



GOVERNMENT OF TAMILNADU

NAAN MUTHALVAN - PROJECT-BASED EXPERIENTIAL LEARNING

BUILD AN EVENT MANAGEMENT USING SALESFORCE

Submitted by

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PG AND RESEARCH DEPARTMENT OF MATHEMATICS



M.V.MUTHIAH GOVERNMENT ARTS COLLEGE FOR WOMEN

B(Affiliated To Mother Teresa Womens University, Kodaikanal)

Reaccredited with A Grade by NAAC

DINDIGUL-624001.

APRIL - 2023

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BONAFIDE CERTIFICATE

This is to certify that this is a bonafide record of the project entitled, BUILD AN EVENT MANAGEMENT SYSTEM USING SALESFORCE done by Ms.M.Lakshmi praba (20321ER046) , Ms.R.Manimegalai (20321ER048) , Ms.S.Mowniya (20321ER049) and Ms.S.Muneeswari (20321ER050). This is submitted in partial fulfillment for the award of the degree of Bachelor of Science in Mathematics in M.V.MUTHIAH GOVERNMENT ARTS COLLEGE FOR WOMEN, DINDIGUL during the period of December 2022 to April 2023.

S. Dai

Project Mentor(s)

sd

Head of the Department

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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 the

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:



Empathy map

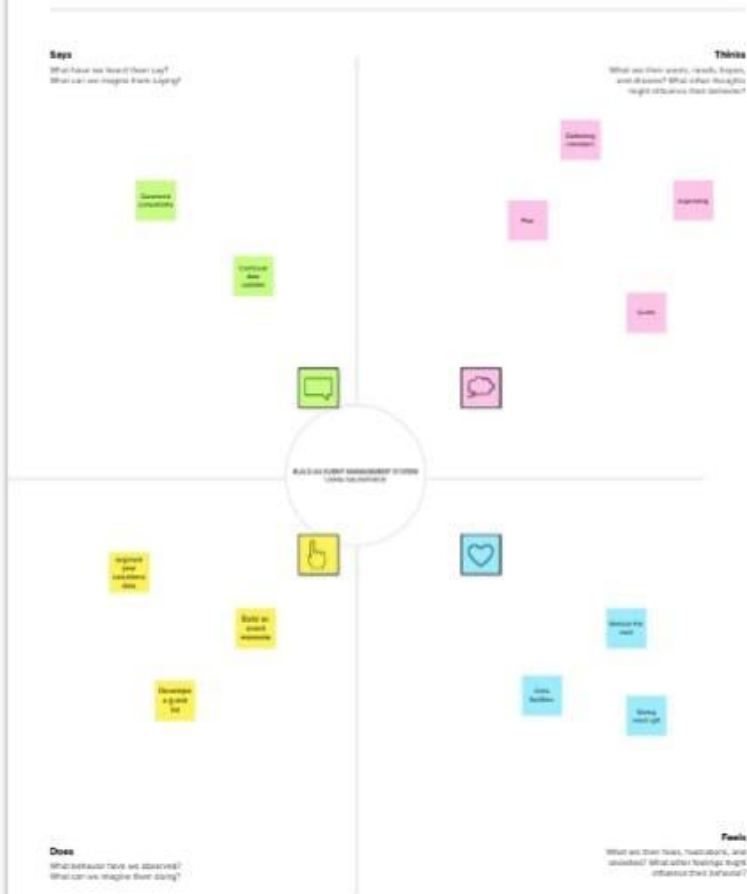
Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.

