

REPORT FOR BUILD AN EVENT MANAGEMENT

1 INTRODUCTION

Overview

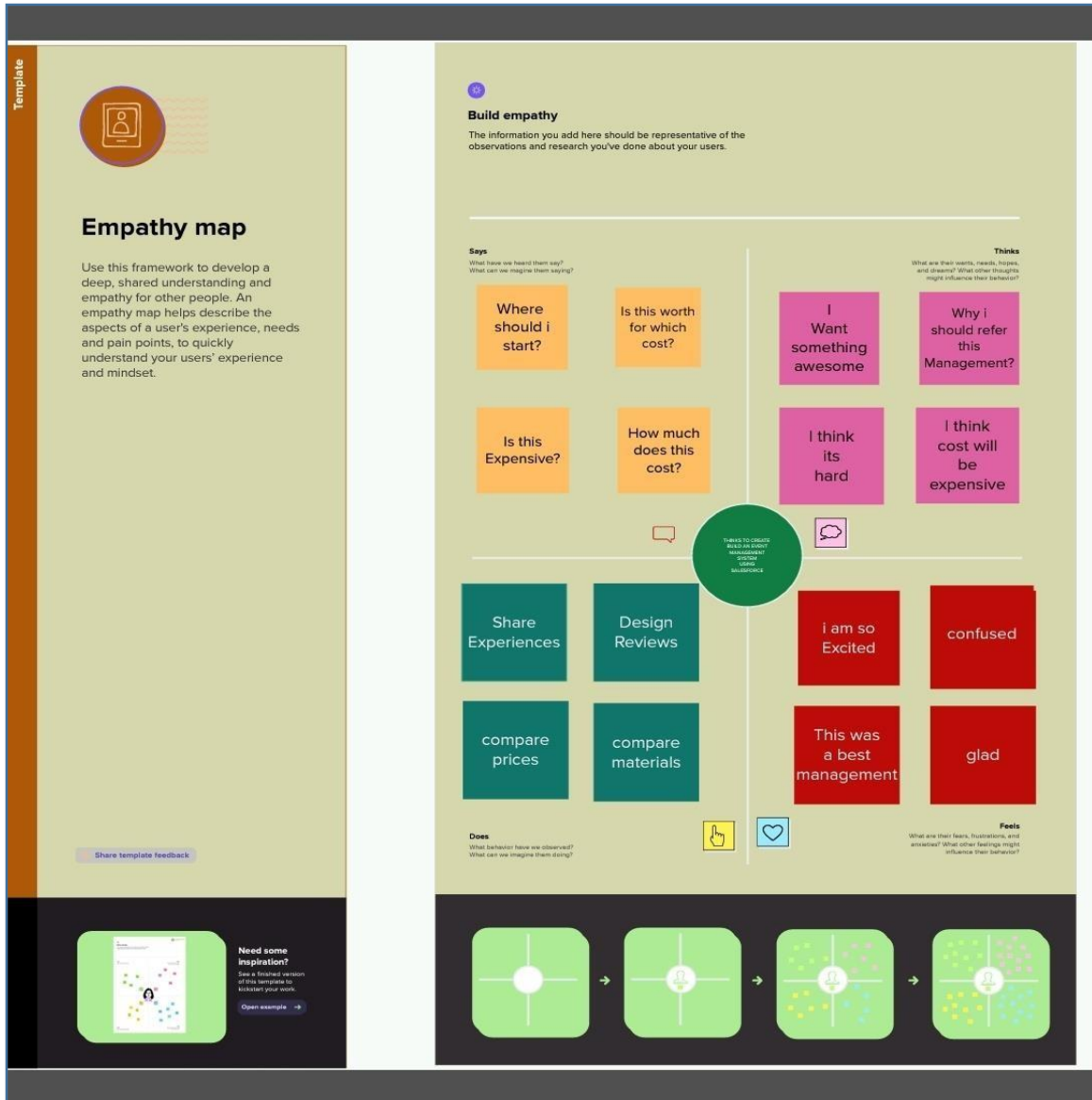
Event management is the process of creating and maintaining an event. This process spans from the very beginning of planning all the way to post-event strategizing. At the start, an event manager makes planning decisions, such as the time, location, and theme of their event.

Purpose

In all areas of business, there are some terms you're never truly sure you know the definition of. However, when it comes to event management, the definition is easy. At its core, event management is the process of planning an event. This is any type of event, whether it be in-person, virtual, or hybrid. It's synonymous with event planning and meeting planning. Just like those other terms, the scope of each project and the nitty-gritty details vary depending on the industry, company size, and more.

2 Problem Definition & Design Thinking

Empathy Map



Ideation & Brainstorming



3 RESULT

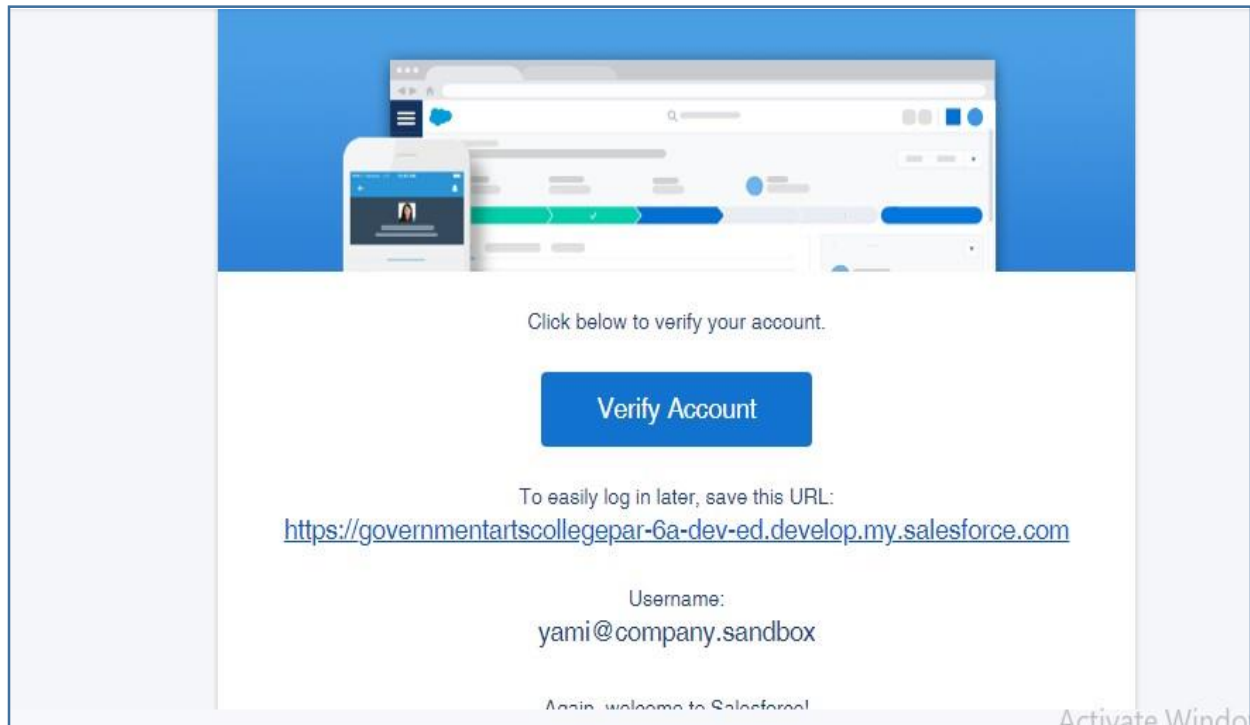
3.1 Data Model:

