PROJECT REPORT ON

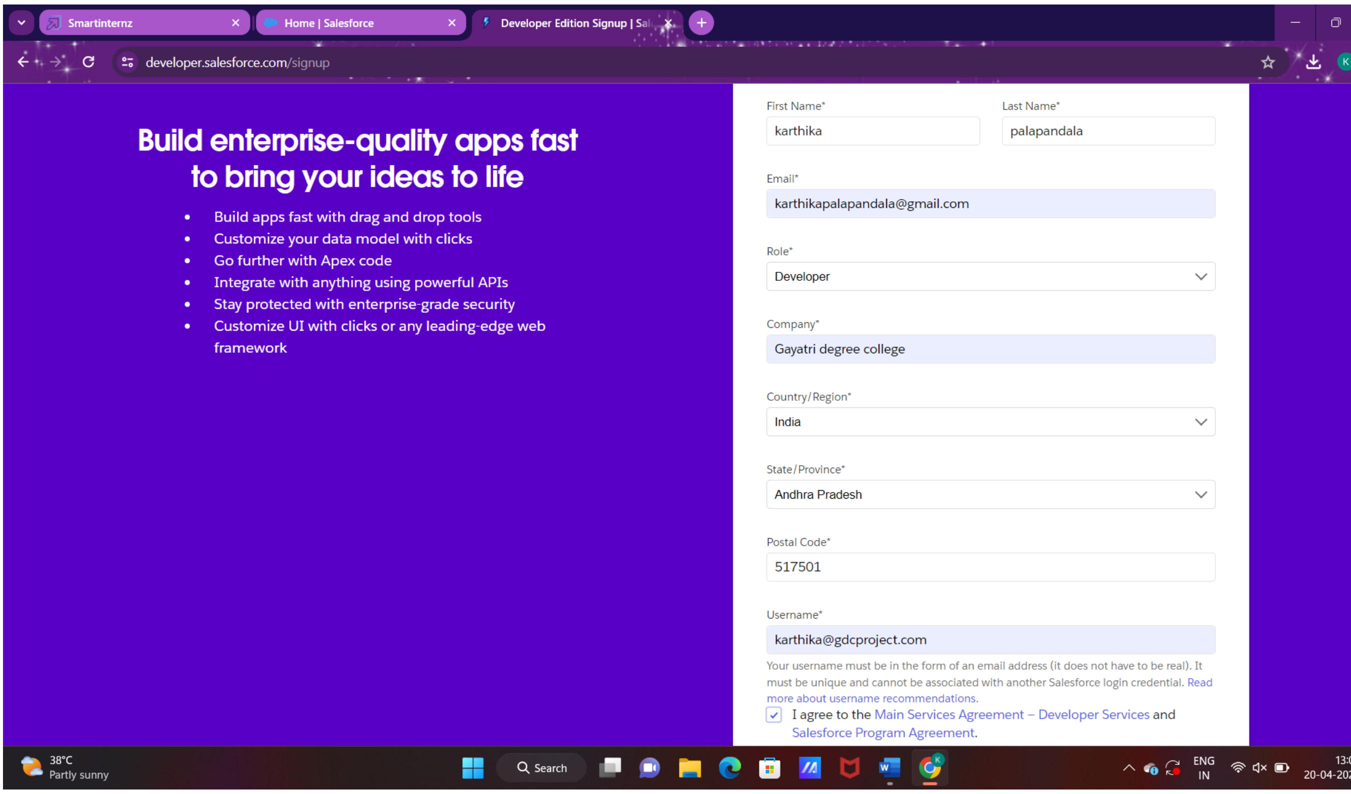
Build An Event Management System Using Salesforce - (Developer)

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: KARTHIKA PALAPANDALA
  - ➢ Email: karthikapalapandala@gmail.com
  - ➢ Role: SALESFORCE DEVELOPER
  - ➢ Company: College Name - GAYATRI DEGREE COLLEGE – TIRUPATI
  - ➢ Country: India
  - ➢ Postal Code: pin code – 517501
  - ➢ Username:karthikapalapandala@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

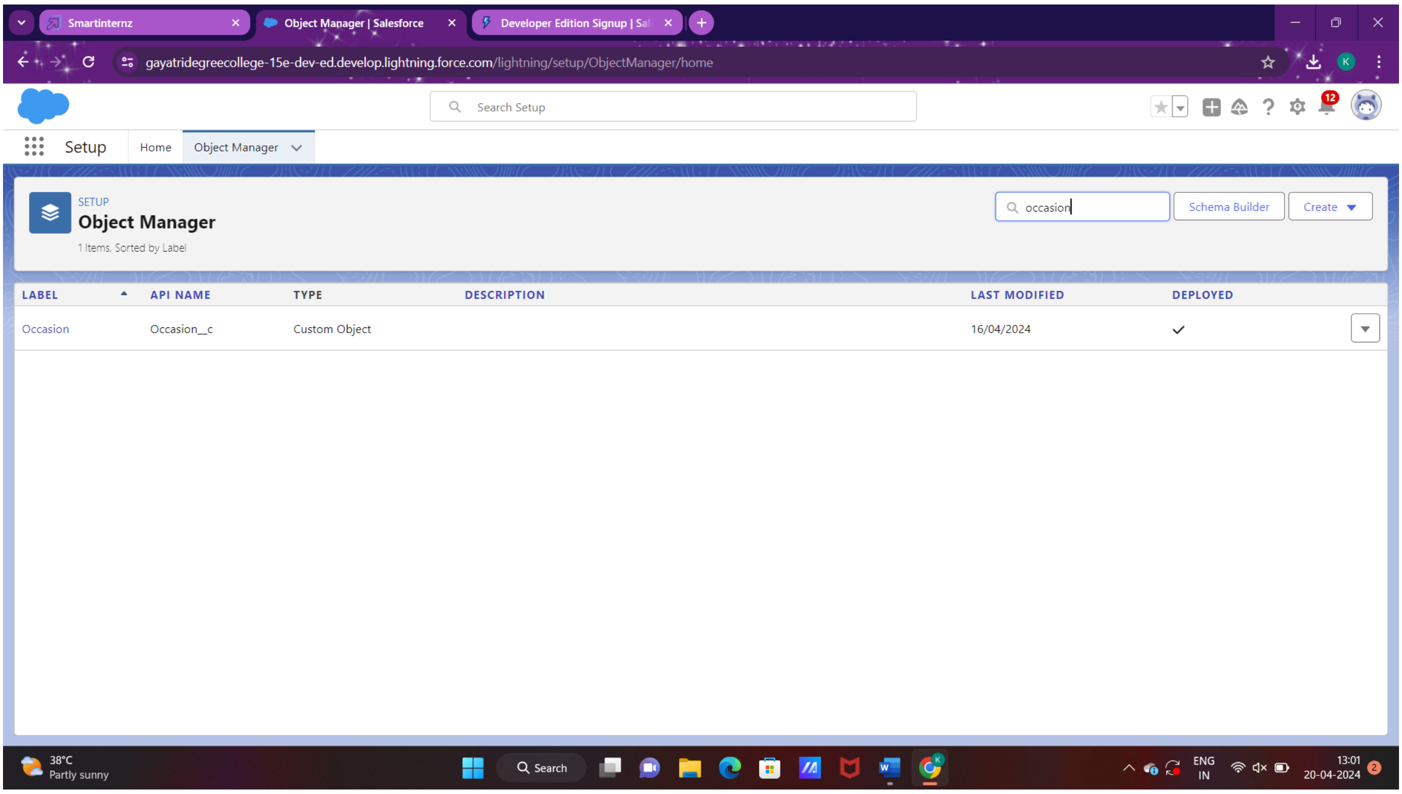
6. Plural Label: Occasions

7. Record Name: Event Name

8. Check the Allow Reports checkbox

9. Check the Allow Search checkbox

10. Click Save.



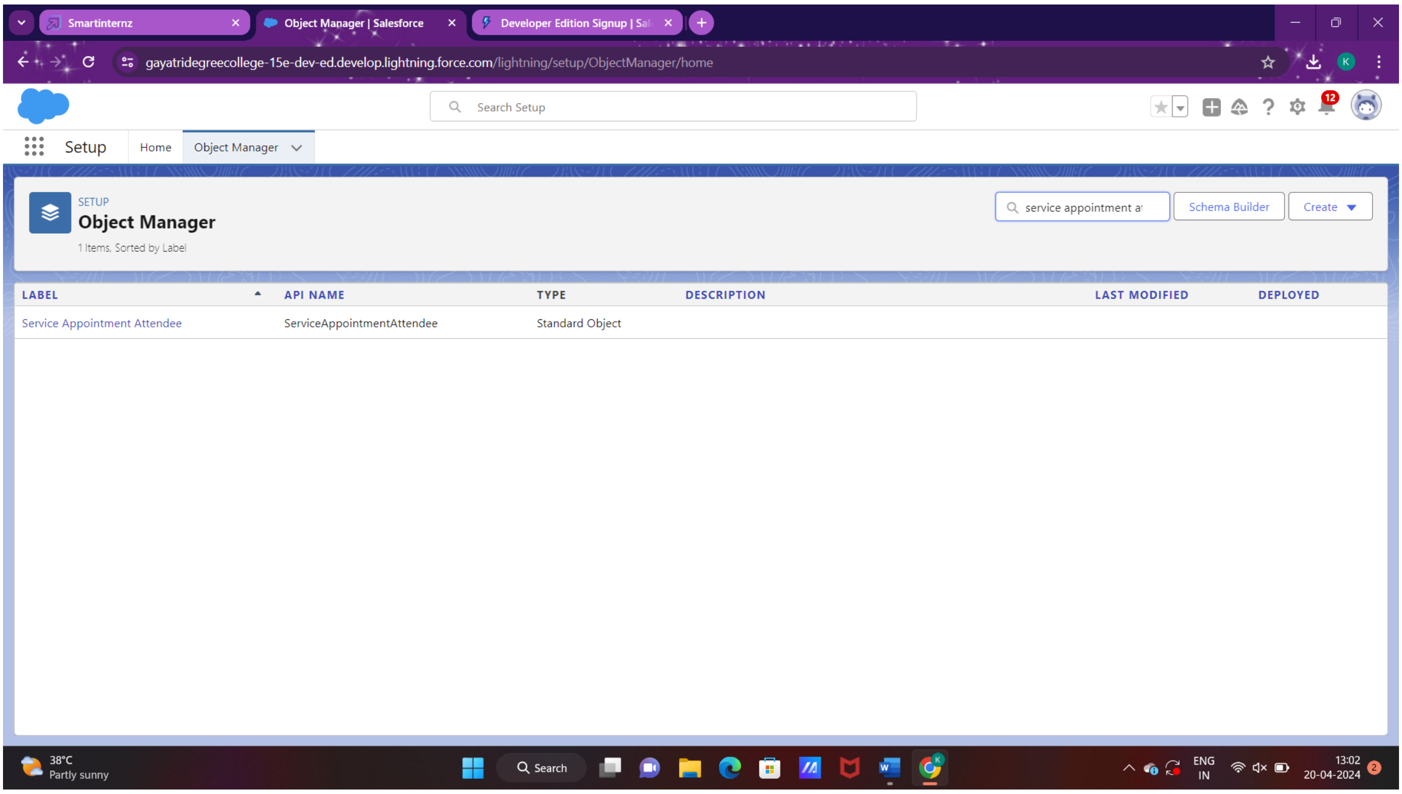
→ Creation Of Custom Object **Attendees**:

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

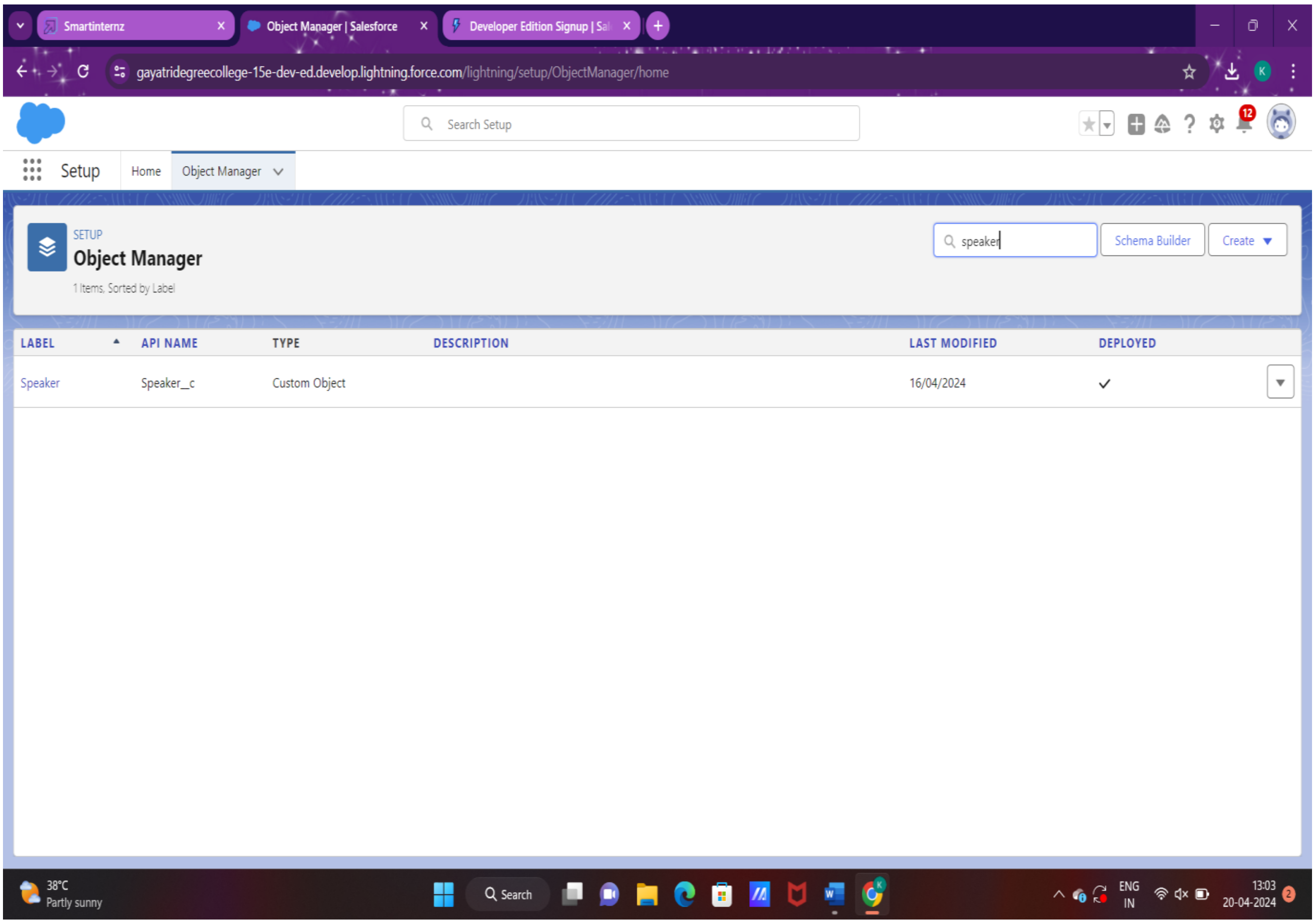
6. Plural Label: Speakers

7. Record Name: Speakers Name

8. Check the Allow Reports checkbox

9. Check the Allow Search checkbox

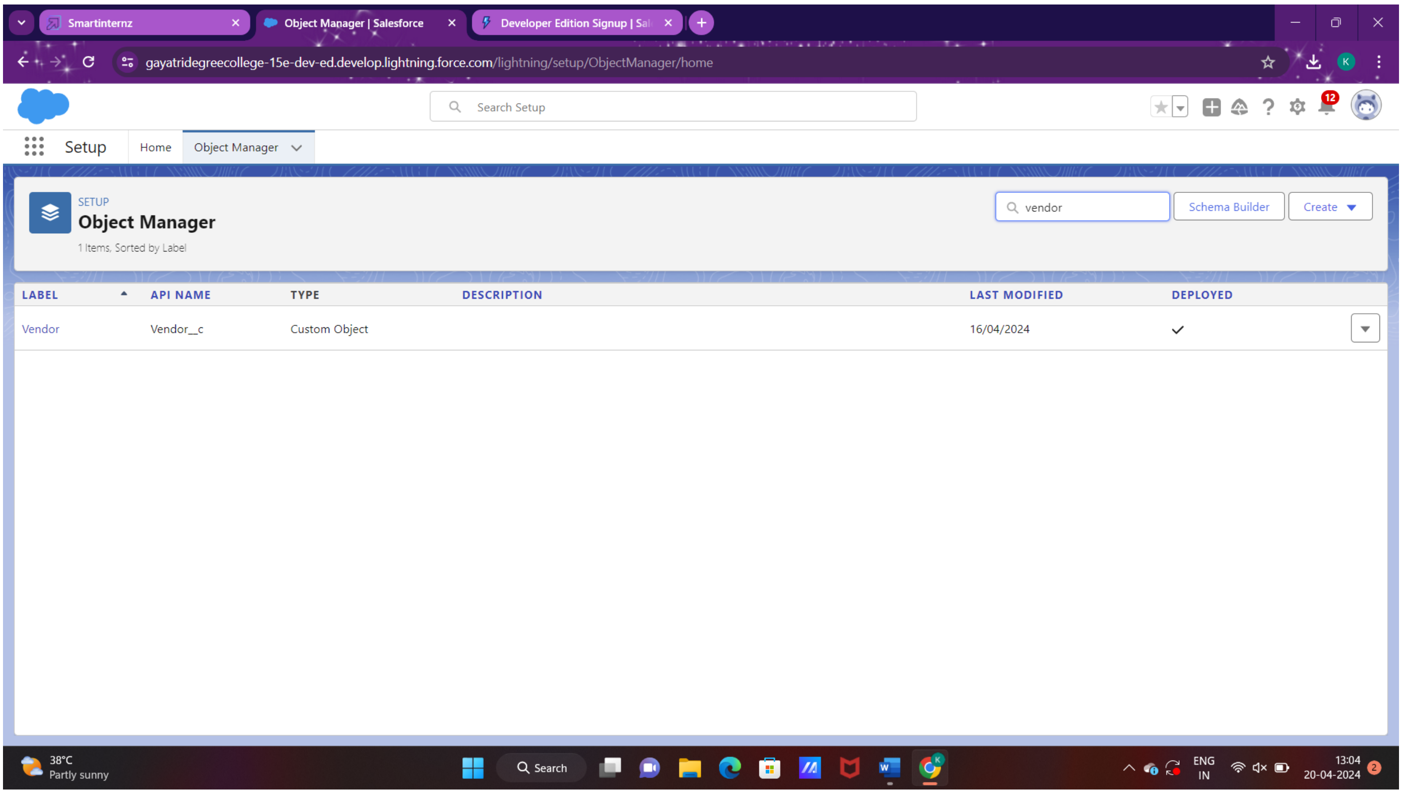
10. Click Save.



➔ 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:

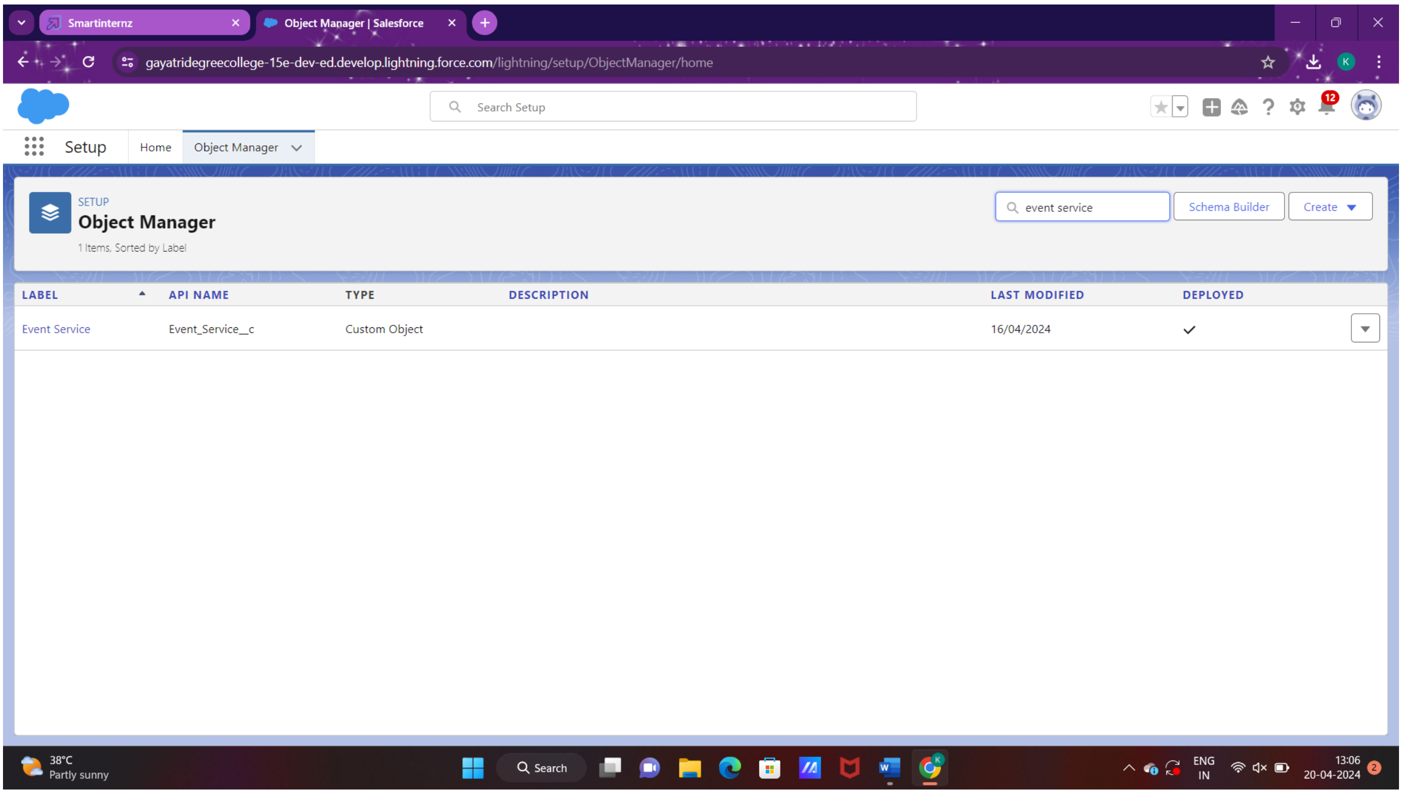
5. Label: Speaker
6. Plural Label: Speakers
7. Record Name: Speakers Name
8. Check the Allow Reports checkbox
9. Check the Allow Search checkbox
10. Click Save.