[Share template feedback](#)



Build empathy

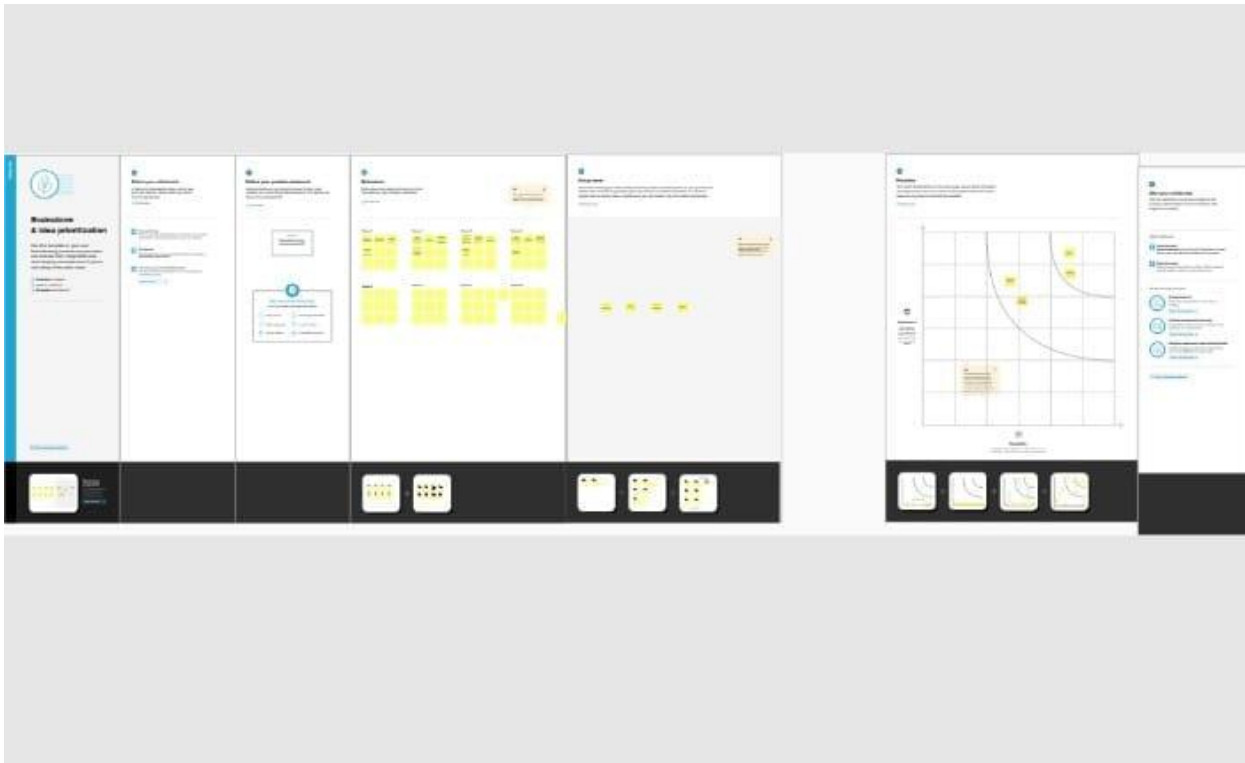
The information you add here should be representative of the observations and research you've done about your users.



Need some inspiration?
Here is a brief overview of the template for your work.
[Open example](#)