Object Name	Fields in the Object	
Event Object	Field label	Data type
	City	Text
Attendees Object	Field label	Data type
	Id	Auto Number
	Phone	Phone
	e-mail	Email
Speakers Object	Field label	Data type
	Bio	Text Area
	e-mail	Email
Vendors Object	Field label	Data type
	e-mail	Email
	Phone	Phone
	Service Provider	Text

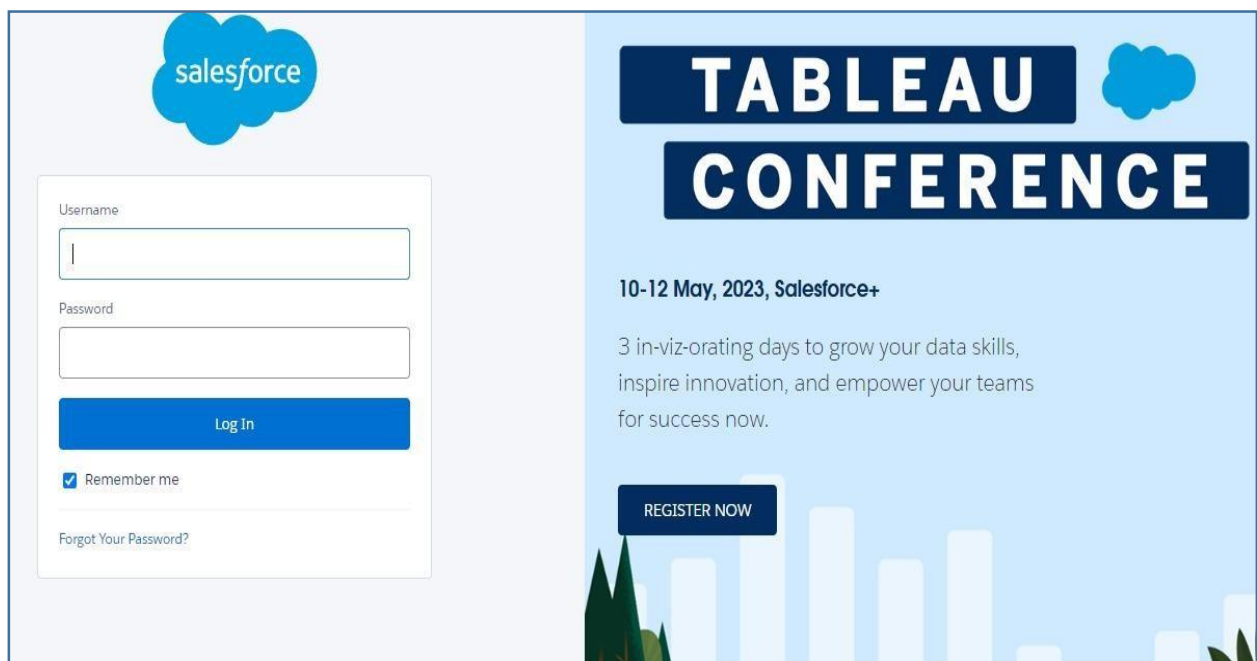
3.2 Activity & Screenshot

Milestone: 1

Activity: Creating Developer Account



Login to your salesforce account



Milestone-2: Object

Activity-1: Creation of Event Object

The screenshot shows the 'New Custom Object' page in Salesforce Setup. The 'Custom Object Information' section is highlighted. The 'Label' field is set to 'Event' and the 'Plural Label' field is set to 'Events'. Both fields are highlighted with a red box. The 'Object Name' field is set to 'Event'. The 'Description' field is empty. The 'Context-Sensitive Help Setting' is set to 'Open the standard Salesforce.com Help & Training window'. The 'Content Name' is set to 'None'.

Setup | Home | Object Manager

SETUP New Custom Object

Custom Object Definition Edit [Save] [Save & New] [Cancel]

Custom Object Information Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name Example: Account

Description

Context-Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window ☐ Open a window using a Visualforce page

Content Name

Enter Record Name Label and Format

Activity 2: Creation of Attendee Object

The screenshot shows the 'New Custom Object' page in Salesforce Setup. The 'Custom Object Information' section is highlighted. The 'Label' field is set to 'Attendee' and the 'Plural Label' field is set to 'Attendees'. Both fields are highlighted with a red box. The 'Object Name' field is set to 'Event'. The 'Description' field is empty. A yellow banner at the top indicates that permissions for this object are disabled for all profiles by default.

Setup | Home | Object Manager

SETUP New Custom Object

New Custom Object Help for this Page

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)

Custom Object Definition Edit [Save] [Save & New] [Cancel]

Custom Object Information Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name Example: Account

Description

Activity 3: Creation of Speaker Object

The screenshot shows the 'New Custom Object' page in Salesforce Setup. The 'Custom Object Definition Edit' section is active, showing the 'Custom Object Information' tab. The 'Label' field is set to 'Speaker' and the 'Plural Label' field is set to 'speakers'. Both fields are highlighted with a red box. The 'Object Name' field is set to 'Speaker'. The 'Description' field is empty. A message at the top states: 'Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)'.

Setup Home Object Manager

SETUP New Custom Object

Help for this Page

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label Speaker Example: Account

Plural Label speakers Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name Speaker Example: Account

Description

Activity 4: Creation of Vendor Object

The screenshot shows the 'New Custom Object' page in Salesforce Setup. The 'Custom Object Definition Edit' section is active, showing the 'Custom Object Information' tab. The 'Label' field is set to 'Vendor' and the 'Plural Label' field is set to 'Vendors'. Both fields are highlighted with a red box. The 'Object Name' field is set to 'Vendor'. The 'Description' field is empty. A message at the top states: 'Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)'.

