

BUILD AN EVENT MANAGEMENT SYSTEM USING SALESFORCE

Project Description:

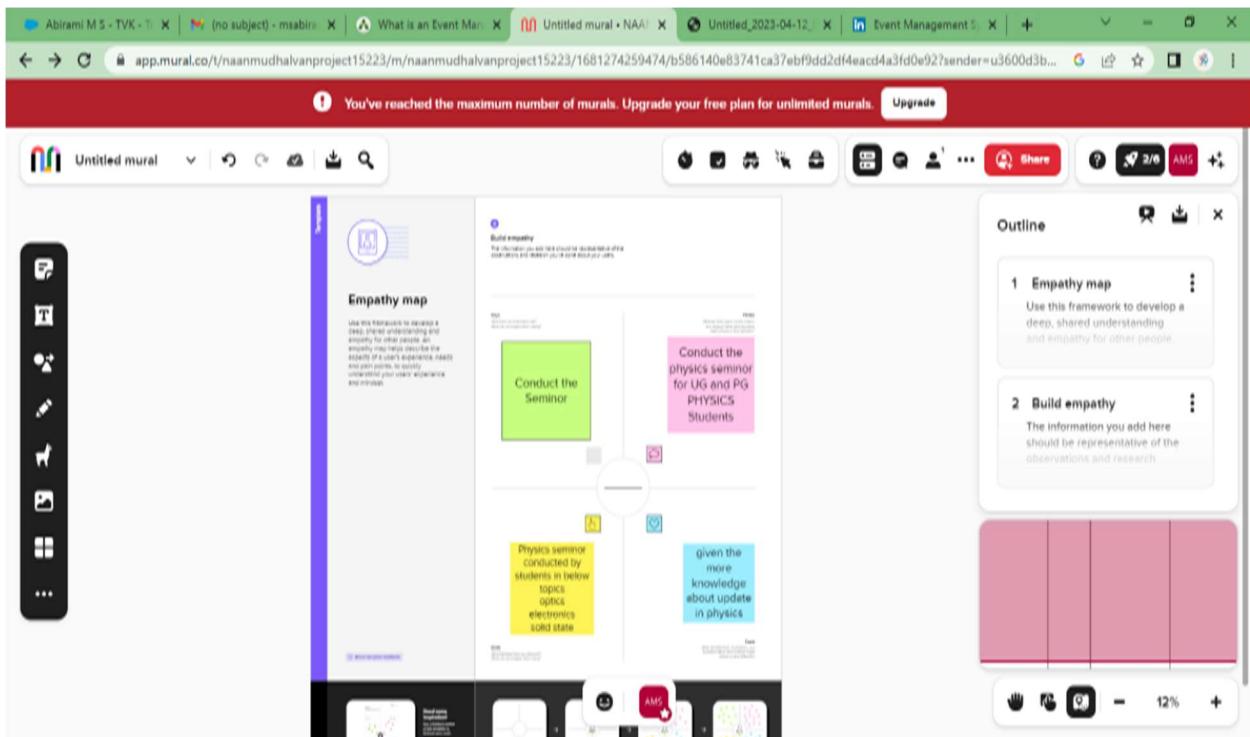
An event management system within Salesforce allows you to access all relevant data in one centralized location

You'll be able to manage all event-related tasks without leaving Salesforce, providing you with a seamless and comprehensive event-planning experience

Use of this Project:

This project helps in managing the ongoing and upcoming events in the organization. And also helps organizer plan execute and report on events, driving success for business by using salesforce.

Problem Definition and Design Thinking: EMPATHY MAP



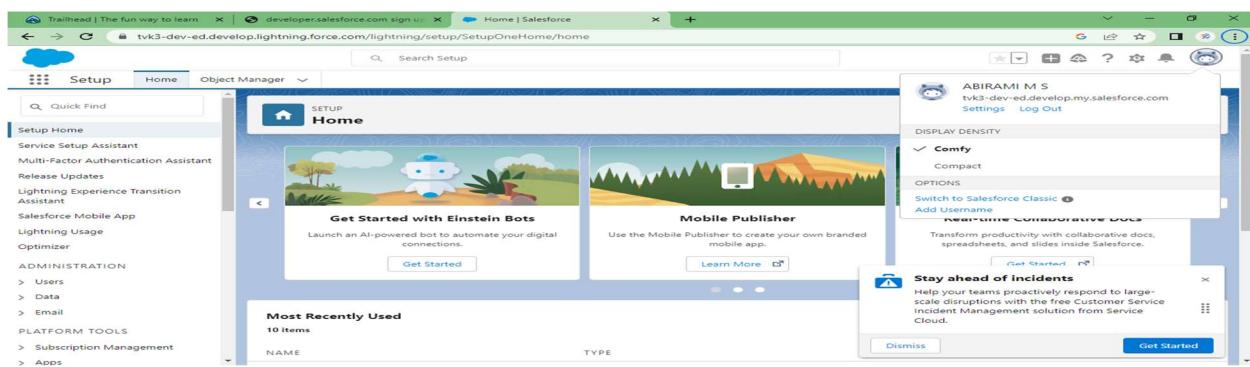
RESULT:

Data Model:

OBJECT NAME	FIELD IN THE OBJECT	
	FIELD LABEL	DATA TYPE
EVENTS	CITY	TEXT
	START DATE	DATE AND TIME
	END DATE	DATE AND TIME
	EVENT	MASTER DETAILS RELATIONSHIP
	ID	AUTO NUMBER
ATTENDEES	PHONE NUMBER	PHONE
	EMAIL	EMAIL
	TICKETS	PICK LIST
	BIO	TEXT AREA
SPEAKER	EMAIL	EMAIL
		LOOK UP RELATIONSHIP
VENDOR	NAME	EMAIL
	EMAIL	PHONE
	PHONE NO	EMAIL
	SERVICE PROVIDER	TEXT
	EVENT NAME	LOOK UP RELATIONSHIP

