

NM SMARINTERNZ PROJECT

BUILD AN EVENT MANAGEMENT SYSTEM USING SALESFORCE

**CREATED BY III BSC PHYSICS AT GOVERNMENT ARTS COLLEGE
UDUMALPET**

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BUILD AN EVENT MANAGEMENT SYSTEM USING SALESFORCE.

1.INTRODUCTION

1.1.OVERVIEW

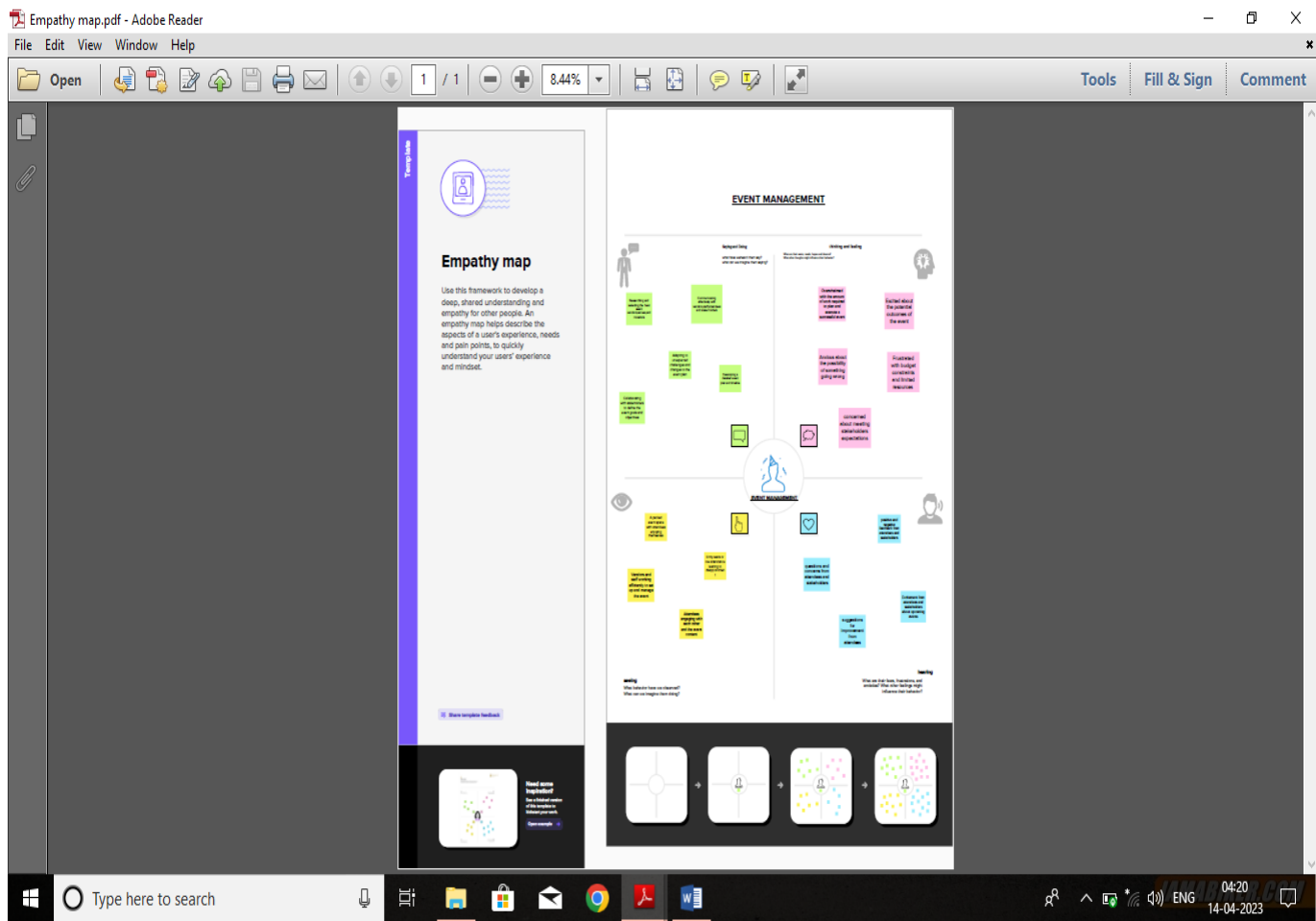
The project aim is to provide real-time knowledge for all the students who have basic knowledge of Salesforce and Looking for a real-time project. This project will also help to those professionals who are in cross-technology and wanted to switch to Salesforce with the help of this project they will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

