# Dr. KALAIGNAR GOVERNMENT ARTS COLLEGE KULITHALAI-639120

## **DEPARTMENT OF MATHEMATICS**

# NAAN MUDHALVAN – SMART BRIDGE PROJECT

**PROJECT TITLE:** Build an Event Management System using Salesforce

# **SUBMITTED BY**

**TEAM LEAD: LOGESHWARI.A (CB20S379377)** 

**TEAM MEMBER 1: KALAISELVI.V (CB20S379375)** 

TEAM MEMBER 2: LAKSHMI.S (CB20S379376)

**TEAM MEMBER 3: MAHALAKSHMI.E (CB20S379378)** 

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## **INTRODUCTION:**

With the growing data generation, businesses are required to leverage a platform that helps them make use of their <u>customer data</u> well, and Salesforce is one such CRM platform. Salesforce is used by startups to Fortune 500 companies. In this Salesforce tutorial, you will walk through what is Salesforce and how beneficial it is.

## What Is Salesforce?

Salesforce is a cloud-based software company that provides businesses with tools that help them find more prospects, close more deals, and provide a higher level of service to their customers.

Salesforce, Inc. is a famous American cloud-based software company that provides CRM services. Salesforce is a popular CRM tool for support, sales, and marketing teams worldwide.

Salesforce services allow businesses to use cloud technology to better connect with partners, customers, and potential customers. Using the Salesforce CRM, companies can track customer activity, market to customers, and many more services.

A CRM platform helps you go deeper with all your metrics and data; you could also set up a dashboard that showcases your data visually. In addition to this, you can also have personalized outreach with automation. Another significant benefit is that a CRM platform can also improve customer service's ability to help customers or a sales team's outreach efforts.

## **OVER VIEW:**

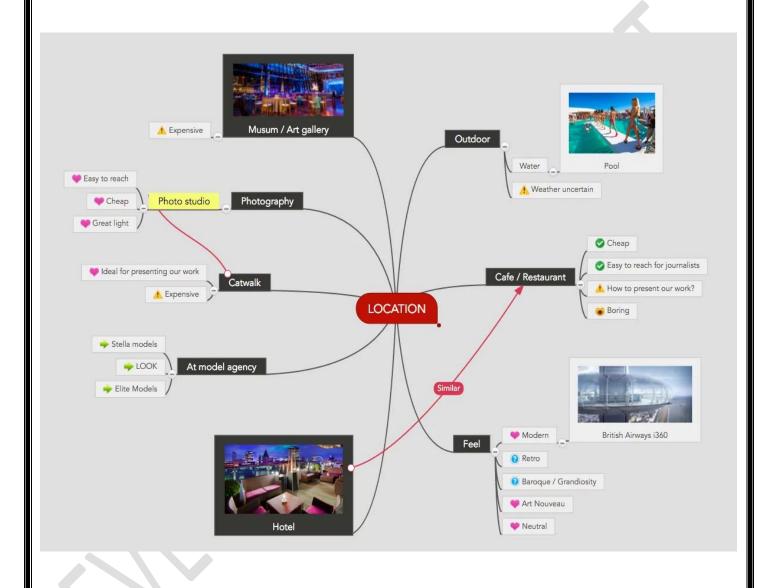
# In this project,

- Makes planning decisions, such as the time, location and theme of our event.
- Create custom objects and fields for the app.
- Create the event management the construction app.
- Define relationships between objects.
- Creating a permission set.

