Smart Internz

BUILD AN EVENT MANAGEMENT SYSTEM USING SALESFORCE

1.INTRODUCTION :

1.1 Overview

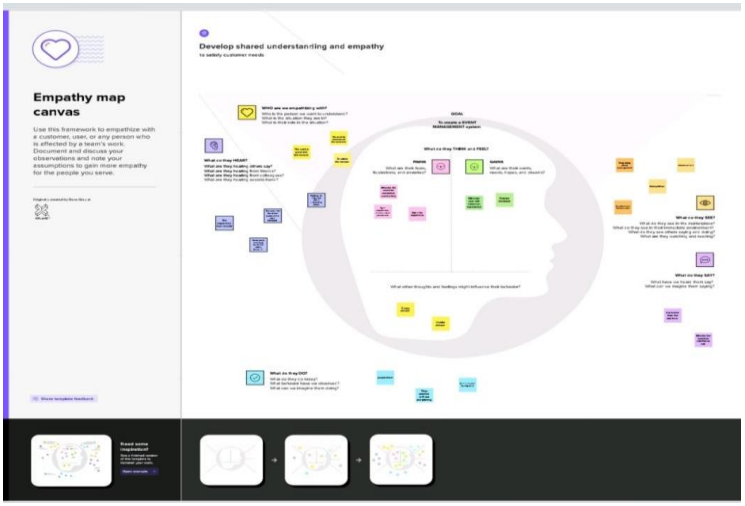
The project aim is to provide real-time knowledge for all the students who have basic knowledge of Salesforce and Looking for a real-time project.

1.2 Purpose

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.

2 Problem Definition & Design Thinking

2.1 Empathy Map



2.2 Ideation & Brainstorming Map

3 RESULT

3.1 Data Model:

<table>
<tr><th>Object name</th><th>Fields in the Object</th></tr>
<tr><td>Event</td><td>
<table>
<tr><td>City</td><td>Data Type</td></tr>
<tr><td>Start Date</td><td>Date/Time</td></tr>
<tr><td>End date</td><td>Date/Time</td></tr>
</table>
</td></tr>
<tr><td>Attendee</td><td>
<table>
<tr><td>Id</td><td>Auto Number</td></tr>
<tr><td>Phone</td><td>Phone</td></tr>
<tr><td>Email</td><td>Email</td></tr>
<tr><td>Tickets</td><td>Picklist</td></tr>
<tr><td>Event</td><td>Master-detail Relationship</td></tr>
</table>
</td></tr>
<tr><td>Speaker</td><td>
<table>
<tr><td>Bio</td><td>Area</td></tr>
<tr><td>e-mail</td><td>Email</td></tr>
<tr><td>Event</td><td>Look-up Relationship</td></tr>
</table>
</td></tr>
<tr><td>Vendor</td><td>
<table>
<tr><td>e-mail</td><td>Email</td></tr>
<tr><td>Phone</td><td>Phone</td></tr>
<tr><td>e-mail</td><td>Email</td></tr>
<tr><td>Event</td><td>Look-up Relationship</td></tr>
<tr><td>Service Provider</td><td>Data Type</td></tr>
</table>
</td></tr>
</table>