➔ 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:**

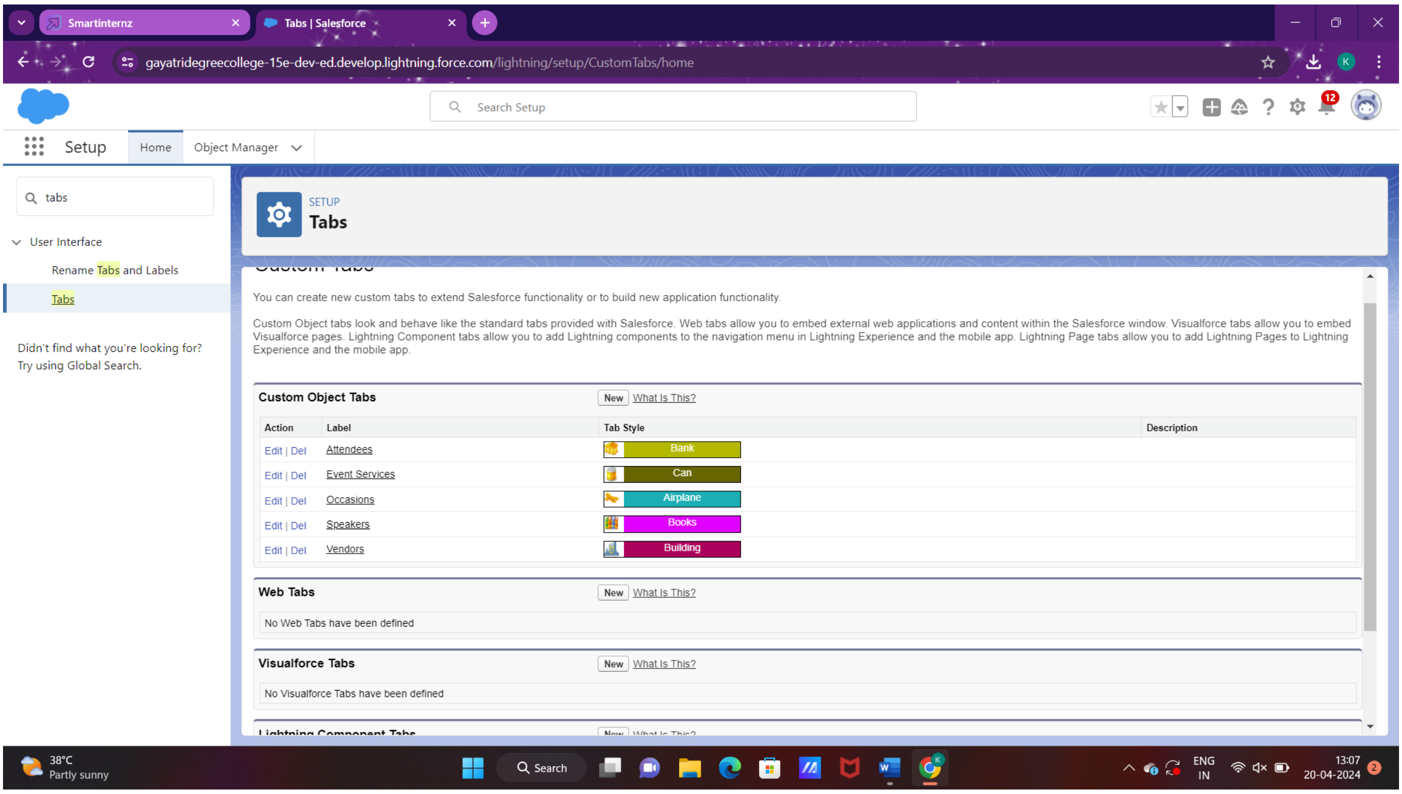
  Web Tabs display any external Web-based application or Web page in a Salesforce tab.

- **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

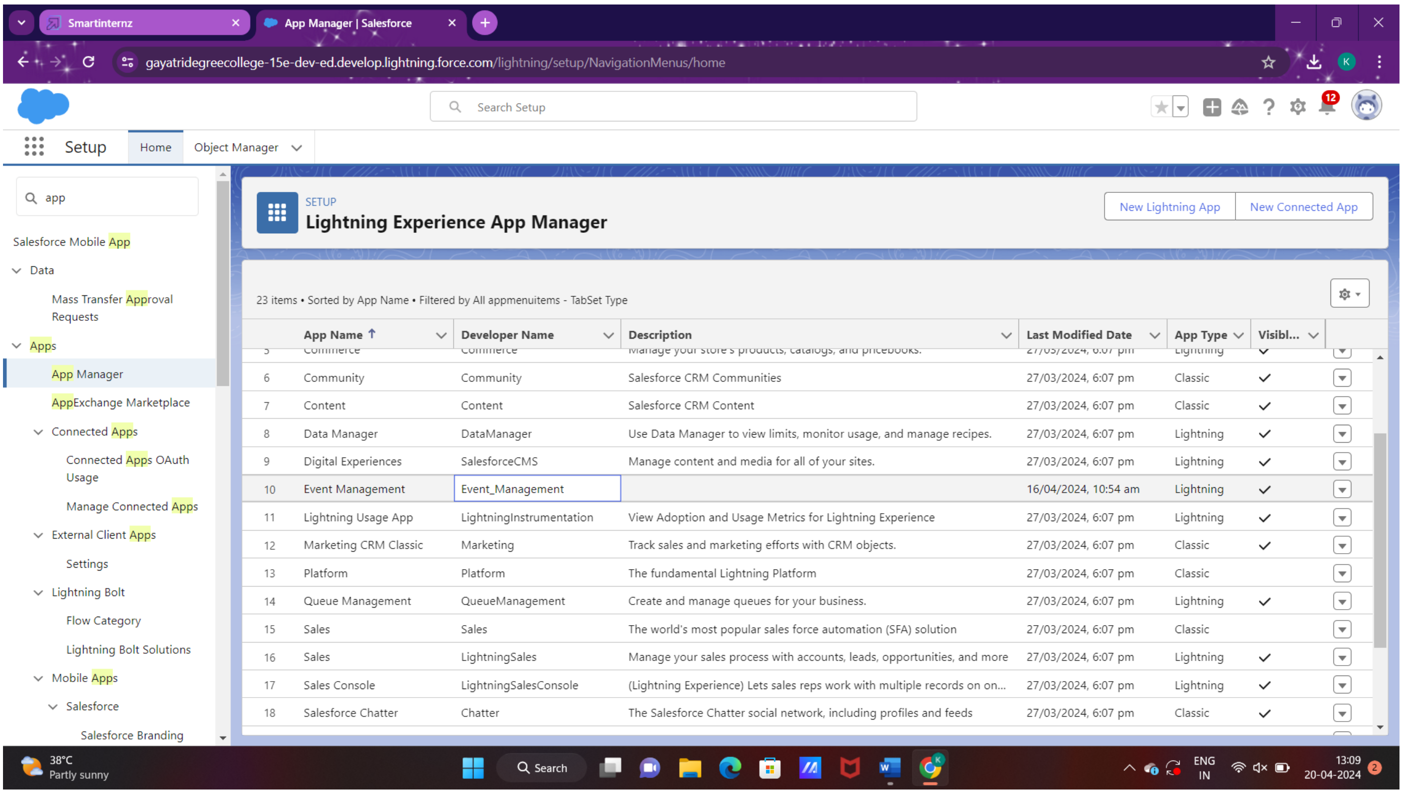
4.Under App Options, leave the default selections and click Next.

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.

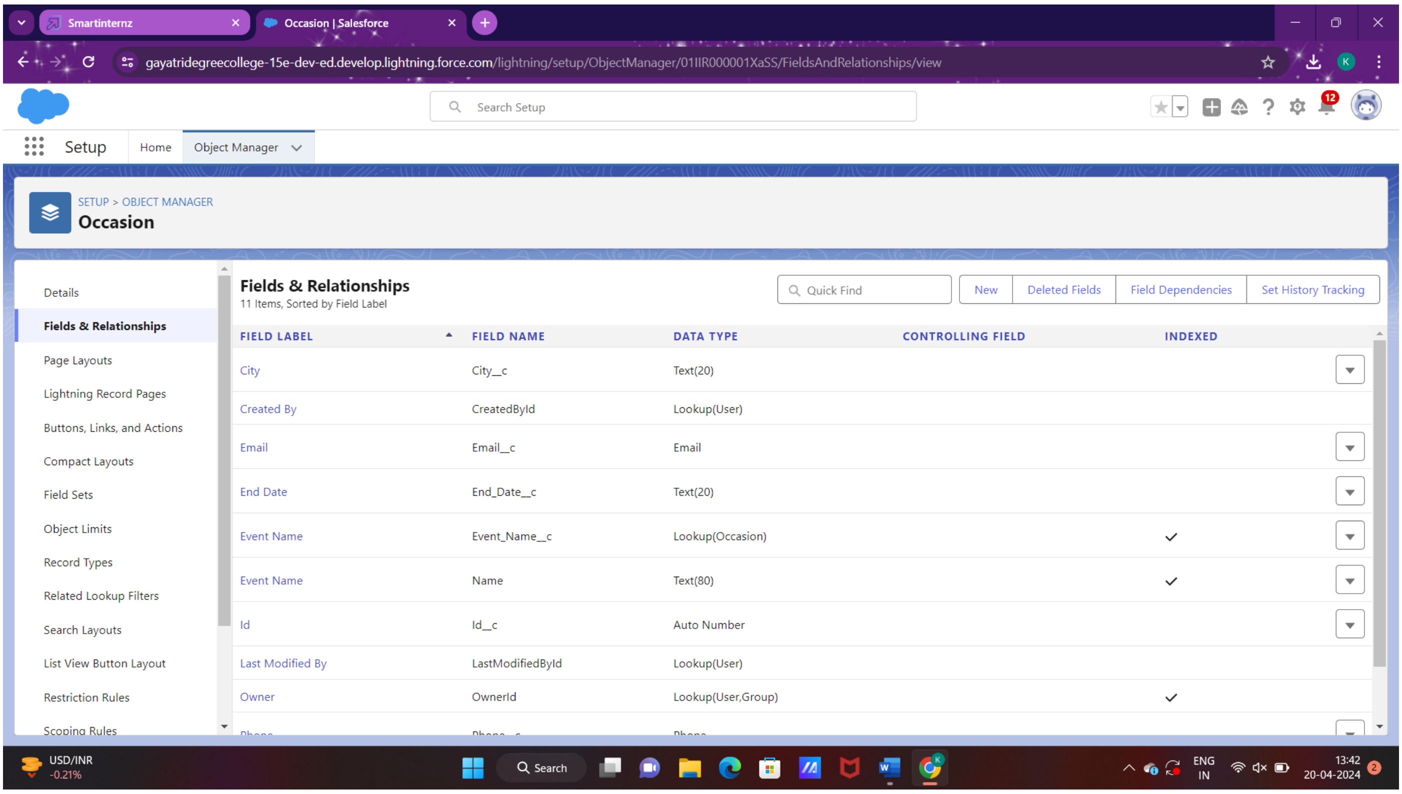
4. Select Fields & Relationships from the left navigation, and click Next

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.