## **EMPATHY MAP:**



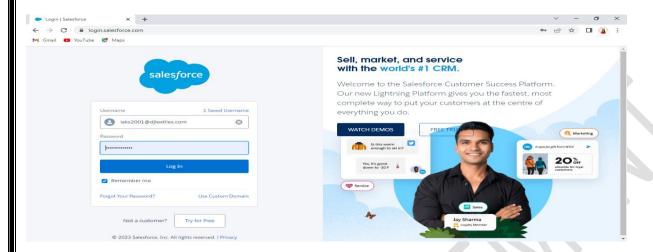
# **BRAIN STROMING MAP:**



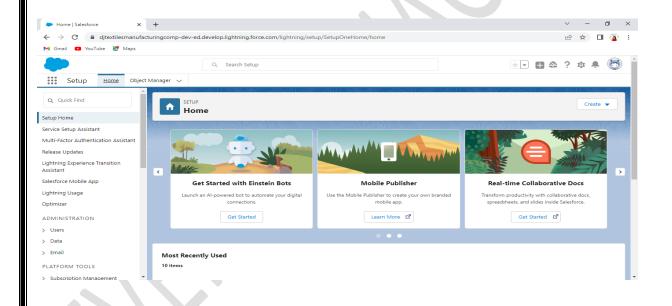
## **Milestone 1:**

# **Activity:**

# **Creating a Sales force Developer Org:**



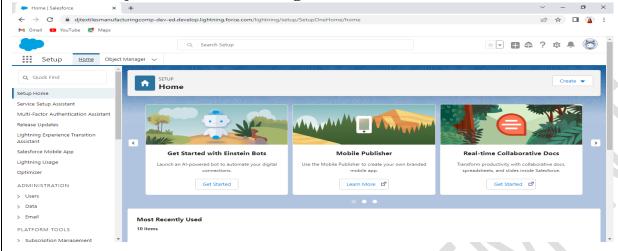
## The setup page will appear as below



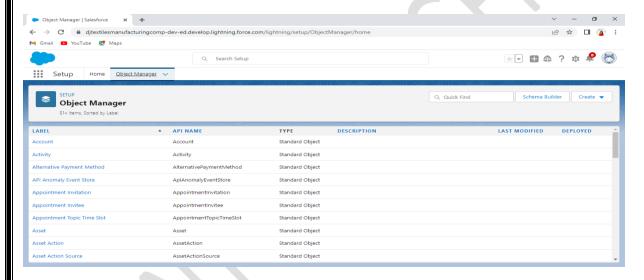
### **Milestone 2-object:**

### **Activity 1:**

**Creation of objects for Event Management** 

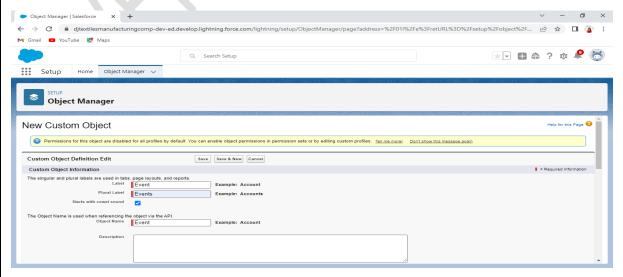


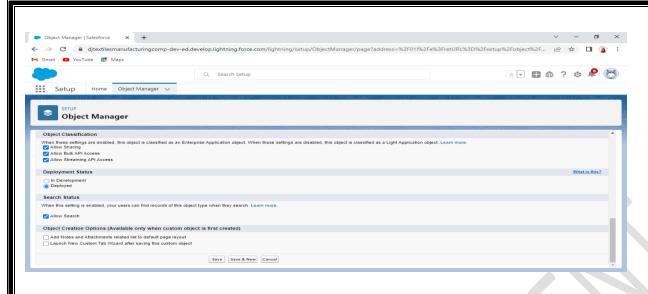
#### **Object Management:**



On the custom object definition page create the object as follow:

