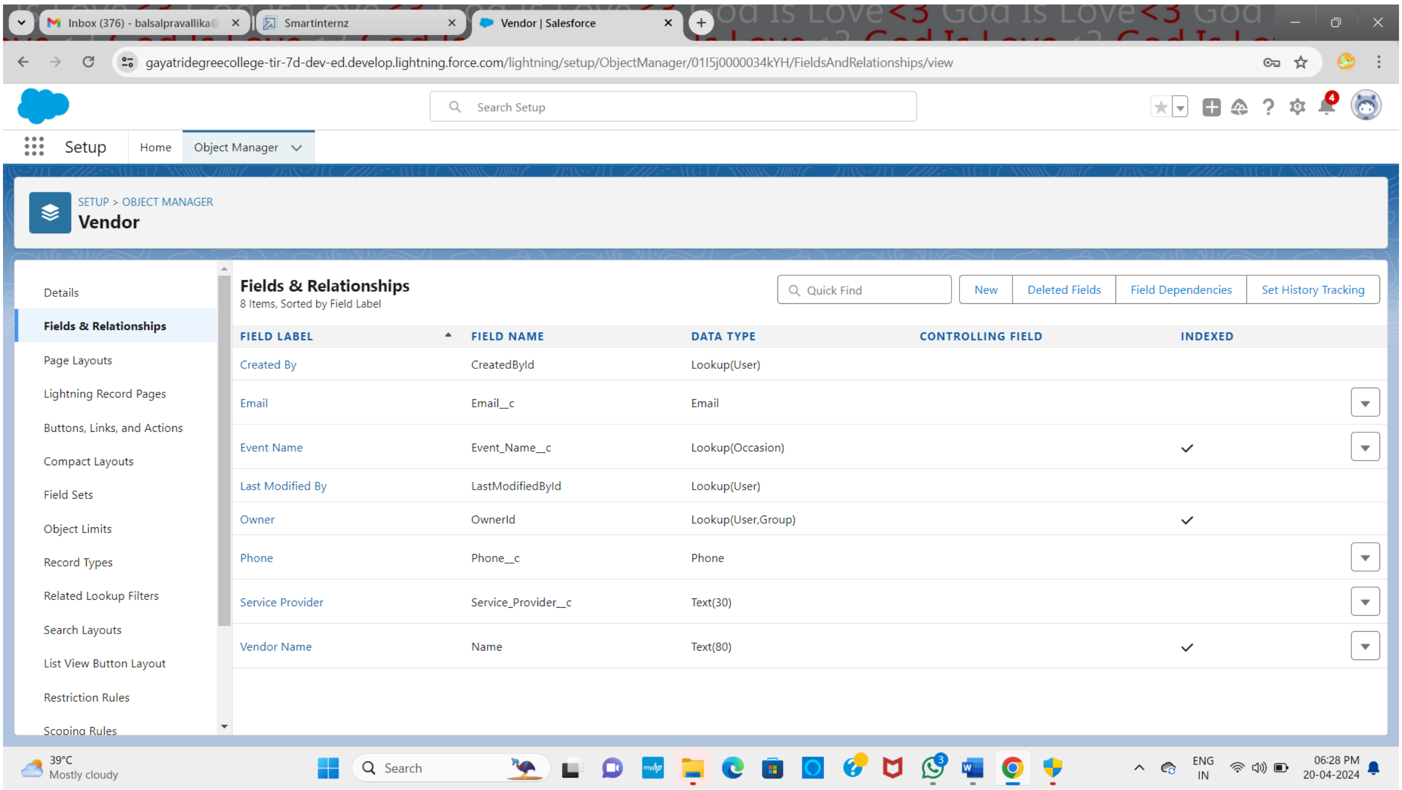
4. Click Next, Next, then Save & New

5. Select the Text as the Data Type, then click Next.

6. For Field Label, enter Service Provider and length (30). Click Next, Next, then Save & New.

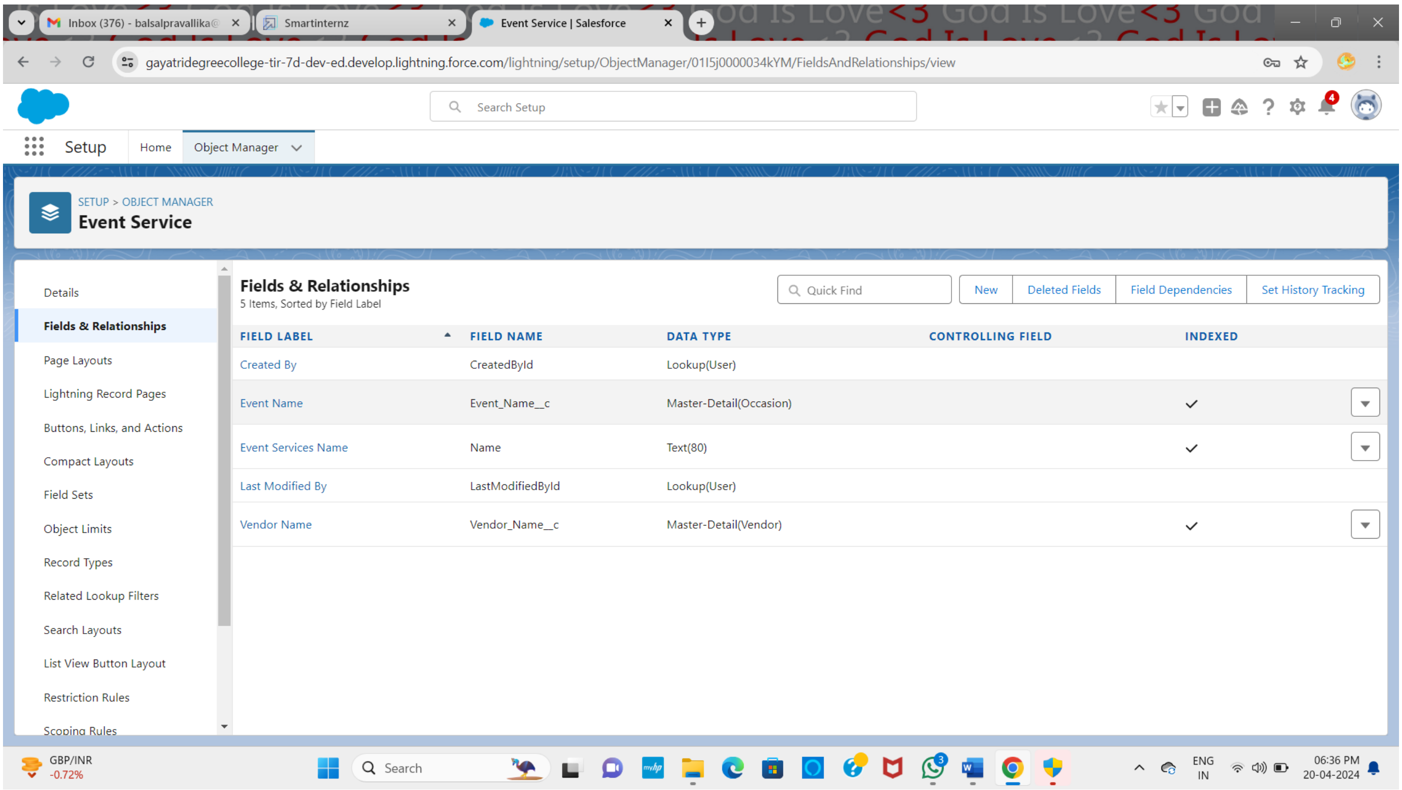
7. Select Lookup Relationship as the Data Type and click Next. For Related to, enter Occasion.

8. Click next, next, save.



❖ Creation Relationship on Event Service Objects

1. Let's create a Master-Detail relationship with Event Service object
2. Click fields & relationships and click new
3. Select Master-Detail relationship & click next
4. Choose the related object as Occasion & click next Give the field label(Event Name) & click next,
5. next, next and Save
6. Let's create a Master-Detail relationship with Event Service object
7. click fields & relationships and click next
8. Select Master- Detail relationships and click new
9. Choose the related object as Vendor & click next and give the field label (Vendor Name)
10. Click next , save