1.2.PURPOSE

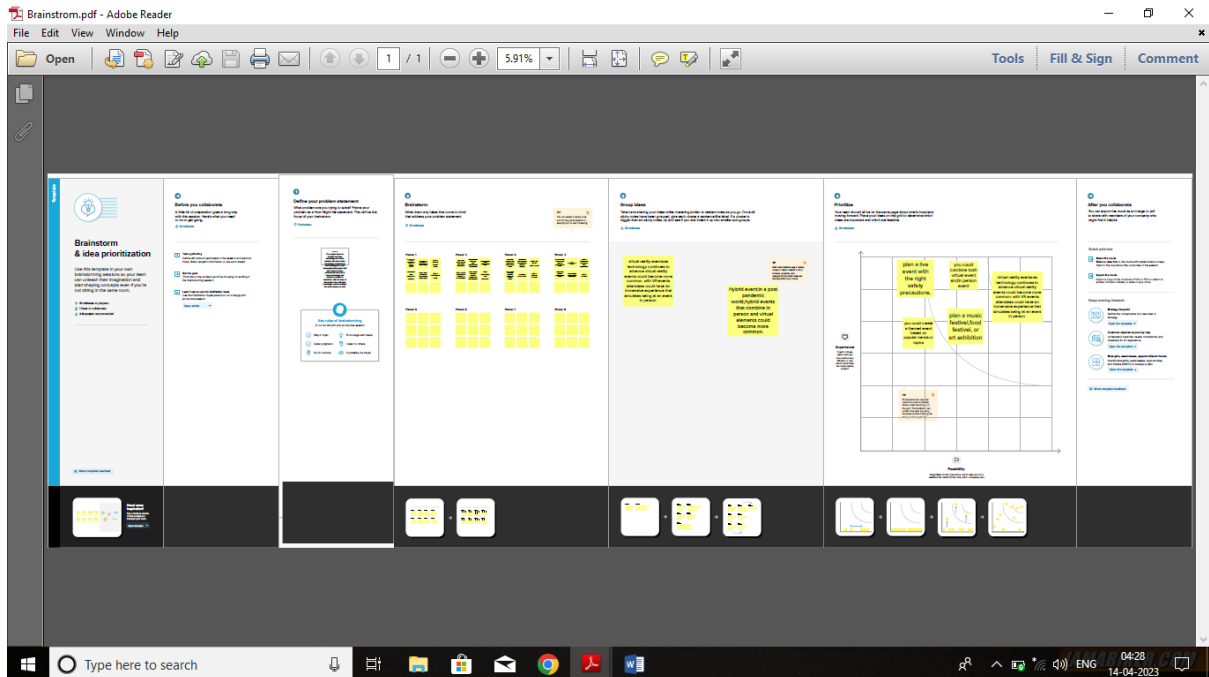
- What is real time Salesforce project.
- Object and Relationship
- Profile
- Users
- Reports
- Permission sets
- Reports

PROBLEM DEFINITION & DESIGN THINKING

2.1.Empathy map



2.2.BRAINSTORMINGN MAP



3.RESULT

3.1.DATA MODEL

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.And we had created field label and data along with this objects and also we created specific icons for this objects.

We enclosed the screenshots of objects we created such as follows.

