BUILD AN EVENT MANAGEMENT SYSTEM USING SALES FORCE

1.INTRODUCTION:

Salesforce is a cloud-based software company that provides its customers with a platform to develop their own applications without following the tough steps that they used to follow in the legacy system. The software or application once created can be uploaded onto the cloud allowing the end-users to view them.

1.1 Overview:

This project helps in managing the on-going and upcoming event organization.

1.2 Purpose:

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

2 PROBLEM DEFINITION AND DESIGN THINKING:

2.1 Empathy map:

2.2 Ideation and Brainstorming Map:
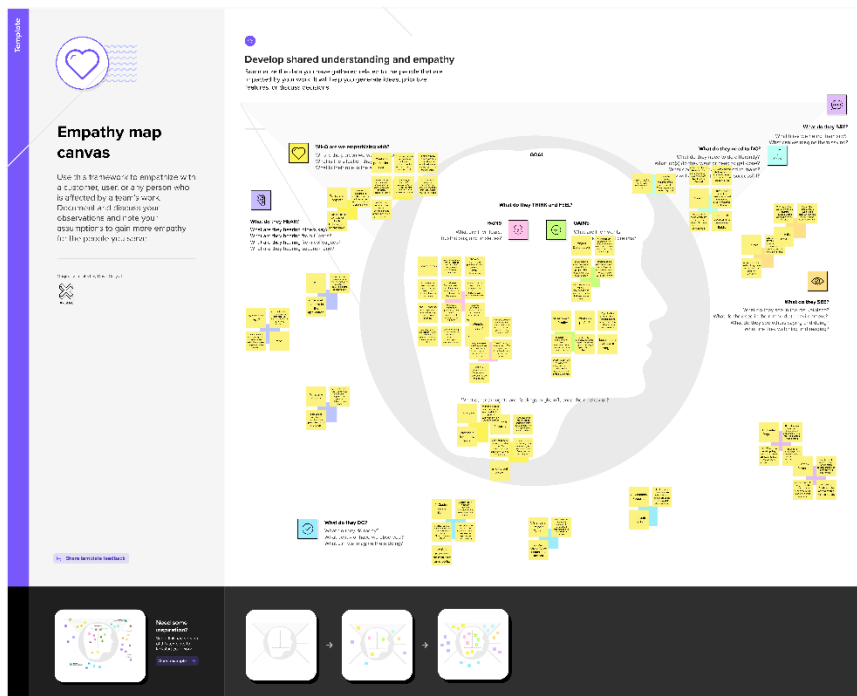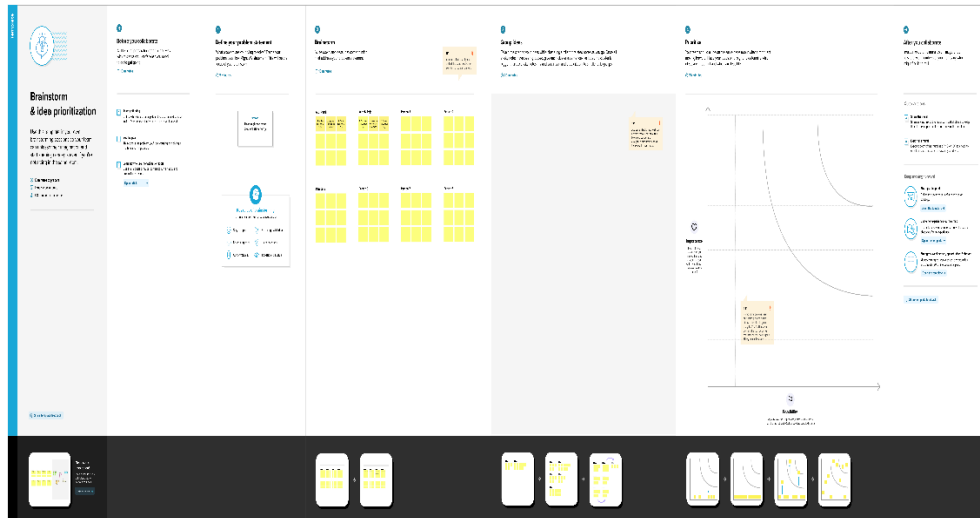
3. RESULT:

