NM SMARINTERNZ PROJECT

BUILD AN EVENT MANAGEMENT SYSTEM USING SALESFORCE

CREATED BY III BSC PHYSICS AT GOVERNMENT ARTS COLLEGE UDUMALPET

TEAM:

1.KAVIPRIYA.C

2.KARTHIKEYAN.K

3.KIRUBHAKAR.R

4.MANJULADEVI.K

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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.
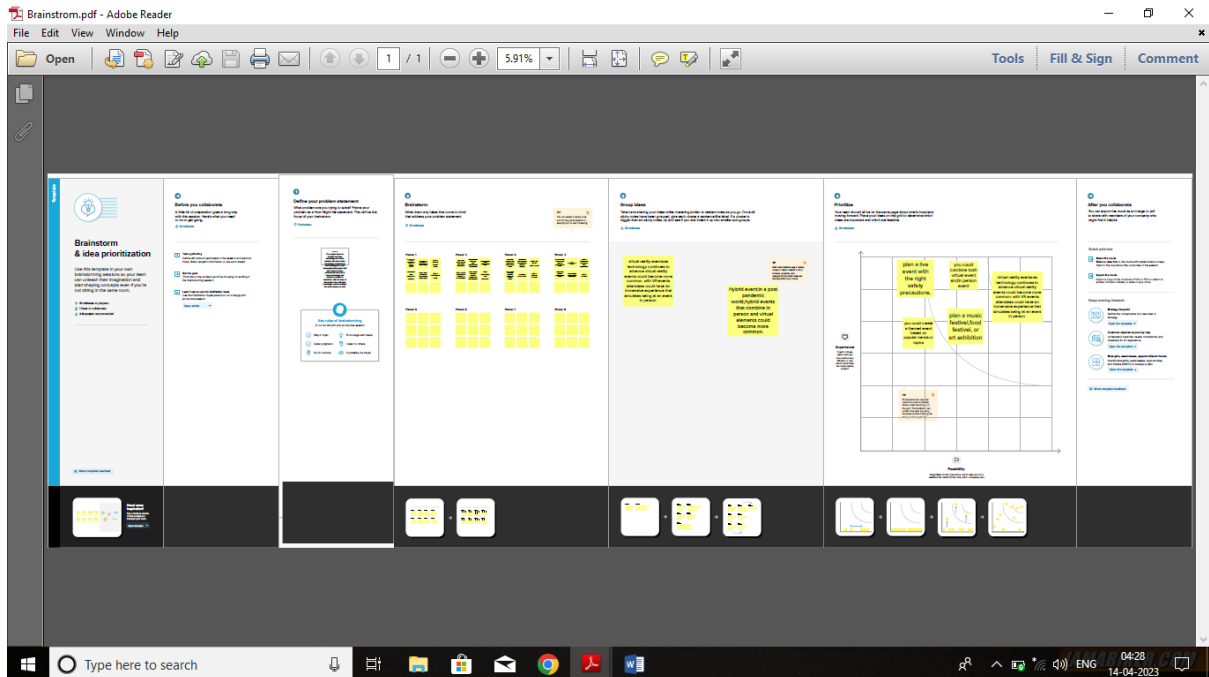
1.2.PURPOSE