OBJECT NAME:EVENT

This screenshot shows the Salesforce Object Manager interface for the 'Event' object. The browser address bar indicates the URL: `physicsgovernmentartscolle3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w00000364Dz/Details/view`. The Salesforce navigation bar at the top includes links to Setup, Home, and Object Manager. The left sidebar lists various configuration options for the object, with 'Details' currently selected. The main content area displays the configuration details for the 'Event' object, including its API Name, Custom status, and various tracking and deployment settings.

Details	
Description	
API Name	Event__c
Custom	✓
Singular Label	Event
Plural Label	Events
Enable Reports	✓
Track Activities	✓
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

OBJECT NAME:SPEAKER

This screenshot shows the Salesforce Object Manager interface for the 'Speaker' object. The browser address bar indicates the URL: `physicsgovernmentartscolle3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w00000364KI/Details/view`. The Salesforce navigation bar at the top includes links to Setup, Home, and Object Manager. The left sidebar lists various configuration options for the object, with 'Details' currently selected. The main content area displays the configuration details for the 'Speaker' object, including its API Name, Custom status, and various tracking and deployment settings.

Details	
Description	
API Name	Speaker__c
Custom	✓
Singular Label	Speaker
Plural Label	Speakers
Enable Reports	✓
Track Activities	✓
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

OBJECT NAME: VENDOR

The screenshot shows the Salesforce Setup interface for the 'Vendor' object. The browser address bar displays the URL: `physicsgovernmentartscolle3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w00000364Kc/Details/view`. The page title is 'Vendor | Salesforce'. The left sidebar contains a navigation menu with the following items: 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, and Triggers. The 'Details' section is active, showing the following configuration:

Field	Value
Description	
API Name	Vendor__c
Custom	✓
Singular Label	Vendor
Plural Label	Vendors
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

The right sidebar contains 'Edit' and 'Delete' buttons. The bottom status bar shows the Windows taskbar with the search bar, taskbar icons, and system tray information (ENG, 06:46, 14-04-2023).

OBJECT NAME: ATTENDEES

The screenshot shows the Salesforce Setup interface for the 'Attendee' object. The browser address bar displays the URL: `physicsgovernmentartscolle3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w00000364K3/Details/view`. The page title is 'Attendee | Salesforce'. The left sidebar contains a navigation menu with the following items: 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, and Triggers. The 'Details' section is active, showing the following configuration:

Field	Value
Description	
API Name	Attendee__c
Custom	✓
Singular Label	Attendee
Plural Label	Attendees
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

The right sidebar contains 'Edit' and 'Delete' buttons. The bottom status bar shows the Windows taskbar with the search bar, taskbar icons, and system tray information (ENG, 06:46, 14-04-2023).

OBJECT NAME	FIELD IN THE OBJECT	
EVENT	FIELD LABEL	DATA TYPE
	city	Text
	Start date	Date/time
	End date	Date/time
ATTENDEE	id	Auto number
	Phone	phone
	Email	email
	Tickets	picklist
SPEAKER	bio	Text area
	email	email
VENDORS	email	email
	phone	phone
	Service provider	text
	Event name	Look up relationship

3.2 ACTIVITY AND SCREENSHOTS

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

Salesforce objects are of two types:

- **Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
- **Custom Objects:** Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

ACTIVITY 1:EVENT OBJECT

The screenshot shows the Salesforce Setup interface for the 'Event' object. The browser address bar displays the URL: `physicsgovernmentartscolle3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w00000364Dz/Details/view`. The page title is 'Event | Salesforce'. The left sidebar contains a navigation menu with the following items: 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, and Triggers. The main content area is titled 'Details' and includes a description field and a table of settings. The settings table has two columns: 'Setting' and 'Value'. The settings are: Enable Reports (checked), Track Activities (checked), Track Field History (checked), Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). The bottom of the screen shows a Windows taskbar with the search bar and system tray.