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

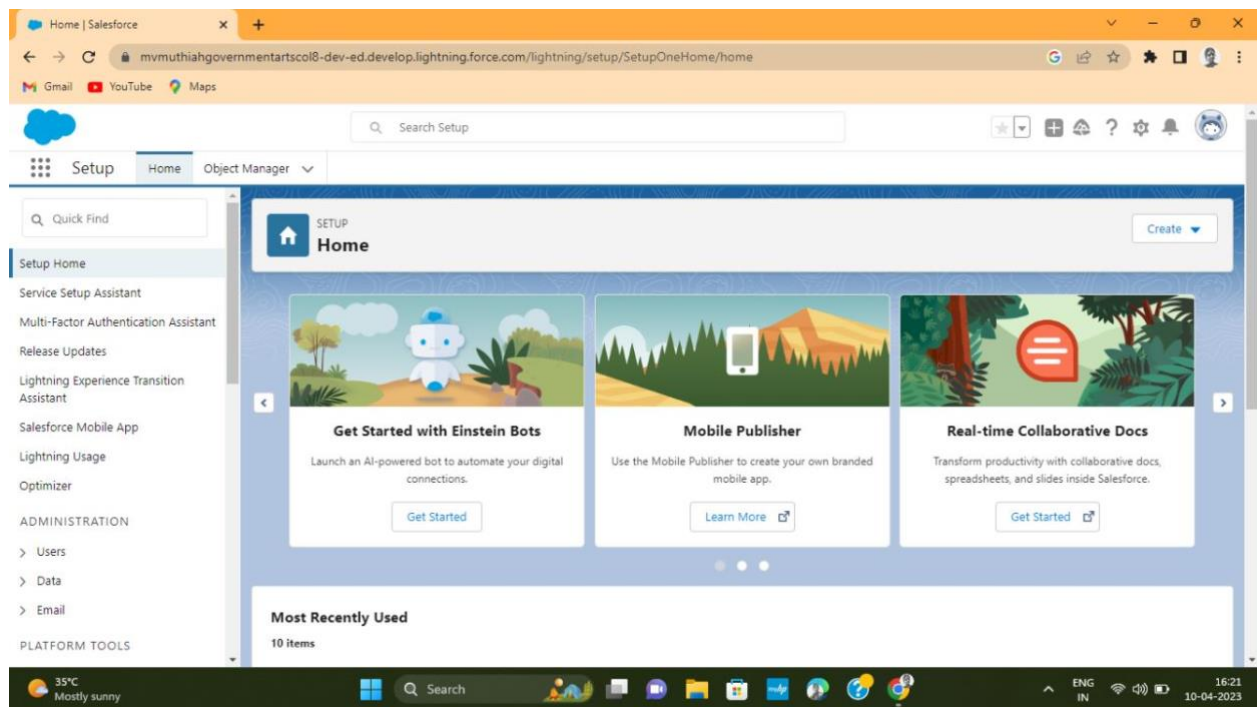
2. Enter the following details like First name, last name, Email, Role, Company, Country/Region, Postal code, and Username must be unique.

3. Click sign me up, after a few min you will receive a mail from 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 log 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 Dropdown click on that and select Custom Object.

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

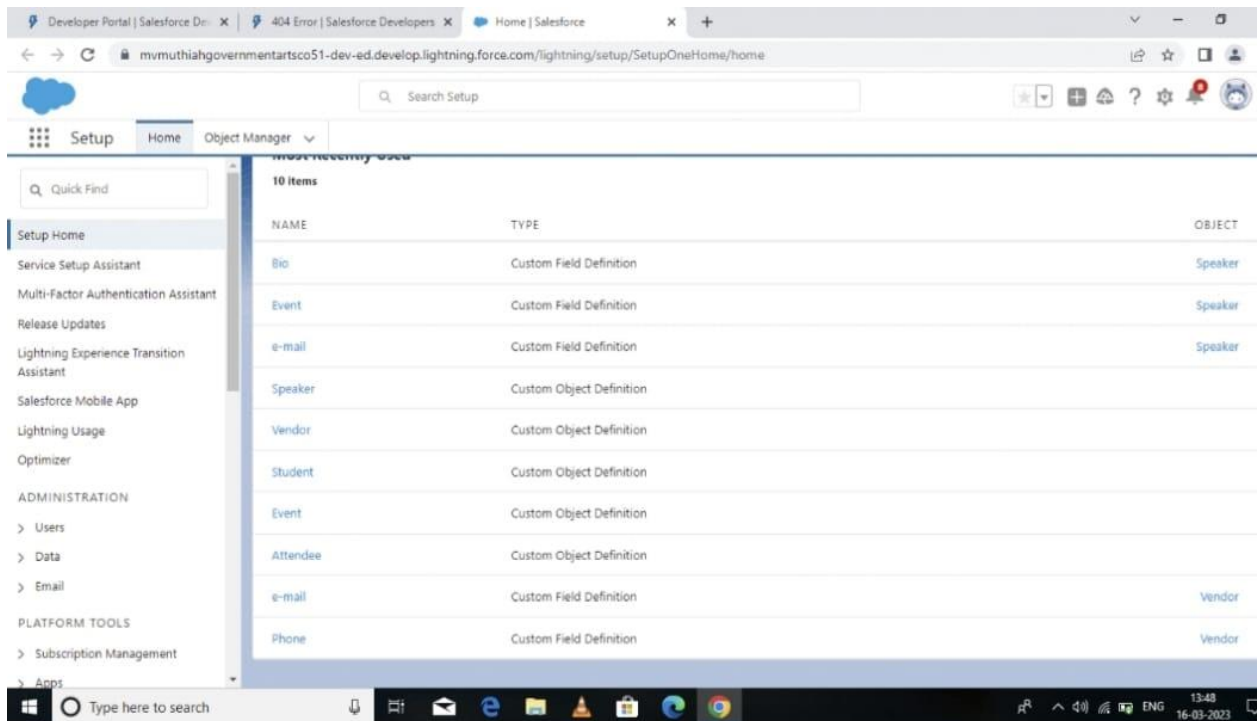
1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdownclick on that and select Custom Object.
 - a. On the Custom Object Definition page, create the object as follows:
 - b. Label: Speaker
 - c. Plural Label: Speakers
 - 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