Milestone – 06- Profile

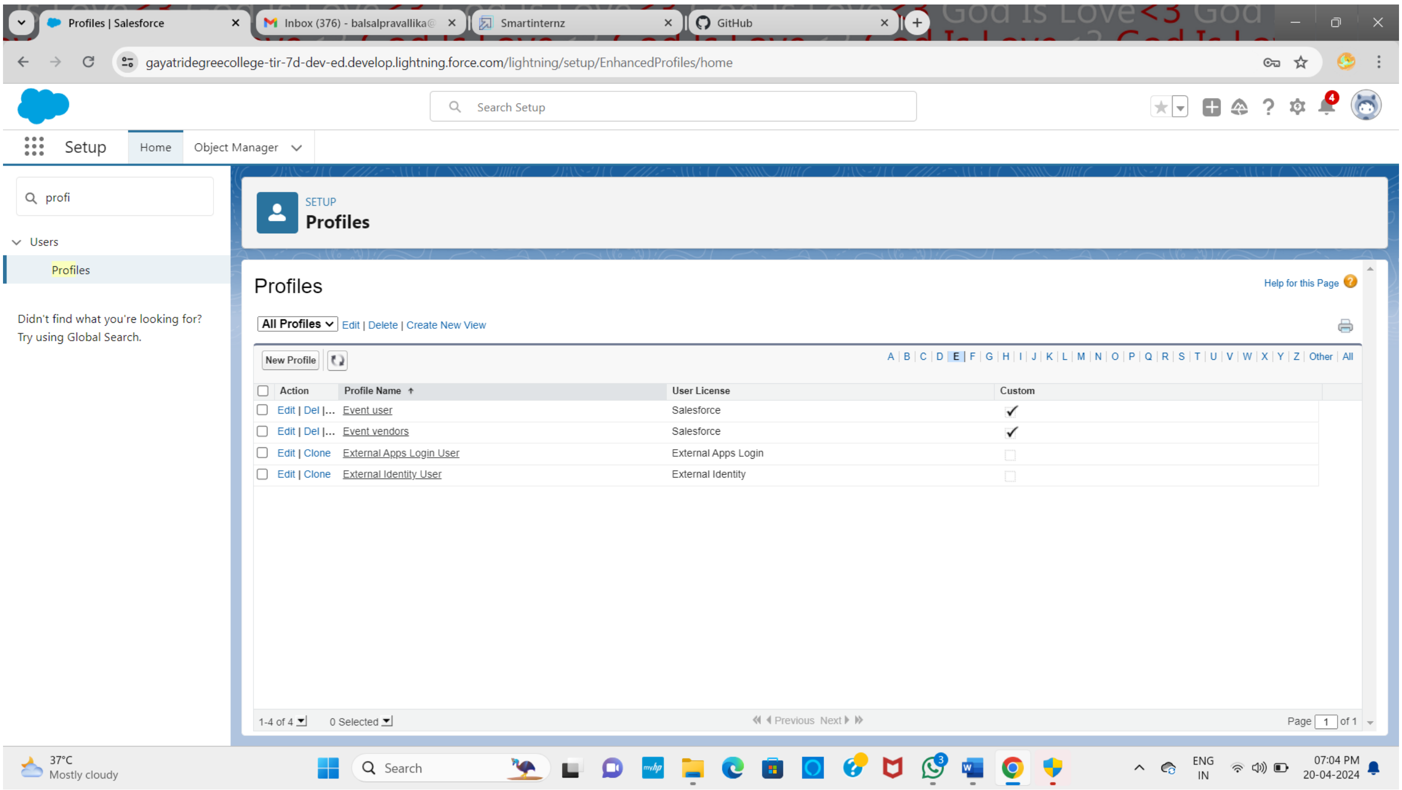
A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls "Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login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

❖ Creation On 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 an Give view all access permissions to the Atteendees,