3.2 Activity & Screenshot

Milestone -1

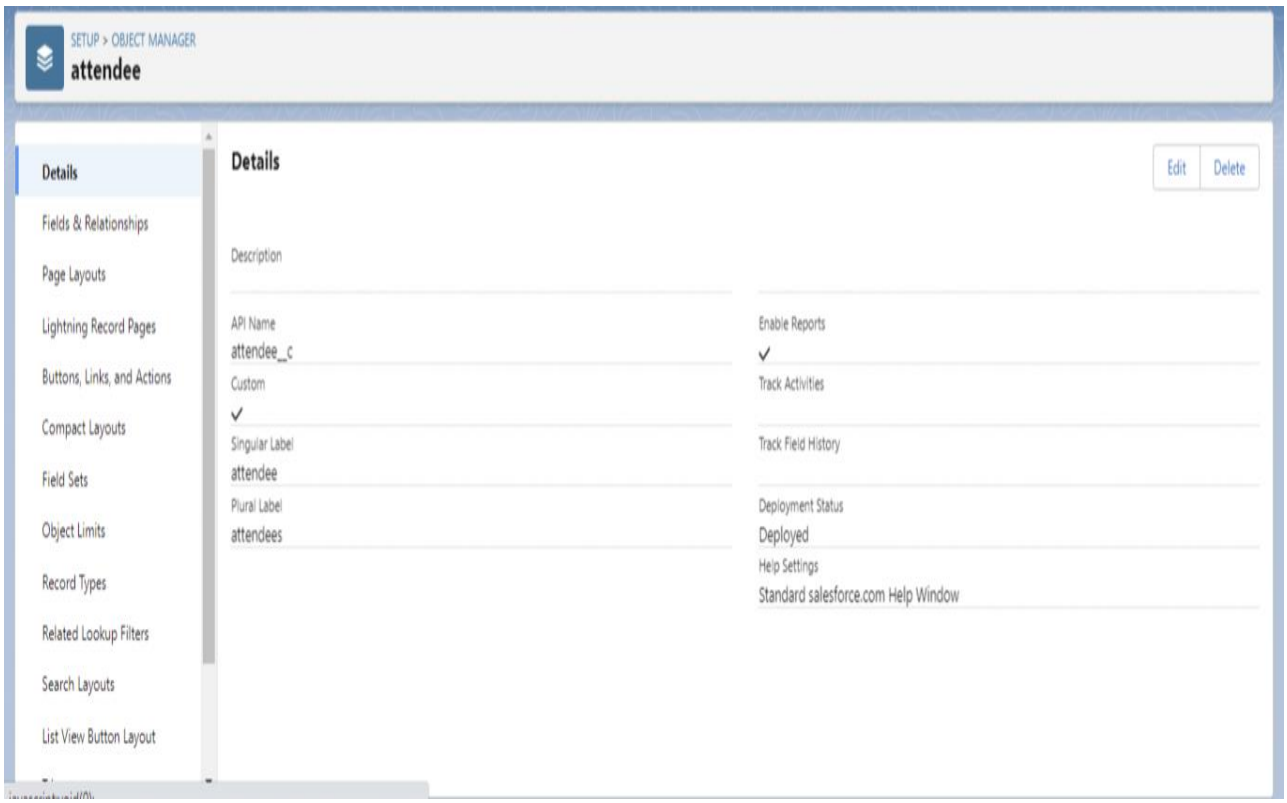
We have created the developer account and login for Salesforce account.

Milestone 2-Object:

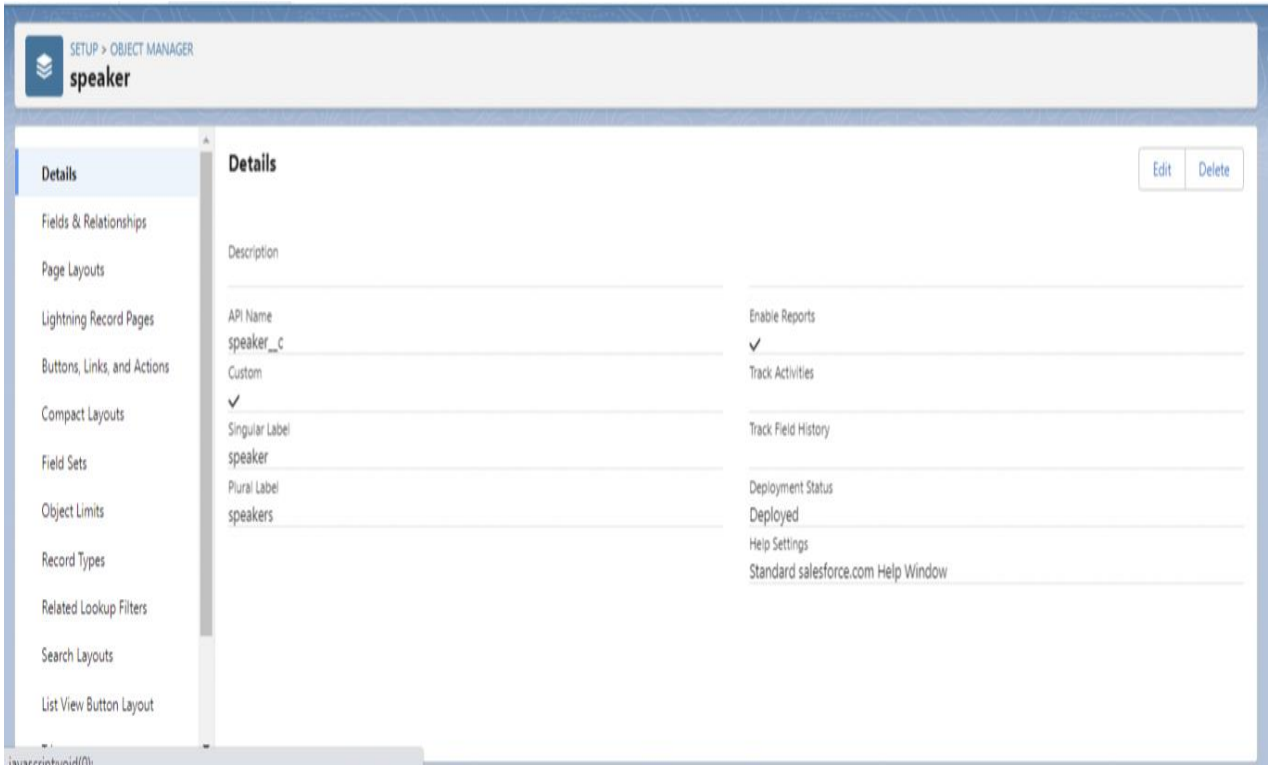
Event:

For this Event management we need to create 4 objects i.e Events, Attendees,Speakers and vendors. The below steps will assist we in creating those objects.

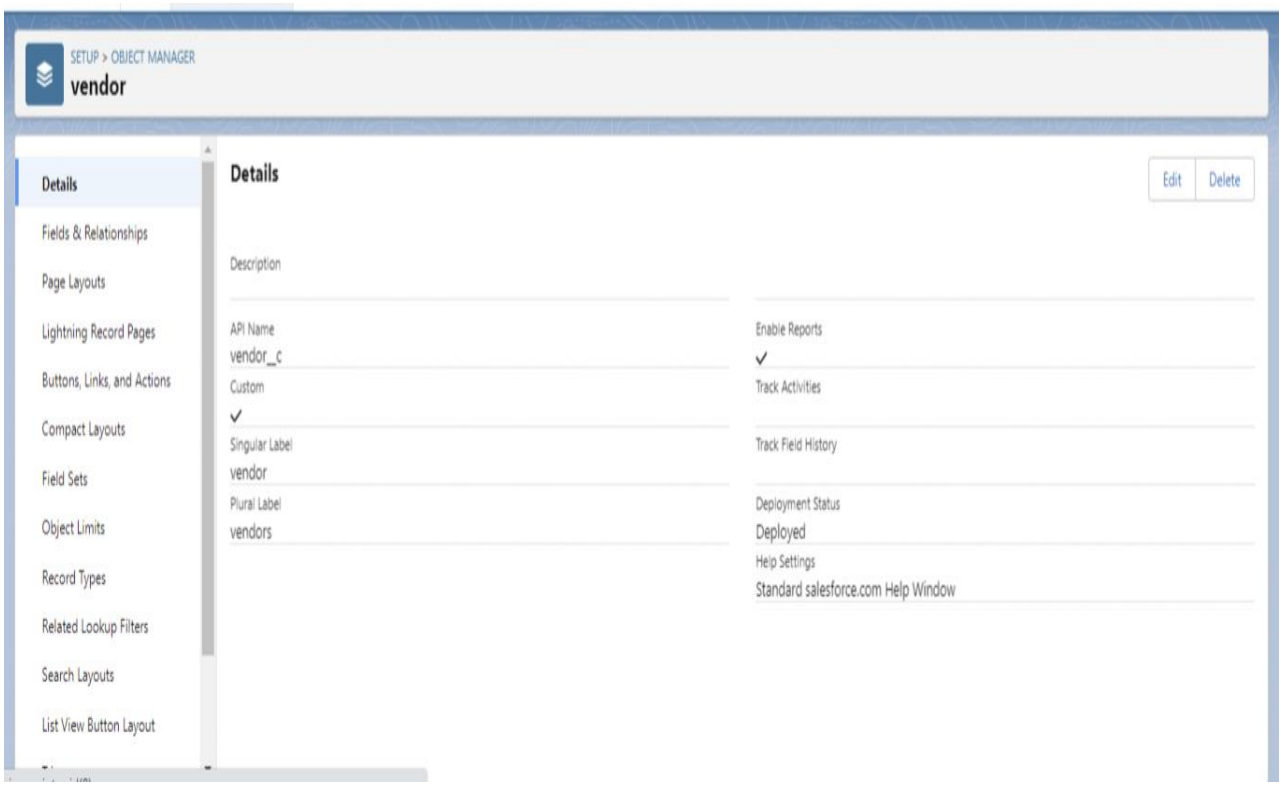
Attendee:



Speaker :