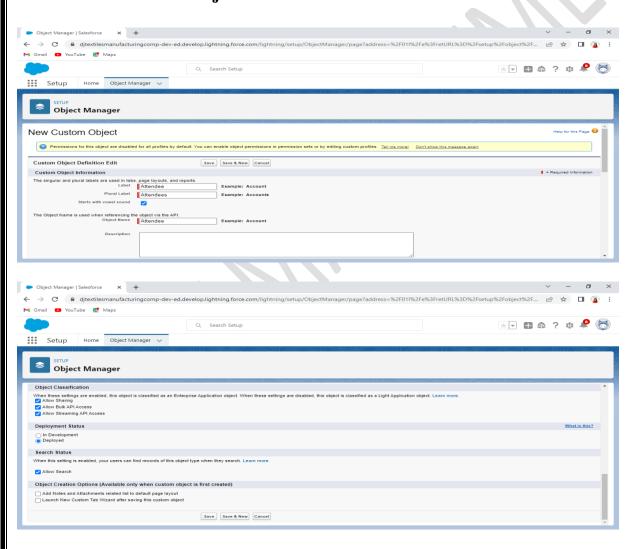
Label: Event



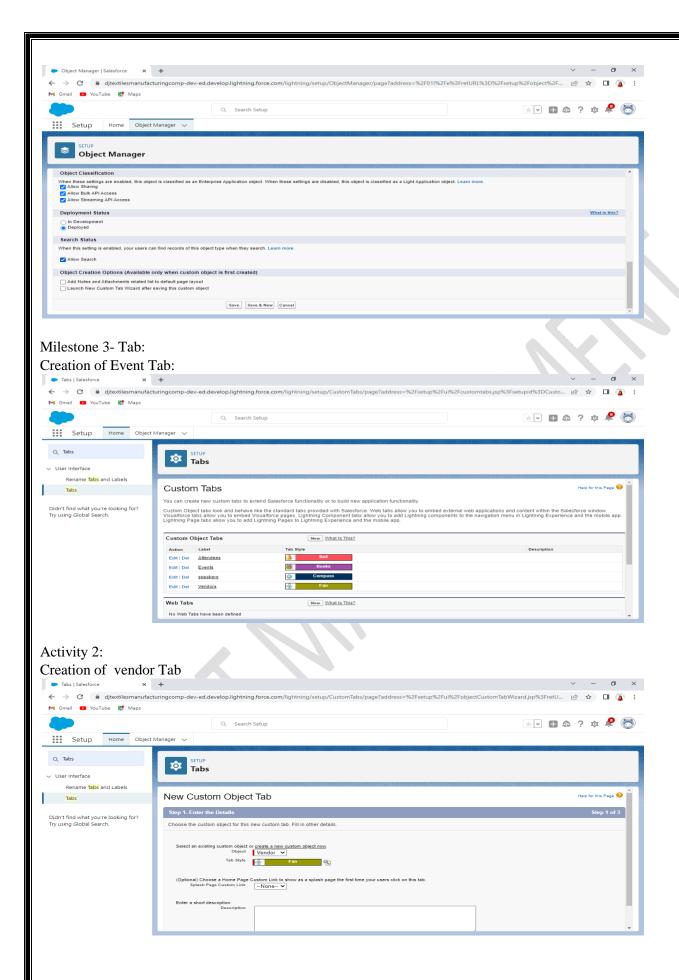


### **Activity 2:**

### **Creation of Attendees object:**



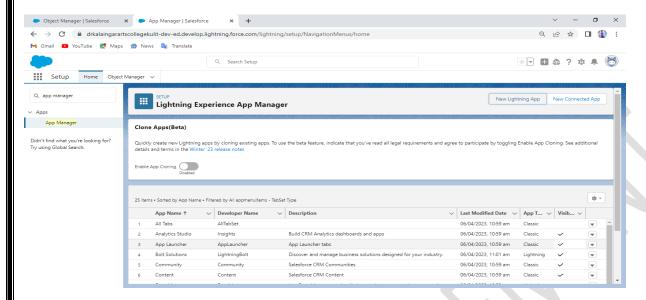
# **Activity 3: Creation of Speaker object:** \* T 🖽 🕸 ? 🌣 🔑 🐻 Setup Home Object Manager V Object Manager Permissions for this object are disabled for all profiles by default. You can enable object permissions in permissions ets or by editing custom profiles. Taki ms. morei. Dent show this messages again Custom Object Information ustom Cupiect innormation e singular and piural labeles are used in tabs, page layouts, and reports. Label Speakers Example: Account Plural Label Speakers Example: Accounts Starts with yowel shund The Object Name is used when referencing the object via the API. Object Name Event Example: Account Object Manager | Salesforce x + 🗧 ightarrow C 🕯 djextilesmanufacturingcomp-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/page?address=%2F011%2Fe%3FretURL%3D%2Fsetup%2Fobject%2F... 