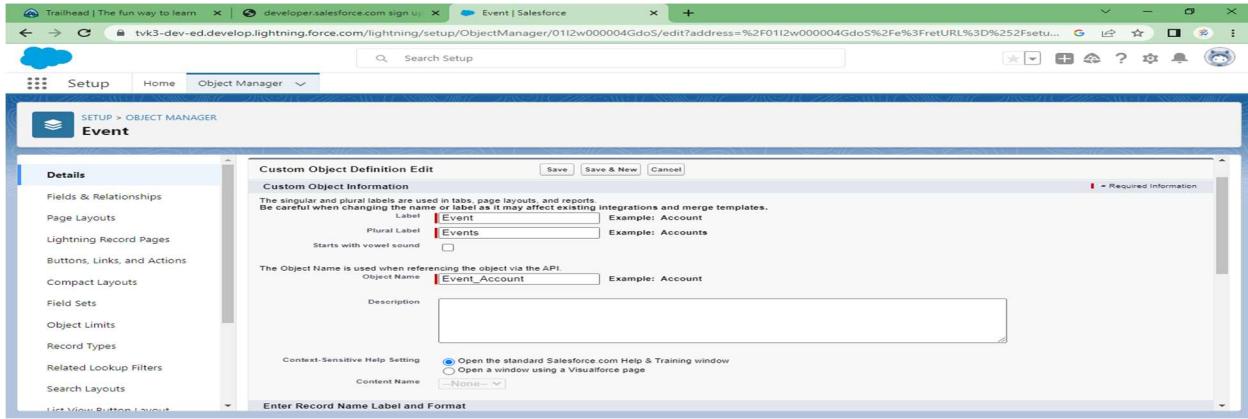
Activity and Screenshot

Creating a salesforce Developer org

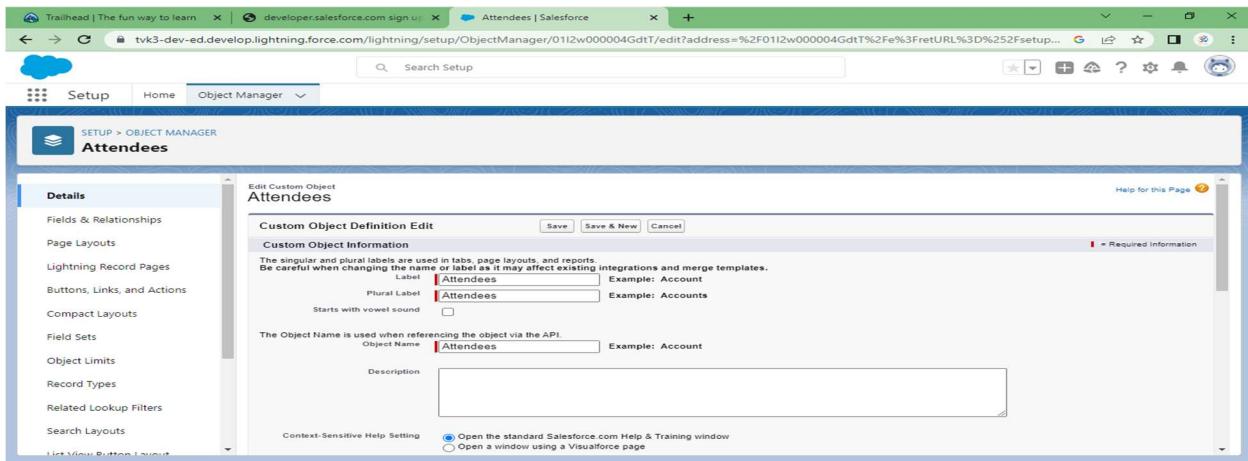


Object

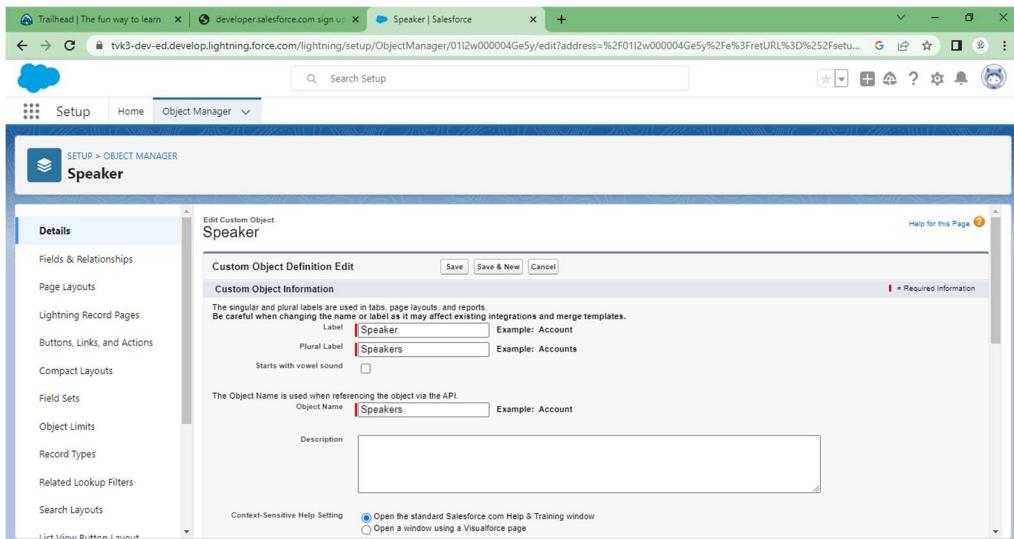
Creation of object for event management



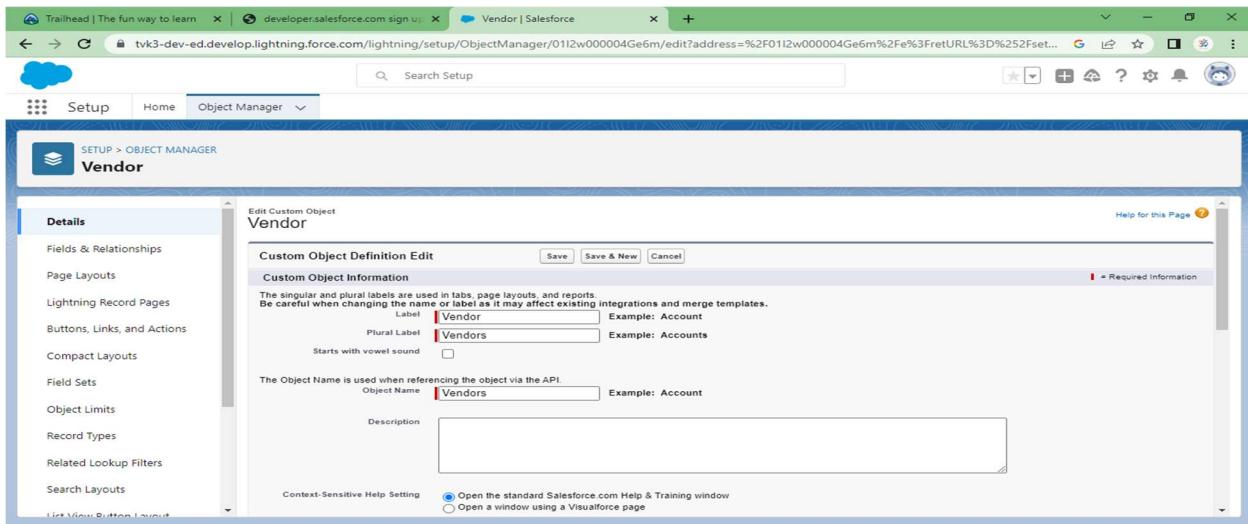
Create of attendees object



Creation of Speaker