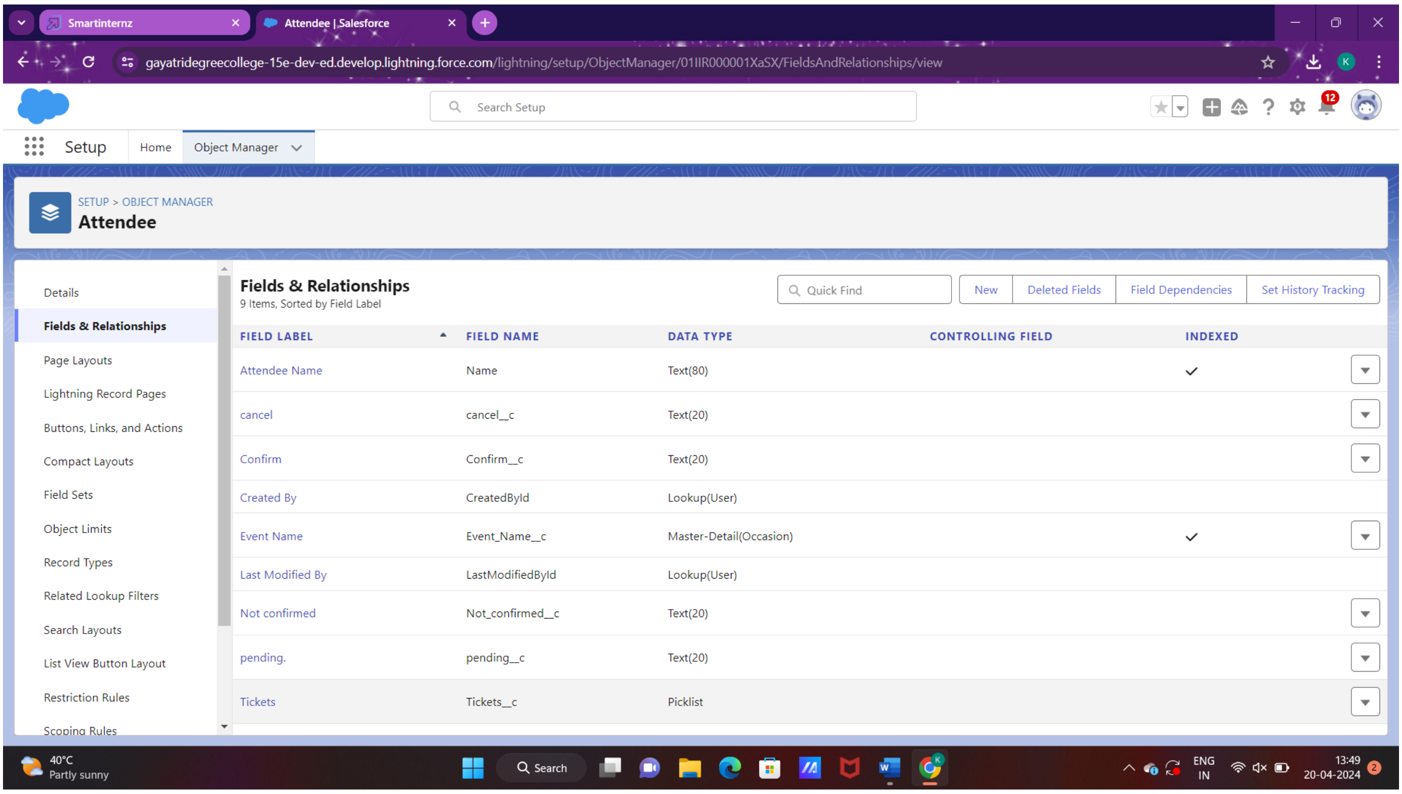
3. After the above steps, Select Attendee Object

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(Prememium, Gold, Silver)

7. Next , Next and Save



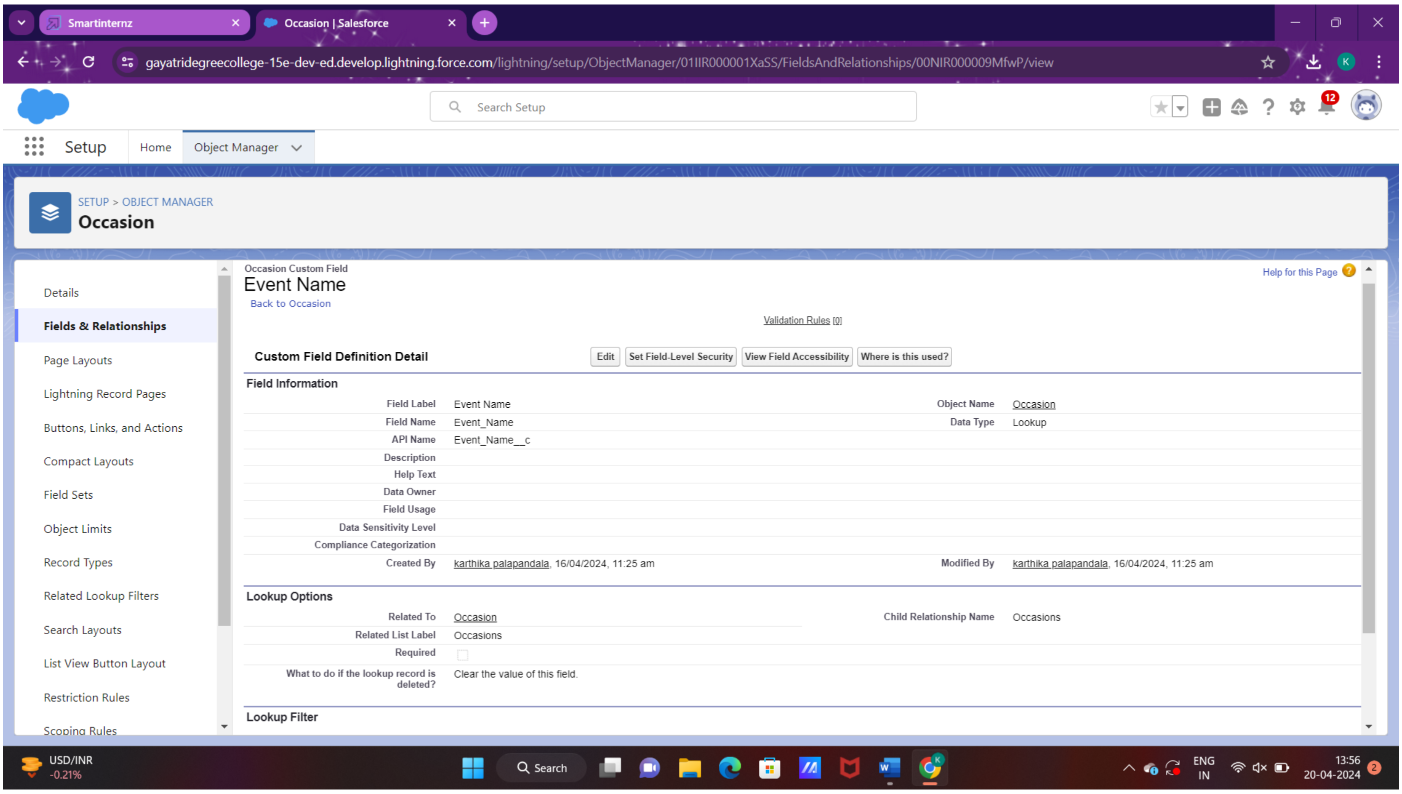
❖ Creation Of Master-Detail Relationship

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

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

Click Next, Next, then Save & New.

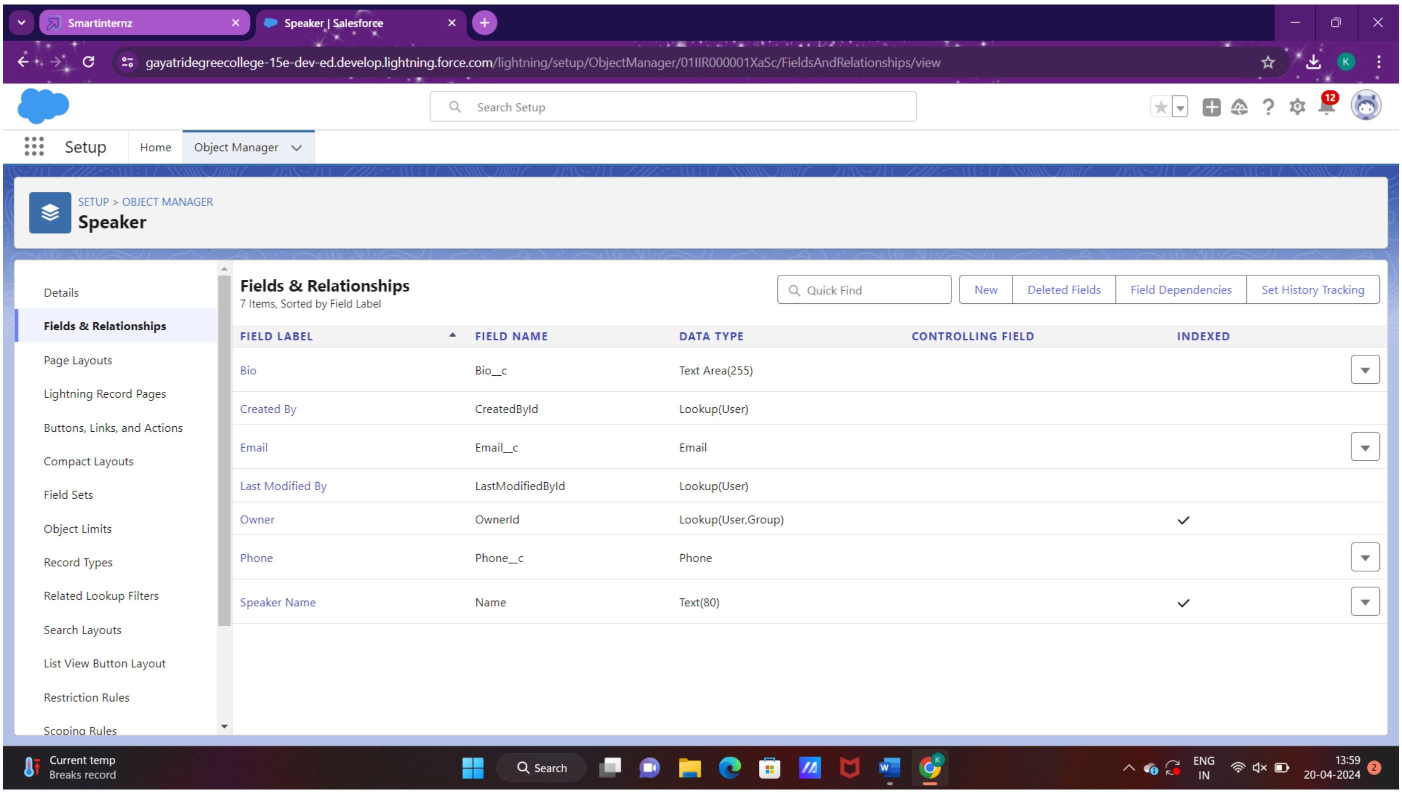
2. Select the Email as the Data Type, then click Next. For Field Label, Email.

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.