Setup Home Object Manager

SETUP New Custom Object

Help for this Page

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label Vendor Example: Account

Plural Label Vendors Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name Vendor Example: Account

Description

Milestone-3: Tabs

The screenshot shows the Salesforce Setup interface. In the left sidebar, under 'User Interface', the 'Tabs' link is highlighted with a left-pointing arrow. The main content area is titled 'Custom Tabs' and includes a 'Search Setup' bar at the top. Below the title, there is a section for 'Custom Object Tabs' with a 'New' button and a 'What Is This?' link. A table lists existing tabs, with 'Energy Audits' highlighted and a right-pointing arrow next to it. Below this are sections for 'Web Tabs' and 'Visualforce Tabs', each with a 'New' button and a 'What Is This?' link.

Setup
Home
Object Manager

Search Setup

Q Tabs

User Interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for?
Try using Global Search.

SETUP
Tabs

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

New What Is This?

Action	Label	Tab Style	Description
Edit Del	Energy Audits	Sun	

Web Tabs

New What Is This?

No Web Tabs have been defined

Visualforce Tabs

New What Is This?

No Visualforce Tabs have been defined

Activity 1: Creation of Event Tab

The screenshot shows the 'Step 1. Enter the Details' page for creating a new custom tab. The left sidebar is the same as in the previous screenshot. The main content area has a 'Step 1 of 3' indicator. It prompts the user to 'Choose the custom object for this new custom tab. Fill in other details.' There is a dropdown menu for 'Select an existing custom object' with 'Event' selected, and a 'Tab Style' dropdown with 'Shield' selected. A red box highlights these two dropdowns, with arrows pointing to them. Below these are optional fields for 'Splash Page Custom Link' (set to '--None--') and a 'Description' text area. At the bottom right, there are 'Next' and 'Cancel' buttons, with a downward arrow pointing to the 'Next' button.

Setup
Home
Object Manager

Search Setup

Q Tabs

User Interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for?
Try using Global Search.

SETUP
Tabs

Step 1. Enter the Details

Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object

Object

Event

Tab Style

Shield

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link

--None--

Enter a short description.

Description

Next Cancel

Activity 2: Creation of Attendee object

The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is open, and 'User Interface' is selected. Under 'User Interface', 'Rename Tabs and Labels' is highlighted, and 'Tabs' is selected. The main content area is titled 'SETUP Tabs' and shows 'Step 1 of 3: Enter the Details'. The instructions state: 'Choose the custom object for this new custom tab. Fill in other details.' Below this, there are two fields: 'Object' and 'Tab Style'. The 'Object' field is set to 'Attendee' and is highlighted with a red box. The 'Tab Style' field is set to 'Shield' and is also highlighted with a red box. Below these fields, there is an optional section for 'Home Page Custom Link' with a dropdown set to '--None--'. At the bottom, there is a text area for 'Enter a short description.' and a 'Next' button with a downward arrow pointing to it.

Activity 3: Creation of Speaker Tab

The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is open, and 'User Interface' is selected. Under 'User Interface', 'Rename Tabs and Labels' is highlighted, and 'Tabs' is selected. The main content area is titled 'SETUP Tabs' and shows 'Step 1 of 3: Enter the Details'. The instructions state: 'Choose the custom object for this new custom tab. Fill in other details.' Below this, there are two fields: 'Object' and 'Tab Style'. The 'Object' field is set to 'Speaker' and is highlighted with a red box. The 'Tab Style' field is set to 'People' and is also highlighted with a red box. Below these fields, there is an optional section for 'Home Page Custom Link' with a dropdown set to '--None--'. At the bottom, there is a text area for 'Enter a short description.' and a 'Next' button with a downward arrow pointing to it.

Activity 4: Creation of Vendor Tab

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "Tabs" entered. Under "User Interface", the "Tabs" link is highlighted. The main content area is titled "SETUP Tabs" and shows "Step 1. Enter the Details". The instructions say: "Choose the custom object for this new custom tab. Fill in other details." There are two sections: "Select an existing custom object" and "Create a new custom object". In the "Select an existing custom object" section, the "Object" dropdown is set to "Vendor" and the "Tab Style" dropdown is set to "Laptop". These two dropdowns are highlighted with a red rectangle. Below this, there is an optional section for "Splash Page Custom Link" with a dropdown set to "--None--". At the bottom, there is a "Description" field. A "Next" button is at the bottom right, with a downward arrow pointing to it.