3.1 Data Model:

Object Name	Fields in the object	
Event	field label	data type
	City	text
	start date	date /time
Attendee	field label	data type
	Id	auto number
	phone	phone

Speaker	field label	data type
	Bio	text area
	e-mail	email
Vendor	field label	data type
	e-mail	email
	service provider	text

3.2 Activity and Screenshots:

MILESTONE 1-SALESFORCE? :

Activity

Creating a Salesforce Developer Org: A Developer org has all the features and licenses you need to get started with Salesforce.

1. Search Developer.salesforce.com

2.Enter the following details like First name, last name, Email, Role, Company, Country/Region, Postal code, and Username must be unique.

3. Click sign me up, after a few min you will reserve a mail salesforce org and by using the verify account link you can create your new password.

4. Click save

5. Search login.salesforce.com

6. By using username and password you can into the salesforce org.
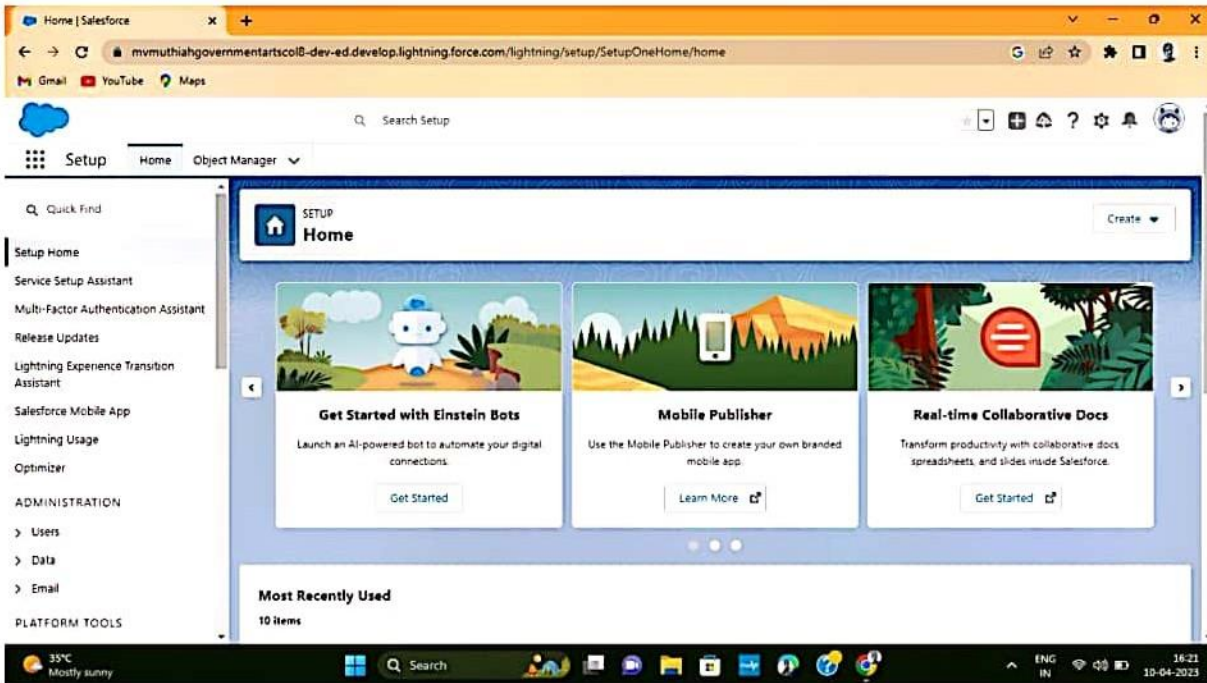
MILESTONE 2 –OBJECT:

Activity 1

- Record Name: Event Name

- Check the Allow Reports checkbox

- Check the Allow Search checkbox

- Click Save Creation of Objects for Event Management:

For this Event management we need to create 4 objects i.e Events, Attendees, Speakers and vendors. The below steps will assist you in creating those objects.