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

PROBLEM DEFINITION & DESIGN THINKING

2.1.Empathy map
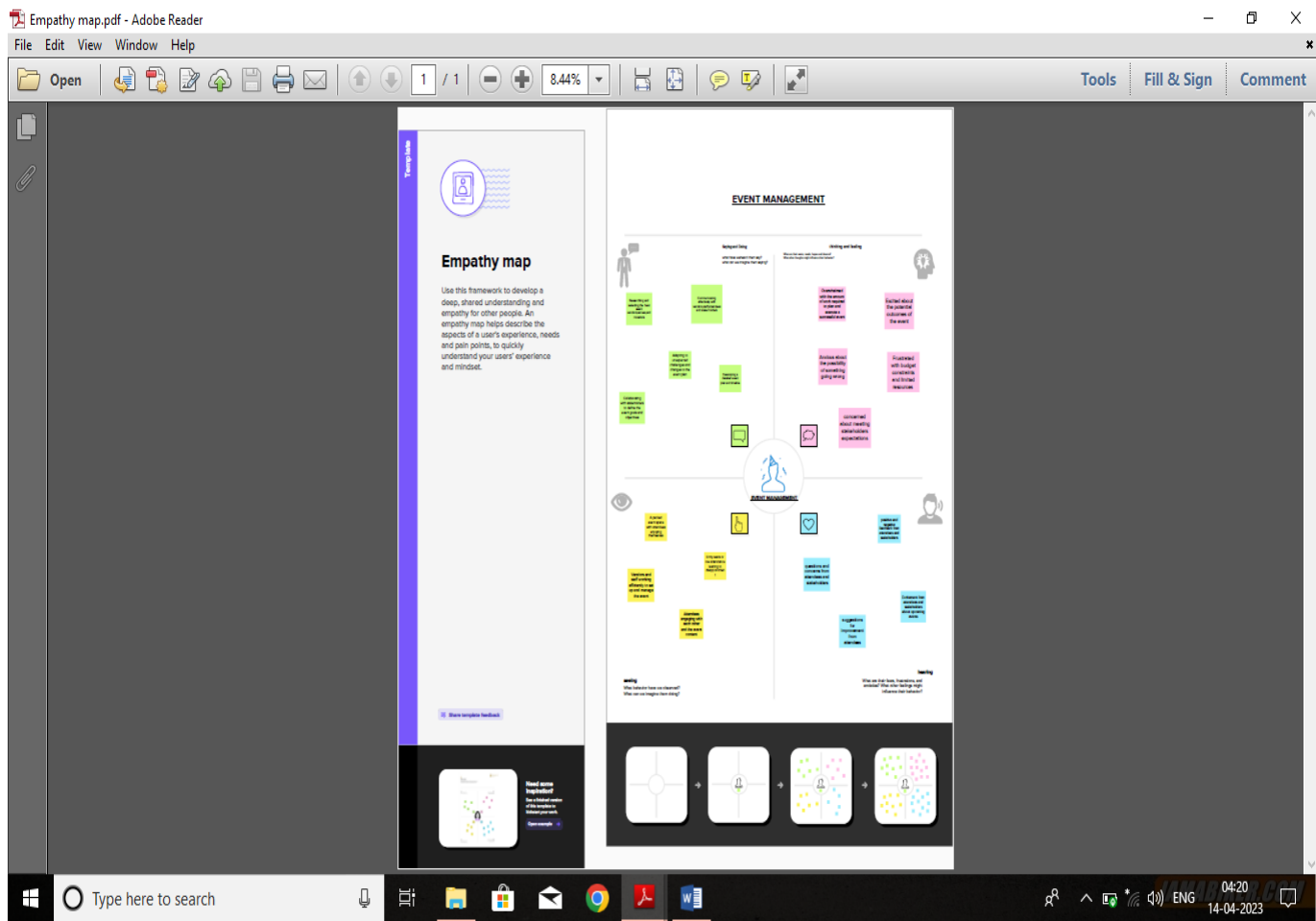
2.2.BRAINSTORMINGN MAP

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

OBJECT NAME:SPEAKER

OBJECT NAME: VENDOR

OBJECT NAME:ATTENDEES

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

