

Project Report Template

BUILD AN EVENT MANAGEMENT SYSTEM

USING SALESFORCE

1.Introduction:

1.1Description:

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.

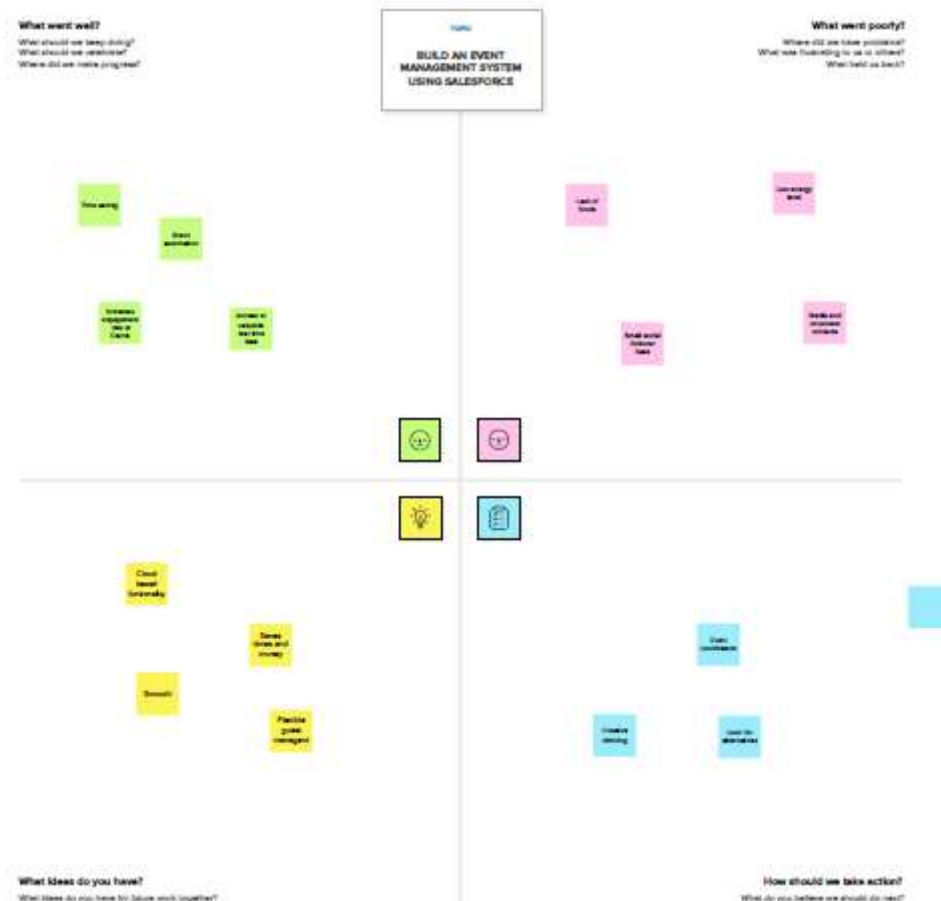
1.2Purpose:

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. During an event, event managers oversee the event live and make sure things run smoothly. After an event, event managers are tasked with reviewing event data, submitting KPI and ROI findings, and staying on the ball for any post-event offerings.