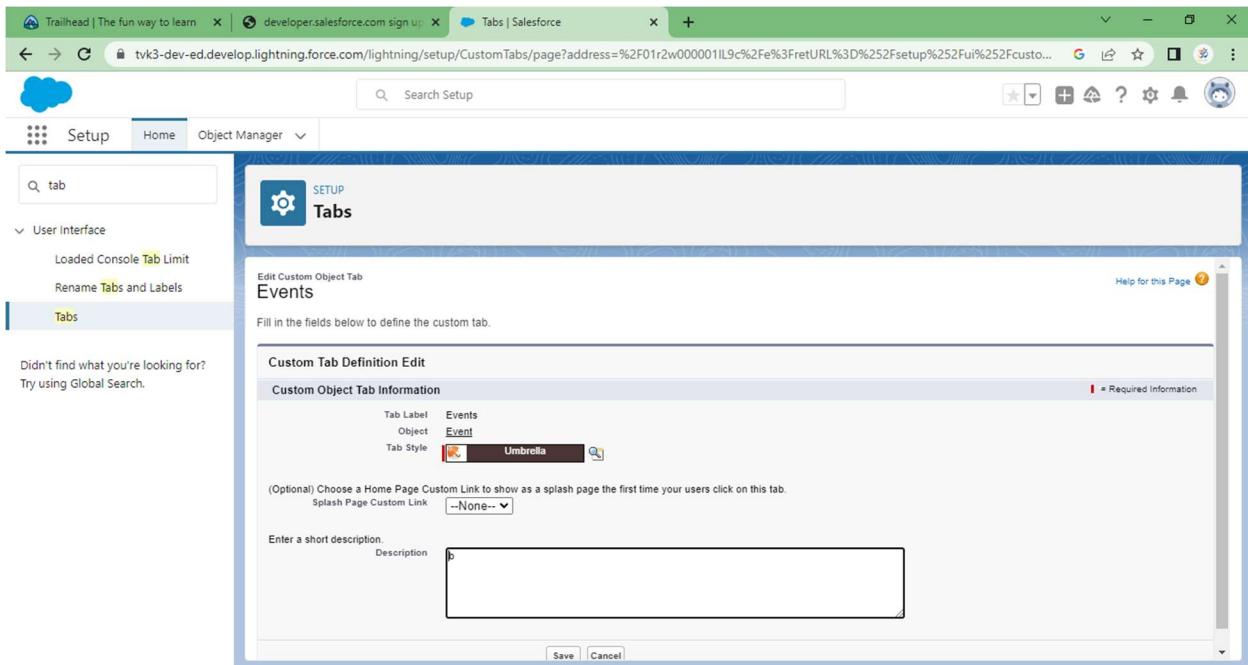


Creation of vendor object

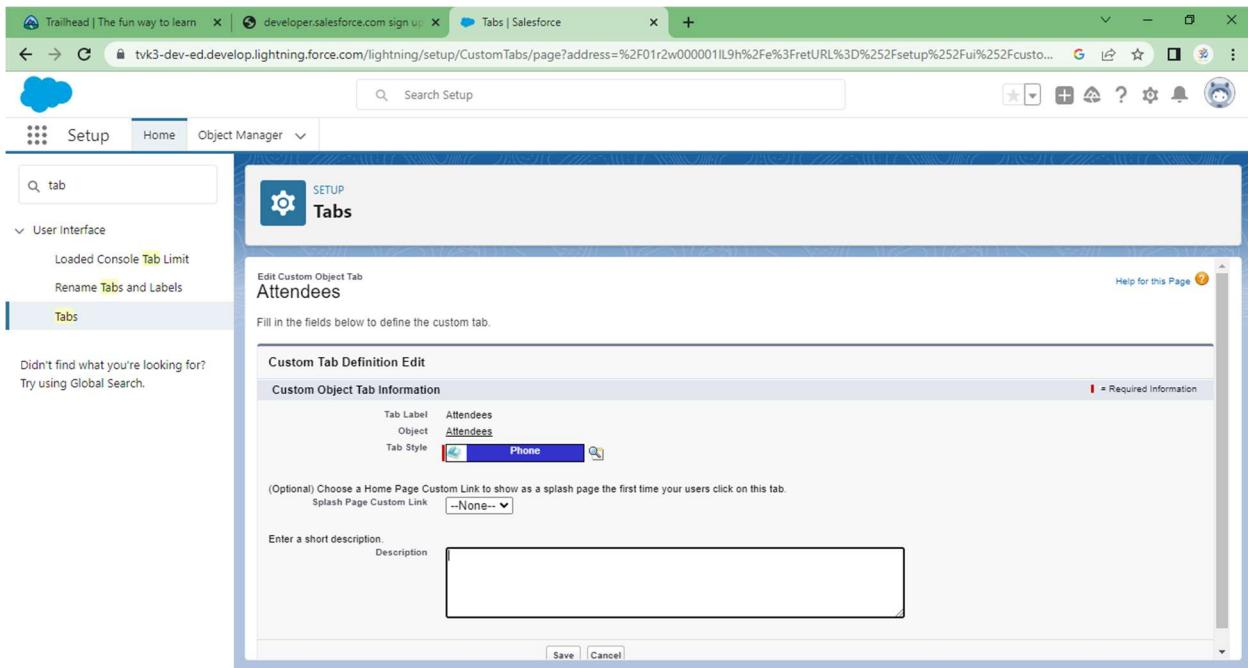


TAB

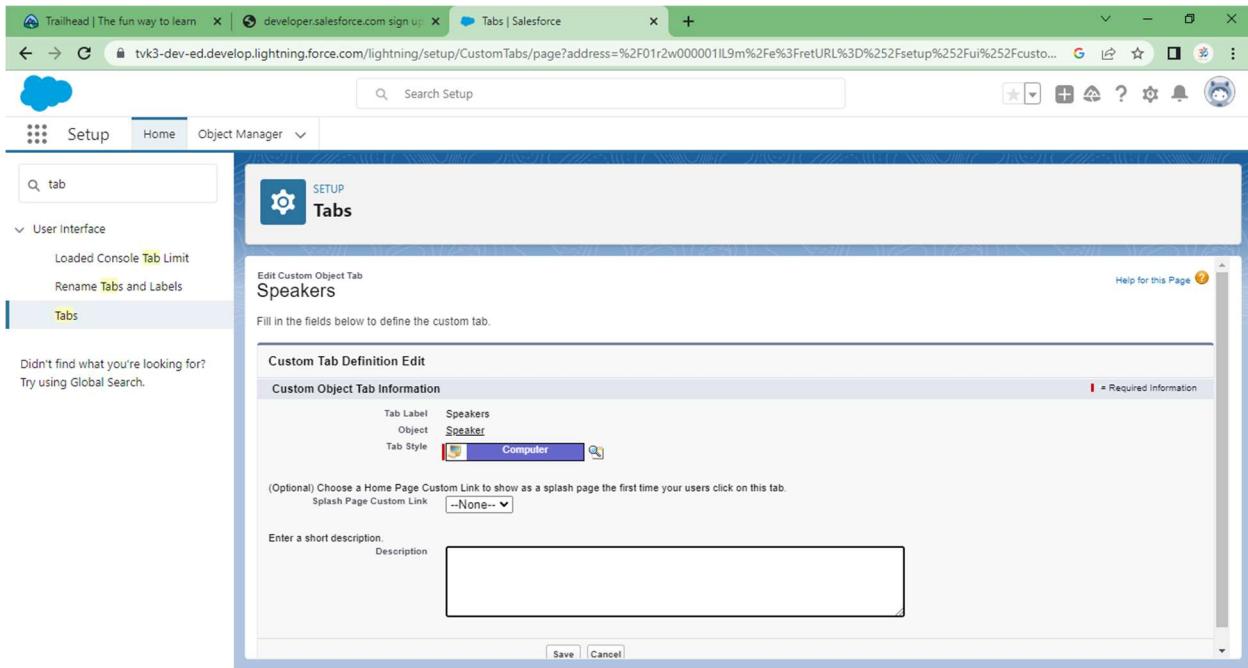
Creation of Event tab



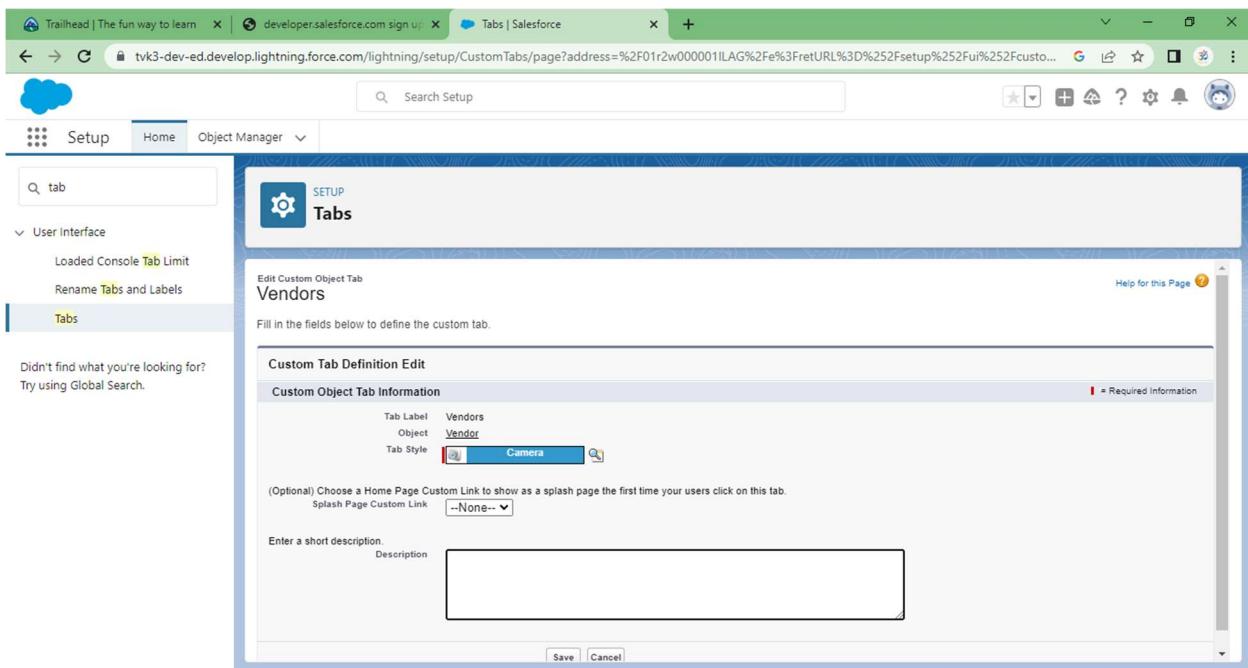
Creation of Attendees tab



Creation of speaker tab

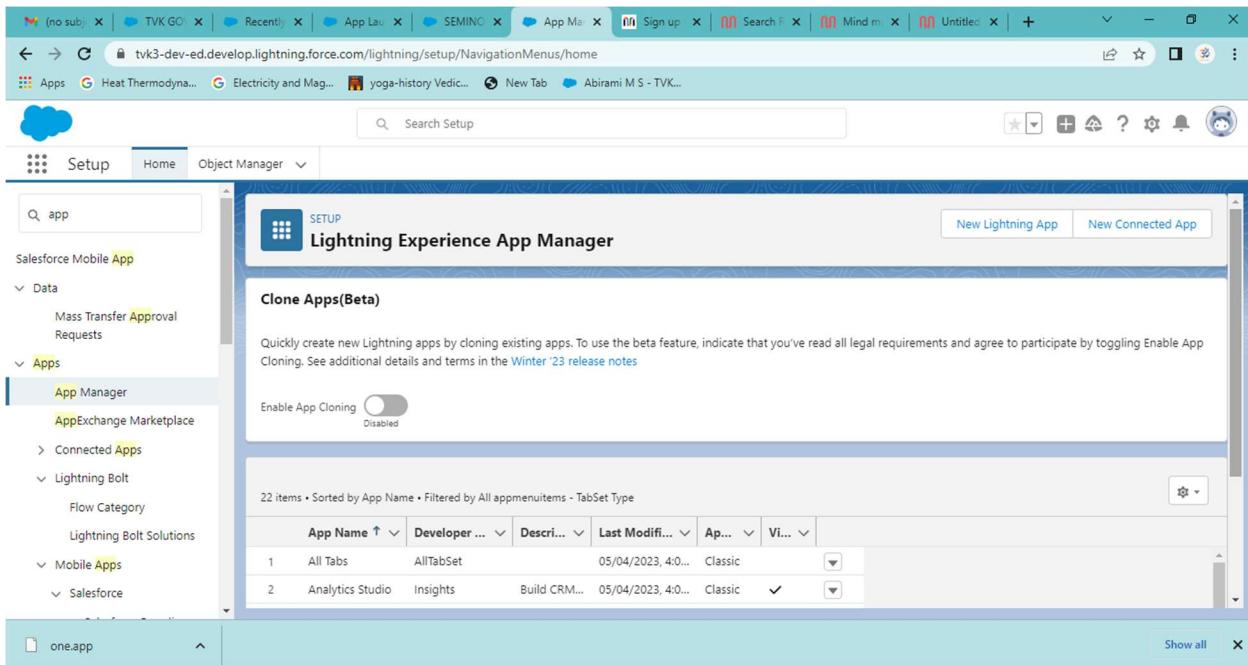


Creation of vendor tab



APPLICATION

Create the event management construction app



The screenshot shows the Salesforce Setup interface with the 'App Manager' tab selected. On the left, a sidebar lists various app categories like 'Salesforce Mobile App', 'Data', 'Apps', 'Lightning Bolt', 'Mobile Apps', and 'Salesforce'. Under 'Apps', 'App Manager' is highlighted. The main content area displays a table titled '22 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type'. The table columns include 'App Name', 'Developer Name', 'Description', 'Last Modified', 'Apex Class', and 'Visible'. The data includes entries for Event Manager, Lightning Usage, Marketing, Platform, Queue Manager, Sales, and Sales Console, among others.