ACTIVITY 2:SPEAKER OBJECT

ACTIVITY 3:VENDOR OBJECT

ACTIVITY 4:ATTENDEE

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.
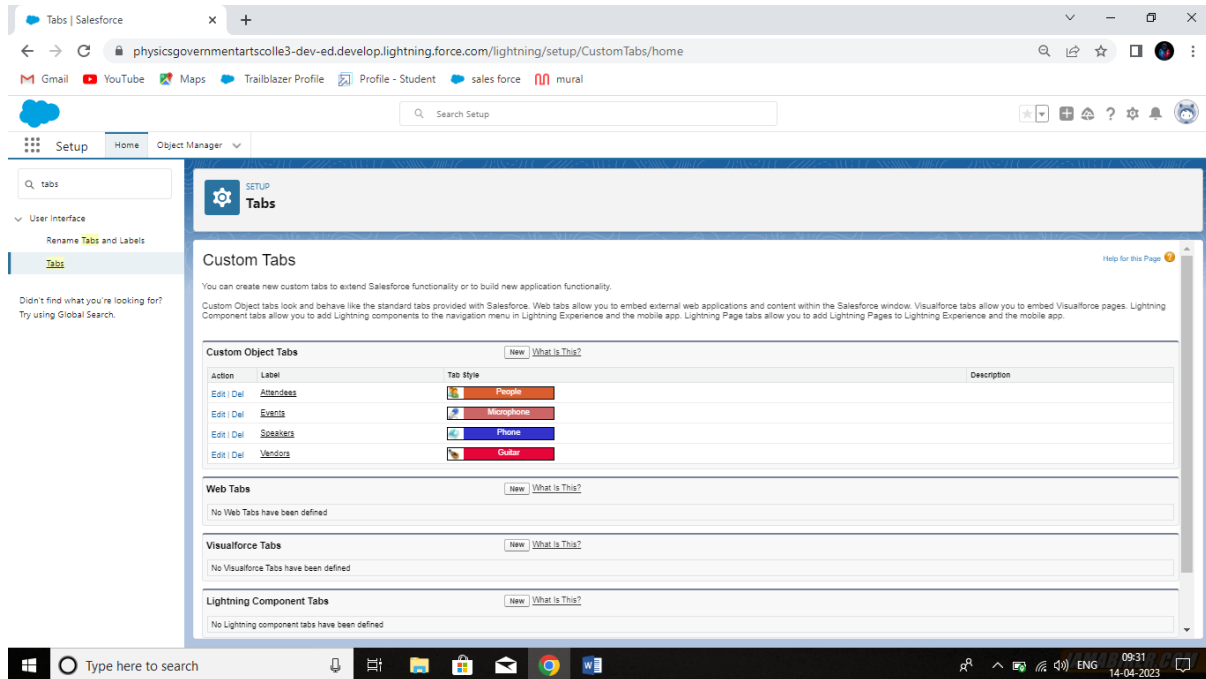
3.APPLICATION

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.
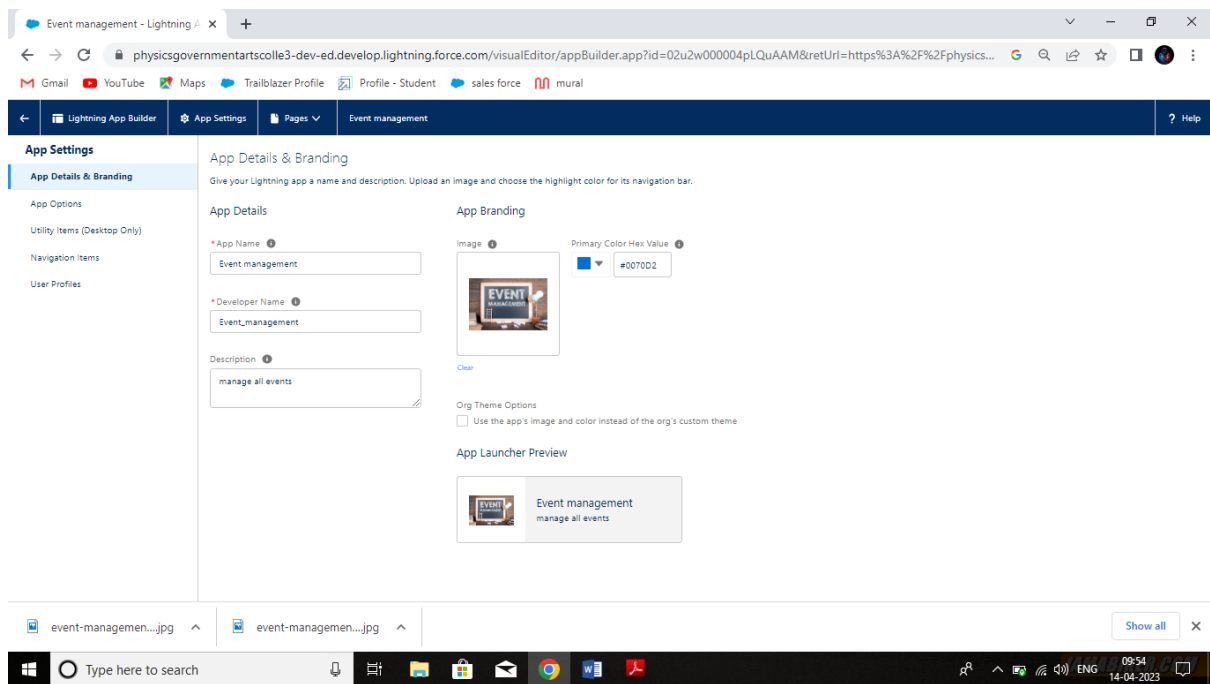
4.FIELDS & RELATIONSHIP