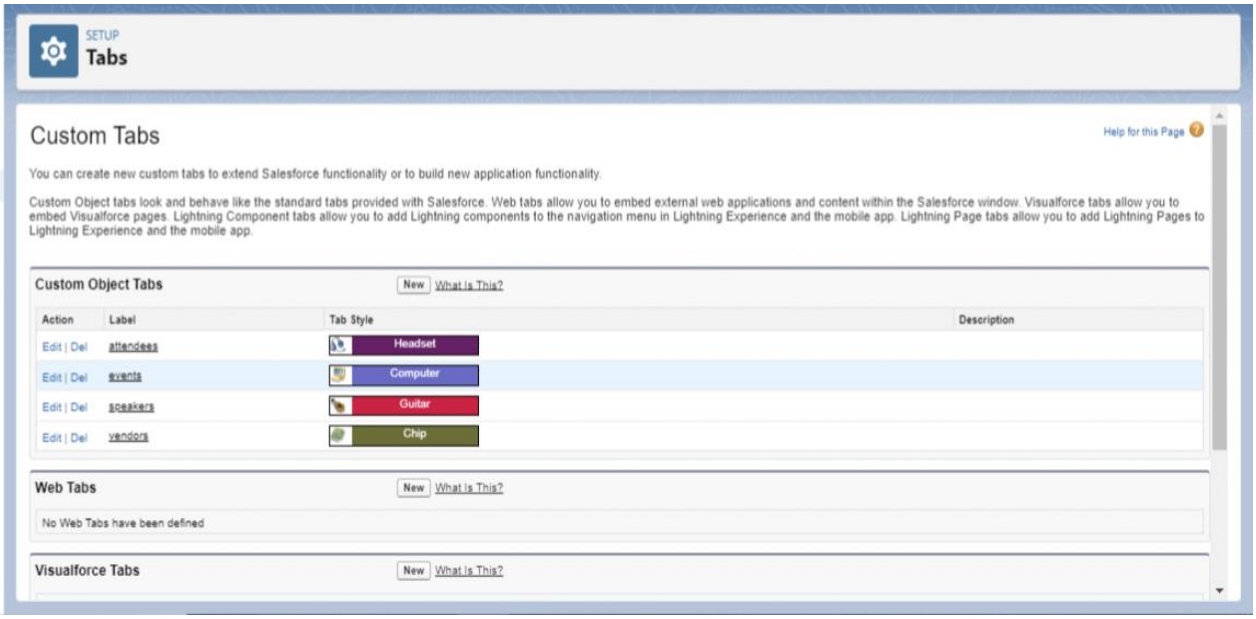


Vendor:



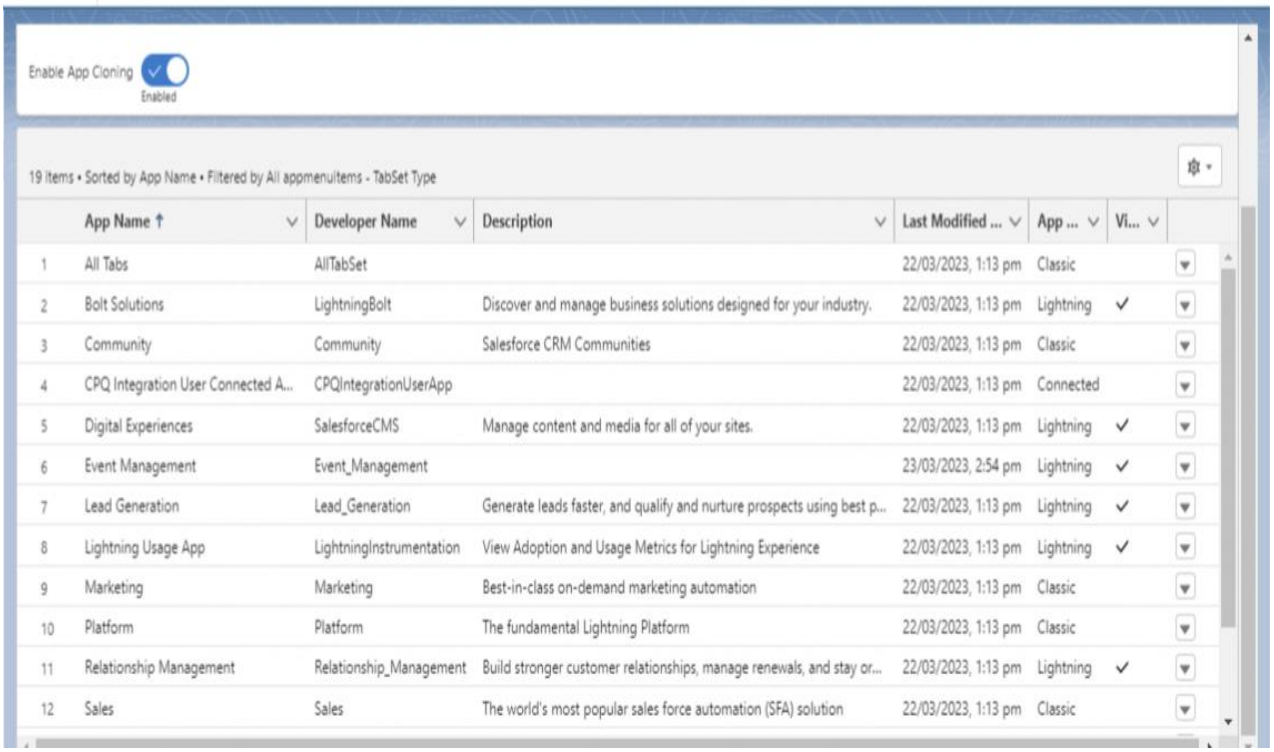
Milestone 3-Tab:

Tabs in Salesforce help users view the information at a glance. It displays the data of objects and other web content in the application.



Milestone 4-Application:

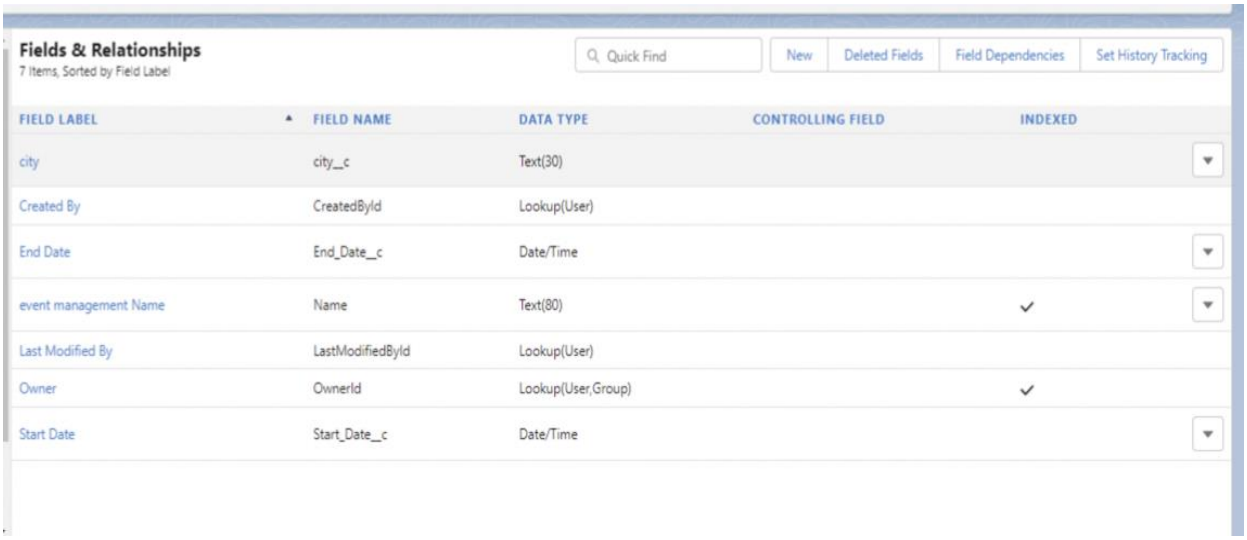
Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs



	App Name	Developer Name	Description	Last Modified ...	App ...	Vi...
1	All Tabs	AllTabSet		22/03/2023, 1:13 pm	Classic	
2	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	22/03/2023, 1:13 pm	Lightning	✓
3	Community	Community	Salesforce CRM Communities	22/03/2023, 1:13 pm	Classic	
4	CPQ Integration User Connected A...	CPQIntegrationUserApp		22/03/2023, 1:13 pm	Connected	
5	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	22/03/2023, 1:13 pm	Lightning	✓
6	Event Management	Event_Management		23/03/2023, 2:54 pm	Lightning	✓
7	Lead Generation	Lead_Generation	Generate leads faster, and qualify and nurture prospects using best p...	22/03/2023, 1:13 pm	Lightning	✓
8	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	22/03/2023, 1:13 pm	Lightning	✓
9	Marketing	Marketing	Best-in-class on-demand marketing automation	22/03/2023, 1:13 pm	Classic	
10	Platform	Platform	The fundamental Lightning Platform	22/03/2023, 1:13 pm	Classic	
11	Relationship Management	Relationship_Management	Build stronger customer relationships, manage renewals, and stay or...	22/03/2023, 1:13 pm	Lightning	✓
12	Sales	Sales	The world's most popular sales force automation (SFA) solution	22/03/2023, 1:13 pm	Classic	

Milestone 5-Fields :