Setting	Value
Enable Reports	✓
Track Activities	✓
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

ACTIVITY 2:SPEAKER OBJECT

The screenshot shows the Salesforce Setup interface for the 'Speaker' object. The browser address bar displays the URL: `physicsgovernmentartscolle3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w00000364KJ/Details/view`. The page title is 'Speaker | Salesforce'. The left sidebar contains a navigation menu with the following items: 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, and Triggers. The main content area is titled 'Details' and includes a description field and a table of settings. The settings table has two columns: 'Setting' and 'Value'. The settings are: Enable Reports (checked), Track Activities (checked), Track Field History (checked), Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). The bottom of the screen shows a Windows taskbar with the search bar and system tray.

Setting	Value
Enable Reports	✓
Track Activities	✓
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

ACTIVITY 3:VENDOR OBJECT

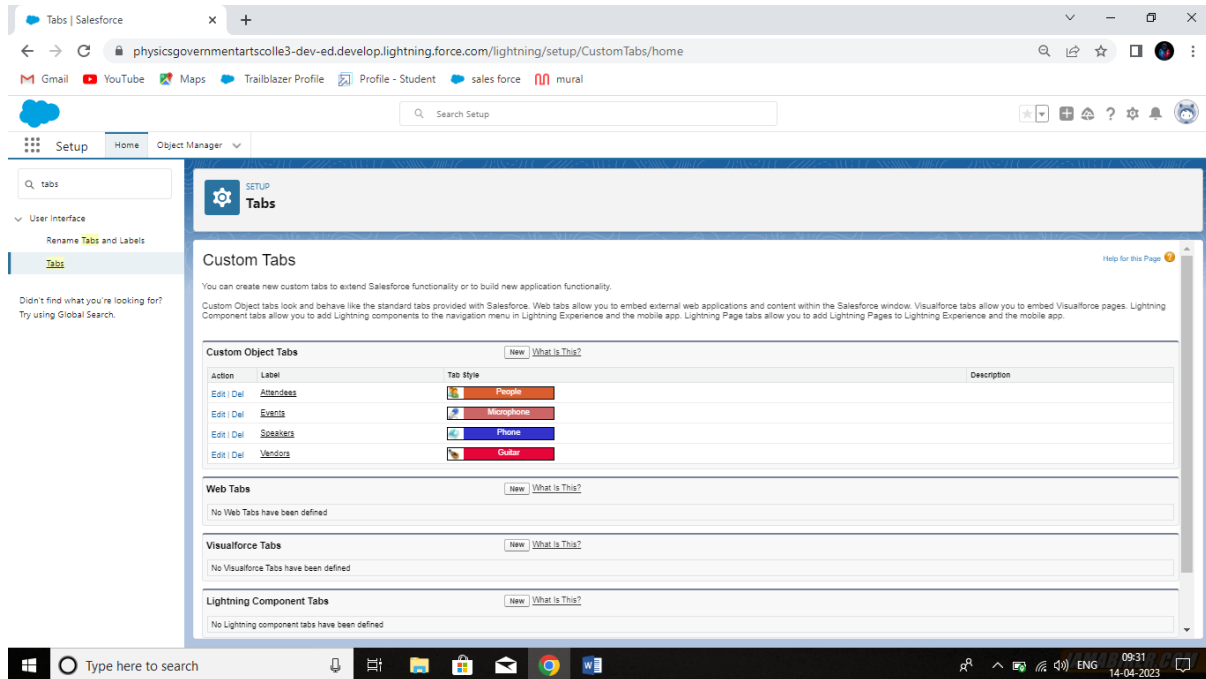
The screenshot shows the Salesforce Setup interface for the Vendor object. The browser address bar displays the URL: `physicsgovernmentartscolle3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w00000364Kc/Details/view`. The page title is "Vendor | Salesforce". The left sidebar contains a navigation menu with the following items: 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, and Triggers. The main content area is titled "Details" and includes a search bar and "Edit" and "Delete" buttons. The details are organized into two columns. The left column contains: Description, API Name (Vendor__c), Custom (checked), Singular Label (Vendor), and Plural Label (Vendors). The right column contains: Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window).