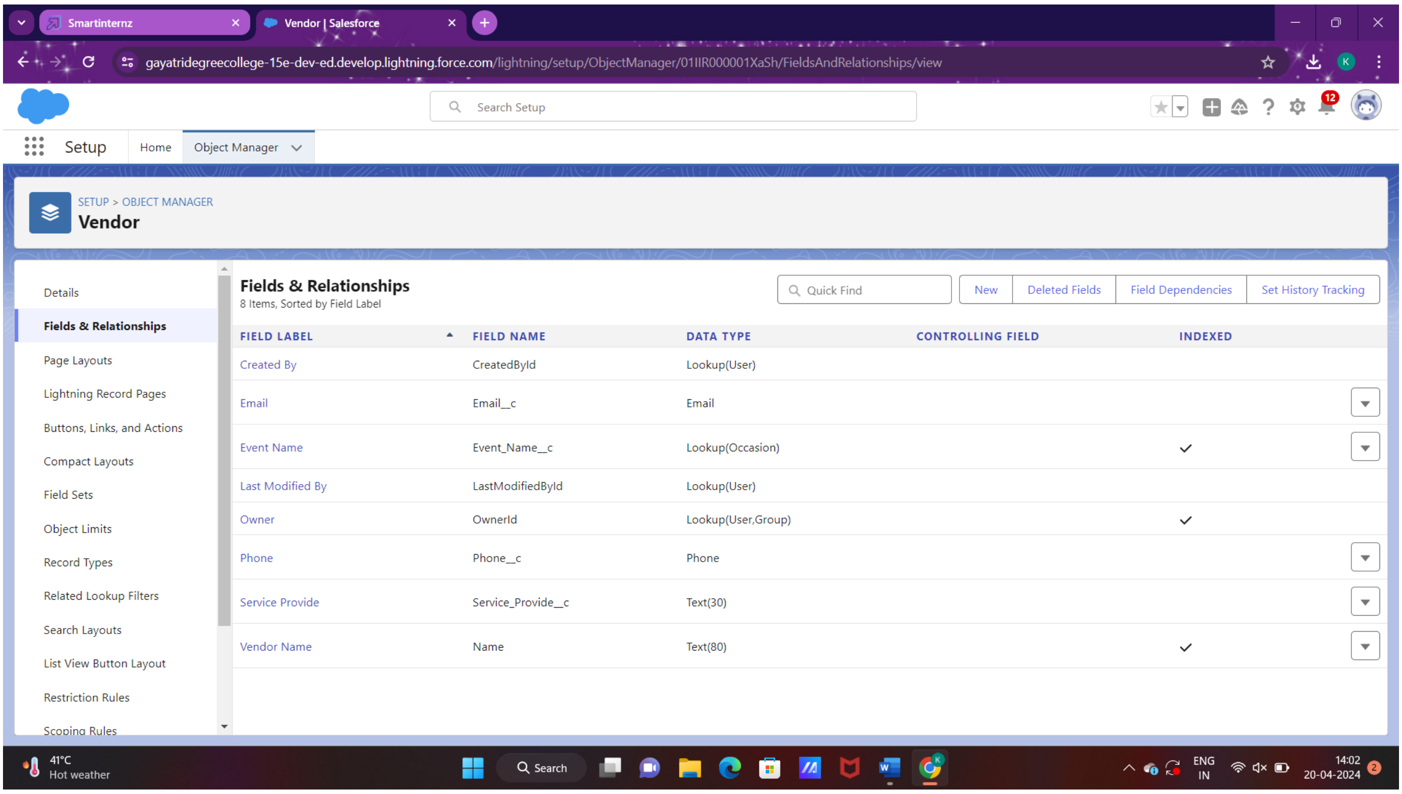
   Click Next, Next, then Save & New

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

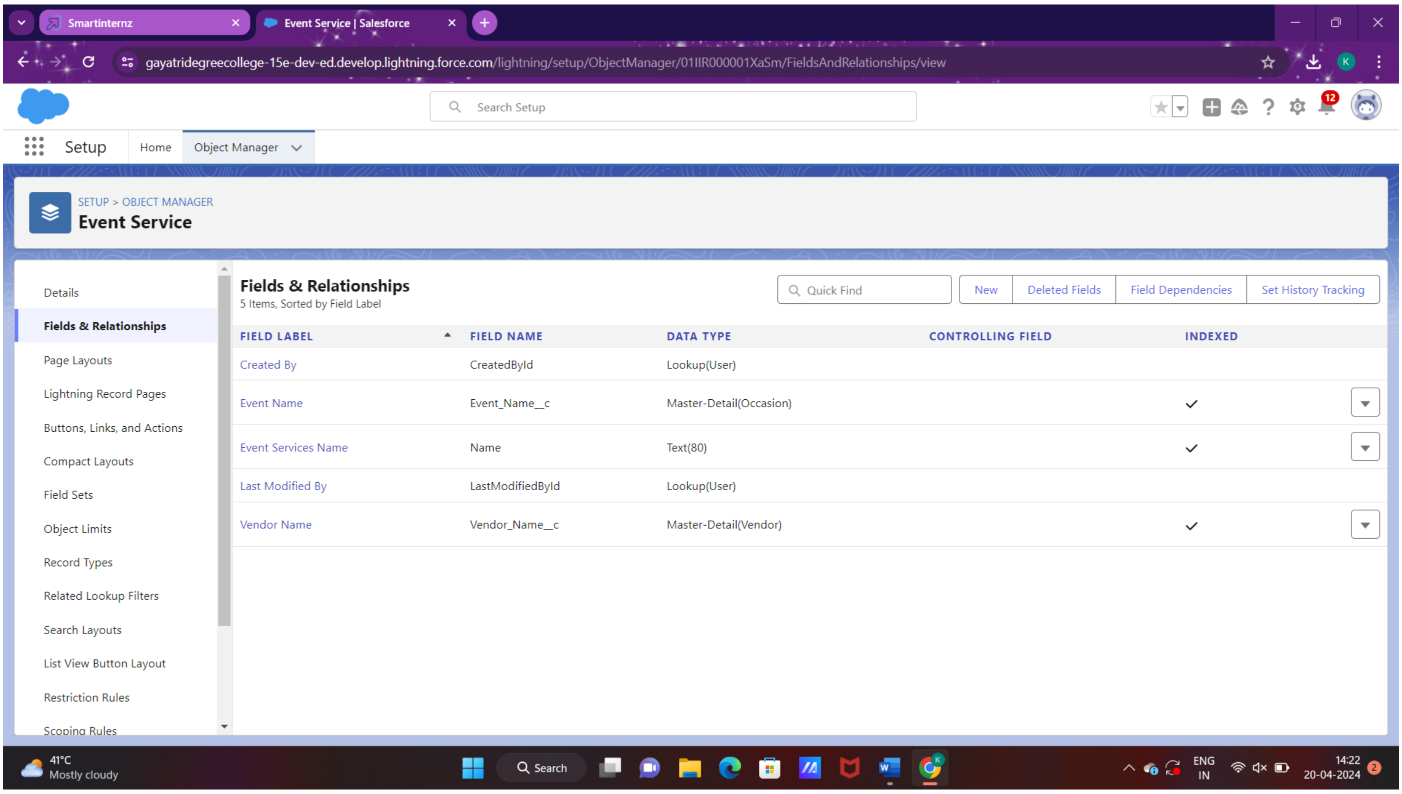
   c. Choose the related object as Occasion & click next Give the field label(Event Name) & click next, next, next and Save

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

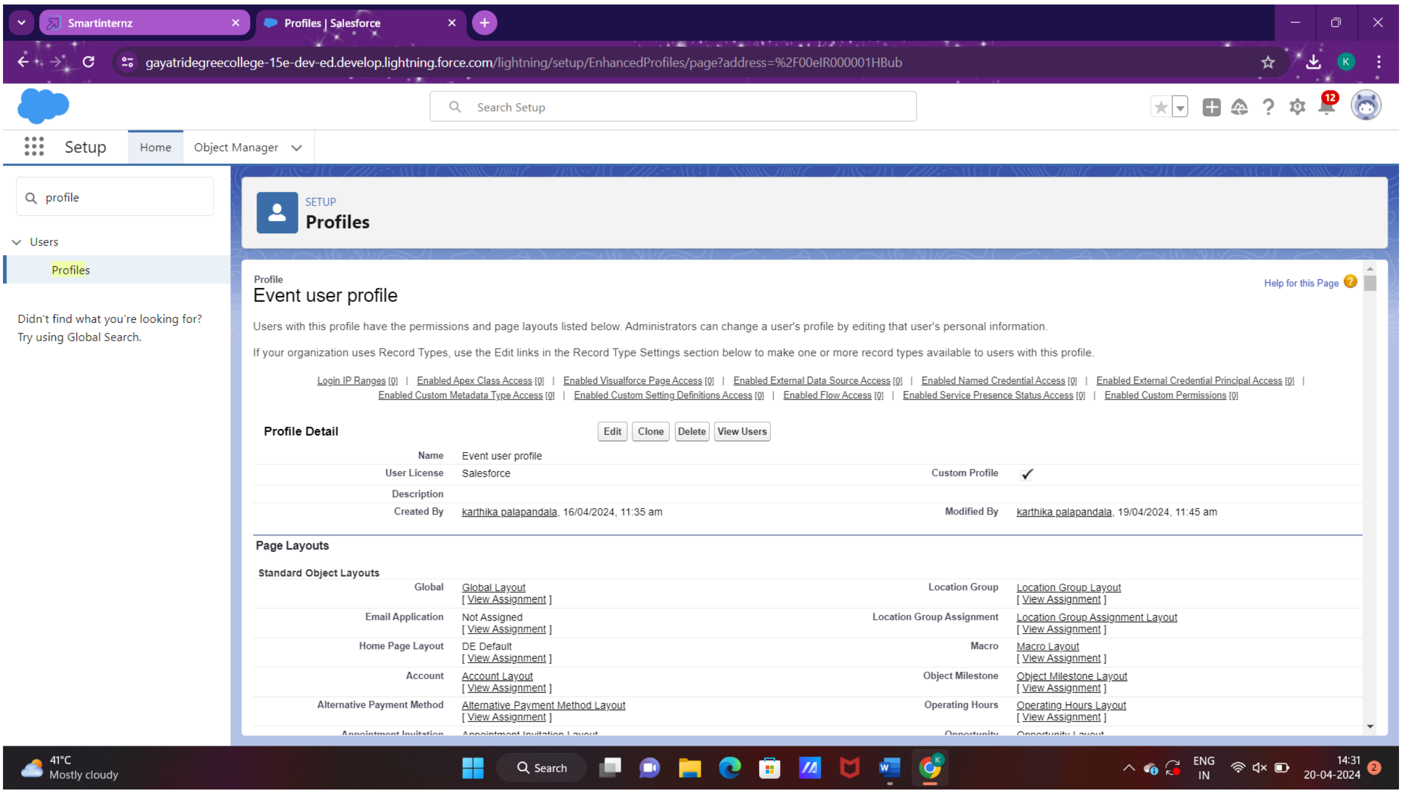
   c. Choose the related oject as Vendor & click next and Give the field label (Vendor Name) & click next,next,next and save



Milestone – 06 – Profile

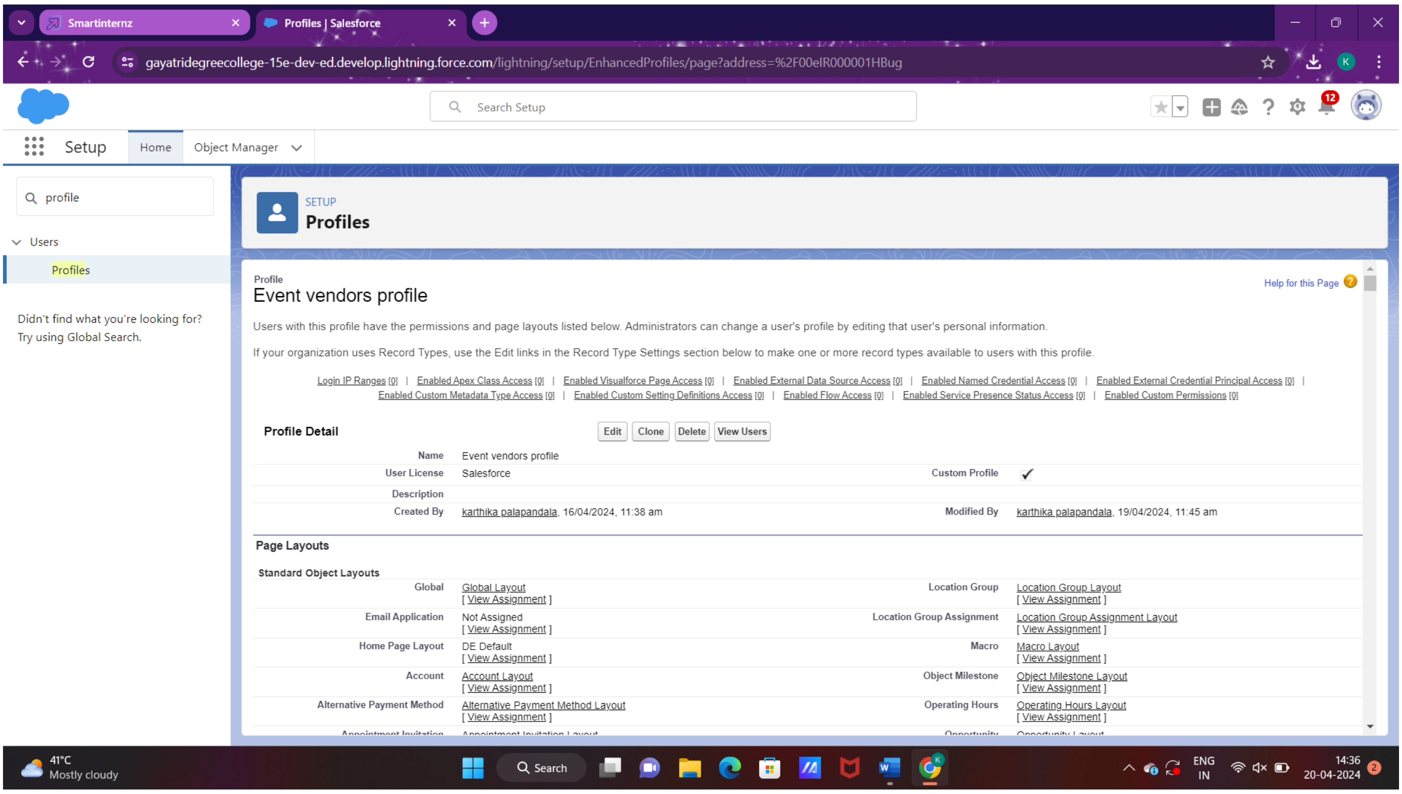
❖ Creation Of profile

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 an Give view all access permissions to the Atteendees, 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.**