🖻 🛊 🗖 🐞 : M Gmail D YouTube 🔀 Maps \* 🖈 🖽 😩 ? 🌣 🔑 🐻 Setup Home Object Manager V Object Manager The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account Is "Account Name" and for Case It is "Case Number". Note that the Record Name field is always called "Name referenced via the API Record Name. | Record Name | Permitted Name Data Type Text 🗸 Optional Features When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. Learn more. Allow Sharing **Activity 4: Creation of Vendors object:** 🗧 🗦 🖰 🐞 djtextilesmanufacturingcomp-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/page?address=%2F011%2Fe%3FretURL%3D%2Fsetup%2Fobject%2F... 🖄 🛊 🗖 🐞 : M Gmail D YouTube Maps Q Search Setup 🖈 🖪 😩 ? 🌣 🔑 🔚 Setup Home Object Manager V Object Manager New Custom Object Custom Object Definition Edit Save & New Cancel The Object Name is used when referencing the object via the API. Object Name | Vendor | Example: Account



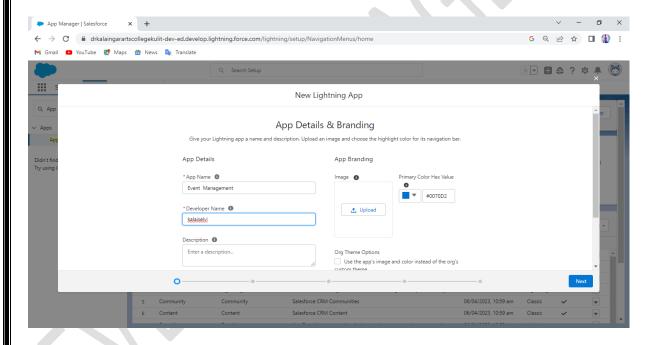
#### Milestone 4-Application:

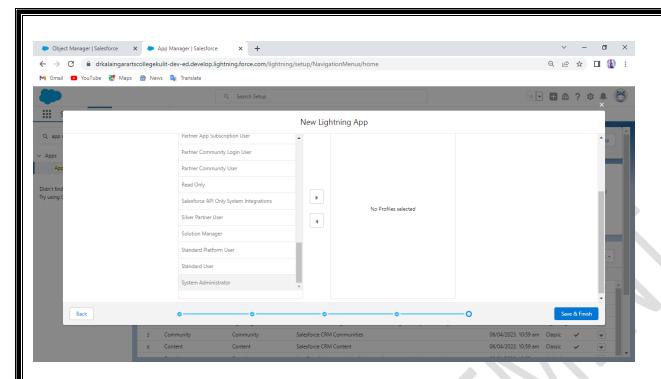
#### Activity:

Creation the Event Management Construction app

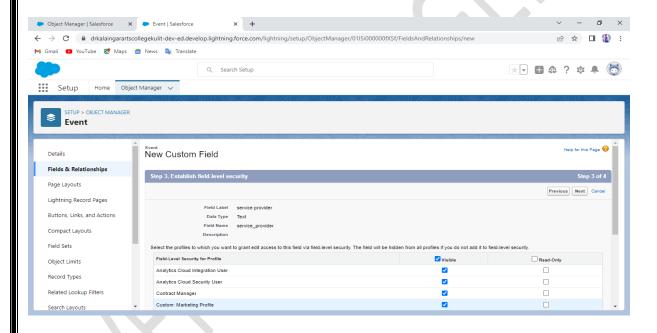


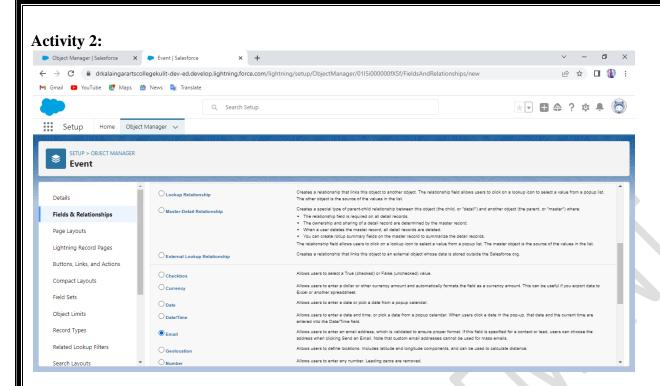
Click New Lightning App Enter Event management as the app Name then Click Next



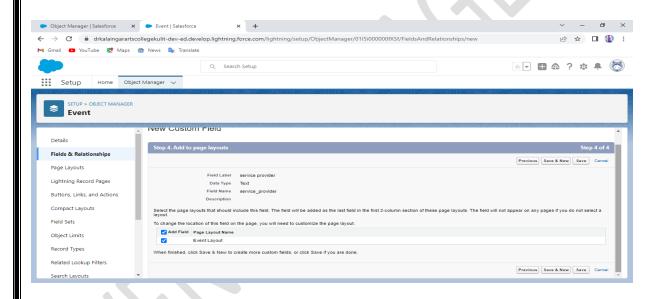


# Milestone 4-Fields: Activity1:





#### Activity3:



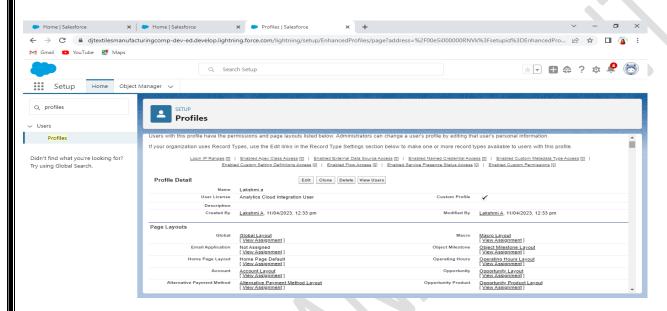
# **MILESTONE 5- PROFILE:**

### **ACTIVITY -1:**

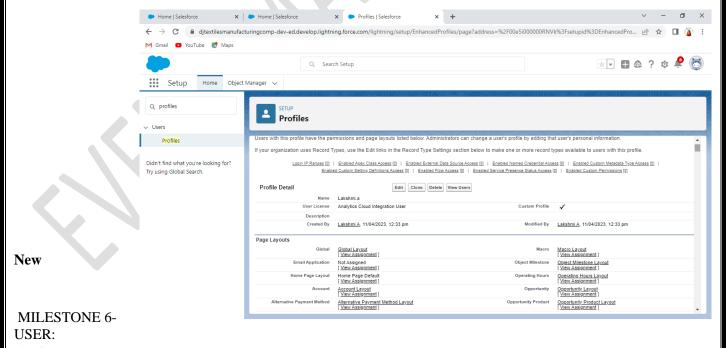
#### **CREATION ON PROFILE:**

Setup  $\rightarrow$  Quick Find box  $\rightarrow$  profiles  $\rightarrow$  standard user  $\rightarrow$  clone

1.