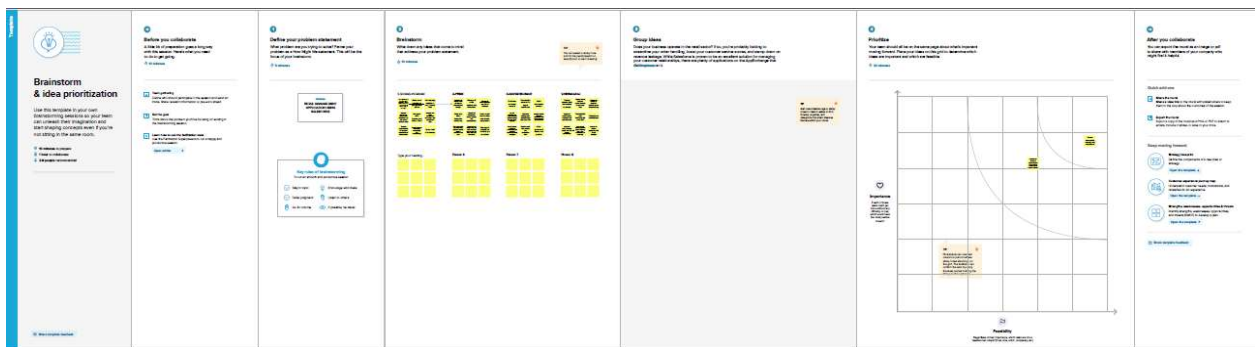
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2.Problem Definition & Design Thinking:

2.1Empathy Map:



2.2Ideation & Brainstorming Map:



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3.Result:

3.1Data Modal:

Object name Field in the Object

Object	Field Label	Data Type
1.Events	1.City 2.Start Date	1.Text 2.Date/Time
2.Attendee	1.Id 2.Phone 3.email 4.Tickets	1.Auto Number 2.Phone 3.email 4.Picklist
3.Speakers	1.Bio 2.email 3.Event Name	1.Text Area 2.email 3.Lookup Relationship
4.Vendors	1.email 2.Phone 3.email 4.Service Provider 5.Event Name	1.email 2.Phone 3.email 4.Text 5.Lookup Relationship

3.2Activity & ScreenShort:

1.Object:

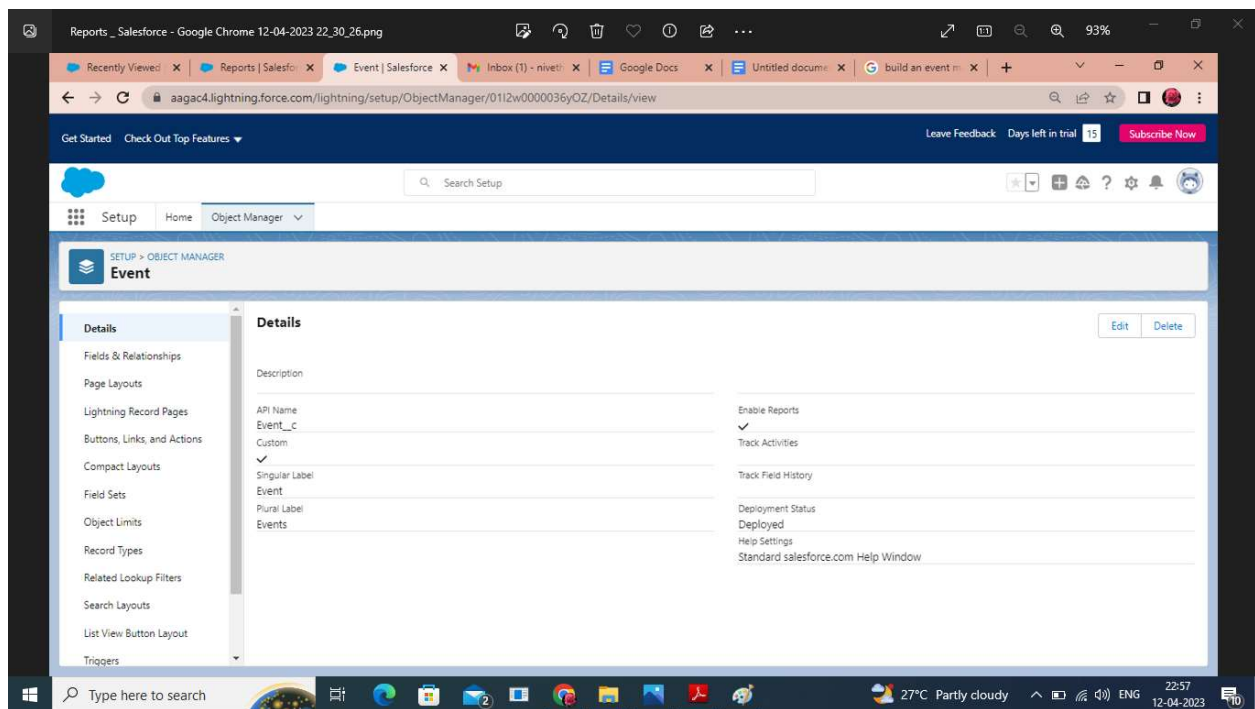
1. Click on the gear icon and then select Setup
- .2. Click on the object manager tab just beside the home tab.