ACTIVITY 4:ATTENDEE

The screenshot shows the Salesforce Setup interface for the Attendee object. The browser address bar displays the URL: `physicsgovernmentartscolle3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w00000364K3/Details/view`. The page title is "Attendee | Salesforce". The left sidebar contains a navigation menu with the following items: 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, and Triggers. The main content area is titled "Details" and includes a search bar and "Edit" and "Delete" buttons. The details are organized into two columns. The left column contains: Description, API Name (Attendee__c), Custom (checked), Singular Label (Attendee), and Plural Label (Attendees). The right column contains: Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window).

2.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.

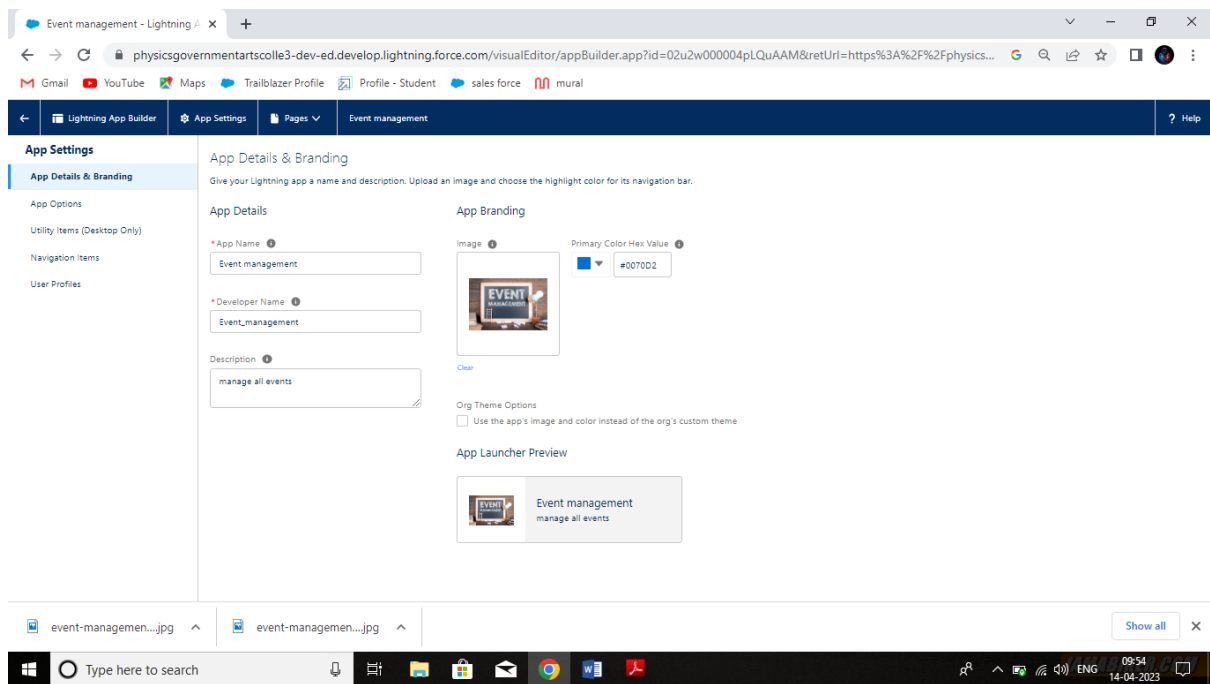


3.APPLICATION

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:

- **Standard apps:** these apps come with every occurrence of Salesforce as default. Community, Call Center, Content, Sales, Marketing, Salesforce Chatter, Site.com, and App Launcher are included in these apps. The description, logo, and label of a standard app cannot be altered.
- **Custom apps:** these apps are created according to the needs of a company. They can be made by putting custom and standard tabs together. Logos for custom apps can be changed.