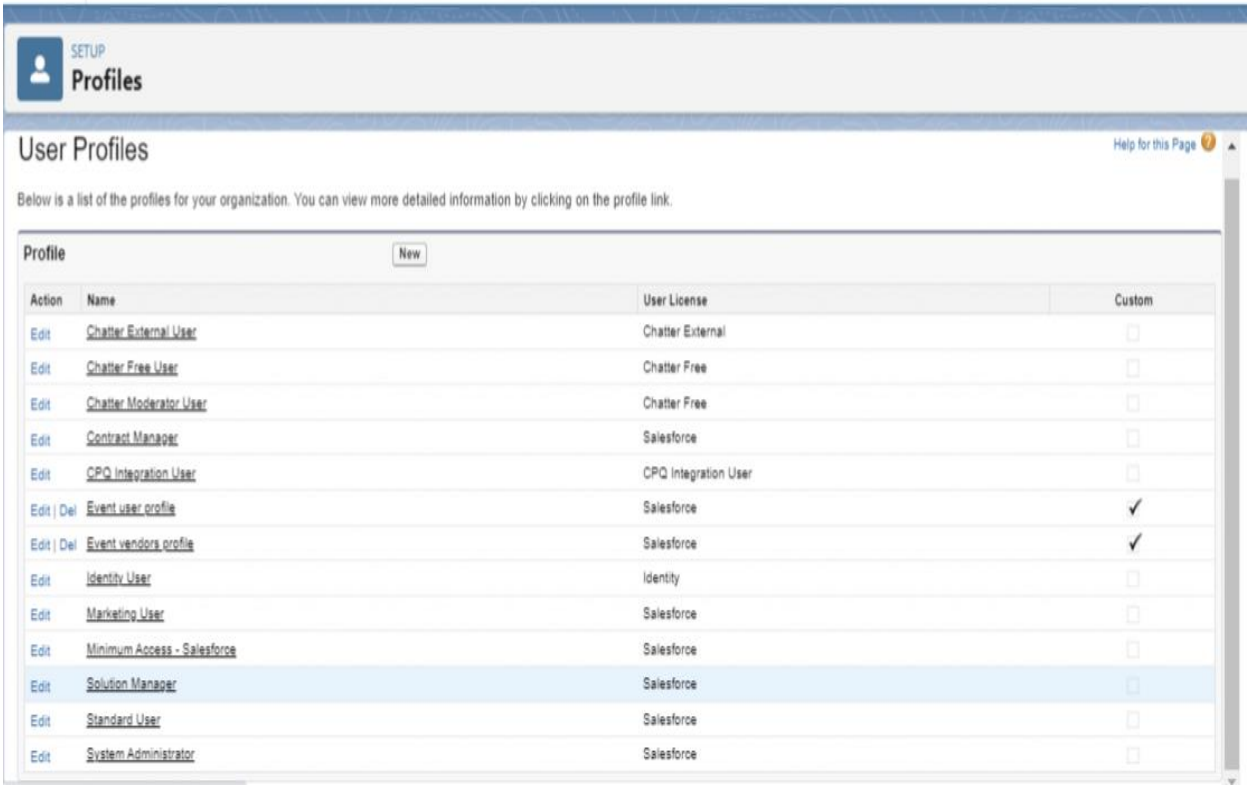
Fields in Salesforce represents what the columns represent in relational databases. It can store data values which are required for a particular object in a record.



FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
city	city__c	Text(30)		
Created By	CreatedById	Lookup(User)		
End Date	End_Date__c	Date/Time		
event management Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Start Date	Start_Date__c	Date/Time		

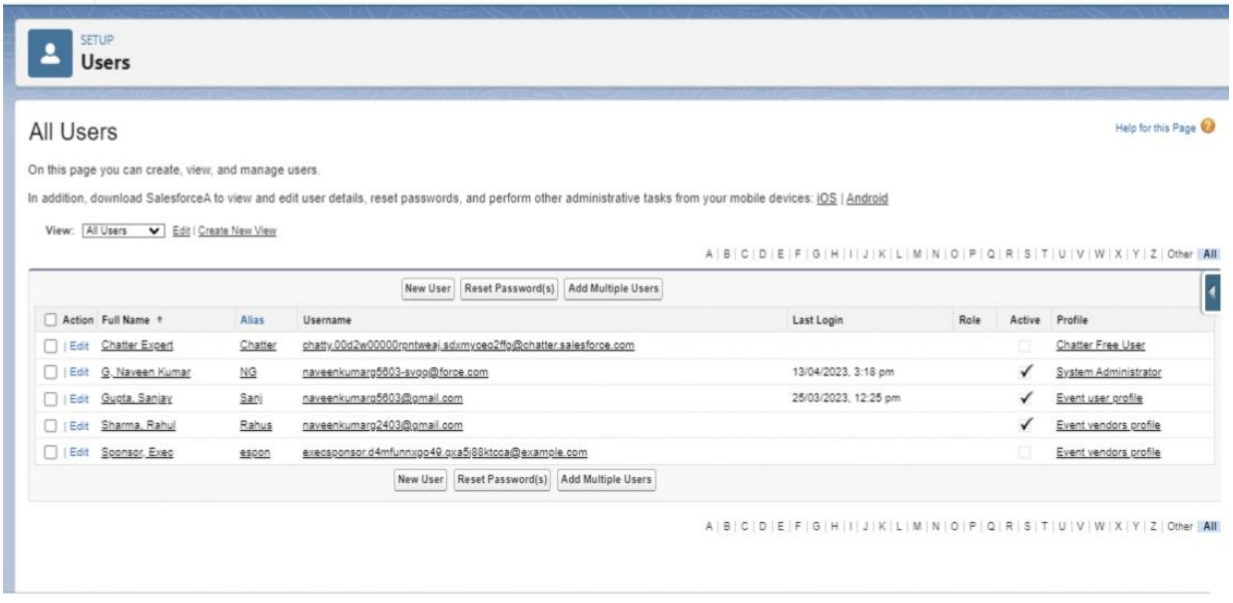
Milestone 6-Profile :