FIELD

Creation of field for the event object

The screenshot shows the Salesforce Setup interface with the 'Event' object selected. The left sidebar shows 'FIELDS & RELATIONSHIPS' and other options like 'Page Layouts', 'Lightning Record Pages', etc. The main content area is titled 'Fields & Relationships' and displays a table with 5 items. The columns are 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. The fields listed are 'Created By' (CreatedById, Lookup(User)), 'Event Account Name' (Name, Text(80)), 'Last Modified By' (LastModifiedById, Lookup(User)), 'Owner' (OwnerId, Lookup(User,Group)), and 'Start Date' (Start_Date__c, Date/Time).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Event Account Name	Name	Text(80)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		
Start Date	Start_Date__c	Date/Time		

Creation of field for attendees object

The screenshot shows the Salesforce Setup interface with the title bar "Attendees | Salesforce". The main area is titled "Fields & Relationships" under the "Attendees" object. The table lists the following fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Attendees 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		
Tickets	Tickets__c	Picklist		

Creation of field for speaker object

The screenshot shows the Salesforce Setup interface with the title bar "Speaker | Salesforce". The main area is titled "Fields & Relationships" under the "Speaker" object. The table lists the following fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Bio	Bio__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
e-mail	e_mail__c	Email		
Event	Event__c	Lookup(Event)	✓	
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)	✓	
Speakers Name	Name	Text(80)	✓	

Creation of field for vendor object

The screenshot shows the Salesforce Setup interface for creating a new field. The left sidebar is titled 'Object Manager' and shows 'Vendor'. The main area is titled 'Fields & Relationships' and lists eight items. A table displays the field details:

Field Name	Label	Type
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(1)
Vendors Name	Name	Text(80)

PROFILE

The screenshot shows the Salesforce Setup interface for managing user profiles. The left sidebar is titled 'Object Manager' and shows 'Profiles'. The main area is titled 'Profiles' and lists all profiles. A table displays the profile details:

Action	Profile Name	User License
<input type="checkbox"/> Edit Clone	Customer Community Plus User	Customer Community Plus
<input type="checkbox"/> Edit Clone	Customer Community User	Customer Community
<input type="checkbox"/> Edit Clone	Customer Portal Manager Custom	Customer Portal Manager Custom
<input type="checkbox"/> Edit Clone	Customer Portal Manager Standard	Customer Portal Manager Standard
<input type="checkbox"/> Edit Del ...	Event user profile	Salesforce
<input type="checkbox"/> Edit Del ...	Event vendors profile	Salesforce
<input type="checkbox"/> Edit Clone	External Apps Login User	External Apps Login
<input type="checkbox"/> Edit Clone	External Identity User	External Identity
<input type="checkbox"/> Edit Clone	Force.com - App Subscription User	Force.com - App Subscription
<input type="checkbox"/> Edit Clone	Force.com - Free User	Force.com - Free
<input type="checkbox"/> Edit Clone	Gold Partner User	Gold Partner

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Setup Home Service Setup Assistant Multi-Factor Authentication Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer ADMINISTRATION Users Permission Set Groups Permission Sets Profiles Public Groups Queues

Profiles

All Profiles Edit | Delete | Create New View

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Del ...	Custom_Sales_Profile	Salesforce	✓
<input type="checkbox"/> Edit Clone	Customer_Community_Profiles	Salesforce	✓
<input type="checkbox"/> Edit Clone	Customer_Community_Logo_User	Customer Community Login	
<input type="checkbox"/> Edit Clone	Customer_Community_Plus_User	Customer Community Plus Login	
<input type="checkbox"/> Edit Clone	Customer_Community_User	Customer Community Plus	
<input type="checkbox"/> Edit Clone	Customer_Portal_Manager_Custom	Customer Portal Manager Custom	
<input type="checkbox"/> Edit Clone	Customer_Portal_Manager_Standard	Customer Portal Manager Standard	
<input type="checkbox"/> Edit Del ...	Event_user_profile	Salesforce	✓
<input type="checkbox"/> Edit Del ...	Event_vendors_profile	External Apps Login	✓
<input type="checkbox"/> Edit Clone	External_Apps_Login_User		

Page 1 of 2

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Setup Home Service Setup Assistant Multi-Factor Authentication Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer ADMINISTRATION Users Permission Set Groups Permission Sets Profiles Public Groups Queues

Profiles

All Profiles Edit | Delete | Create New View

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Clone	Analytics_Cloud_Integration_User	Analytics Cloud Integration User	
<input type="checkbox"/> Edit Clone	Analytics_Cloud_Security_User	Analytics Cloud Integration User	
<input type="checkbox"/> Edit Clone	Authenticated_Website	Authenticated Website	
<input type="checkbox"/> Edit Clone	Authenticated_Website	Authenticated Website	
<input type="checkbox"/> Edit Clone	Chatter_External_User	Chatter External	
<input type="checkbox"/> Edit Clone	Chatter_Free_User	Chatter Free	
<input type="checkbox"/> Edit Clone	Chatter_Moderator_User	Chatter Free	
<input type="checkbox"/> Edit Clone	Contact_Manager	Salesforce	
<input type="checkbox"/> Edit Clone	Cross_Org_Data_Proxy_User	XOrg Proxy User	
<input type="checkbox"/> Edit Del ...	Custom_Marketing_Profile	Salesforce	✓
<input type="checkbox"/> Edit Del ...	Custom_Sales_Profile	Salesforce	✓

Page 1 of 2

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Setup Home Object Manager

Users Profiles Data Feature Settings Data.com Marketing Sales Products Asset Settings Product Schedules Settings

pr

Profiles

Profile Detail

Name: Custom_Sales_Profile

User License: Salesforce

Description:

Created By: ABIRAMI M S 05/04/2023, 4:07 pm

Modified By: ABIRAMI M S 06/04/2023, 6:12 am

Page Layouts

Standard Object Layouts	Global	Object Milestone	Object Milestone Layout
Mass Transfer Approval Requests	Global Layout [View Assignment]	Not Assigned	[View Assignment]
Prospector Preferences	Email Application Layout [View Assignment]	DE Default	[View Assignment]
Prospector Users	Home Page Layout [View Assignment]	Account Layout [View Assignment]	[View Assignment]
Functions	Alternative Payment Method Layout [View Assignment]	Appointment Invitation Layout [View Assignment]	[View Assignment]
Marketing	Lead Processes	Asset Layout [View Assignment]	[View Assignment]
Sales	Products	Asset Action Layout [View Assignment]	[View Assignment]
Asset Settings	Product Schedules	Asset Action Source Layout [View Assignment]	[View Assignment]

Screenshot of the Salesforce Setup interface showing the Profiles page.