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, have a look on the extreme right you will find a Create Dropdownclick on that and select Custom Object.

- On the Custom Object Definition page, create the object as follows:

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• Label: Event

• Plural Label: Event;

Activity 2

Creation of Attendees 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, have a look on the extreme right you will find a Create Dropdownclick on that and select Custom Object

.a. On the Custom Object Definition page, create the object as follows:

b. Label: Attendee

c. Plural Label: Attendees

d. Record Name: Attendee Name

e. Check the Allow Reports checkbox

f. Check the Allow Search checkbox

g. Click Save.
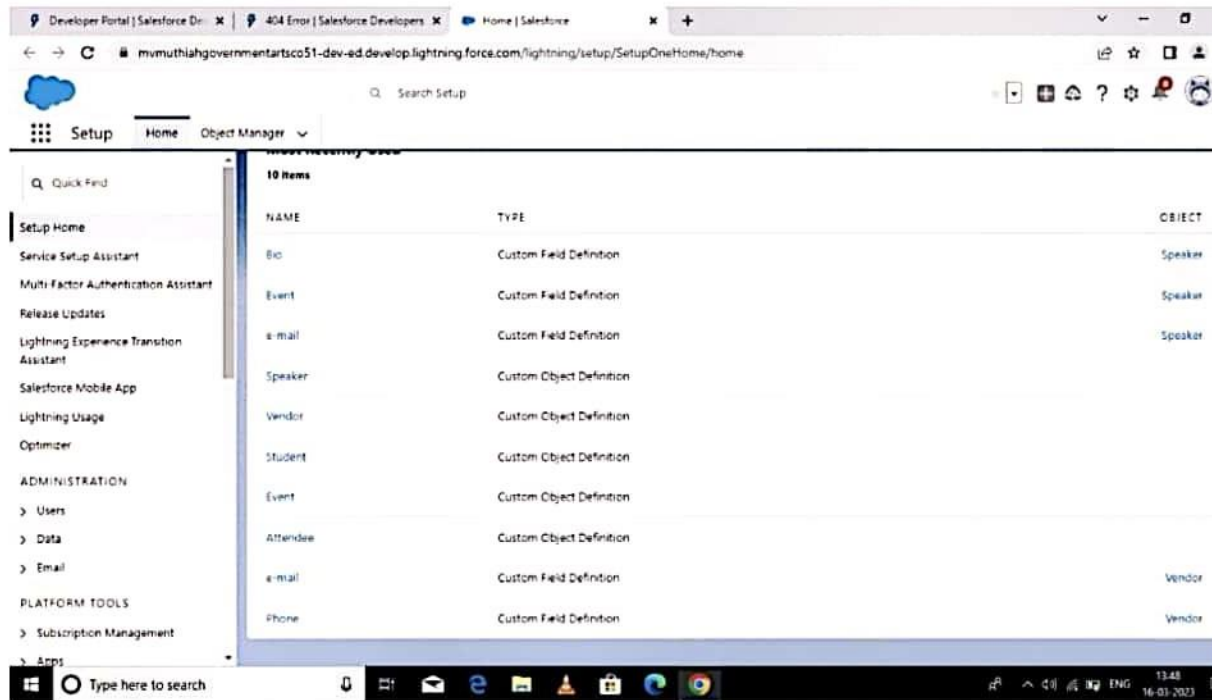
Activity 3

Creation of Speaker 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, have a look on the extreme right you will find a Create Dropdownclick on that and select Custom Object.

a. On the Custom Object Definition page, create the object as follows:

b. Label: Speaker

c. Plural Label: Speaker

 d. Record Name: Speaker Name

 e. Check the Allow Reports checkbox

 f. Check the Allow Search checkbox

 g. Click Save.