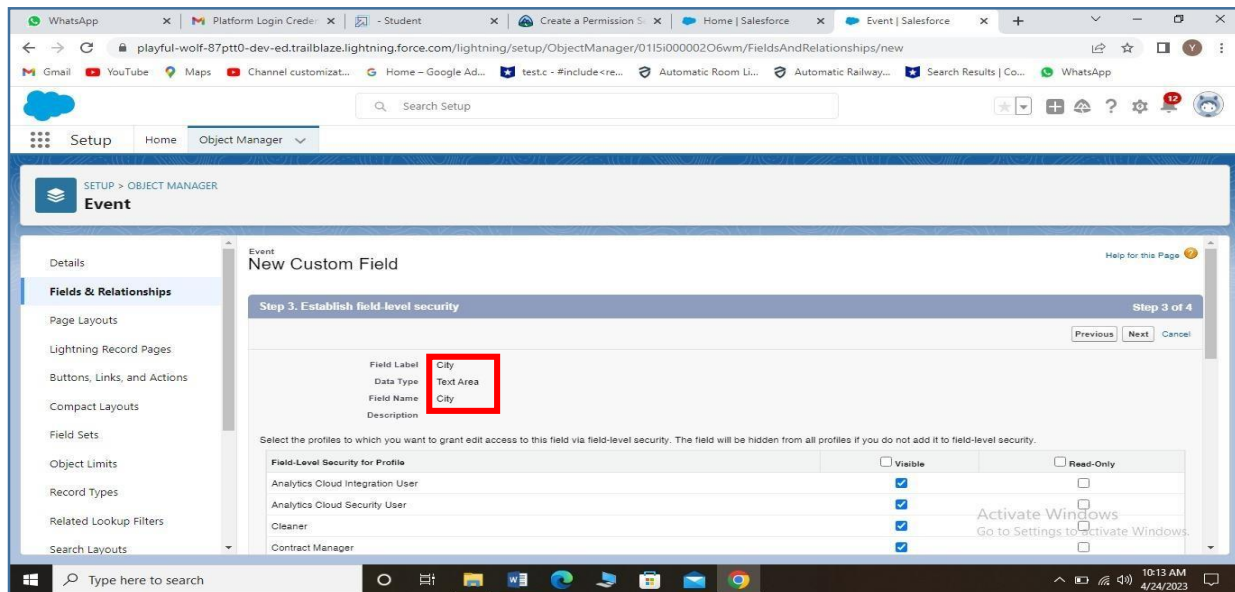
Milestone -3: Lightning App

Activity: Creation of Event Management Construction App

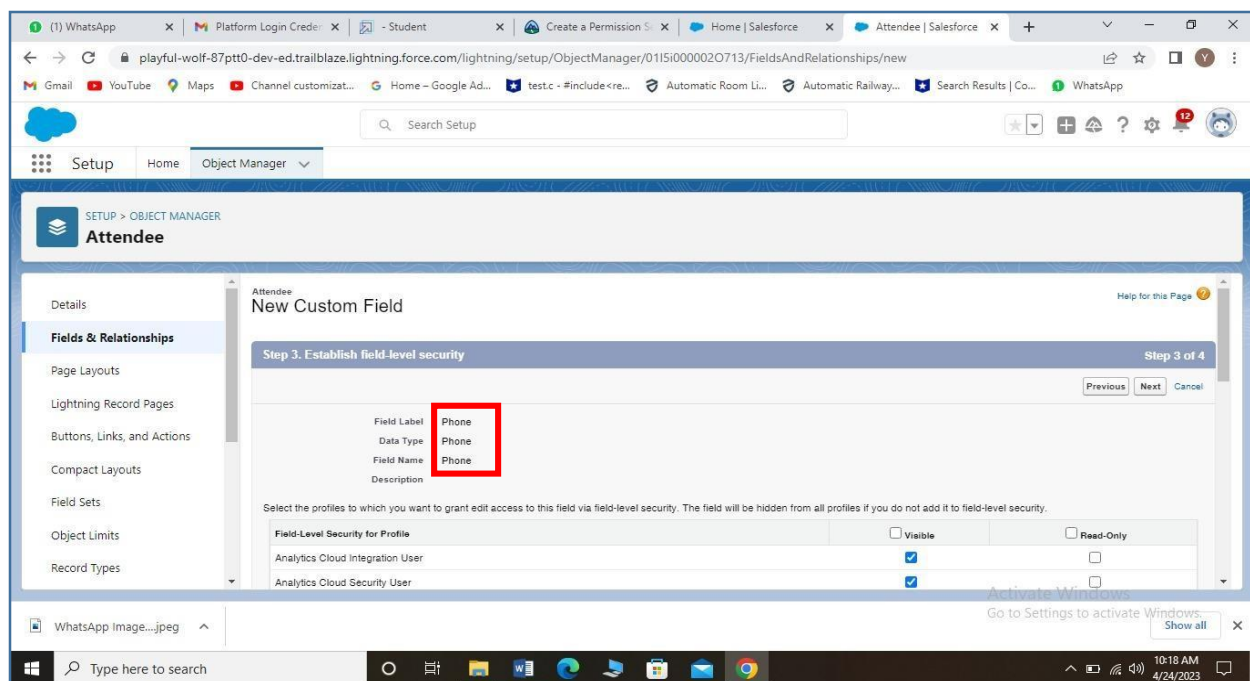
The screenshot shows the "New Lightning App" interface. The title is "App Details & Branding". The instructions say: "Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar." There are two main sections: "App Details" and "App Branding". In the "App Details" section, the "* App Name" field is highlighted with a red rectangle and contains the text "Event Management". Below it is the "* Developer Name" field with the text "Event_Management". At the bottom of the "App Details" section is the "Description" field with the placeholder text "Enter a description". In the "App Branding" section, there is an "Image" field with an "Upload" button. To the right of the "Image" field is the "Primary Color Hex Value" field, which has a color picker set to blue and the hex value "#0070D2". A "Next" button is at the bottom right, with a downward arrow pointing to it.