Profile Detail

Name	Description	Custom Profile
Custom Support Profile	Salesforce	<input checked="" type="checkbox"/>
	Created By ABIRAMI M S 05/04/2023, 4:07 pm	Modified By ABIRAMI M S 06/04/2023, 6:12 am

Page Layouts

Standard Object Layouts	Global	Object Milestone
Email Application	Not Assigned [View Assignment]	Operating Hours [View Assignment]
Home Page Layout	DE Default [View Assignment]	Opportunity [View Assignment]
Account	Account (Support) Layout [View Assignment]	Opportunity Product [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Order [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Order Product [View Assignment]
Asset	Asset Layout [View Assignment]	Payment [View Assignment]
Asset Action	Asset Action Layout [View Assignment]	Payment Authorization [View Assignment]
Asset Action Source	Asset Action Source Layout [View Assignment]	Payment Authorization Adjustment [View Assignment]

Screenshot of the Salesforce Setup interface showing the Event user profile page.

Profile Detail

Name	Description	Custom Profile
Event user profile	Salesforce	<input checked="" type="checkbox"/>
	Created By ABIRAMI M S 06/04/2023, 6:17 am	Modified By ABIRAMI M S 06/04/2023, 6:20 am

Page Layouts

Standard Object Layouts	Global	Object Milestone
Email Application	Not Assigned [View Assignment]	Operating Hours [View Assignment]
Home Page Layout	DE Default [View Assignment]	Opportunity [View Assignment]
Account	Account Layout [View Assignment]	Opportunity Product [View Assignment]

The screenshot shows the Salesforce Setup interface with the following details:

- Left Sidebar:** Shows the navigation menu under "Setup". The "Profiles" section is currently selected.
- Header:** The title is "Profiles | Salesforce".
- Content Area:**
 - Profile Detail:** Name: Event vendors profile, User License: Salesforce, Description: Created By ABIRAMI M S, 06/04/2023, 6:22 am, Modified By ABIRAMI M S, 06/04/2023, 6:23 am.
 - Page Layouts:** Global Layout: Global Layout [View Assignment], Object Milestone Layout: Object Milestone Layout [View Assignment].

USERS

The screenshot shows the Salesforce Setup interface with the following details:

- Left Sidebar:** Shows the navigation menu under "Setup". The "Users" section is currently selected.
- Header:** The title is "Users | Salesforce".
- Content Area:**
 - User Edit:** ABIRAMI M S
 - General Information:** First Name: ABIRAMI, Last Name: M S, Alias: AM S, Email: msabirami29@gmail.com, Username: msabirami29@gmail.com, Nickname: User1680691044076431932, Title: , Company: TVK, Department: , Division: .
 - Role:** <None Specified> (dropdown)
 - User License:** Salesforce
 - Profile:** System Administrator
 - Active:** checked
 - Marketing User:** checked
 - Offline User:** checked
 - Knowledge User:** unchecked
 - Flow User:** unchecked
 - Service Cloud User:** checked
 - Site.com Contributor User:** unchecked
 - Site.com Publisher User:** unchecked
 - WDC User:** unchecked

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. The main window displays the 'User Edit' screen for a user named 'ABIRAMI MURUGAN'. The 'General Information' section contains fields for First Name (ABIRAMI), Last Name (MURUGAN), Alias (ABI), Email (msabirami29@gmail.com), Username (abiramimurugan@gmail.com), Nickname (ABI), Title (empty), Company (empty), Department (empty), and Division (empty). To the right of these fields are dropdown menus for Role ('None Specified'), User License ('Salesforce'), Profile ('Event user profile'), and Active status (checked). Other optional checkboxes include Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, and WDC User.

PERMISSION SET

Event permit

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' tab selected. The main window displays the 'Permission Set Overview' for a permission set named 'Event_Permits'. The table includes columns for API Name (Event_Permits), Namespace Prefix (empty), and Created By (ABIRAMI M.S. 06/04/2023, 7:22 am). Below this, the 'Apps' section lists several configuration categories: Assigned Apps, Assigned Connected Apps, Object Settings, App Permissions, and Apex Class Access.

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' tab selected. The left sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration, Users, Permission Set Groups, and Permission Sets. The main content area displays a table titled 'Permission Sets' with columns for Action, Permission Set Label, Description, and License. The table lists various permission sets such as Contact Center Admin, Contact Center Agent, Contact Center Supervisor, Event Permits, Experience Profile Manager, Facility Manager, FieldServiceMobileStandardPermSet, Merchandiser, and Order Management Agent. A navigation bar at the bottom allows for searching and filtering the list.

REPORTS

The screenshot shows the Salesforce Event Management interface with the 'Recently Viewed' tab selected. The left sidebar includes links for Event Management, Attendees, Reports, Speakers, Vendors, Events, and Dashboards. The main content area displays a list of recently viewed events under the 'Events' category. The list shows one item: 'SEMINAR'. The bottom status bar indicates the URL as https://tvk3-dev-ed.develop.lightning.force.com/lightning/o/Event_Account_c/list?filterName=Recent.

The screenshot shows the Salesforce Lightning interface. The top navigation bar includes tabs for Trailhead, developer.salesforce.com sign up, App Manager | Salesforce, and Recently Viewed | Attendees | Sales. The main content area is titled "Attendees Recently Viewed". It displays a single item: "1 item • Updated a few seconds ago" followed by a table with one row. The table has a header "Attendees Name" and a single data row "1 UG&PG PHYSICS STUDENTS". The interface includes standard Salesforce navigation and search tools.