Activity 4

Creation of Vendors object:

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

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

 3. After the above steps, have a look on the extreme right you will find a Create Dropdownclick on that and select Custom Object.

 a. On the Custom Object Definition page, create the object as follows:

 b. Label: Vendor

 c. Plural Label: Vendors

 d. Record Name: Vendor Name

 e. Check the Allow Reports checkbox

 f. Check the Allow Search checkbox

 g. Click Save

MILESTONE 3-TAB:

Activity 1

Creation of Event tab: Now create a custom tab.for object select event.

1.Click on Home tab, enter Tabs in Quick Find and select Tabs

2.Under custom object tabs ,click new.

3 .for object select event.

4. For Tab Style, select any icon.

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

Activity 2

Creation of Attendee tab: Now create a custom tab.

1. Click on Home tab, enter Tabs in Quick Find and select Tabs.

2. Under custom object tabs, click New.

3. For Object, select Attendee.

4. For Tab Style, select any icon.

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

Activity 3

Creation of Speakers tab: Now create a custom tab.

1. Click on Home tab, enter Tabs in Quick Find and select Tabs.

2. Under custom object tabs, click New.

3. For Object, select Speaker.

4. For Tab Style, select any icon.

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

Activity 4

Creation of Vendor tab: Now create a custom tab.

1. Click on Home tab, enter Tabs in Quick Find and select Tabs.

2. Under custom object tabs, click New.

3. For Object, select Vendor.

4. For Tab Style, select any icon.

5. Leave all defaults as is. Click Next, Next, and Save.
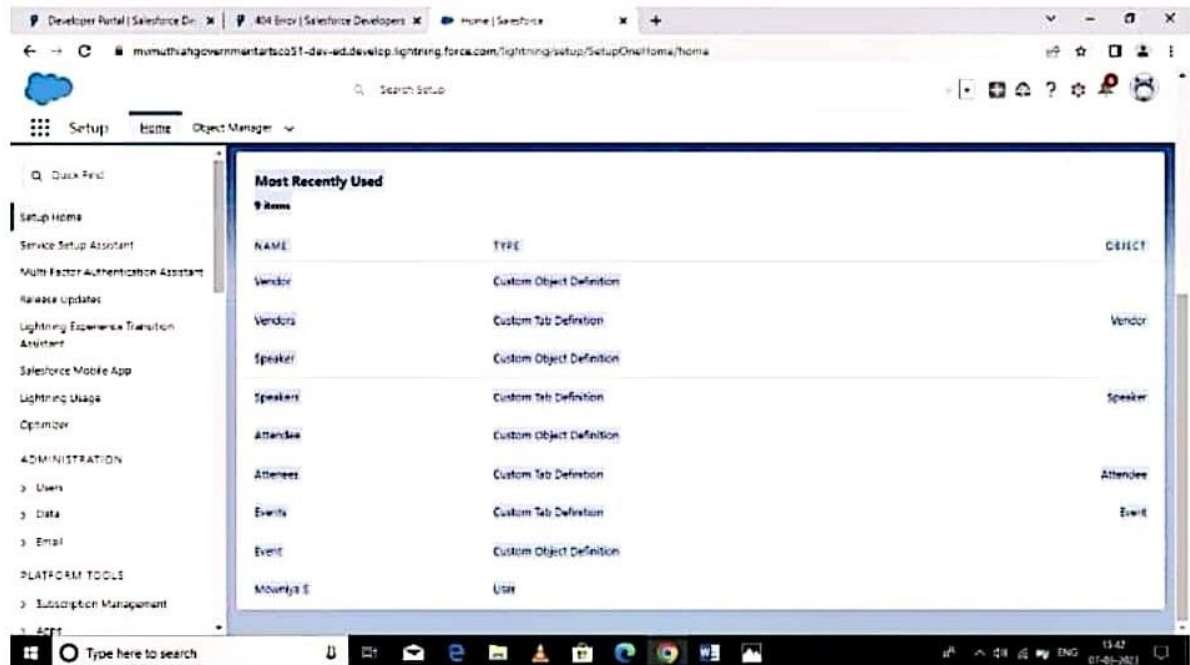
MILESTONE 3-APPLICATION:

Activity 1

Create the Event Management Construction app

• From Setup, enter App Manager in the Quick Find and select App Manager

• Click New Lightning App. Enter Event Management as the App Name, then click Next

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

• Under Utility Items, leave as is and click Next.