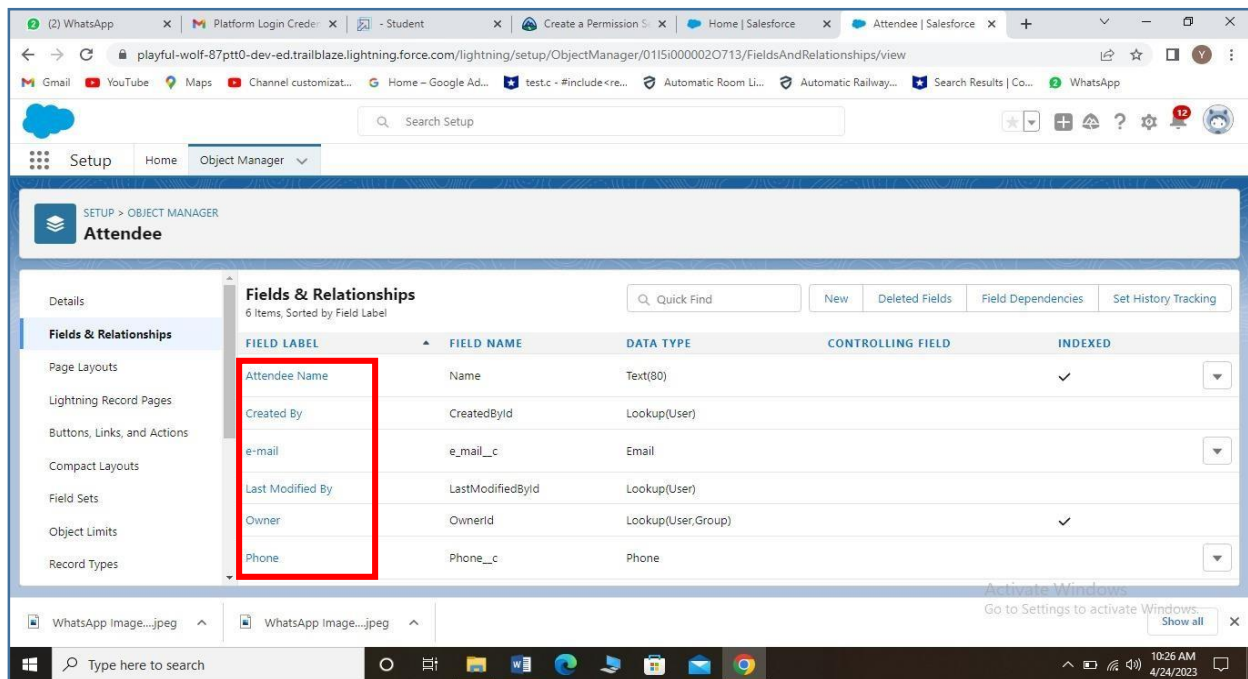
Milestone-4: Fields and Relationship

Activity 1: Creation of fields for the Event object

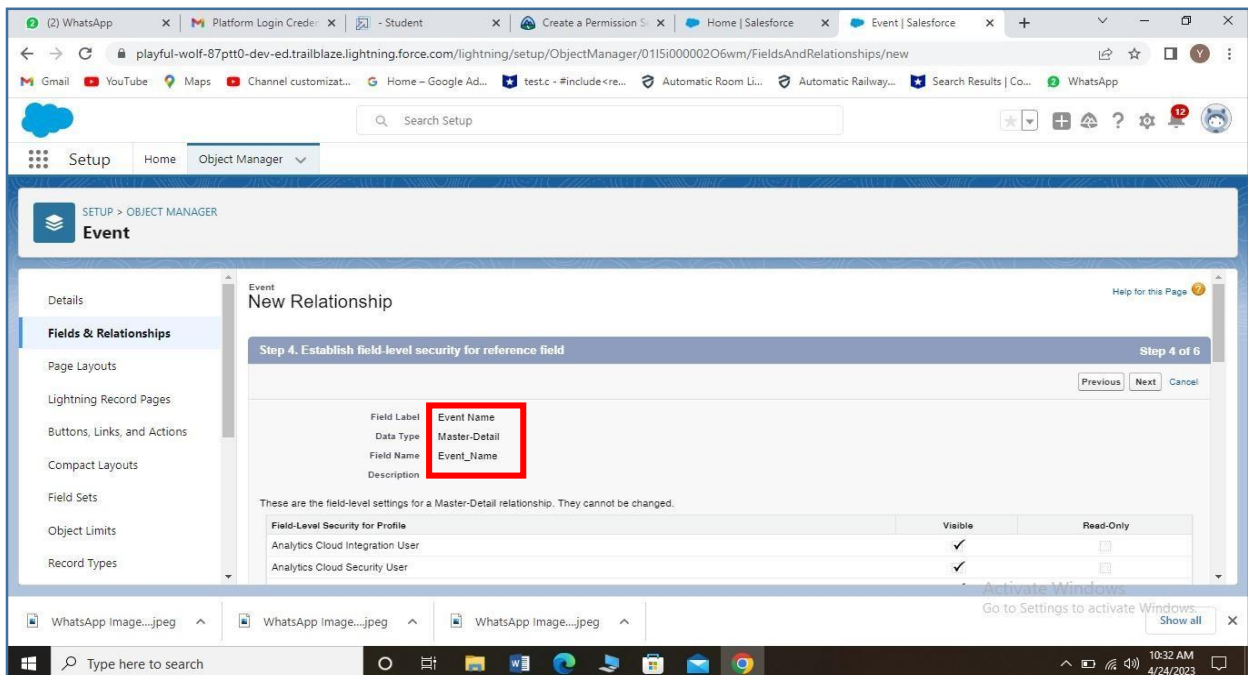


Activity 2: Creation of fields for the Attendee objects





Let's Create a Master-detail Relationship with Event Object



Activity 3: Creation of fields for the Speakers object

The screenshot shows the Salesforce Setup interface for the 'Speaker' object. The 'New Custom Field' wizard is in progress, specifically at 'Step 3. Establish field-level security'. The field details are as follows:

Field Label	Data Type	Field Name	Description
Bio	Text Area	Bio	

Below the field details, there is a section for 'Field-Level Security for Profile'. It shows two profiles: 'Analytics Cloud Integration User' and 'Analytics Cloud Security User'. For each profile, there are checkboxes for 'Visible' and 'Read-Only'. The 'Visible' checkbox is checked for both profiles.

At the bottom of the screen, there is a Windows taskbar with the search bar and several application icons. A watermark for 'Activate Windows' is visible in the bottom right corner.

The screenshot shows the 'Fields & Relationships' page for the 'Speaker' object. The page displays a list of 6 fields, sorted by Field Label. The fields are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
e-mail	e_mail__c	Email		
Event Name	Event_Name__c	Lookup(Event)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Speaker Name	Name	Text(80)		✓

The 'Fields & Relationships' section is highlighted with a red box. The 'Event Name' field is also highlighted with a red box. The 'Speaker Name' field is highlighted with a red box. The 'Created By' field is highlighted with a red box. The 'e-mail' field is highlighted with a red box. The 'Last Modified By' field is highlighted with a red box. The 'Owner' field is highlighted with a red box. The 'Speaker Name' field is highlighted with a red box.

At the bottom of the screen, there is a Windows taskbar with the search bar and several application icons. A watermark for 'Activate Windows' is visible in the bottom right corner.

Activity 5: Creation of fields for the Vendors Object

Setup > OBJECT MANAGER
Vendor

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types

Vendor
New Custom Field
Step 3 of 4

Step 3. Establish field-level security

Field Label: e-mail
Data Type: Email
Field Name: e_email
Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Activate Windows
Go to Settings to activate Windows.