Milestone – 07– User

❖ Creating an user

1. From setup type “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

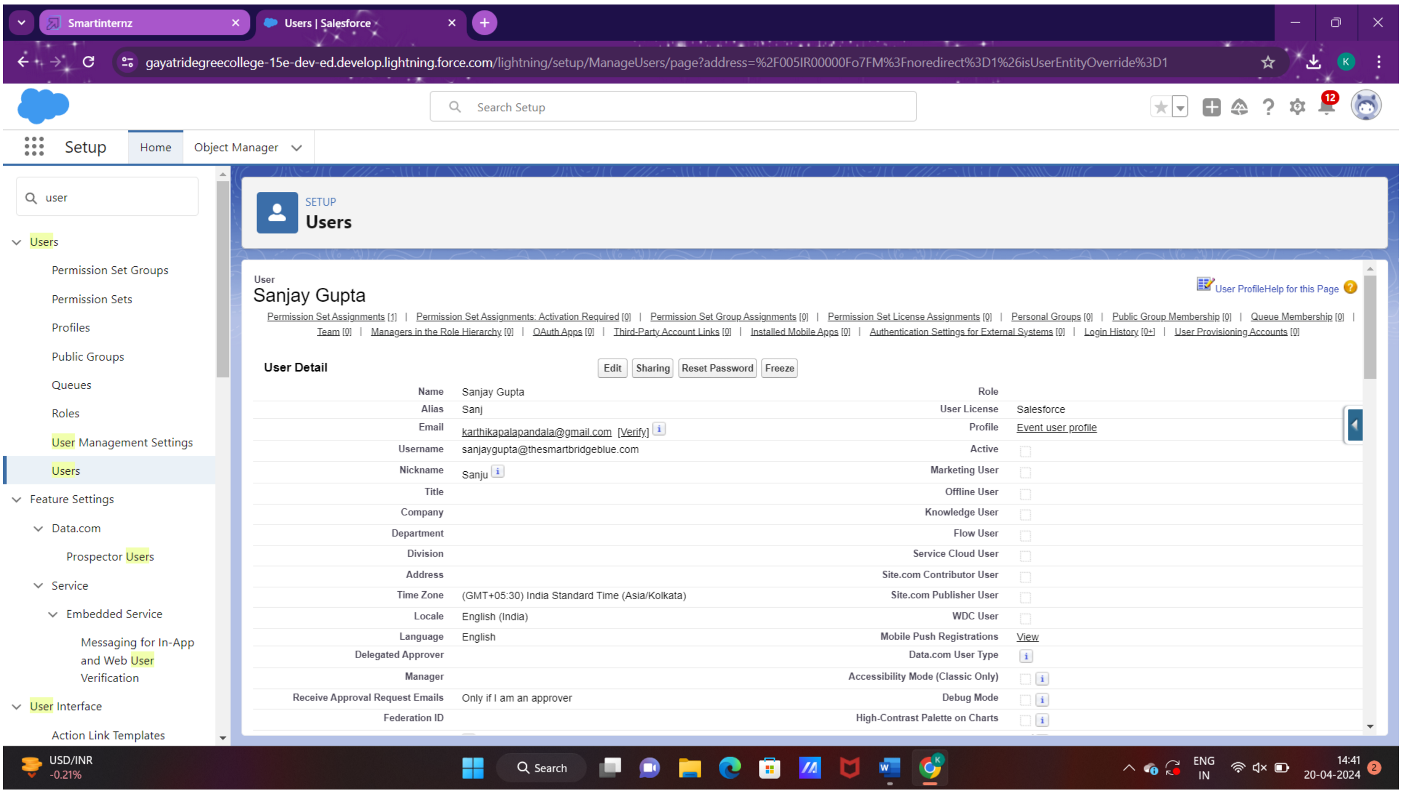
Nickname: Sanju

Role: leave it as default

User License: Salesforce

Profile: Event User Profile

2. 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 User

First Name: Rahul

Last Name: Sharma

Alias: Rahus

Email: provide your personal email id for future reference

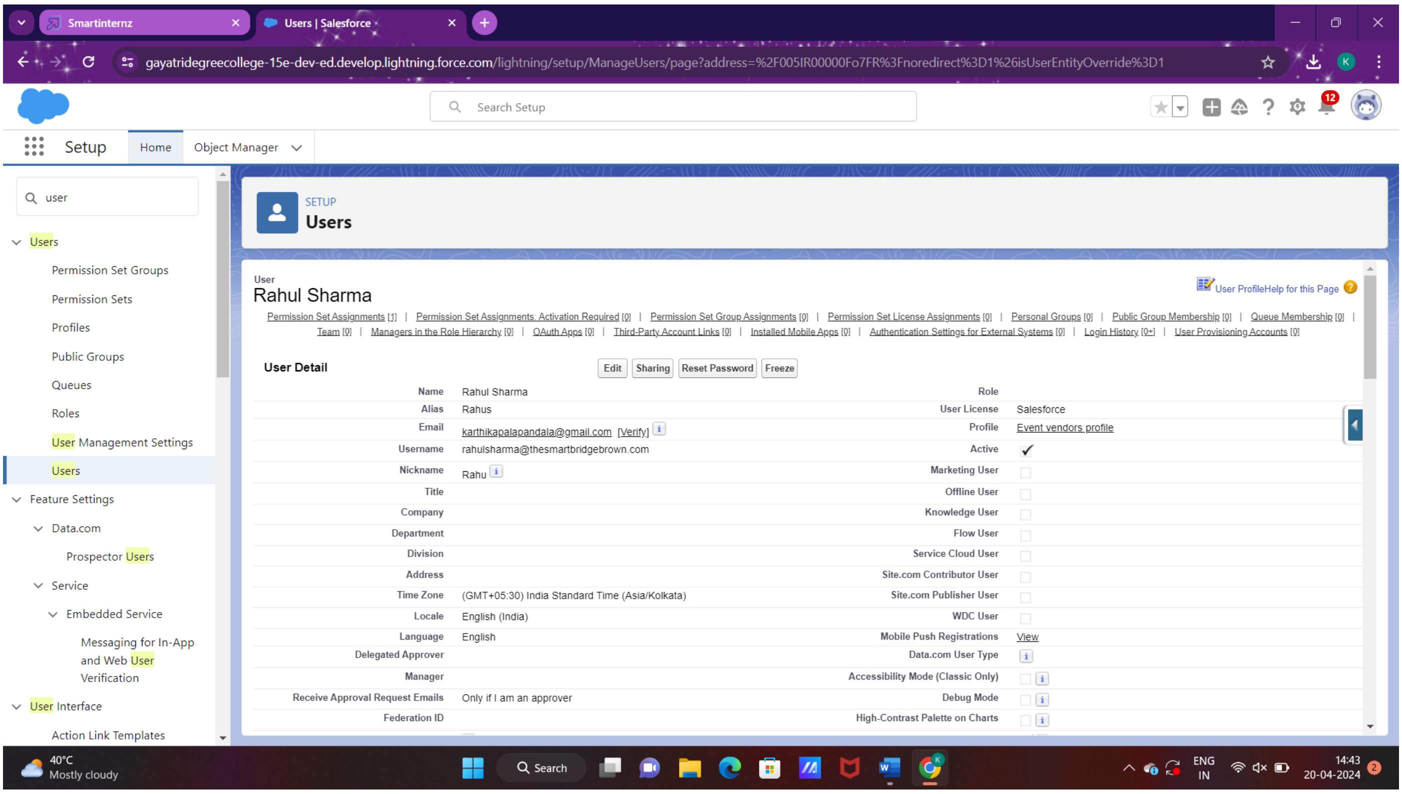
Username: rahulsharma@thesmartbridge.com