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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: Events
- Record Name: Event Name
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save.

Screenshot:



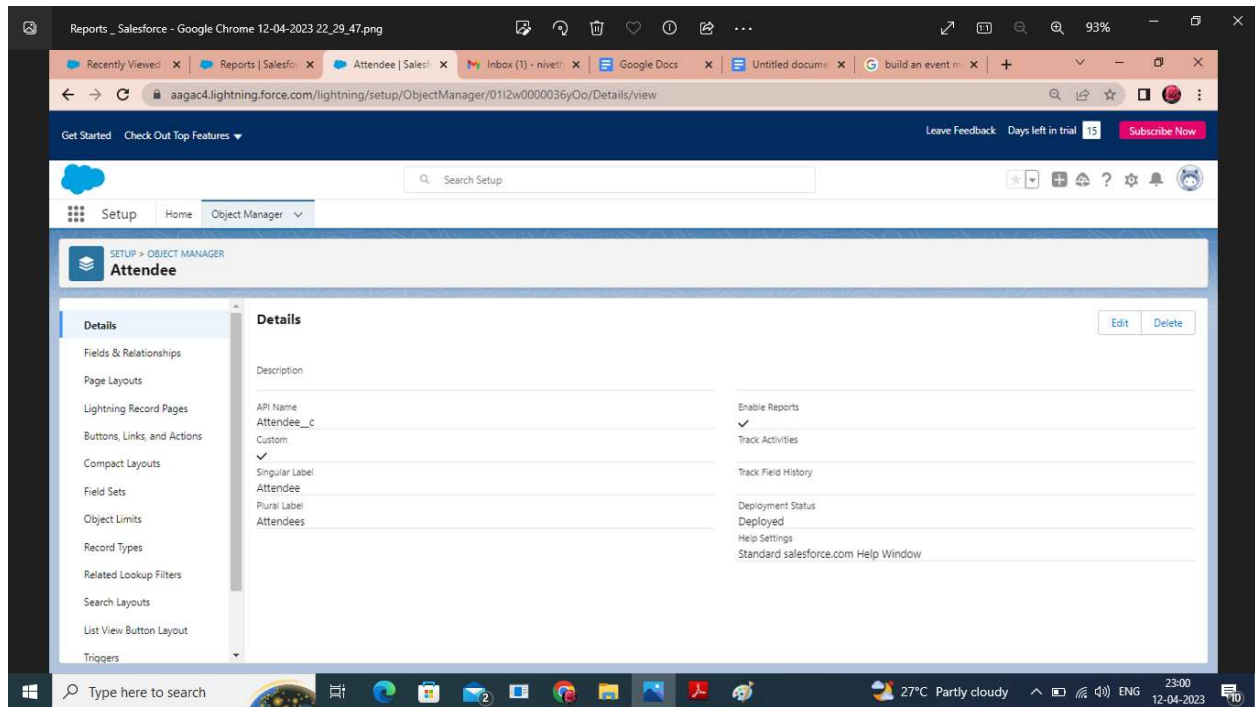
2.Attendee:

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.
 - 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

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- f. Check the Allow Search checkbox
- g. Click Save.