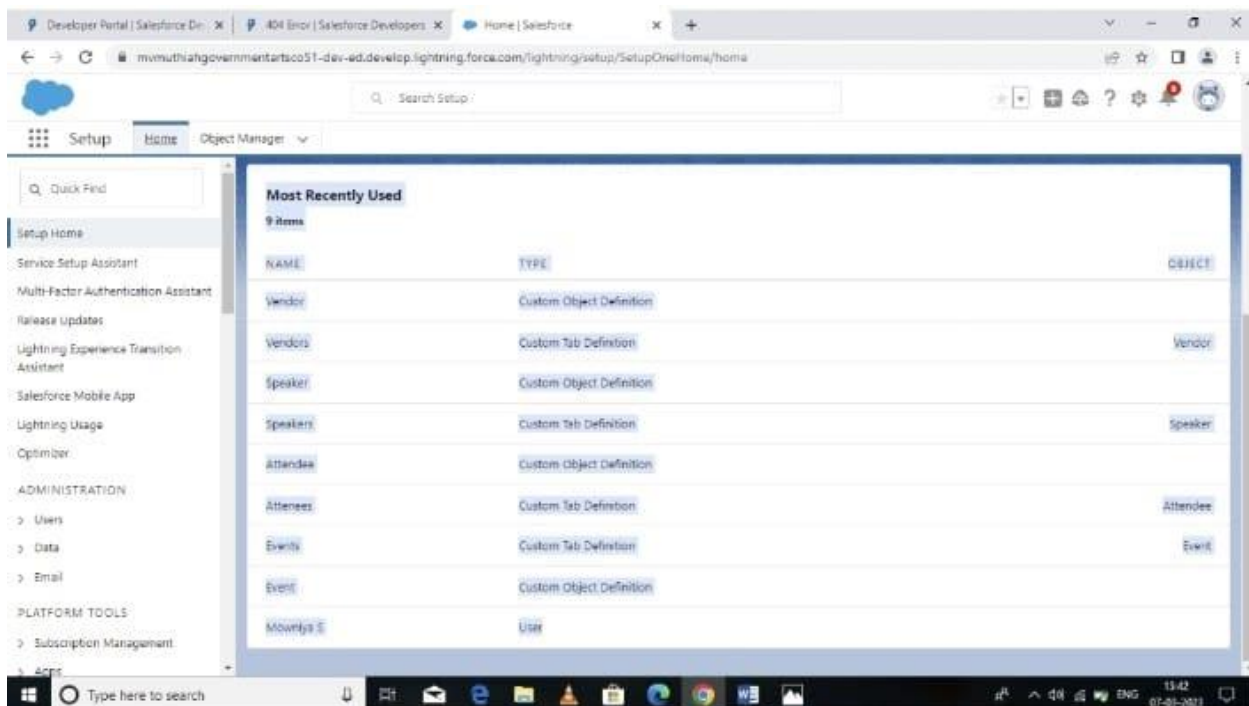
Creation of Speakers tab: Now create a custom tab.