4.FIELDS & RELATIONSHIP

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:

- **Standard fields:** There are four standard fields in every custom object that are Created By, Last Modified By, Owner, and the field created at the time of the creation of an object. These fields cannot be deleted or edited and they are always required. For standard objects, the fields which are present by default in them and cannot be deleted from standard objects are standard fields.
- **Custom fields:** The Custom fields which are added by the administrator/developer to meet the business requirements of any organization. They may or may not be required

Event | Salesforce

physicsgovernmentartscolle3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w00000364Dz/FieldsAndRelationships/view

Gmail YouTube Maps Trailblazer Profile Profile - Student sales force mural

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Event

Details

Fields & Relationships
7 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
City	City__c	Text(50)		
Created By	CreatedById	Lookup(User)		
End date	End_date__c	Date/Time		
Event Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User.Group)		✓
start date	start_date__c	Date/Time		

event-managemen...jpg event-managemen...jpg Show all

Type here to search

Speaker | Salesforce

physicsgovernmentartscolle3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w00000364KI/FieldsAndRelationships/view

Gmail YouTube Maps Trailblazer Profile Profile - Student sales force mural

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Speaker

Details

Fields & Relationships
7 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
Bio	Bio__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
email	email__c	Email		
Event name	Event__c	Lookup(Event)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User.Group)		✓
Speaker Name	Name	Text(80)		✓

The image displays two screenshots of the Salesforce Setup interface, specifically the 'Fields & Relationships' section for the 'Vendor' and 'Attendee' objects.

Top Screenshot: Vendor Object

The 'Vendor' object has 8 fields. The 'Fields & Relationships' section shows the following fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
email	email__c	Email		
Event name	Event_name__c	Lookup(Event)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
phone	phone__c	Phone		
service provider	service_provider__c	Text(50)		
Vendor Name	Name	Text(80)		✓

Bottom Screenshot: Attendee Object

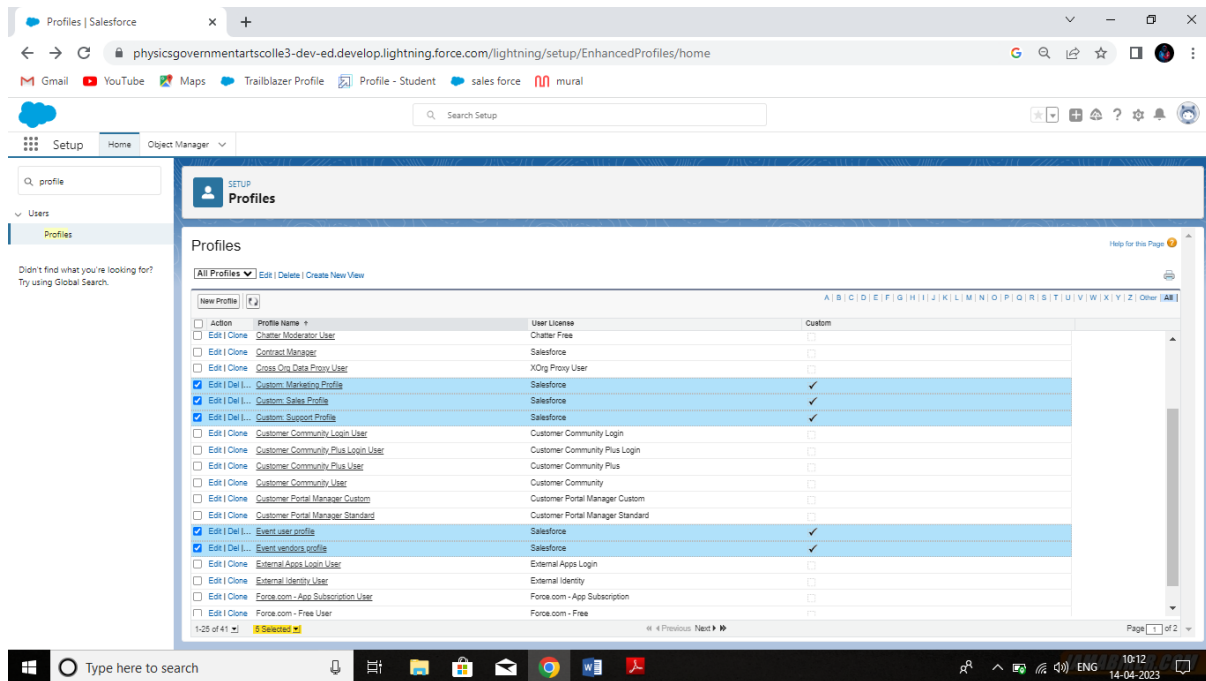
The 'Attendee' object has 7 fields. The 'Fields & Relationships' section shows the following fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Attendee Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Event name	Event_name__c	Master-Detail(Event)		✓
Id	Id__c	Auto Number		
Last Modified By	LastModifiedById	Lookup(User)		
phone	phone__c	Phone		