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.



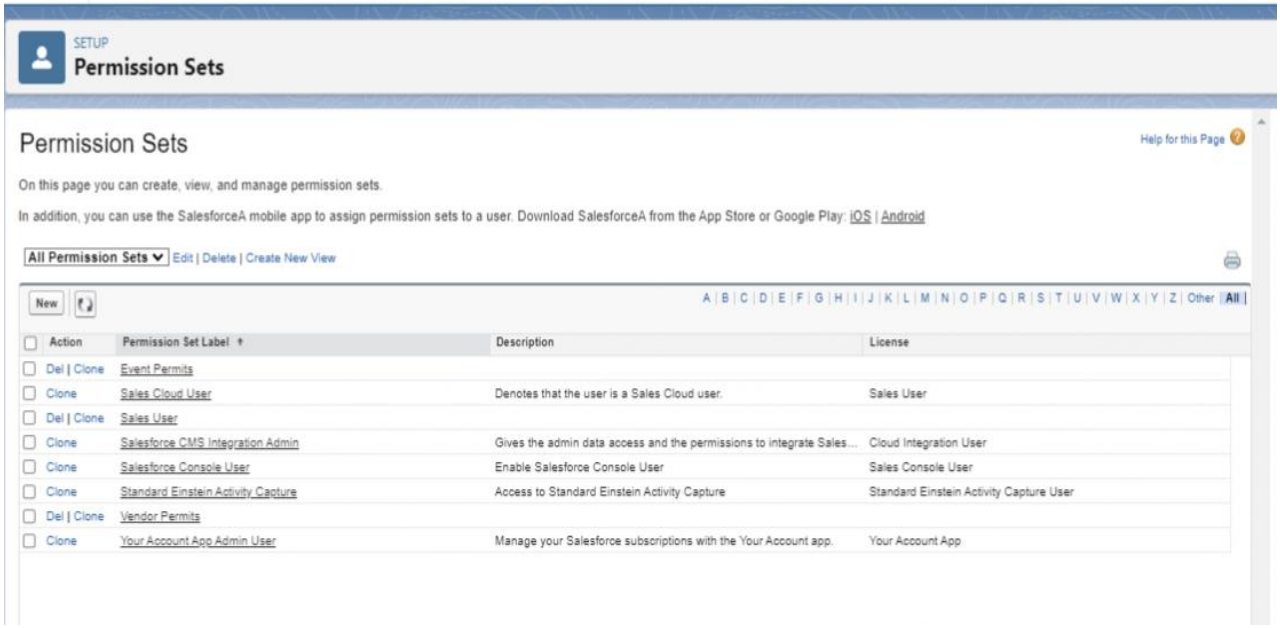
Milestone 7-User :

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.