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.

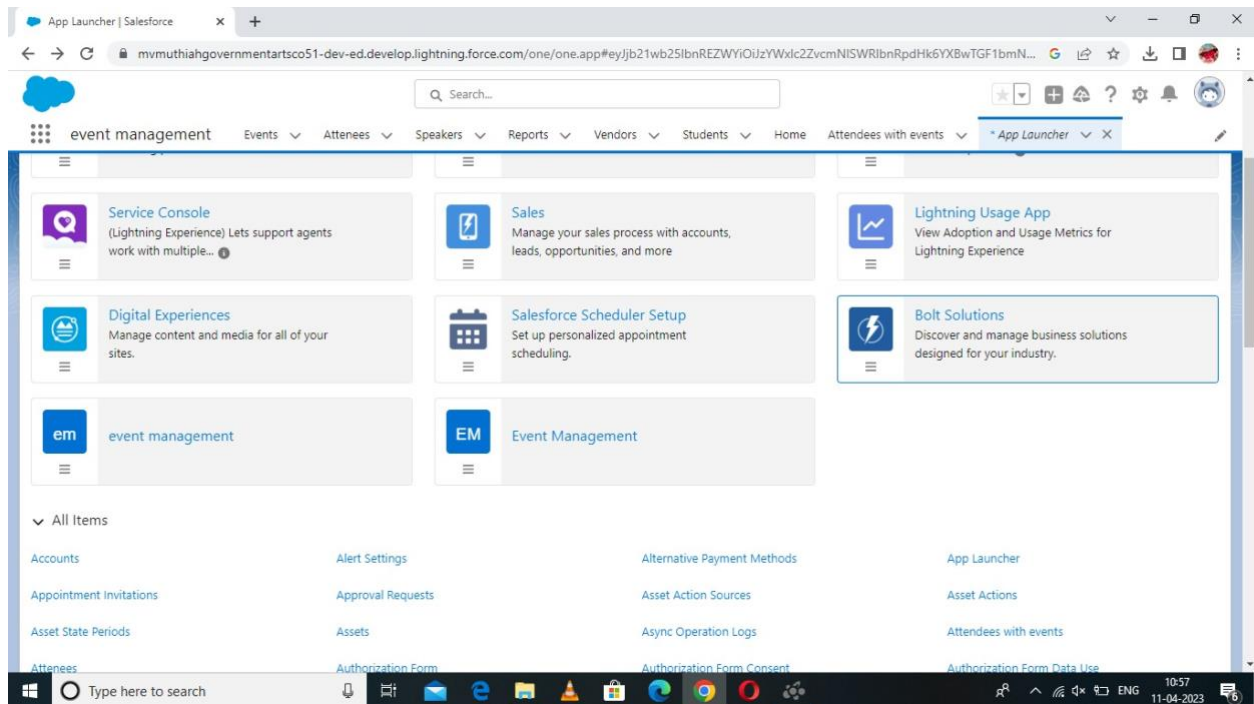


MILESTONE 3-APPLICATION:

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, and Dashboards 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, and Dashboards 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 3

Let's create a master-detail relationship with Event object

1. Select master-detail Relationship as the Data Type and click Next.
2. For Related to, enter Event.
3. Click Next.
4. For Field Label, Event Name.
5. Click Next, Next, Next and Save