Setup > OBJECT MANAGER
Vendor

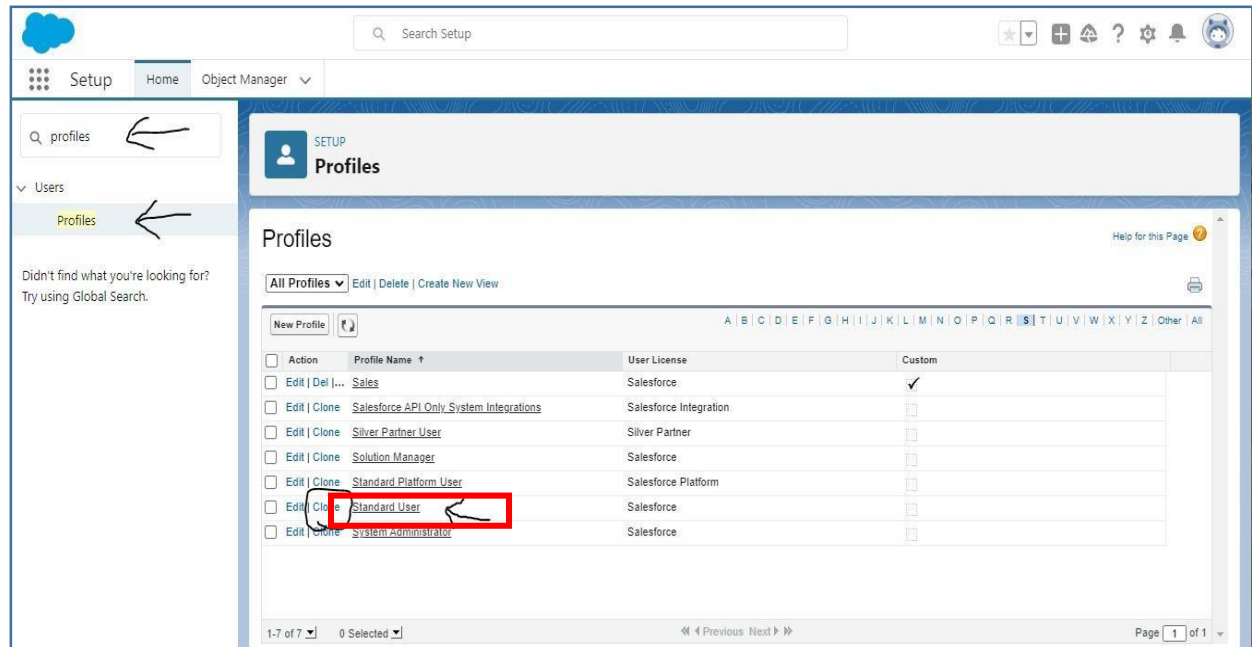
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts

Fields & Relationships
7 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
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 Area(255)		
Vendor Name	Name	Text(80)		

Activate Windows
Go to Settings to activate Windows.

Milestone-5: Profile



Search Setup

Setup Home Object Manager

profiles

Users

Profiles

Didn't find what you're looking for? Try using Global Search.

SETUP Profiles

Profiles

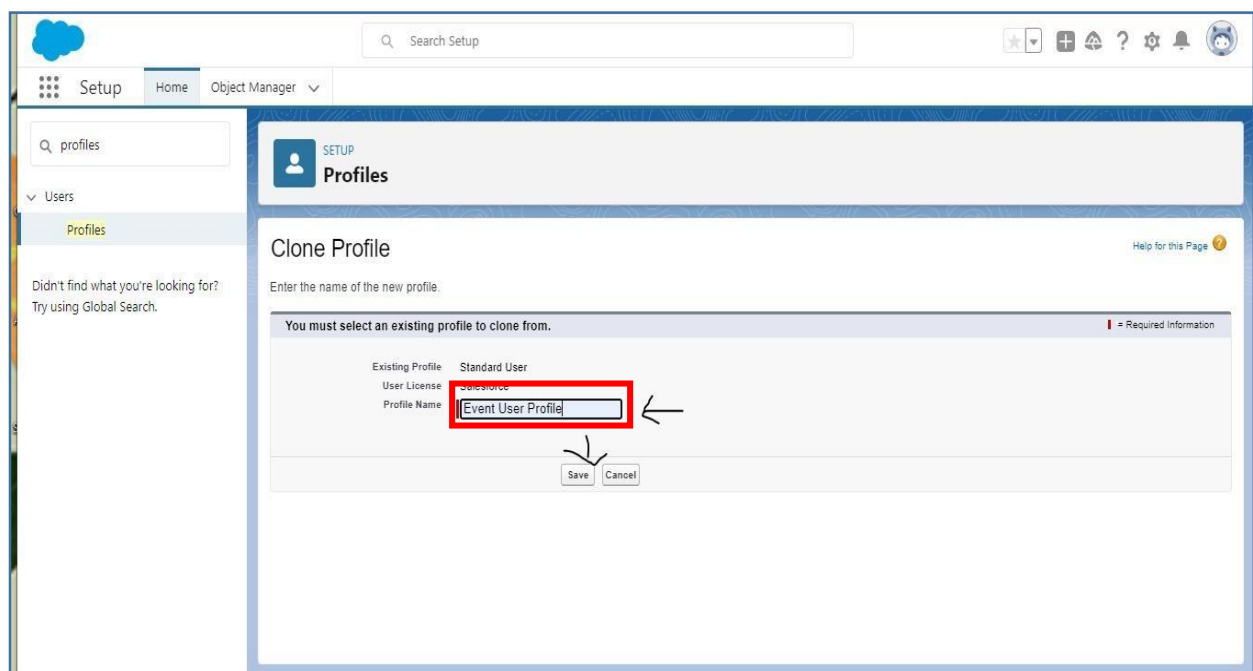
All Profiles Edit Delete Create New View

New Profile

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Del ...	Sales	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	System Administrator	Salesforce	<input type="checkbox"/>

1-7 of 7 0 Selected Previous Next Page 1 of 1

Activity 1: Creation on Event Profile



Search Setup

Setup Home Object Manager

profiles

Users

Profiles

Didn't find what you're looking for? Try using Global Search.

SETUP Profiles

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile Standard User

User License Salesforce

Profile Name **Event User Profile**

Save Cancel

WhatsApp Platform Login - Student Create a Permission Home | Salesforce Vendor | Salesforce Profiles | Salesforce

playful-wolf-87ptt0-dev-ed.trailblaze.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F_ui%2Fperms%2Fui%2Fprofile%2FProfileClone%2F%3Fi...

Gmail YouTube Maps Channel customizat... Home - Google Ad... testc - #include<re... Automatic Room Li... Automatic Railway... Search Results | Co... WhatsApp

Search Setup

Setup Home Object Manager

Profiles

Users

Profiles

Didn't find what you're looking for?
Try using Global Search.

Clone Profile

Enter the name of the new profile:

You must select an existing profile to clone from.

Existing Profile	User License	Profile Name
Standard User	Standard User	Event vendors profile

Save Cancel

Activate Windows
Go to Settings to activate Windows.