5.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.

A profile can be assigned to many users, but user can be assigned single profile at a time.



6.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.

The screenshot shows the Salesforce 'Permission Sets' page for a permission set named 'Event permits'. The left sidebar contains navigation links for Users, Permission Set Groups, Permission Sets, Custom Code, and Custom Permissions. The main content area includes a 'Permission Set Overview' section with fields for Description, License, Session Activation Required, Last Modified By, API Name, Event Permits, Namespace Prefix, Created By, and Created Date. Below this is a section for 'Apps' with links to Assigned Apps, Assigned Connected Apps, Object Settings, App Permissions, Apex Class Access, Visualforce Page Access, External Data Source Access, Flow Access, and Named Credential Access. The bottom of the page shows a Windows taskbar with various application icons and the system clock.

8.REPORT

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.

The screenshot shows the Salesforce 'Reports' page for a report titled 'New Events with Attendees Report'. The left sidebar contains navigation links for Event management, Events, Attendees, Speakers, Vendors, Reports, and Dashboards. The main content area displays a table of 7 records. The table has columns for Attendee Name, Email, phone, Event Name, start date, End date, and Id. The bottom of the page shows a Windows taskbar with various application icons and the system clock.

	Attendee: Attendee Name	Email	phone	Event: Event Name	start date	End date	Id
1	Rishikesh	rishikesh@gmail.com	7904283226	Sports day	11/04/2023, 9:30 am	30/04/2023, 12:00 pm	7
2	prath	prath@gmail.com	9345585933	speech competition	10/04/2023, 12:00 pm	12/04/2023, 12:00 pm	6
3	pradeep c	pradeep@gmail.com	8838074782	Sports day	11/04/2023, 9:30 am	30/04/2023, 12:00 pm	4
4	naseer ahmadi	naseer@gmail.com	7708448645	quiz competition	13/04/2023, 12:00 pm	15/04/2023, 12:00 pm	5
5	Balamurugan	balamurugan@gmail.com	9360937312	Sports day	11/04/2023, 9:30 am	30/04/2023, 12:00 pm	2
6	Aswin Kumar	aswin2003@gmail.com	9047494527	Sports day	11/04/2023, 9:30 am	30/04/2023, 12:00 pm	1
7	Akilan	akilan@gmail.com	6374025554	Sports day	11/04/2023, 9:30 am	30/04/2023, 12:00 pm	3

TRAILHEAD PROFILE PUBLIC URL

1.KAVIPRIYA C(LEAD)

<https://trailblazer.me/id/kchinnasamy4>

2.KARTHIKEYAN K

<https://trailblazer.me/id/karthi82>

3.KIRUBHAKAR R

<https://trailblazer.me/id/kikar3>

4.MANJULADEVI K

<https://trailblazer.me/id/manjk33>

5.ADVANTAGES & DISADVANTAGES

ADVANTAGES:

- **Professionalism:**Event management companies have a team of experienced professionals who are equipped to handle all aspects of event planning ,from logistics to marketing to execution.this ensures that event are well organized,efficiency,and run smoothly.