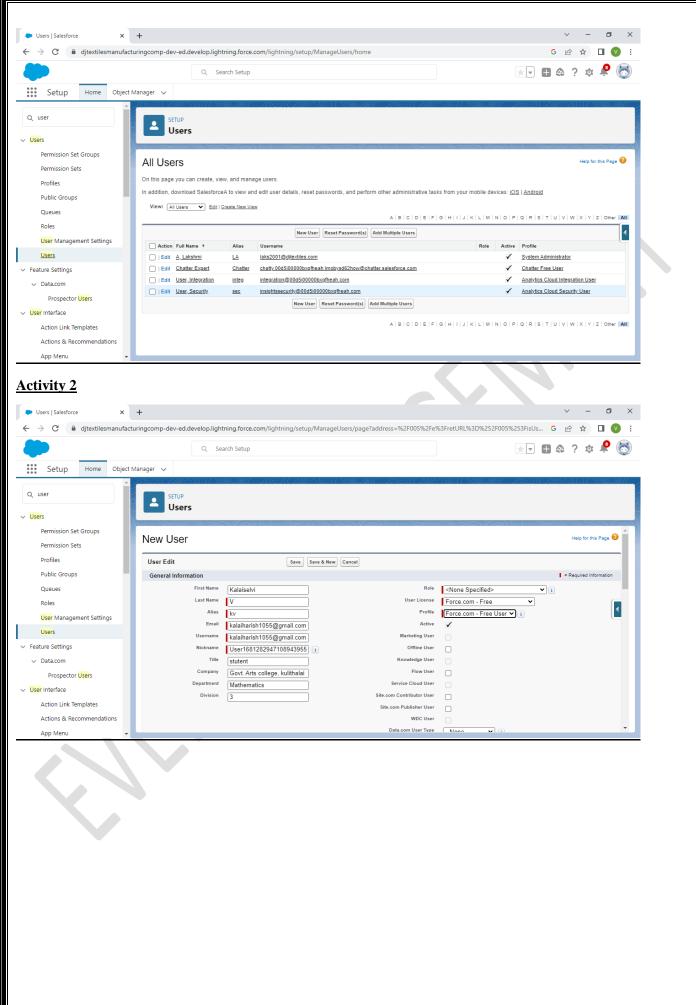


#### **Activity-2:**



# **ACTIVITY 1:**

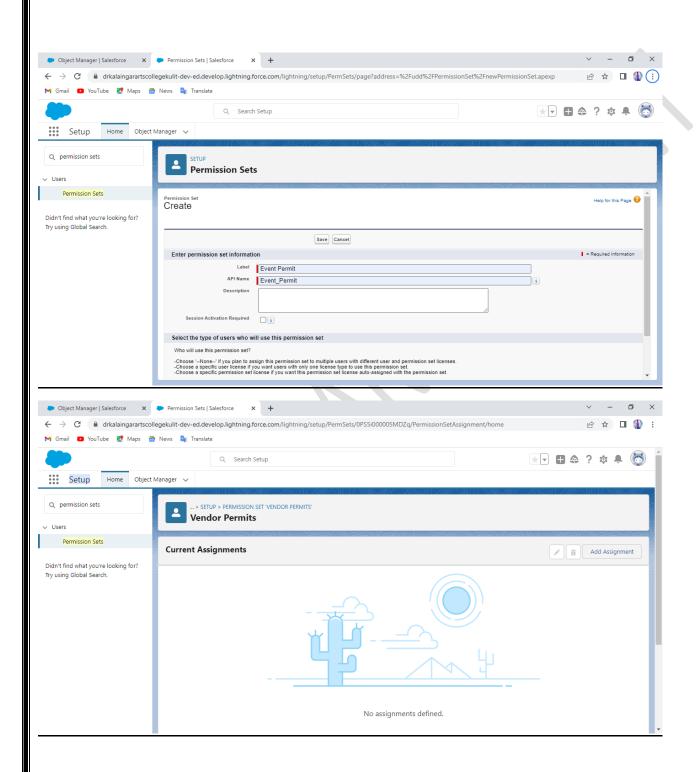
**Setup** → **Quick Find Box** → **User** → **New User** 