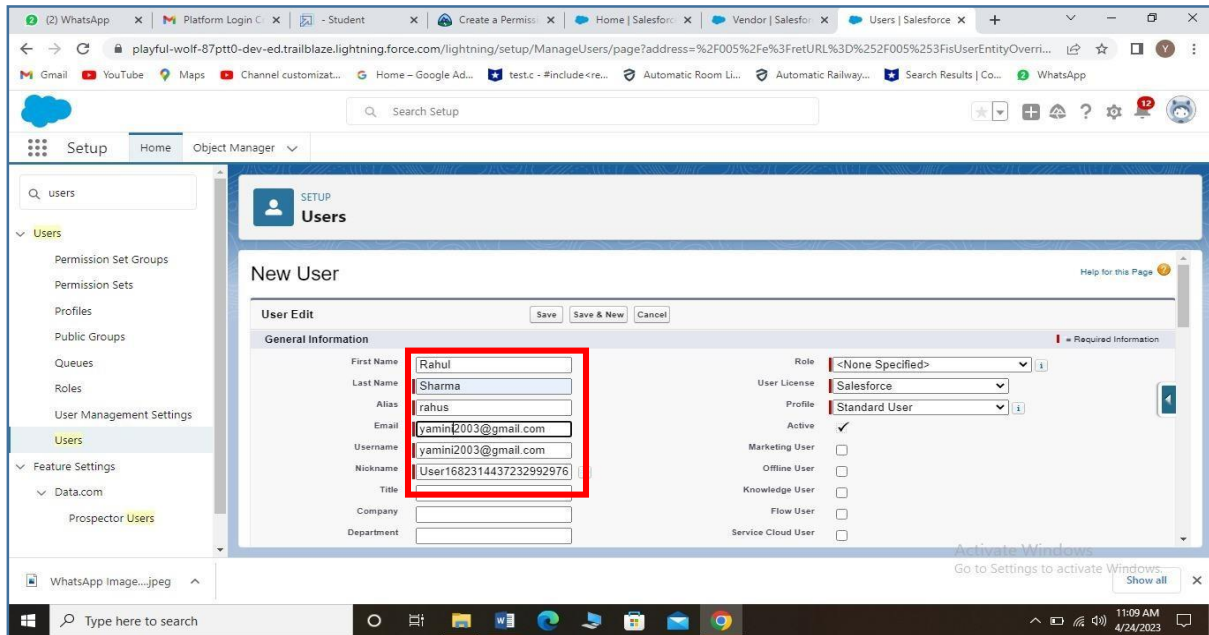
Type here to search

12:06 PM
4/24/2023

Activity 1: Creating of Sanjay Gupta User

The screenshot shows the Salesforce 'New User' setup page. The 'General Information' section is highlighted with a red box, indicating the fields that are required for user creation. The fields include First Name, Last Name, Alias, Email, Username, and Nickname. The right side of the page shows the Role, User License, Profile, and various checkboxes for user capabilities.

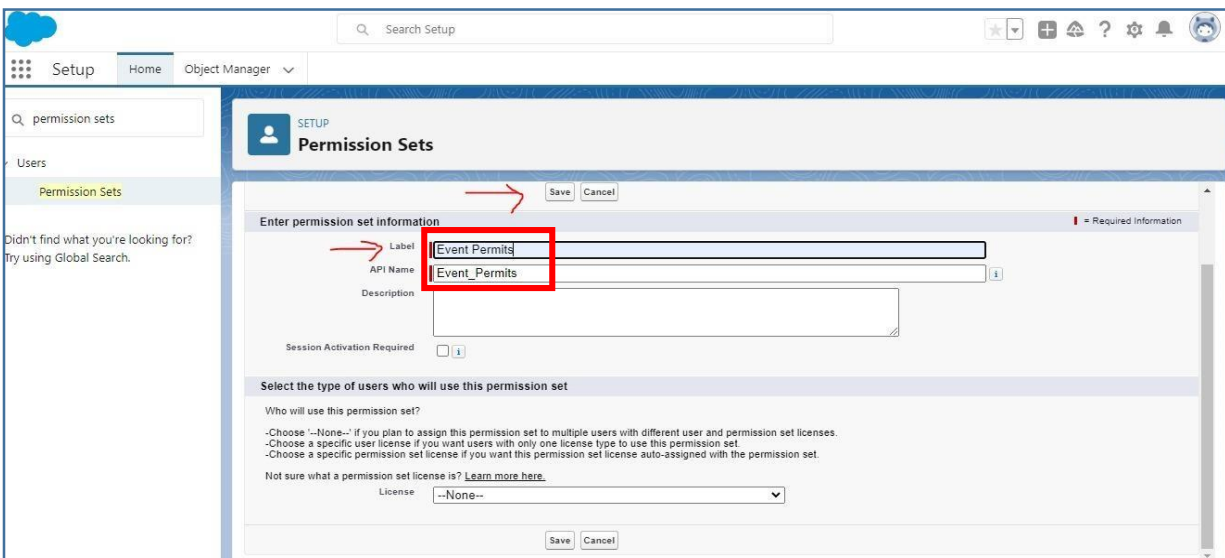
Activity 2: Creating of Rahul Sharma User



The screenshot shows the Salesforce Setup interface for creating a new user. The left sidebar contains a search bar and a navigation menu with categories like Users, Feature Settings, and Data.com. The main content area is titled 'New User' and includes a 'User Edit' section with 'General Information' and 'Required Information' tabs. The 'General Information' tab is active, showing fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, and Department. The 'Required Information' tab shows fields for Role, User License, Profile, Active, Marketing User, Offline User, Knowledge User, Flow User, and Service Cloud User. A red box highlights the 'First Name' field with the value 'Rahul' and the 'Last Name' field with the value 'Sharma'. The 'Email' field contains 'yamin2003@gmail.com' and the 'Username' field contains 'yamin2003@gmail.com'. The 'Nickname' field contains 'User1682314437232992976'. The 'Role' field is set to '<None Specified>' and the 'User License' field is set to 'Salesforce'. The 'Profile' field is set to 'Standard User'. The 'Active' checkbox is checked. The 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', and 'Service Cloud User' checkboxes are unchecked. The 'Save', 'Save & New', and 'Cancel' buttons are visible at the top of the 'User Edit' section.