   Speakers and vendors

8. Repeat the same steps to create event vendors profile.



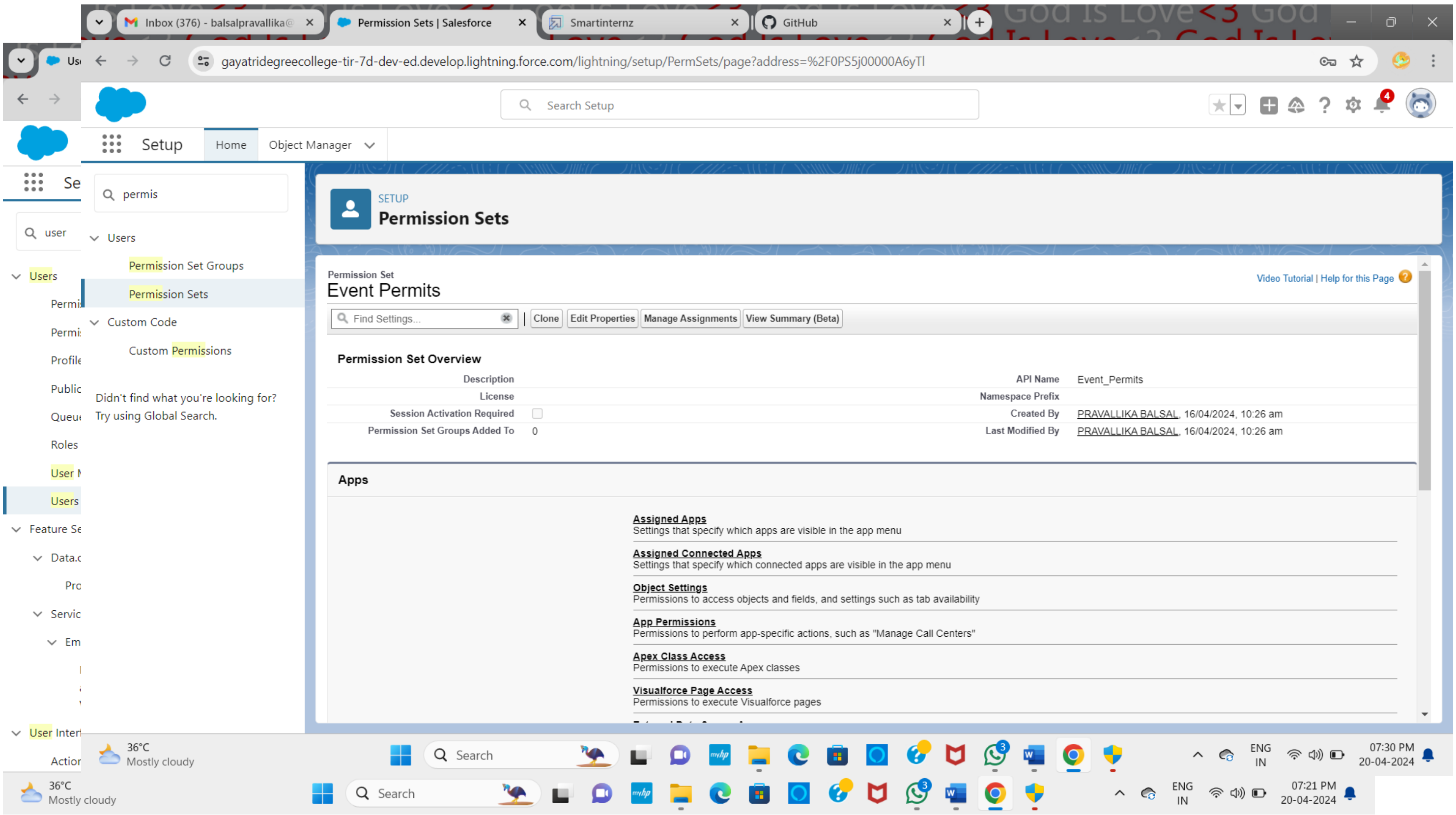
Milestone – 07- User

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.