- **Cost savings :**event management companies often have established relationship with vendors and suppliers,which can lead to discounts and cost savings for their clients.
- **Time savings:**planning and executing an event can be a time consuming process, particularly for individual or business without experience.
- **Creativity:**event management companies often have a team of creative professionals who can help generate innovative ideas and concept for events.
- **Stress reduction:**planning and executing an event can be stressful,particularly for individuals or businesses without experience.
- **Risk management:**event management companies are experienced in anticipating and managing risks associated with events ,such as weather related issues,security concern,and technical difficulties.

DISADVANTAGES:

- **Event management can be high pressure job,**especially when dealing with tight deadlines,demanding clients,and unexpected issues that arise during event.
- **Long and irregular hours:**event managers often work long hours including weekends and evenings,to ensure that events are successful.
- **High level of competition:**the event management industry is highly competitive,with many companies vying for the same clients and contracts.
- **Financial risks:**event management often requires significant upfront investment,with no guarantee of a return.
- **Dependence on external factors:**events are often dependent on external factors,such as weather,traffic,and the availability of vendors and suppliers.

6.APPLICATIONS

- **1. Event Planning:** Event planning applications help event planners and organizers manage tasks such as scheduling, budgeting, vendor management, and logistics.
- **2. Registration and Ticketing:** Registration and ticketing applications allow event organizers to set up ticket sales and registration processes, manage attendee information, and track attendance.
- **3. Marketing and Promotion:** Marketing and promotion applications help event organizers promote their events through email marketing, social media, and other channels.
- **4. Event Analytics:** Event analytics applications provide insights into attendee behavior, engagement, and satisfaction, helping event organizers improve future events.
- **5. Event Mobile Apps:** Event mobile apps provide attendees with event schedules, session information, maps, and other event-related information.

7.CONCLUSION

In conclusion, Salesforce is a powerful platform that can be used for event management. It offers a wide range of features that can help event organizers to streamline their workflows and manage all aspects of their events. With Salesforce, event organizers can automate tasks such as registration, ticketing, attendee management, and post-event follow-up. They can also use Salesforce's reporting and analytics features to gain insights into event performance, make data-driven decisions, and improve future events.

8.FUTURE SCOPE

1. Virtual and hybrid events: The COVID-19 pandemic has accelerated the trend of virtual and hybrid events, and this trend is likely to continue in the future. Event planners will need to become skilled in creating engaging and interactive virtual experiences that can match the energy and excitement of in-person events.

2. Sustainability: The focus on sustainability is likely to increase in the event management industry, with more emphasis on reducing waste, carbon footprint, and environmental impact. Event planners will need to adopt sustainable practices and technologies to host eco-friendly events.

3. Personalization: Attendees are increasingly expecting personalized experiences, and event planners will need to leverage technology to deliver customized experiences. This could include personalized recommendations, tailored content, and interactive tools that enable attendees to create their own agenda.

4. Data analytics: The use of data analytics will become more prevalent in event management, enabling event planners to track attendee behavior, measure the effectiveness of marketing efforts, and optimize event design.

5. Experiential marketing: Event management will increasingly be viewed as a tool for experiential marketing, with events serving as a platform for brands to engage with customers and drive brand awareness.

6. Artificial intelligence: The use of artificial intelligence (AI) is likely to increase in event management, with AI-powered chatbots, facial recognition, and voice assistants becoming more common at events.