Activity 4

Creation of fields for the Speakers objects:

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

3. Click Next, Next, then Save & New.
4. Select the Email as the Data Type, then click Next.
5. For Field Label, e-mail.
6. Click Next, Next, then Save & New

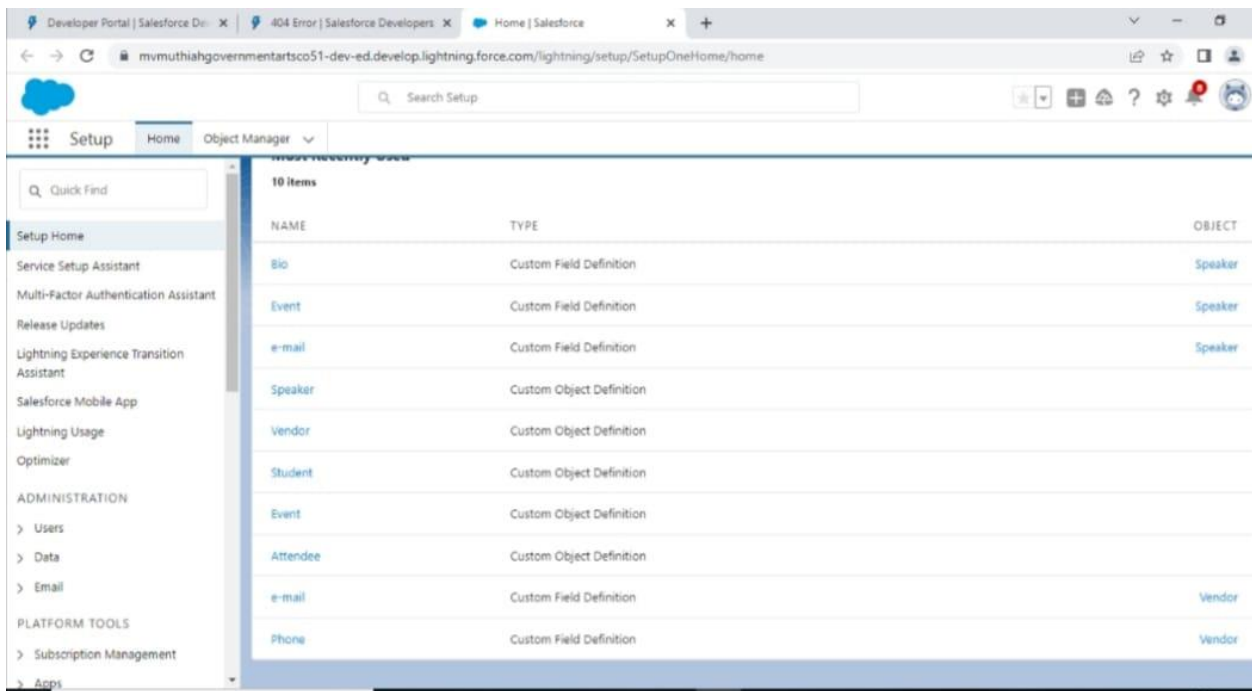
Let's create a Look-up relationship with Event object

1. Select Look-up Relationship as the Data Type and click Next.
2. For Related to, enter Event.
3. Click Next.
4. For Field Label, Event Name
5. Click Next, Next, Next and Save.