• From Available Items, select Events, Attendees, speakers, vendors, Reports, andDashboards and move them to Selected Items. Click Next.

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● Under Utility Items, leave as is and click Next.

● From Available Items, select Events, Attendees, speakers, vendors, Reports, andDashboards and move them to Selected Items. Click Next.
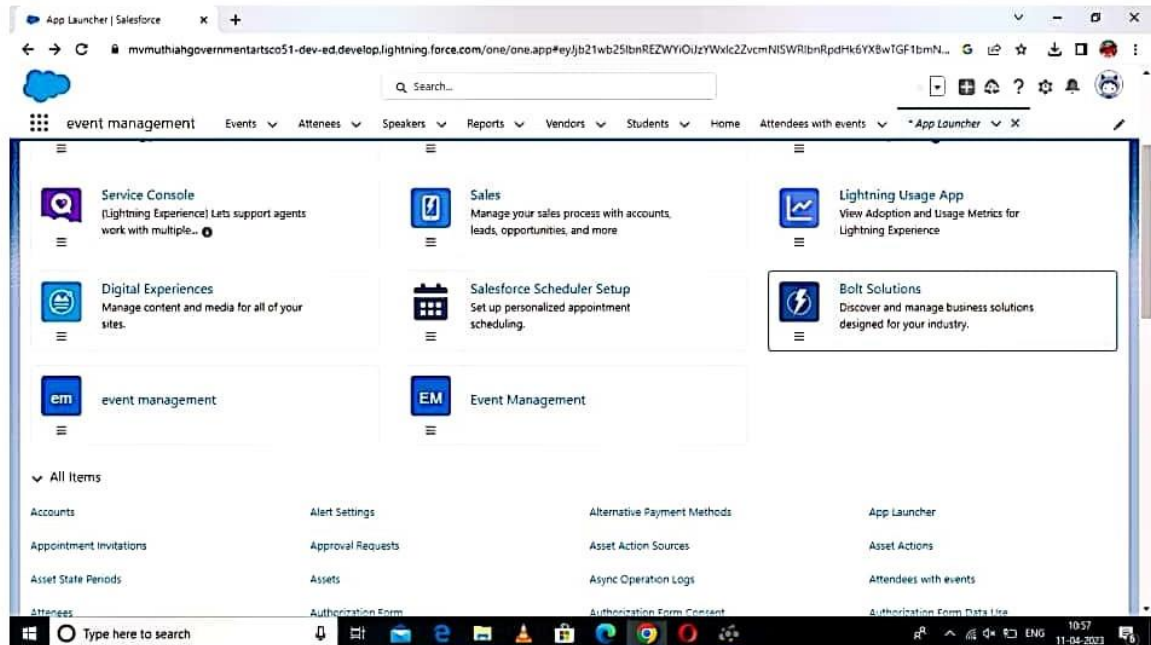
MILESTONE 4-FIELDS:

Activity 1

Creation of fields for the Event objects:

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 Event.

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.

7.Click next,next,then save and new.

Activity 2

Creation of fields for the Attendees objects:

1. Select the Auto number as the Data Type, then click Next.

2. For Field Label, enter Id.

3. Click Next, Next, then Save & New

4. Select the phone as the Data Type, then click Next.

5. For Field Label, Phone.

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

7. Select the Email as the Data Type, then click Next.

8. For Field Label, enter Email.

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

10. From Setup, click Object Manager and select Student.

11. Click Fields & Relationships, then New.

12. Select Picklist as the Data Type and click Next.

13. For Field Label enter Tickets.

14. Select Enter values, with each value separated by a new line and enter these values:

• Premium

• Gold

• Silver

15. Click Next, Next, then Save & New

Activity 2

Creation of fields for the Attendees objects:

1. Select the Auto number as the Data Type, then click Next.

2. For Field Label, enter Id.

3. Click Next, Next, then Save & New

4. Select the phone as the Data Type, then click Next.

5. For Field Label, Phone.

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

7. Select the Email as the Data Type, then click Next.

8. For Field Label, enter Email.

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

10. From Setup, click Object Manager and select Student.

11. Click Fields & Relationships, then New.

12. Select Picklist as the Data Type and click Next.

13. For Field Label enter Tickets.

14. Select Enter values, with each value separated by a new line and enter these values:

- Premium

- Gold

- Silver

15. Click Next, Next, then Save & New

Activity 5

Creation of fields for the Vendors objects:

1. Select the Email as the Data Type, then click Next.

2. For Field Label, e-mail.

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

4. Select the phone as the Data Type, then click Next.

5. For Field Label, Phone.

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

7. Select the Email as the Data Type, then click Next.

8. For Field Label, e-mail.

9. Click Next, Next, then Save & New

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

11. For Field Label, enter Service Provider.

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

13. Select Look-up Relationship as the Data Type and click Next.

14. For Related to, enter Event.

15. Click Next.

16. For Field Label, Event Name.

17. Click Next, Next, Next and Save.
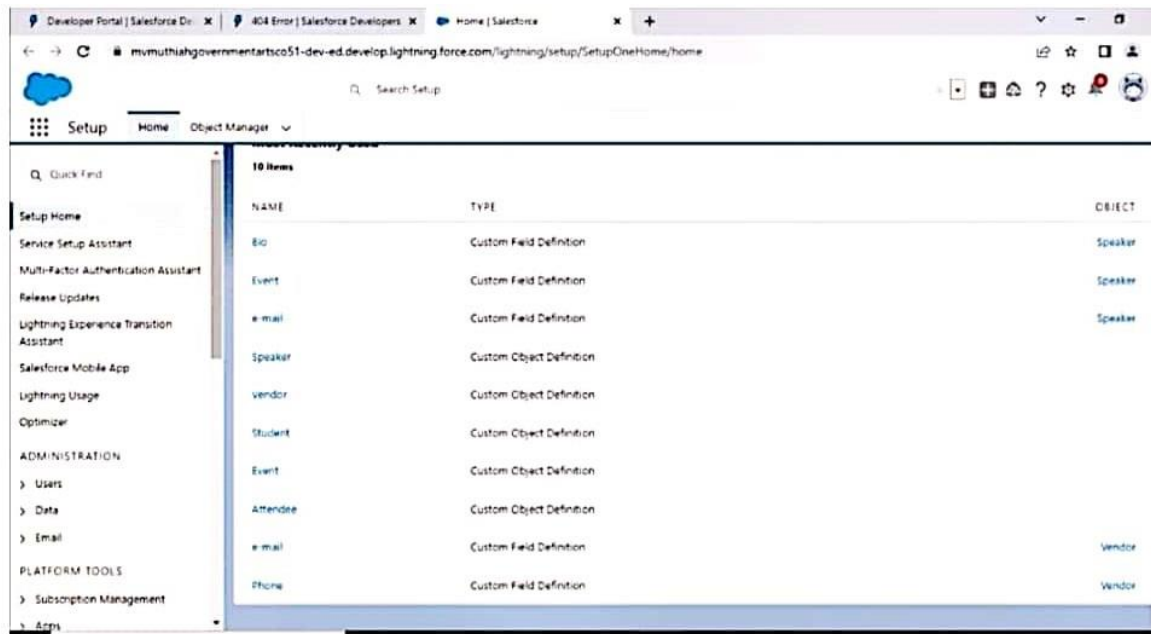
MILESTONE 5-PROFILE:

Activity 1

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 and Give view all access permissions to the Attendees, speakers and vendors.