❖ Creating A User

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

10. Follow the same steps for Rahul sharma

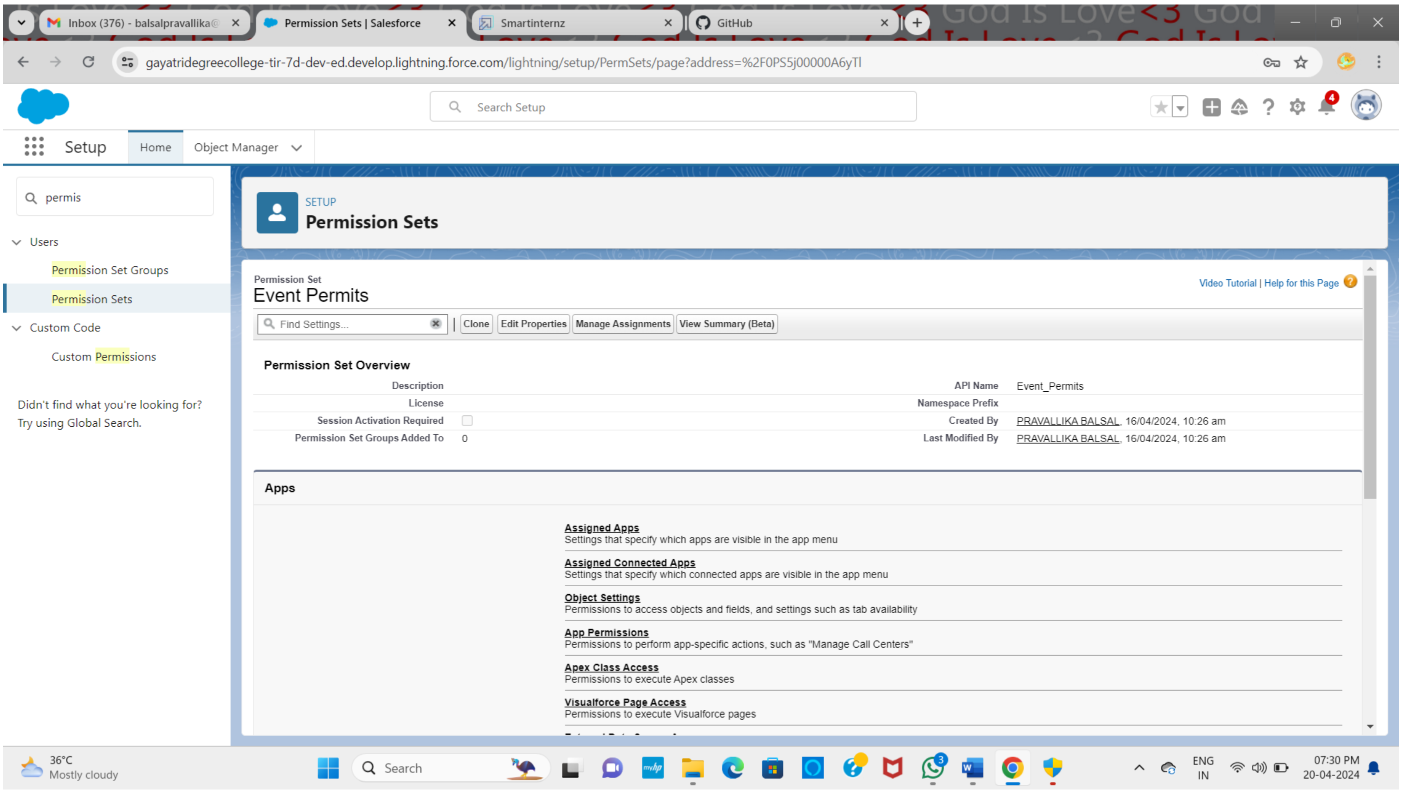


Milestone – 08- Permission Sets

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.

❖ 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 next Assign ,Done
6. Follow the above steps to create another permission set.