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

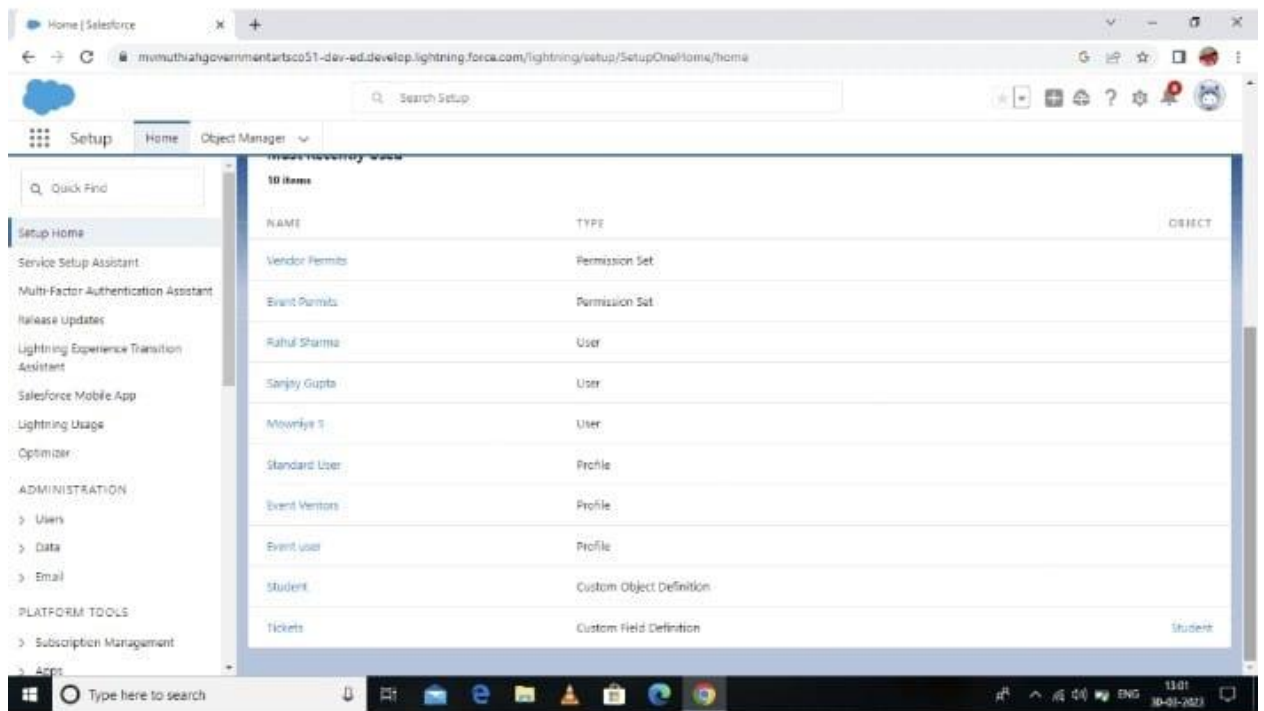
Creation on profile:

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-USERS:

Activity 1

Salesfo Creating a User: From setup type “users” in quick find and select users, then click New User