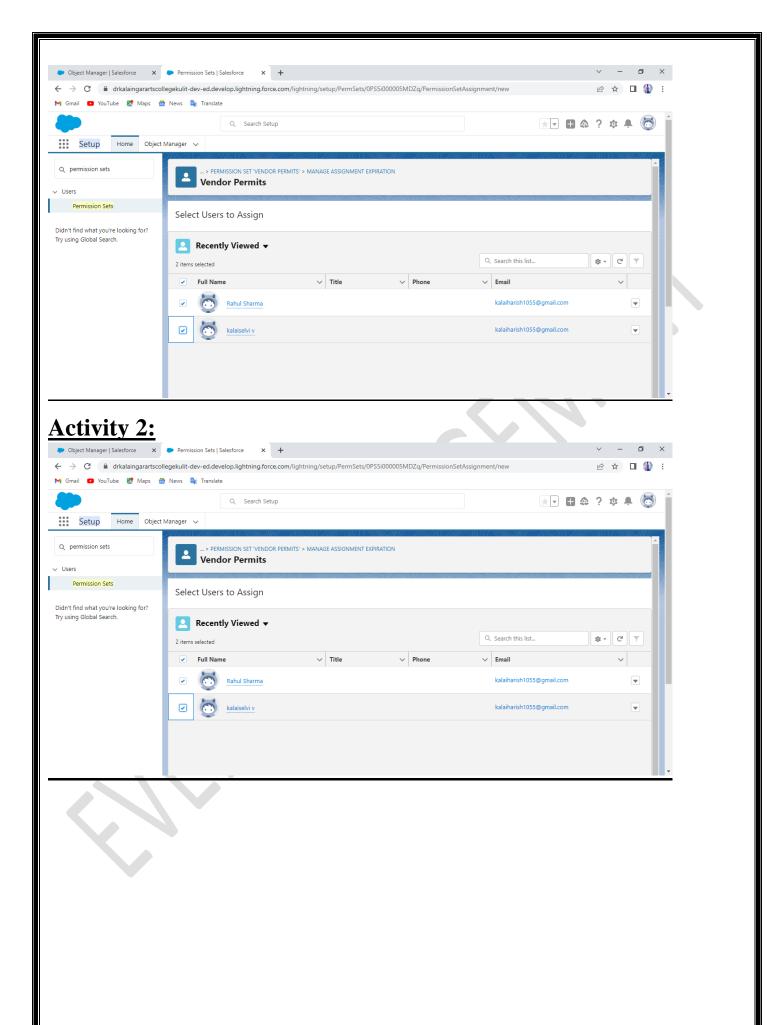


# **Milestone 7- Permission Sets:**

# **Activity -1:**

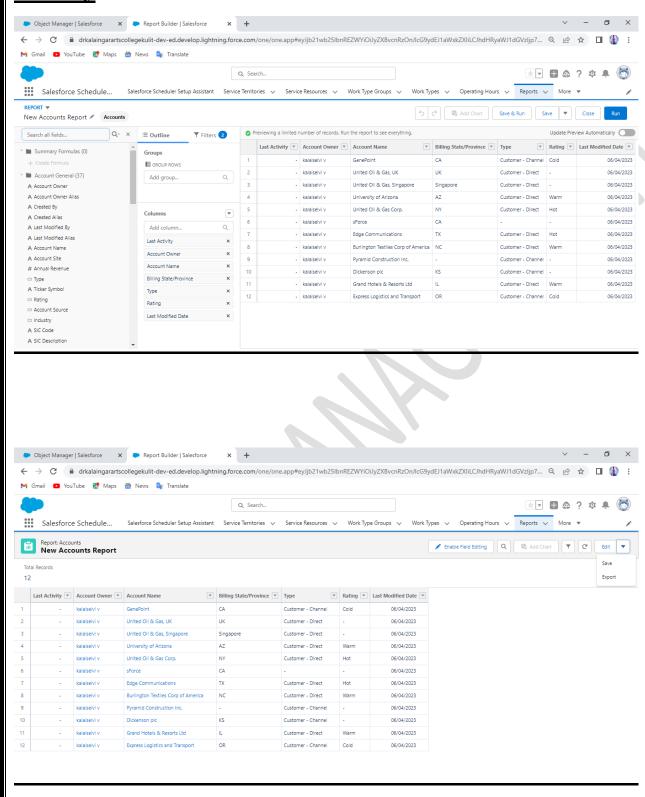
Set up  $\rightarrow$  quick find box  $\rightarrow$ permission sets  $\rightarrow$ new





# **Milestone -8:**

# **Activity**



### Trailhead Profile Public URL:

**Team Lead** – https://trailblazar.me/id/ajeeva11

**Team Member 1** – https://trailblazer.me/id/kalai02

**Team Member 2** – https://trailblazer.me/id/la42

Team Member 3 -s https://trailblazer.me/id/eezhilarasan

# **ADVANTAGES AND DISADVANTAGES:**

The experience requirements for event management jobs vary, but most professional positions require a bachelor's degree. Coursework usually includes general education classes that lay the foundation for event management and customer relations. Some courses will focus on meeting technology, event evaluation, and trend analysis. Some degree programs will also require an internship where you'll gain hands-on experience planning events.

Certification in event management often involves taking a comprehensive exam. In order to become certified, you'll need a minimum of three years of experience. In addition, you'll have to complete an online learning program. After completing the program, you'll be ready to take the DES event certification exam. The exam will include a number of questions related to business management. The certification will ensure that you have a high level of expertise in event marketing.

Event managers may charge a fixed fee for managing events, but they can also pass on certain costs, depending on the event's location and on-site support. These costs are typically not disclosed, but they can add up to the final cost of event management. It's therefore important to understand these costs, as they can significantly increase the overall cost.

Event management offers job flexibility and a varied work environment. In addition to meeting clients in a wide range of settings, event managers can also travel, allowing them to build relationships with different types of customers. Additionally, working with various types of groups will improve their social and