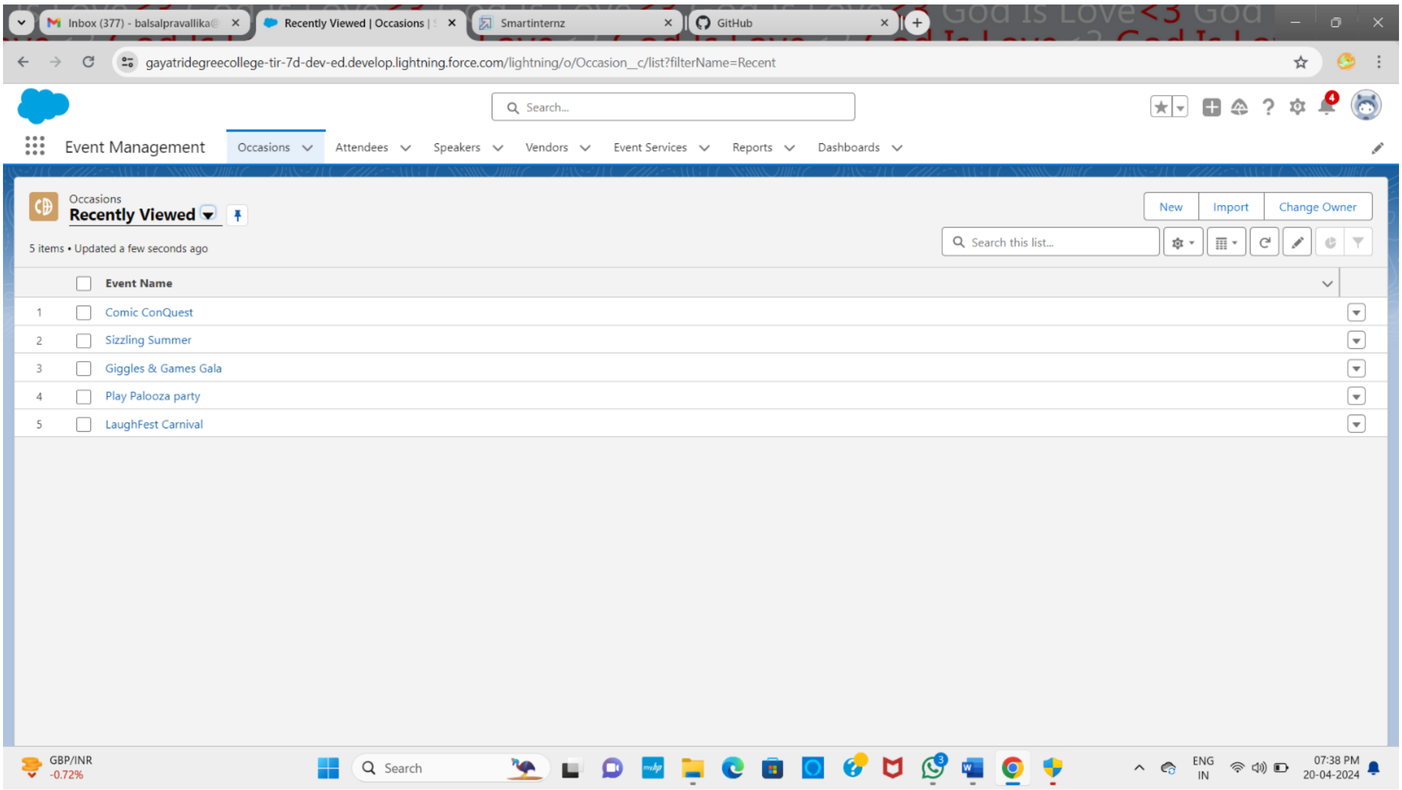
Milestone – 09- User Adoption

❖ 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 record and view.



Milestone – 10- Reports

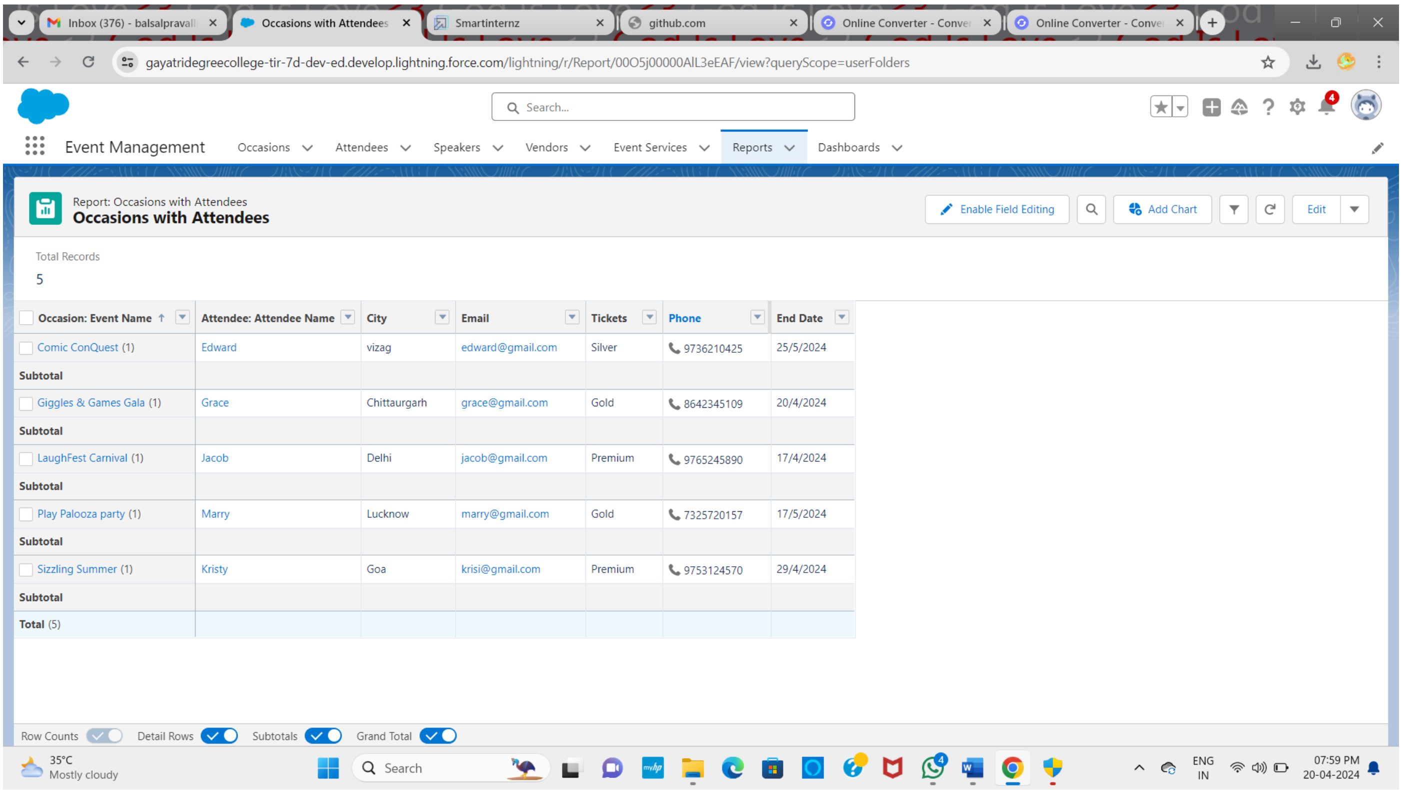
Reports in Salesforce is a list of records that meet a particular criterion which gives an answer to a particular question. These records are displayed as a table that can be filtered or grouped based on any field.