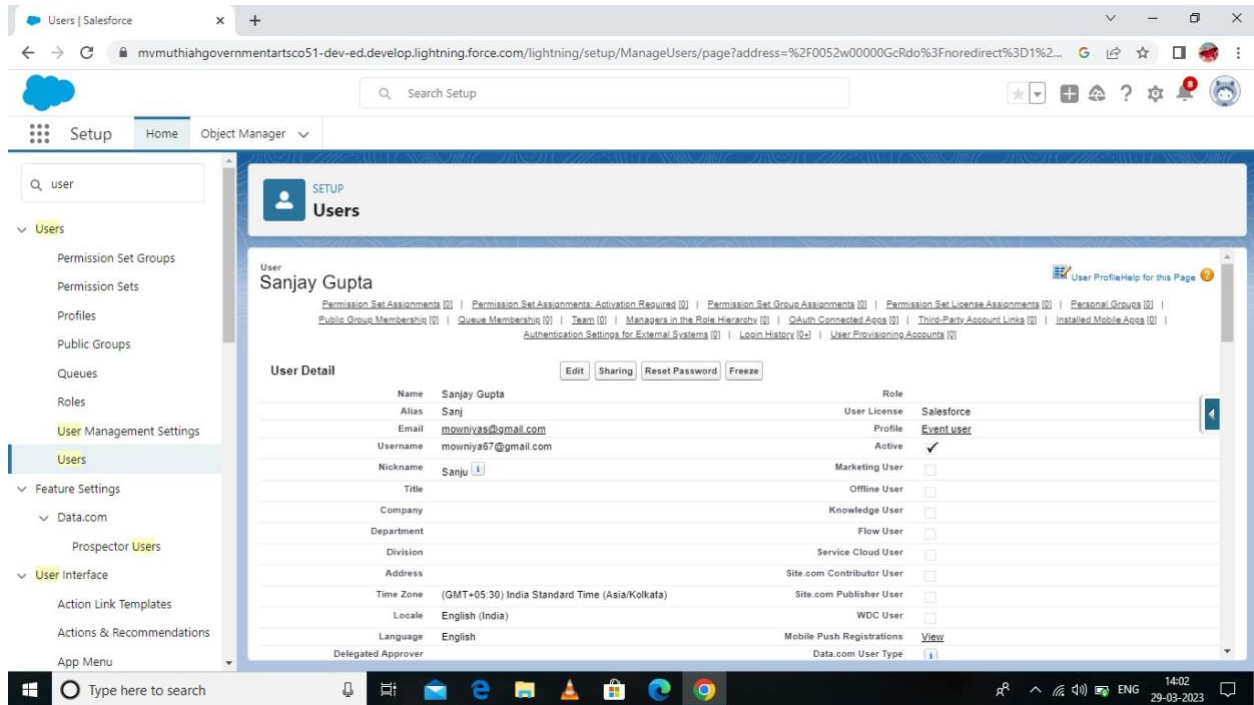
- First Name: Sanjay
- Last Name: Gupta
- Alias: Sanj
- Email: provide your personal email id for future reference
- Username: sanjaygupta@thesmartbridge.com
- Nickname: Sanju
- Role: leave it as default
- Profile: Event User Profile
- User rceliense.

Activity 2

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: Rahu
- 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
- 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 on New
- 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

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

The screenshot shows the Salesforce Setup page for 'Event Permits'. The left sidebar contains a search bar with 'user' and a list of navigation items including Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users, Feature Settings, Data.com, Prospector Users, User Interface, Action Link Templates, Actions & Recommendations, and App Menu. The main content area is titled 'Event Permits' and shows 'Current Assignments' for user Mowniya S. The table below lists the assignment details.

Full Name ↑	Active	Role	Profile	User License	Expires On
Mowniya S	✓		System Administrator	Salesforce	

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.
3. Customize your report accordingly and include all fields, then save or run it.

The screenshot shows the Salesforce Reports page. The top navigation bar includes 'event management', 'Events', 'Attendees', 'Speakers', 'Reports', 'Vendors', 'Students', 'Home', and 'Attendees with events'. The main content area is titled 'Reports' and shows a list of 'Recent' reports. The table below lists the reports.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Speakers Report		Private Reports	Mowniya S	30/3/2023, 1:45 pm	
Created by Me	New Attendees Report		Private Reports	Mowniya S	30/3/2023, 1:46 pm	
Private Reports	New Students Report		Private Reports	Mowniya S	30/3/2023, 1:47 pm	
Public Reports	New Vendors Report		Private Reports	Mowniya S	30/3/2023, 1:46 pm	
All Reports	New Attendees with events Report		Private Reports	Mowniya S	30/3/2023, 1:44 pm	

4.Trailhead profile public URL:

Team lead-<https://trailblazer.me/id/lakshmipraba2282003>

Team member 1-<https://trailblazer.me/id/rrmanimegalai>

Team member2-<https://trailblazer.me/id/mowni555>

Team member3-<https://trailblazer.me/id/muneesm>

5.ADVANTAGES AND DISADVANTAGES:

Advantages:

- 1.Opportunities for creativity
2. Ability to work on different events
3. Chance to work with divorce clients

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 . solution Dot always keep your objectives and goals on top priority while developing plan of work.

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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