Nickname: Rahu

Role: leave it as default

User License: Salesforce Platform

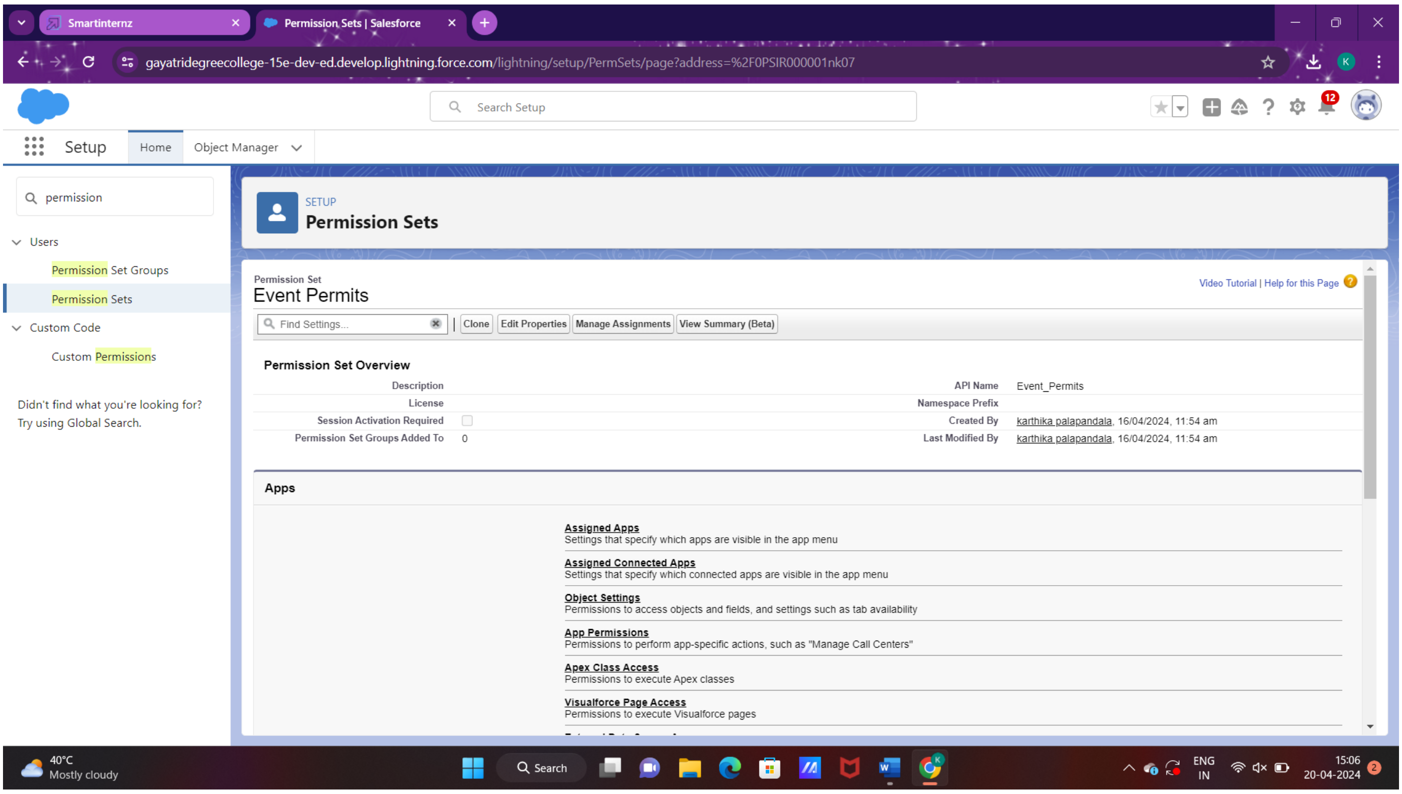
Profile: Event Vendors profile



Milestone – 08– Permission Sets

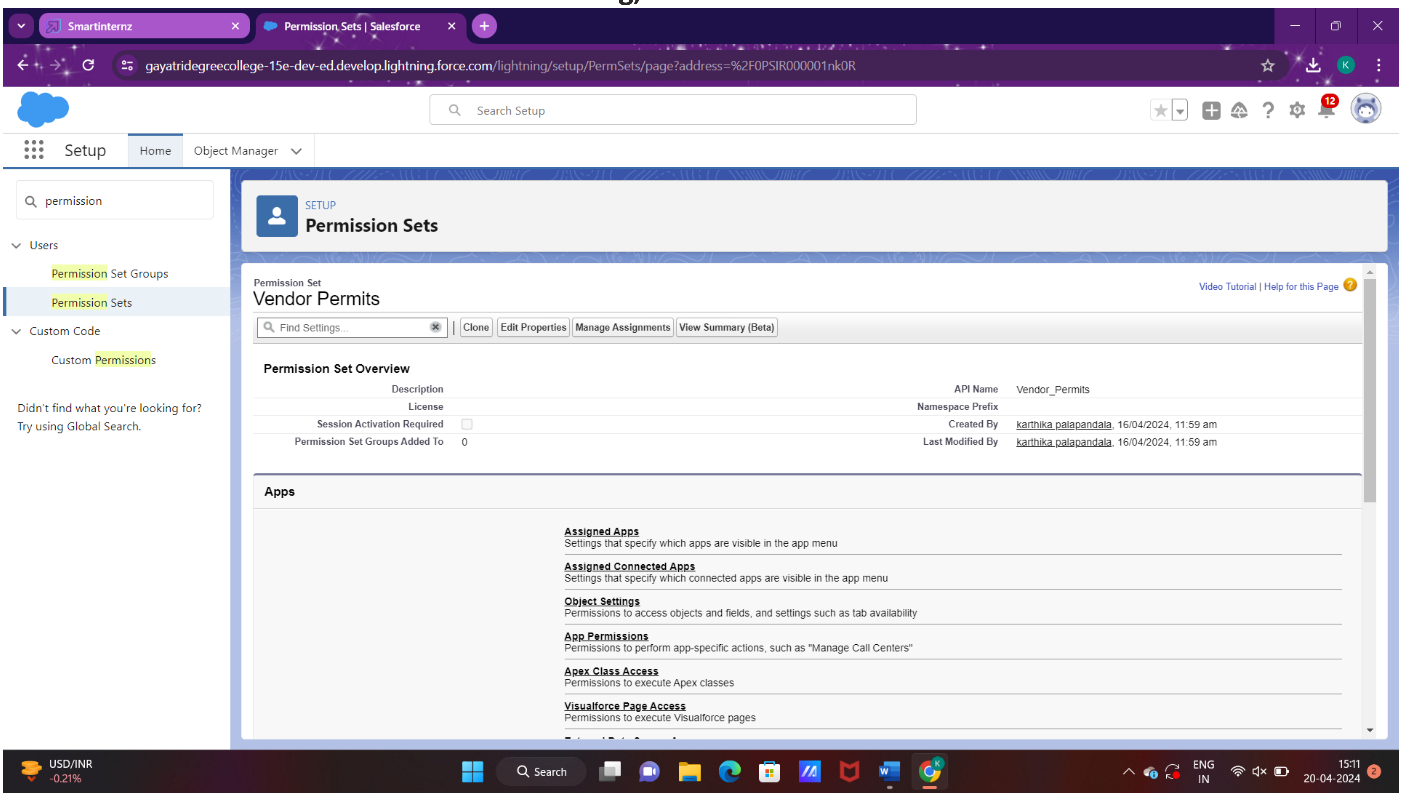
❖ Creating a Permission Set

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



❖ Creating another Permission Set

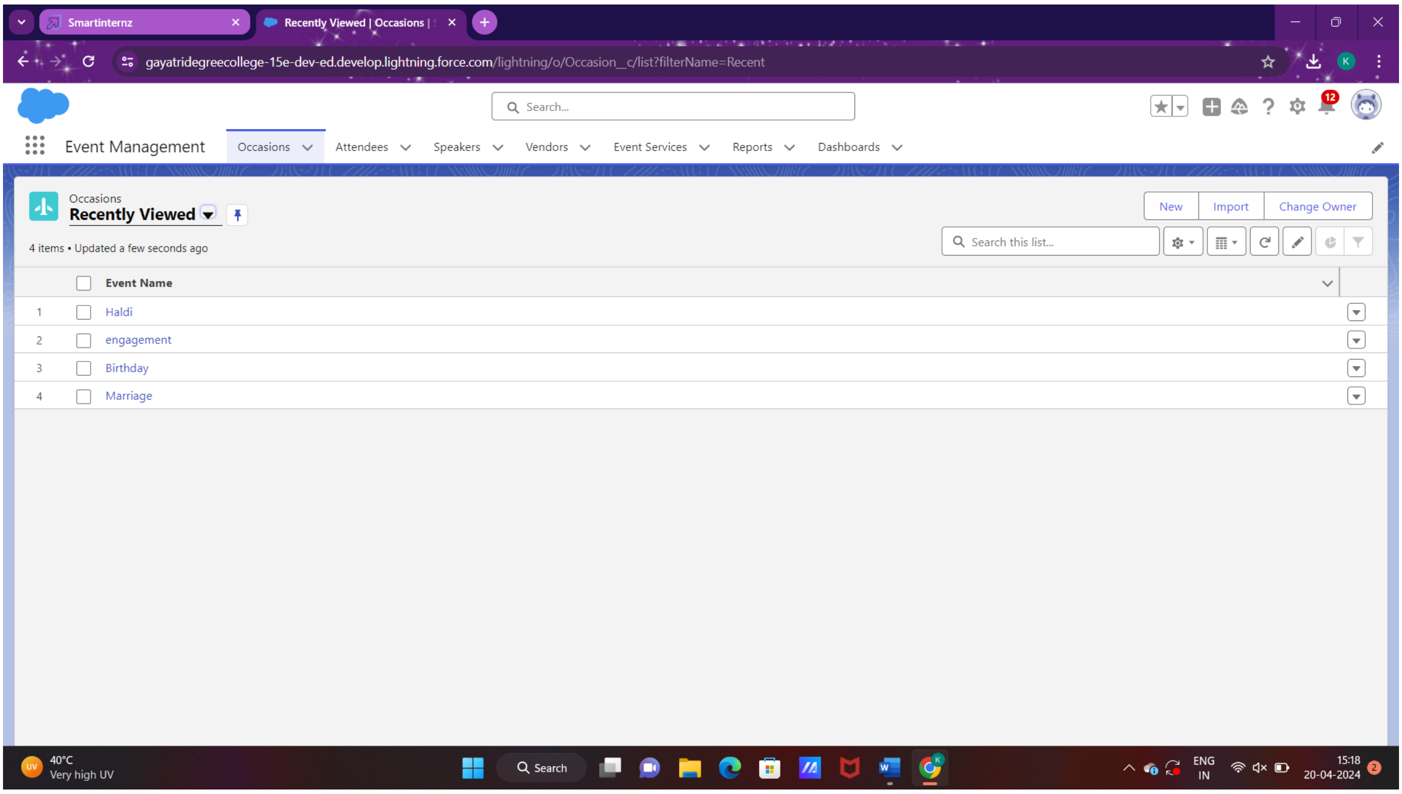
1. From setup search “permission sets” in quick find and select permission set then click on New
2. Enter label as: Vendor Permits and Save.
3. After saving the permission click on the Manage assignment
4. Now click on the Add Assignment
5. Now select the users and click on next Assing, Done



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

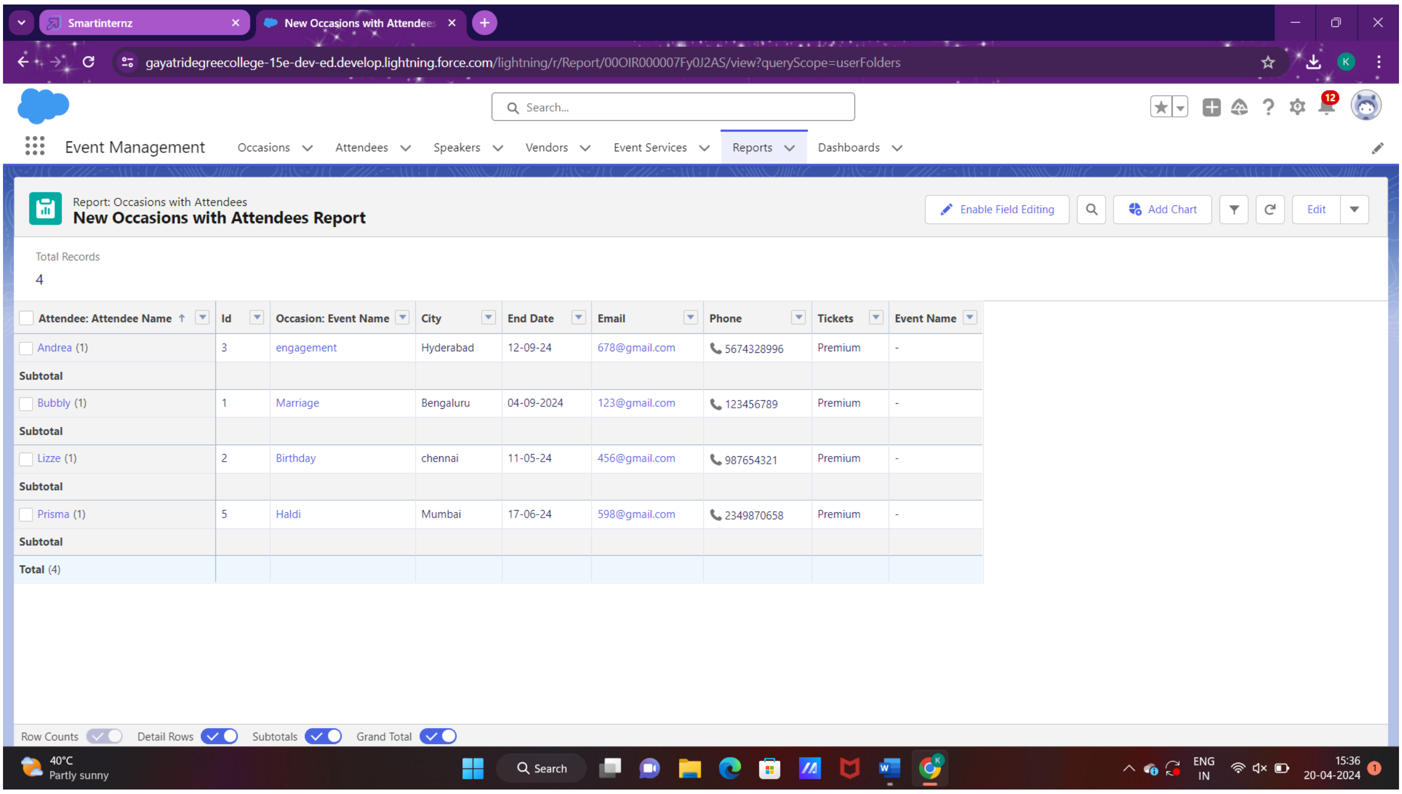
❖ Delete a Record (Occasion)