❖ Creating A Report

1. From the reports tab click on new report

2. Select the report type Occassions 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 (Occassions with Attendees) or run it.

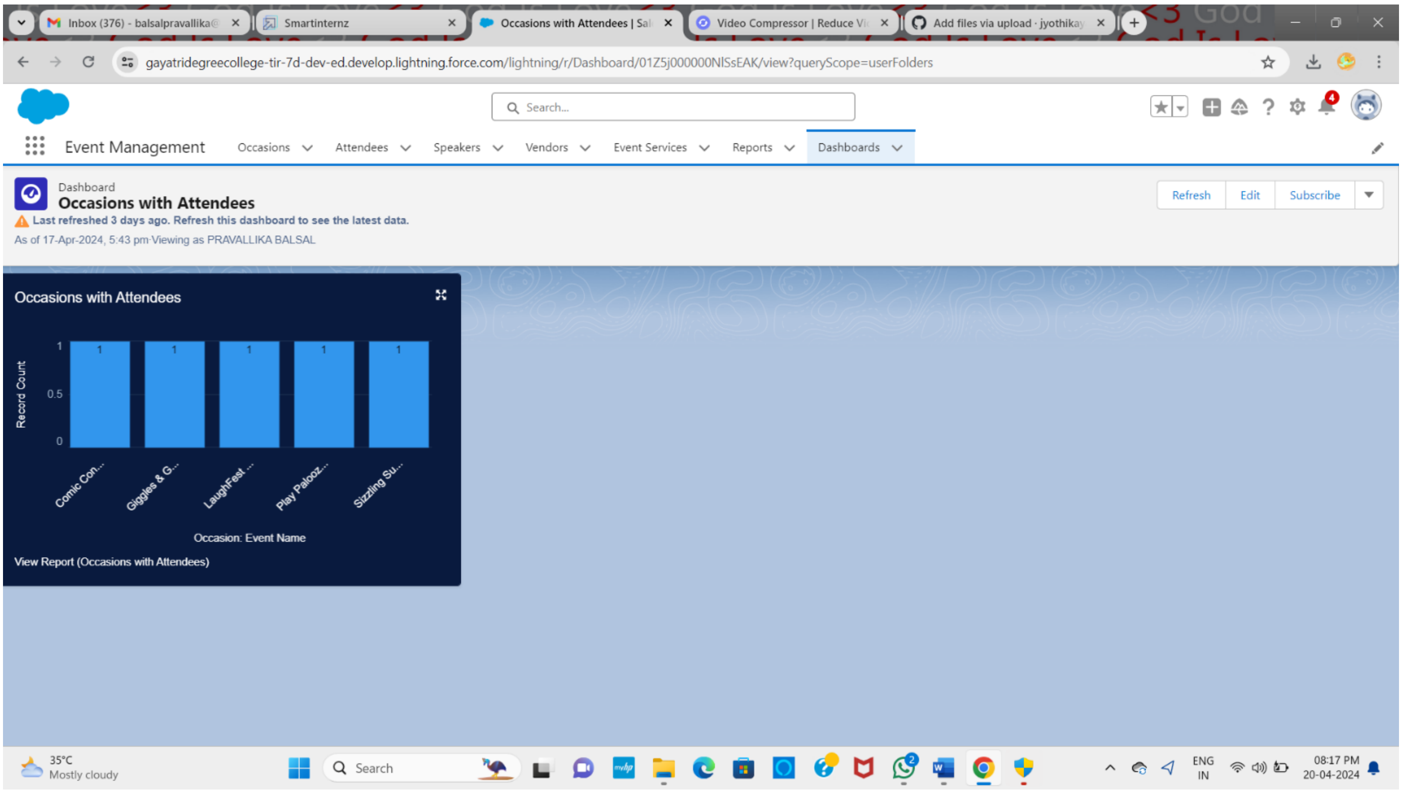


Milestone – 11- Dashboard

Dashboards provide more insights than reports as they combine the data from many reports and show a summarized result. Looking at many reports at a time gives the flexibility of combining the results from them quickly. Also summaries in dashboards help us decide on action plans quicker. The dashboards can contain charts, graphs and Tabular data.