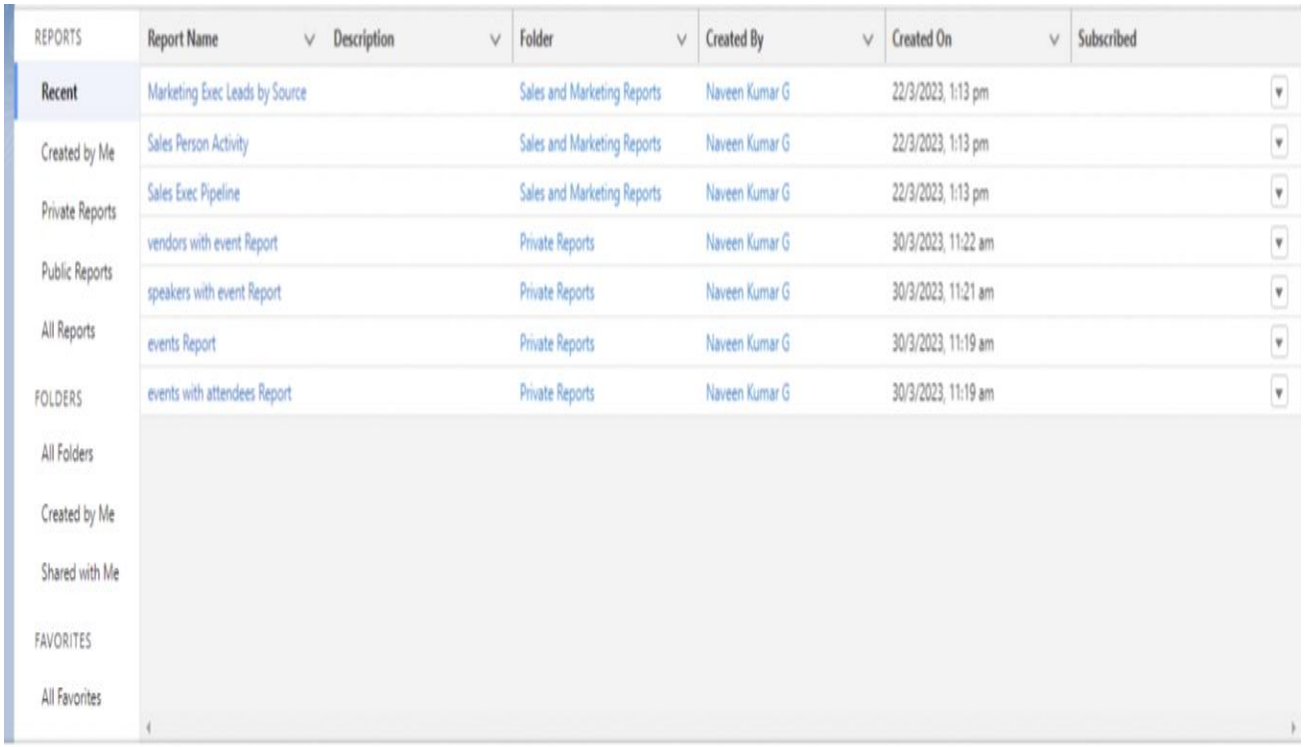
Milestone 8-Permissoin sets :

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.



Milestone 9-Reports :

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

Team Lead 1:https://trailblazer.me/id/naveg24

Team member 1: https://trailblazer.me/id/m20bma009

Team member 2:https://trailblazer.me/id/ramet27

Team member 3:https://trailblazer.me/id/slakshmanan29

-

4 ADVANTAGES & DISADVANTAGE

Data organized and presented by a CRM platform leads to a better understanding of customers. This leads to better messaging and outreach, much of which can be done with automation, which helps we offer better, more efficient customer service.

Many customers claim that Salesforce customer service is unresponsive and some emails and calls can remain unanswered for months. Also, when users reach out to support for help, they seem not to have a solution for their problem.

5 APPLICATIONS

The next topic in this tutorial on what is Salesforce is about Salesforce applications. Here, we have a look at a few applications that make Salesforce popular.

Customer Service: Salesforce provides excellent customer service from anywhere in the world. It helps in resolving customer issues faster and improves support agent response time. Salesforce allows we to unify email, social, phone, and chat support and helps manage every channel from one view.

Customize Data: Salesforce allows we to handle and customize different types of data. It helps we track real-time analytics and enhance the customer experience.

Flexible Data Reporting and Analysis: Salesforce allows flexible data reporting and analysis. Here, sales representatives can create their reports to check the accounts they haven't worked on for a while.

Understand Customer Data: The Salesforce tool makes we understand customer data, identify their interests and perception. we can locate and re-engage inactive customers and increase sales by tracking customer interaction.

6 CONCLUSION

Salesforce is a popular CRM platform today. After reading this tutorial, we would know what CRM is, why Salesforce, what is Salesforce, Salesforce services, and its applications.

If we are interested to learn more about Salesforce check out Simplilearn's Salesforce Admin Certification Training where you will learn how to manage and develop apps for one of the most popular CRM platforms worldwide.

7 FUTURE SCOPE

There are 3.3 million jobs expected in the Salesforce ecosystem by 2022. More than 200K Companies have switched to Salesforce. The annualized growth of the platform is expected to be 65 percent.

According to IDC, it is the number one CRM system that leads the market, with 19.7% of the total market share.