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

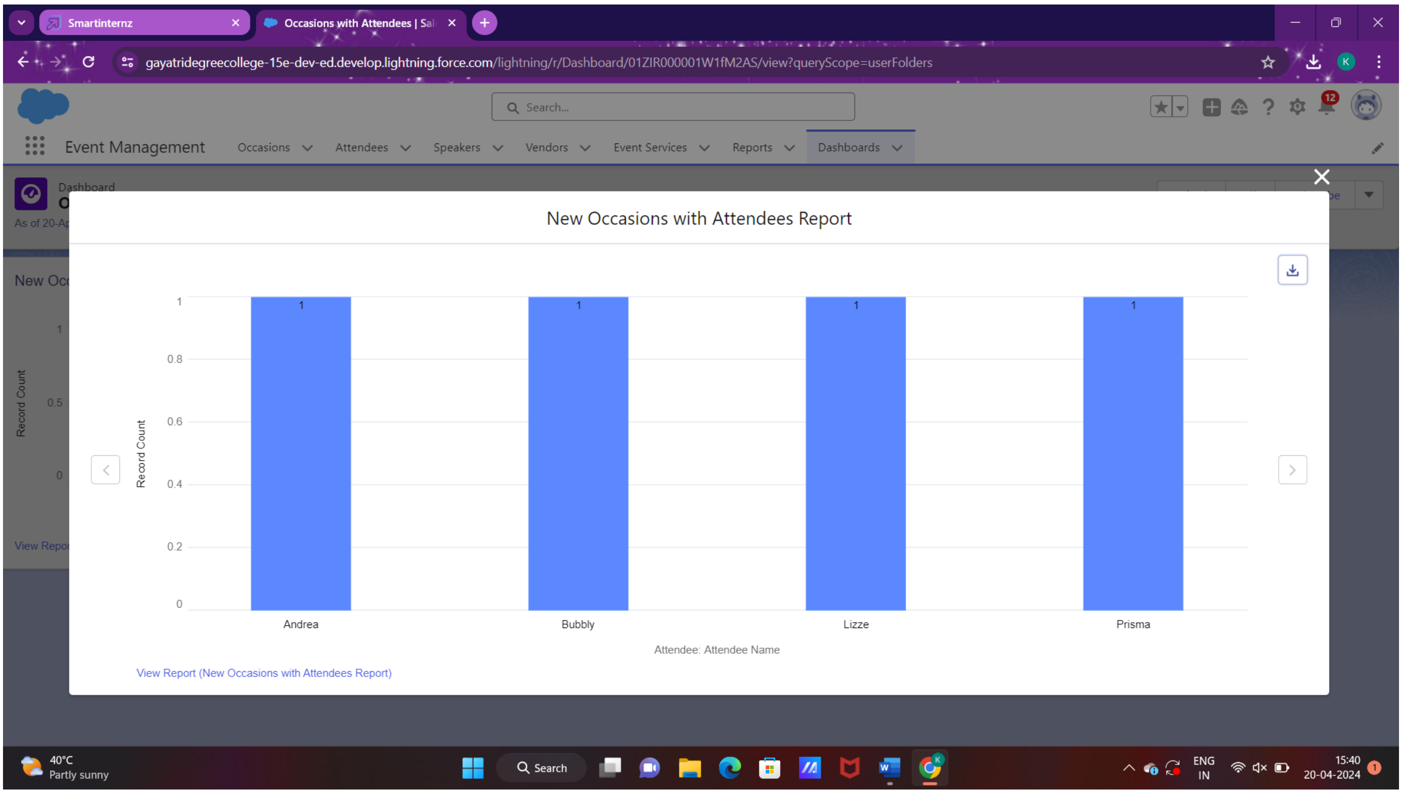
1. From the reports tab click on new report
2. Select the report type Occassions with Attendees for the report, and click Create
3. Customize your report accordingly and include all fields, Reports needs to be Grouped by one field. (ex – Created by) (require to enable add chart) then save (Occasions with Attendees) or run it.



Milestone – 10-Dashboard

❖ Creating a Dashboard

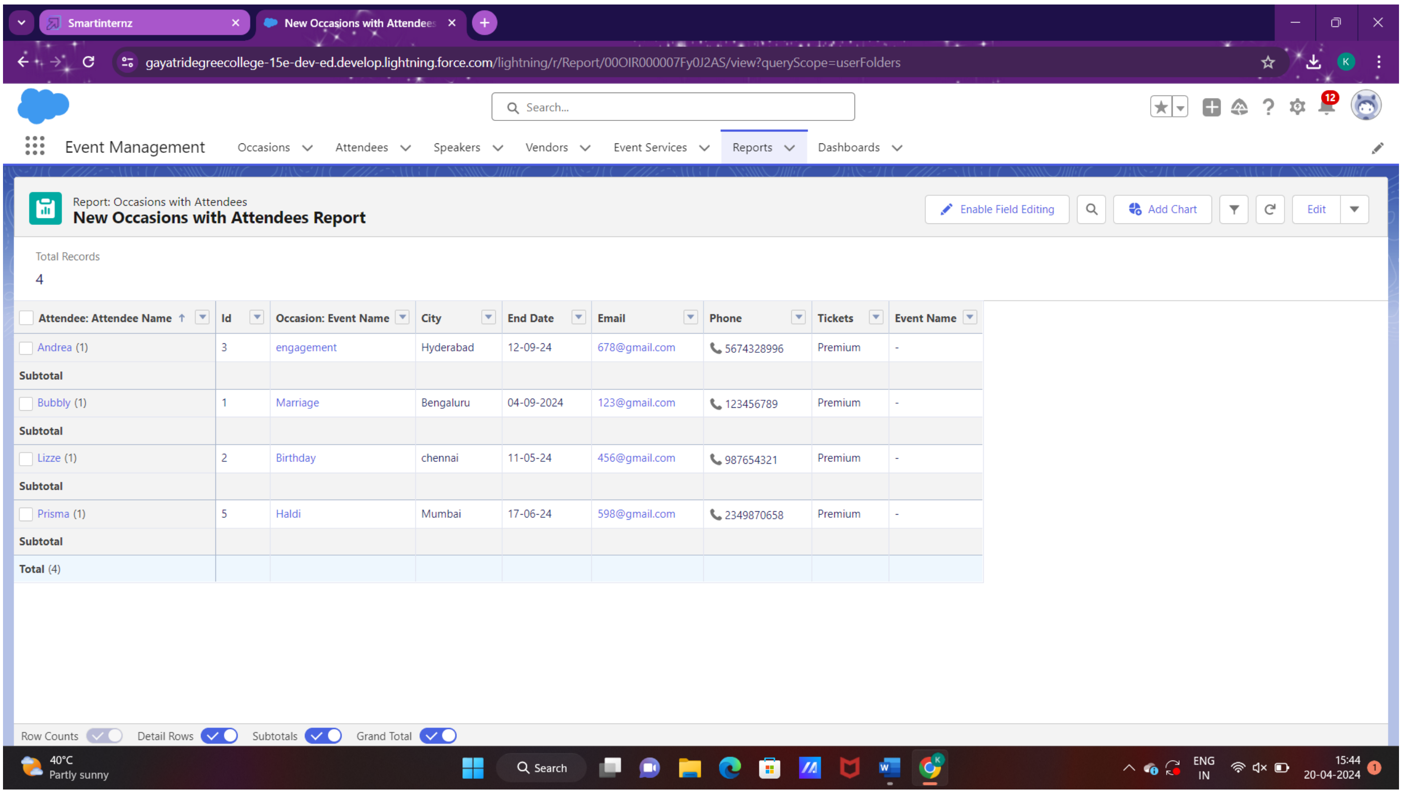
1. Click the Dashboards tab.
2. Click New Dashboard.
3. Name the dashboard Occasions with Attendees and click Create.
4. Click +Component.
5. Select Occasions with Attendees and click Select.
6. Select the Vertical Bar Chart component and click Add.
7. Click Save and then Done



Milestone – 11- View Reports and Dashboards

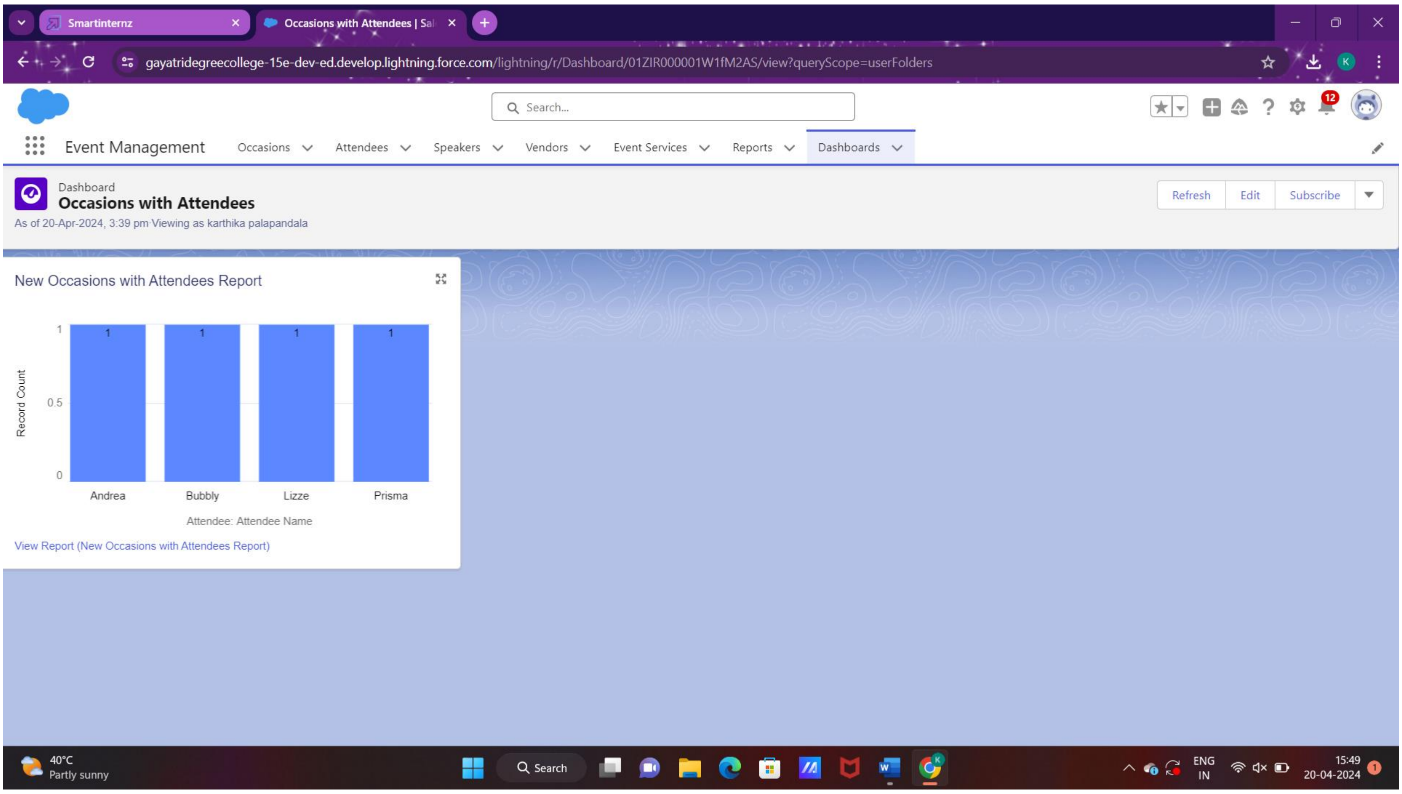
❖ View Report

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.



❖ 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

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.