Activity 2

Create a profile with the profile name as "Event 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.
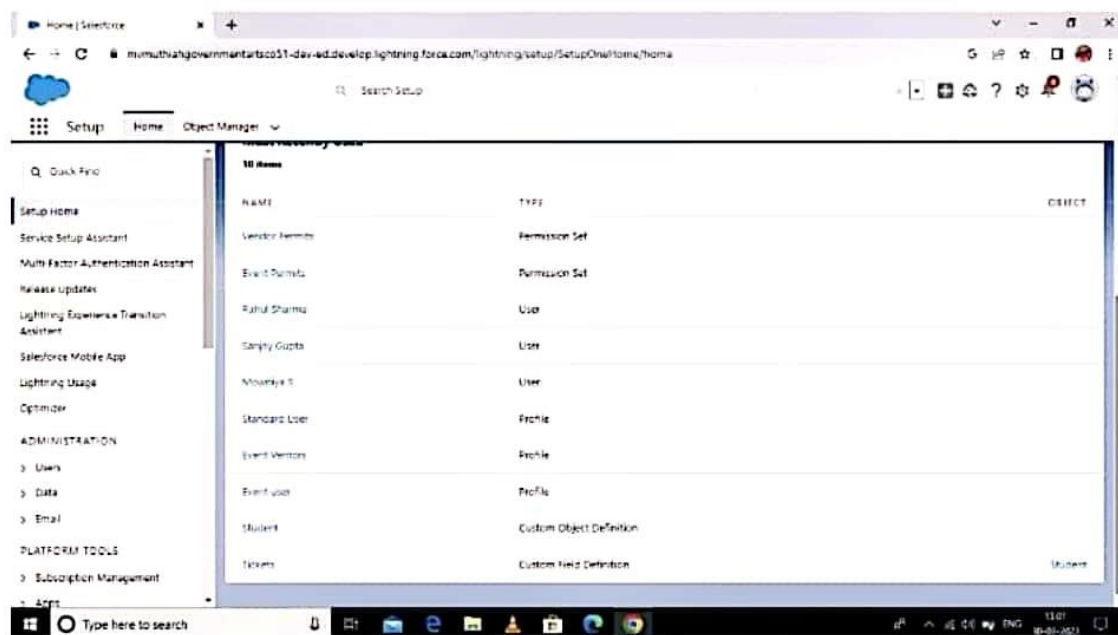
MILESTONE 6- USER:

Salesforces creating a user's : from setup type "user" in quick find and select user, then click new user

- First Name: Karthik raja
- Last Name: .m
- Alias: July
- Email: provide your personal email id for future reference
- Username: m.karthikraja08122002@gamil.com
- Nick name: KAJA
- Role: Leave as default
- Profile: Event User Profile
- User: relicense

ACTIVITY 2

Create a user with a user name as "Karthik raja", and assign him the sales executive profile . from setup type "user" in quick find and select user, then click ne user

- First name: Karthik raja
- Last name: .m
- Alias: July
- Email: provide your personal email id for future reference
- Username: m.karthikraja08122002@gamil.com
- Nick name: KAJA
- Role: Leave as default
- Profile: Event User Profile
- User license: SALESFORCE
- Profile: Event vendors profile

• Nickname: Rahu

• Role: leave it as default

• User License: Salesforce

• Profile: Event vendors profile
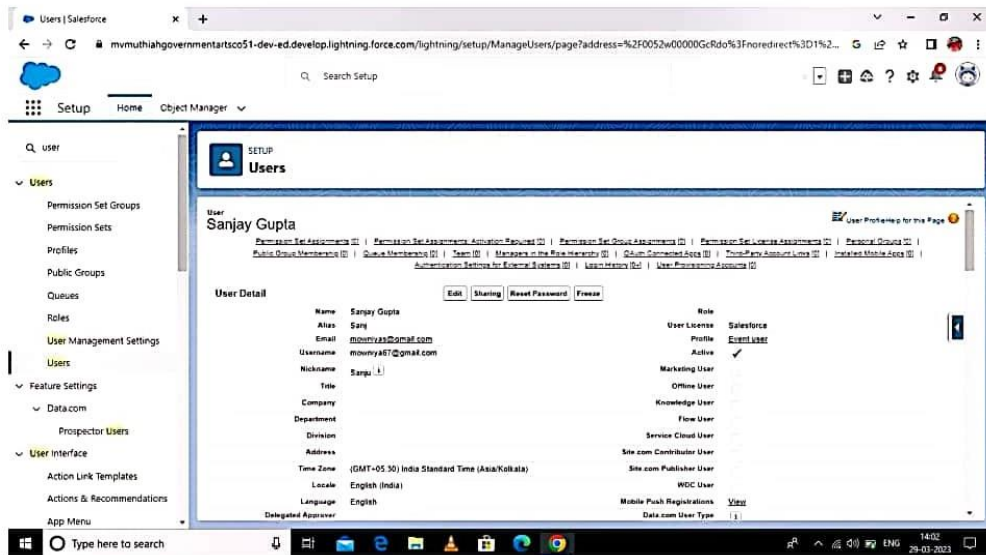
## MILESTONE 7-PERMISSION SETS:

Activity 1

Creating a Permission Set:

• From setup search "permission sets" in quick find and select permission set then click onNew

• Enter label as: Event Permits and Save

. • After saving the permission click on the Manage assignment

• Now click on the Add Assignment

• Now select the users and click on save

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Activity 2

• From setup search "permission sets" in quick find and select permission set then click on

New

• Enter label as: Vendor Permits and Save.

• After saving the permission click on the Manage assignment

• Now click on the Add Assignment

• Now select the users and click on save
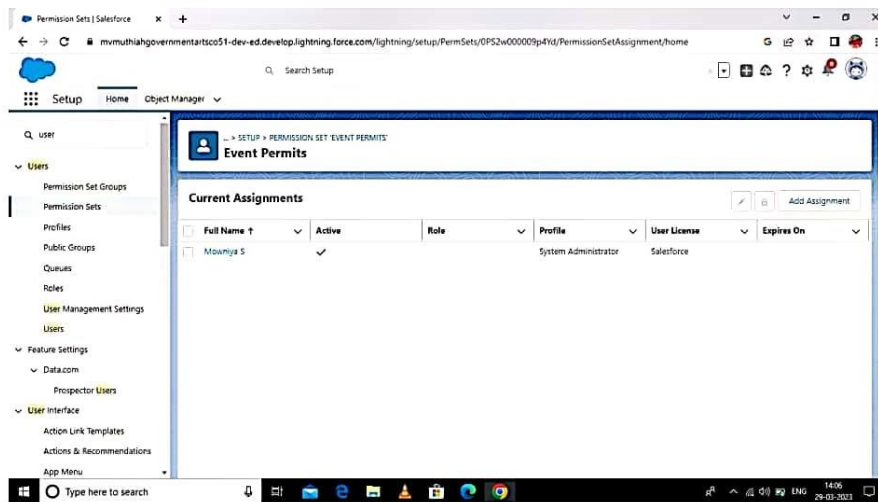
MILESTONE 8-REPORTS

Activity

Creating a Report:

1. From the Reports tab, click New Report
2. Select the report type Attendees with events for the report, and click Create.

4. Trailhead Profile Public URL

Team Lead - S.ARULPASTIN: https://trailblazer.me/id/aruls25

Team Member 1 M.KARTHIKRAJA : https://trailblazer.me/id/krajam12

5.   ADVANTAGES & DISADVANTAGE

ADVANTAGES:

1. Opportunity for creativity
2. Ability to work on different events
3. Change to work with divorce client

Disadvantages:

1.The learning curve never seems to end

2.Expensive

3. Customer support has a poor reputations

6.APPLICATION:

Salesforce is the world's number one customer relationship management (CRM)platform. Help your marketing ,sales ,commerce,service,and IT teams work as one from anywhere-so you can keep your customer happy everywhere.

7. CONCLUSION:

Event management system is user friendly and cost effective system ,it is customized with activities related to event management life-cycle. It provides a new edge to management industry .

8. FUTURESCOPE :

The future scope of Event Management is very high as even also Events will be organized. Many people wants to rest and peace during their events so for such relaxants they need an event management organization that can organize their event in the best professional manner. As well all know every career field or business field has its scope in the future that can be negative as well as a positive one. Event Management is the field which is basically an organization that organizes every event be it like wedding, parties, conferences, concerts, festival events, and many more.

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