communication skills. They can also gain valuable experience and learn new techniques.

Event management can also be stressful. The pressure to meet deadlines and ensure that everything is going well can lead to mistakes and distractions. As such, many people who get into this field leave the industry after a couple of years. Event management is not for everyone. It requires travel and can be extremely tiring after a while. People who suffer from motion sickness or are easily distracted may want to avoid a career in event management.

Loose coupling has many applications. Its benefits go beyond simple event management. It can help companies improve their workflow by streamlining the process of organizing and executing events. It also makes the implementation of a service more reliable.

### **APPLICATIONS:**

The event management feature helps you to organize, manage, and process the events. When you install the event management solution, you get an event portal that gives the users a web application where they can get to know more about the event details. More information: Event Portal.

The event portal consists of two parts:

- 1. Frontend
- 2. REST API backend

You can implement the frontend using any of the available frameworks. The frontend part is a single page application and is fully customizable. The backend and the customization of the backend depends on the hosting type.

# **CONCLUTION:**

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.

# **FUTURE SCOPE:**

Events, ceremonies, cultural programs and celebrations are an integral part of the Indian lifestyle. People in India want to live every moment of their life up to its full extent. So, they try to find amusement in every big and small occasion. Earlier, the events used to be Organized and managed by all the family or group members together but the growth in disposable income, busy lifestyle, and time constraints that people face these days has resulted into the development of the event planning concept in our country. Nowadays people prefer innovative, theme-based and well-organized functions.