❖ Create A Dashboard

1. Click the Dashboards tab.
2. Click New Dashboard.
3. Name the dashboard Occasions with Attendees and click Create.
4. Click +Component.
5. Select Occasions with Attendees and click Select.
6. Select the Vertical Bar Chart component and click Add.
7. Click Save and then Done



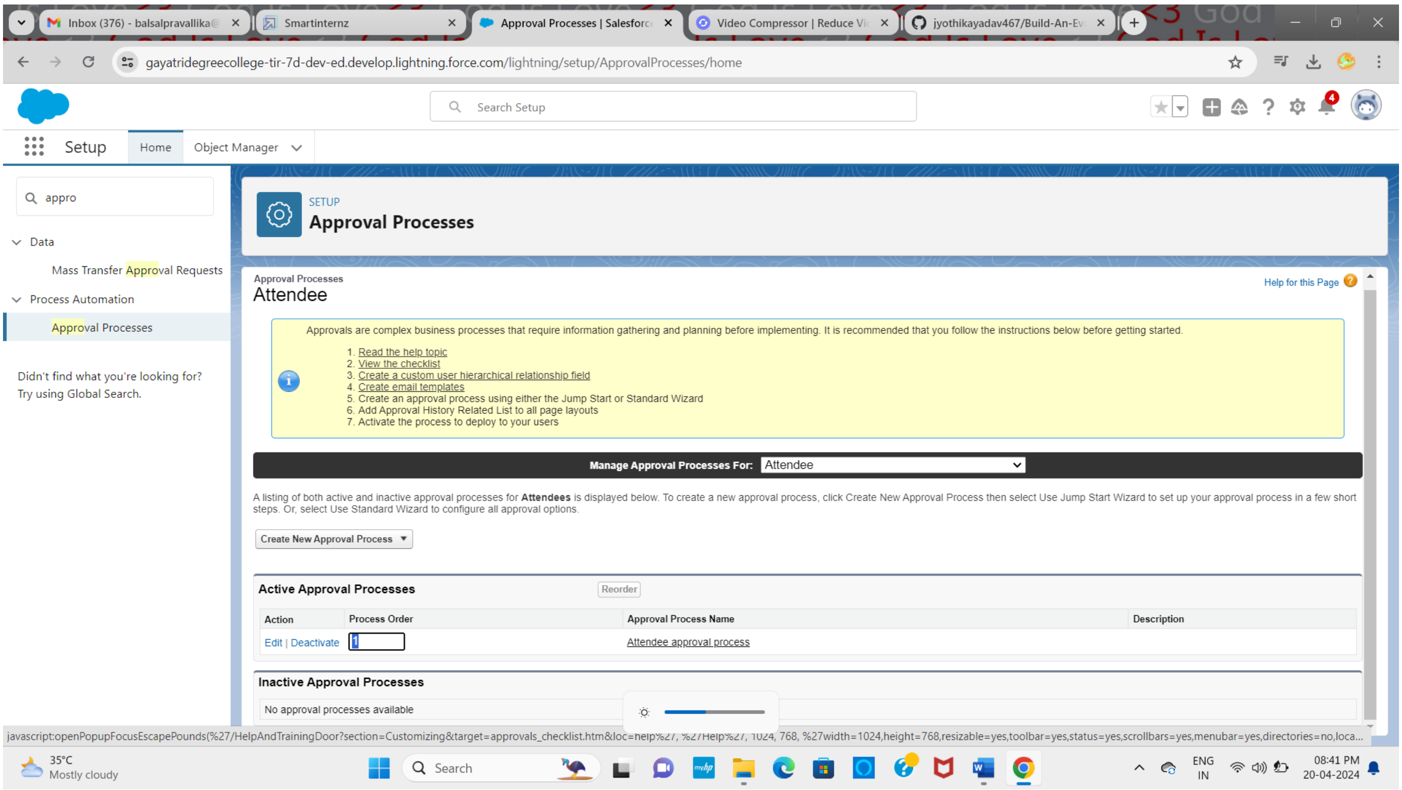
Milestone – 11- Approval Process

The approval process in Salesforce is a powerful tool that allows you to automate and streamline the approval of records such as opportunities, leads, cases, and custom objects. It is a workflow process that is triggered when a record meets certain criteria and requires approval from one or more approvers before it can be moved forward in the sales process.

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
9. Now under Initial Submission action:
10. 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.

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

13. Now select the automatically assign to the approver and select user and keep the user as created user..
14. Now lets check the final approval action
15. 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
16. Now let's check the Final rejection action. click on new and select the field update and enter the following details.
Name: Not confirmed cancel Status
Field to update: Cancel Status
keep value as : Not confirmed
17. And make the approval Process active.



The End