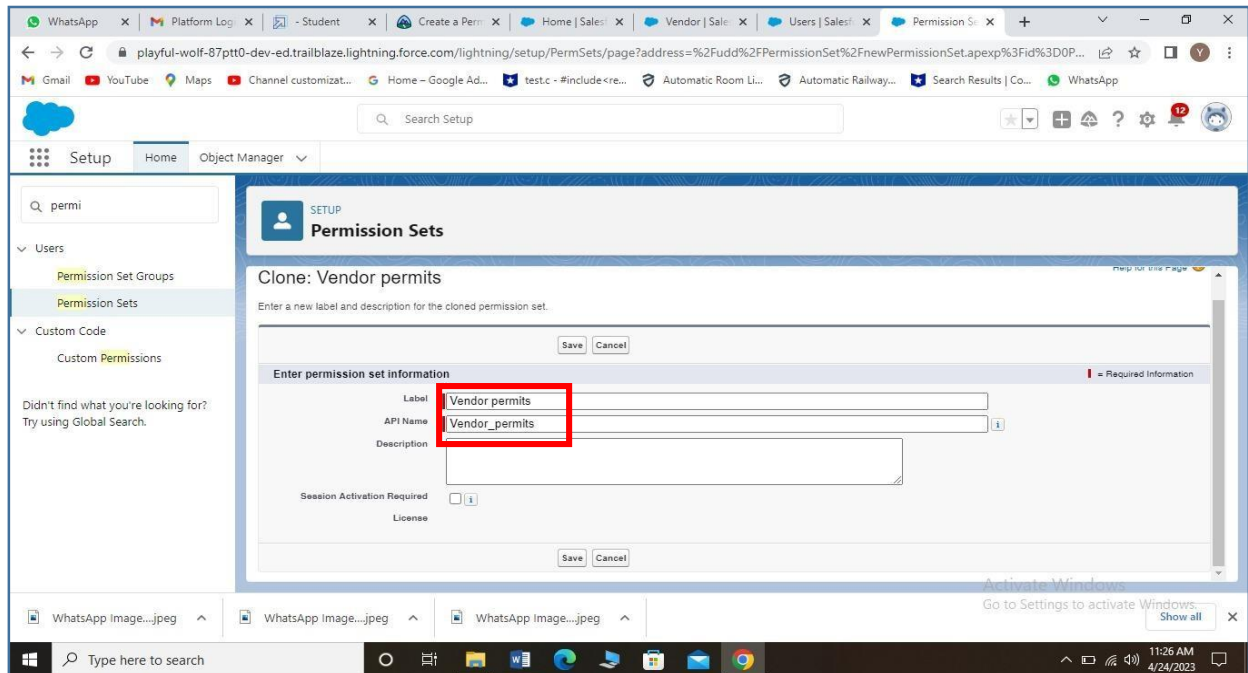
Milestone-7: Permissions Sets

Activity 1: Creating a Permission Set

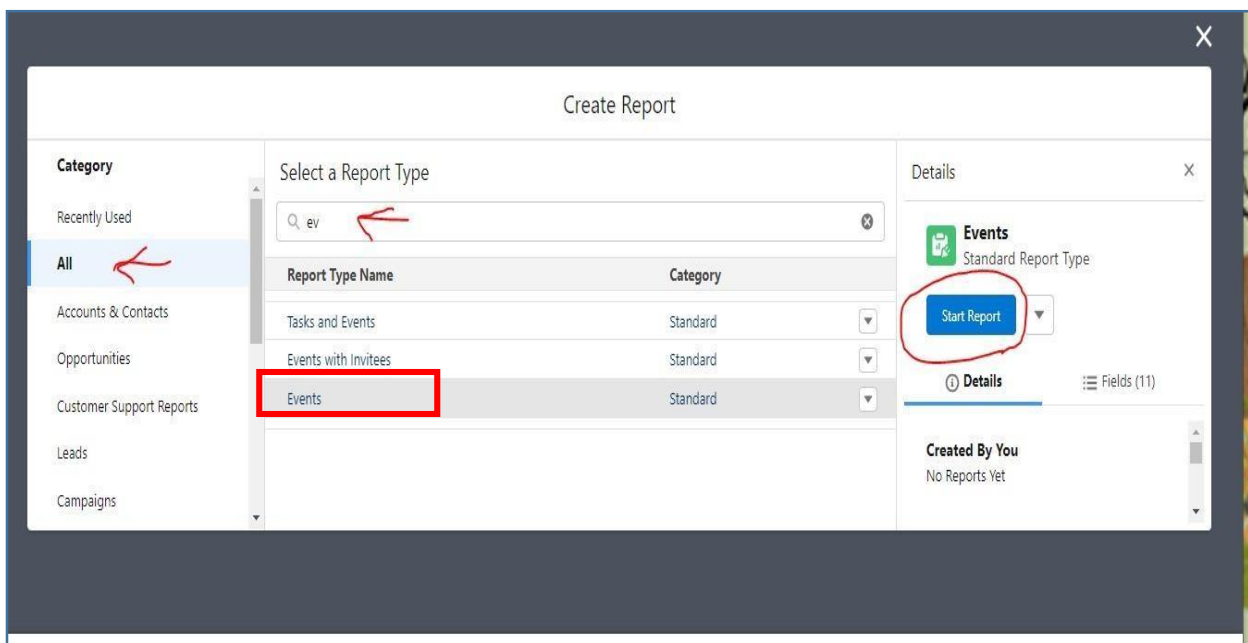


The screenshot shows the Salesforce Setup interface for creating a new permission set. The left sidebar contains a search bar and a navigation menu with categories like Users and Permission Sets. The main content area is titled 'Permission Sets' and includes a 'Enter permission set information' section with 'Label', 'API Name', and 'Description' fields. The 'Label' field contains 'Event Permits' and the 'API Name' field contains 'Event_Permits'. The 'Description' field is empty. The 'Session Activation Required' checkbox is unchecked. The 'Select the type of users who will use this permission set' section is visible below, with a 'Who will use this permission set?' dropdown menu set to '--None--'. The 'Save' and 'Cancel' buttons are visible at the top of the 'Enter permission set information' section.

Activity 2: Permission Sets 2



Milestone – 8: Reports



4 Trailhead Profile Public URL

Team Member:

M. GOPALAKRISHNAN - <https://trailblazer.me/id/gkrishnan78>

5 ADVANTAGES & DISADVANTAGE

- Opportunities for creativity
- Ability to work on different events
- Chance to work with diverse clients
- Collaborative work environment
- High projections for job growth
- Few educational requirements
- Unconventional work hours
- Time away from family and friends

6 Applications

- Tracking Customers.
- Collecting Data for Marketing.
- Improving Interactions and Communications.
- Streamlining Internal Sales Processes.

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.

SolutionDot always keep your objectives and goals on top priority while developing any plan of work.

8 FUTURE SCOPE

Event managers do not lead a simple life. The stressful schedules and the irregular working hours are some of its prime characteristics. But, those in this field believe that they can endure it all to experience the satisfaction they get from hosting a successful event. So, let's begin by discussing what event management exactly is and what's the scope of event management as a career in India.