The screenshot shows the Salesforce Lightning interface. The top navigation bar includes tabs for (no subject), TVK GOVT, Recently V, Recently V, SEMINOR, Sign up fo, Search Res., Mind map, Untitled n, and a New Tab. The main content area is titled "Speakers Recently Viewed". It displays a single item: "1 item • Updated a few seconds ago" followed by a table with one row. The table has a header "Speakers Name" and a single data row "1 STUDENT 1". The interface includes standard Salesforce navigation and search tools.

Screenshot of a Salesforce Lightning interface showing the "Recently Viewed" list for Vendors.

The URL is tvk3-dev-ed.lightning.force.com/lightning/o/Vendors__c/list?filterName=Recent.

The list contains one item: TVK GOVT COLLEGE PHYSICS.

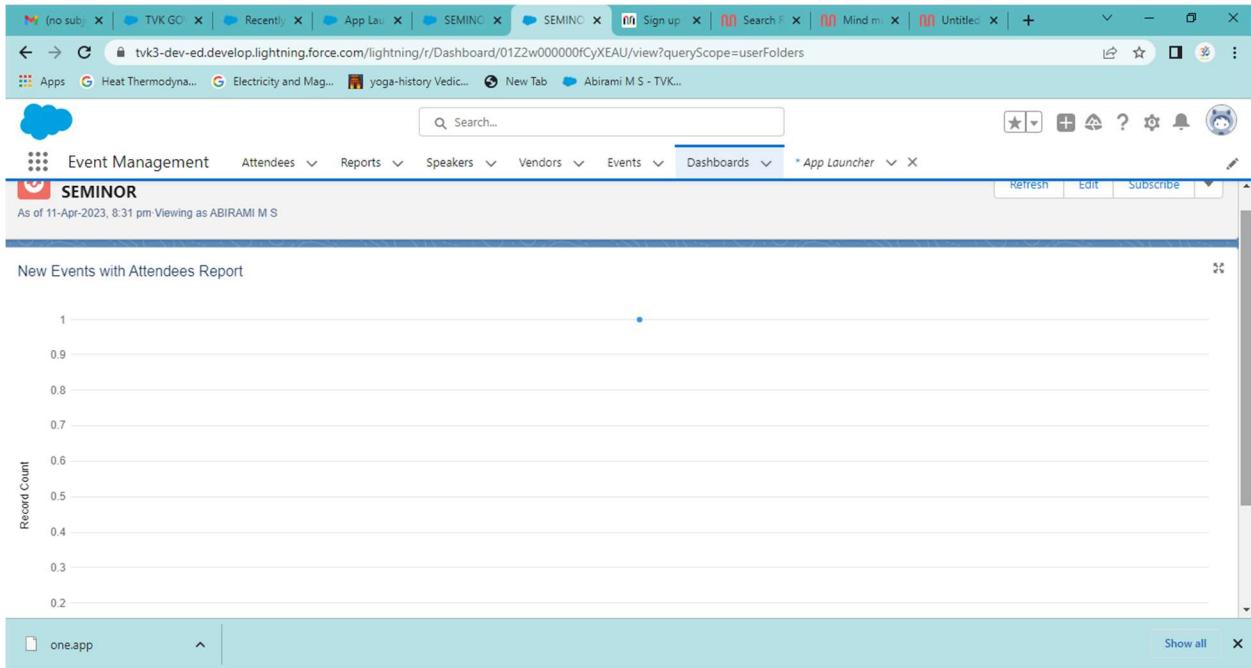
Screenshot of a Salesforce Lightning interface showing the "Recent" reports list.

The URL is tvk3-dev-ed.lightning.force.com/lightning/o/Report/home?queryScope=mru.

The list shows recent reports categorized by type:

- REPORTS**
 - Created by Me: SEMINOR (Private Reports, ABIRAMI M S, 11/4/2023, 8:09 pm)
 - Private Reports: New Events with Attendees Report (Private Reports, ABIRAMI M S, 6/4/2023, 8:01 am)
 - Public Reports: All Reports
- FOLDERS**
 - All Folders
 - Created by Me: New Events with Attendees Report (Private Reports, ABIRAMI M S, 11/4/2023, 1:08 pm)
 - Shared with Me
- FAVORITES**
 - All Favorites

DASHBOARD



4 Trailhead Profile Public URL

Team Lead- <https://trailblazer.me/id/abims6>

Team Members 1- <https://trailblazer.me/id/mkaviya1>

Team Members 2- <https://trailblazer.me/id/pavib21>

Team Members 3- <https://trailblazer.me/id/saikar>

5 Advantages and Disadvantages

ADVANTAGES

- All-inclusive logistics management, with exhibitor, sponsor, vendor, and speaker management tools
- Flexible guest agenda builder for multi-session events.
- Custom ticketing and registration options.
- Mobile-ready event sites to promote your event on all platforms.

DISADVANTAGES

- Multiple customers complain that Salesforce customer care is slow to respond and that some emails and phone calls go unanswered for months.
- There is no free 24/7 help.
- Moreover, when users contact support, sometimes they do not seem to have an answer to their problem.
- Certain requests leave the support team helpless

6 Application

- Customized processes & scheduling
- Effortless event updates & tracking
- Resources & documentation
- Mobile on-the-go access
- Hardware & software integrations
- Data security & management
- Custom reporting & dashboard

7 Conclusion

We worked well on this project

Build an event management system using salesforce is the technology for managing the any event to conduct with the perfect schedule and plan.

8 Future scope

The field of event management opens the door to endless possibilities, encouraging innovation, creativity and diversity to ensure the growth and sustenance of the industry in the years to come.