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

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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

Quick Find   New   Deleted Fields   Field Dependencies   Set History Tracking

Fields & Relationships

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			▼

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

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

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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

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)		✓	▼

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Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Triggers

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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.
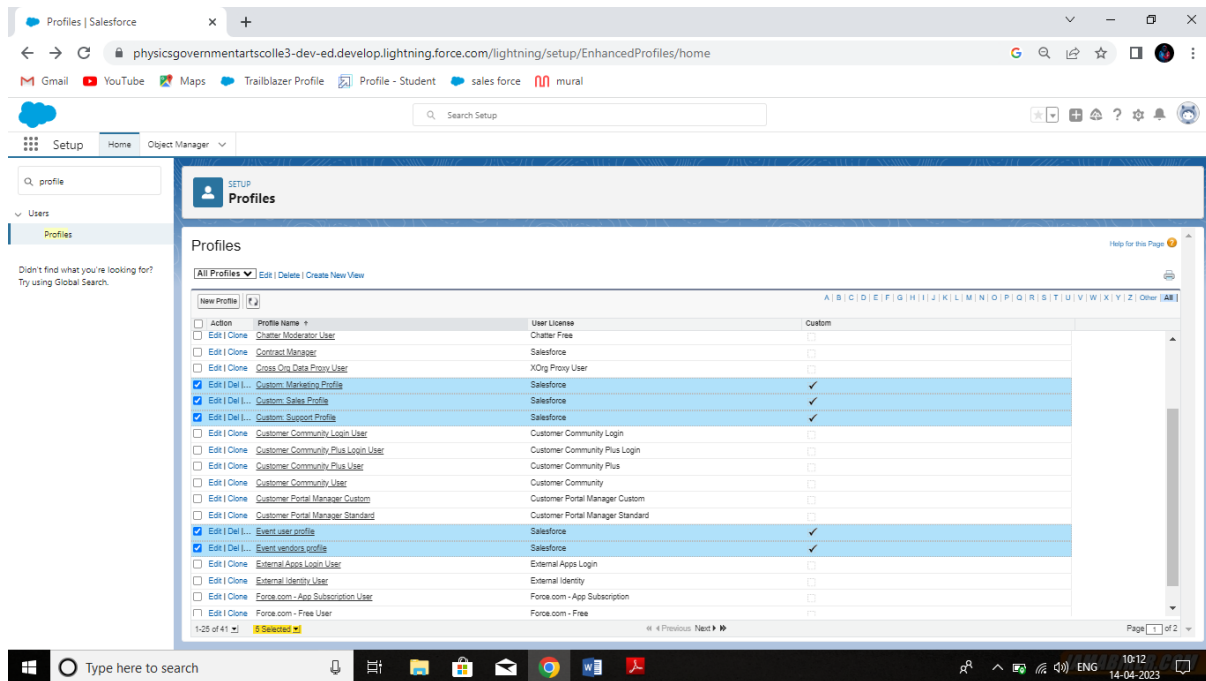
6.USER

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.

7.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. For example, let's say you have several users who must delete and transfer leads. You can create a permission set based on the tasks that these users must perform and include the permission set within permission set groups based on job functions.

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.

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 ,form 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 levelof 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.