Screenshot:

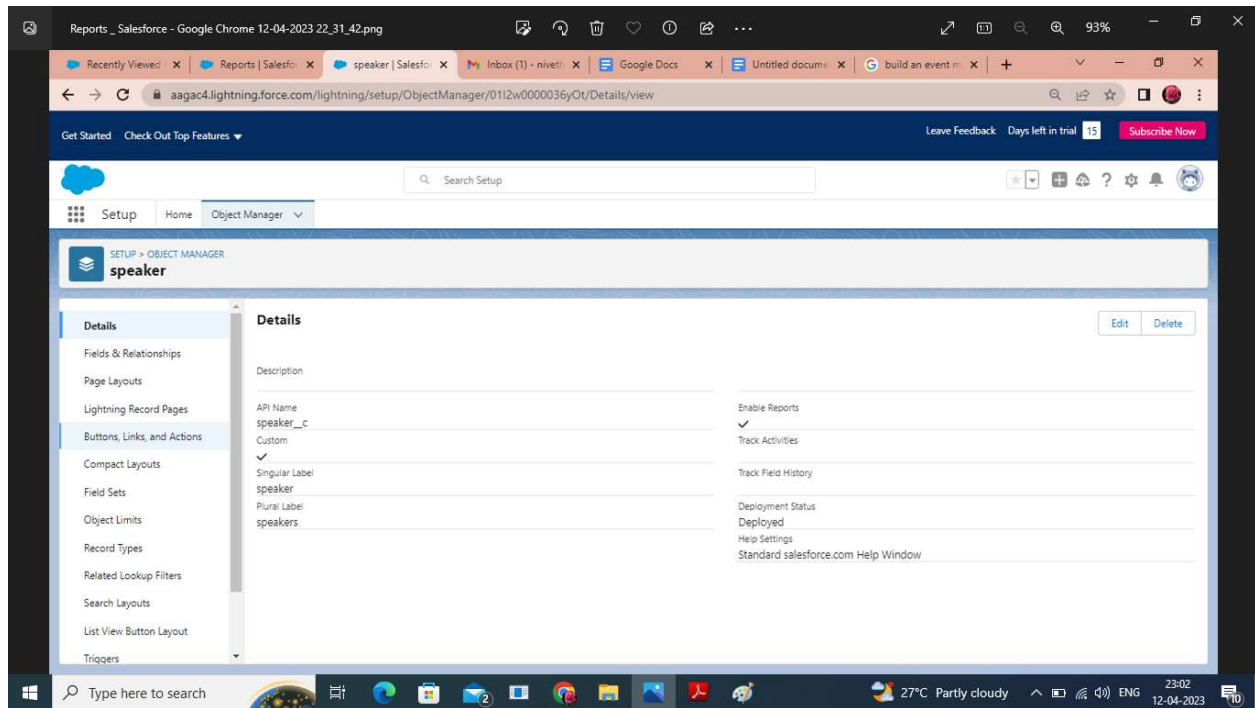


3.Speaker:

- 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.
 - 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.

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Screenshot:

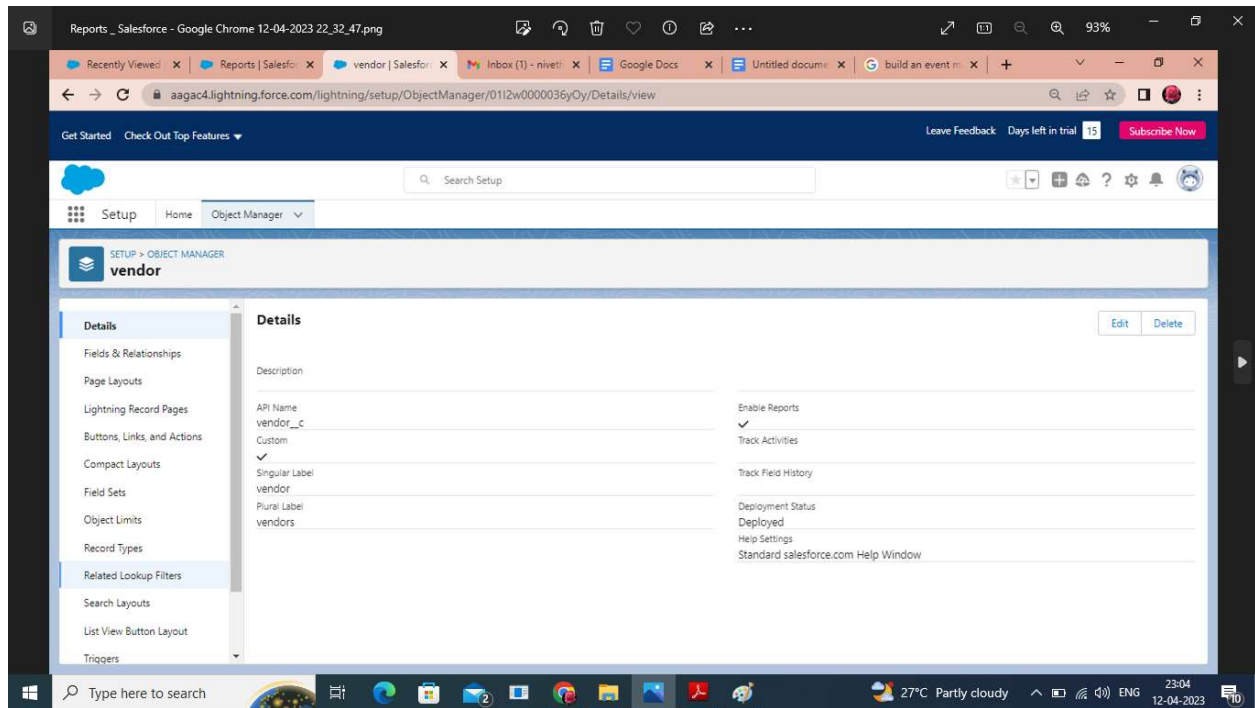


4. Vendor:

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.
 - 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.

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Screenshot:



Tab:

1.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.

2.Attendee:

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

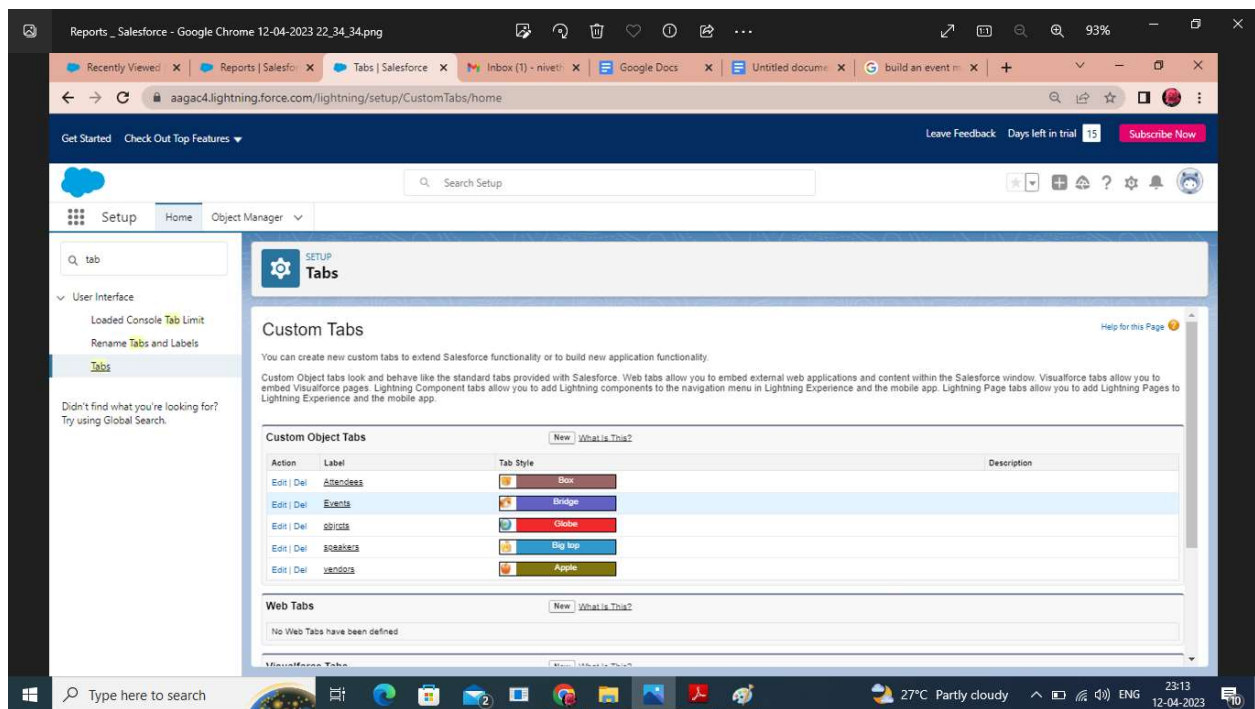
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3.Speaker:

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.

4.Vendor:

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.

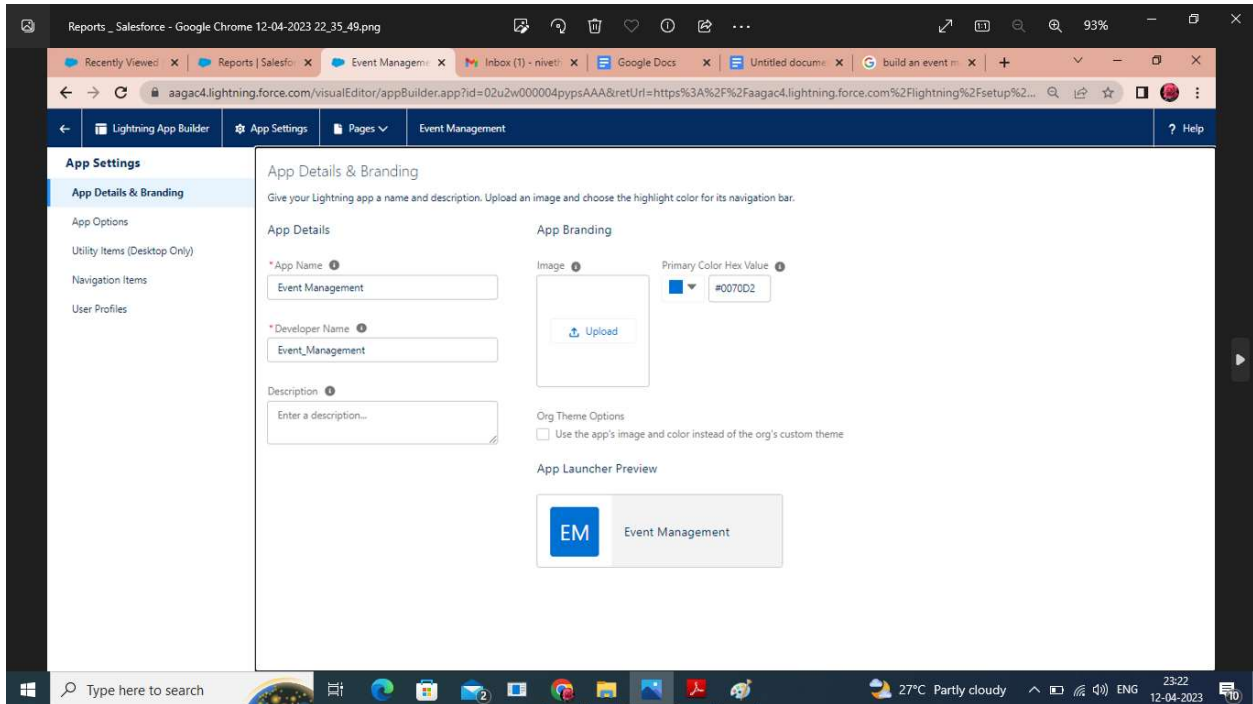


Application:

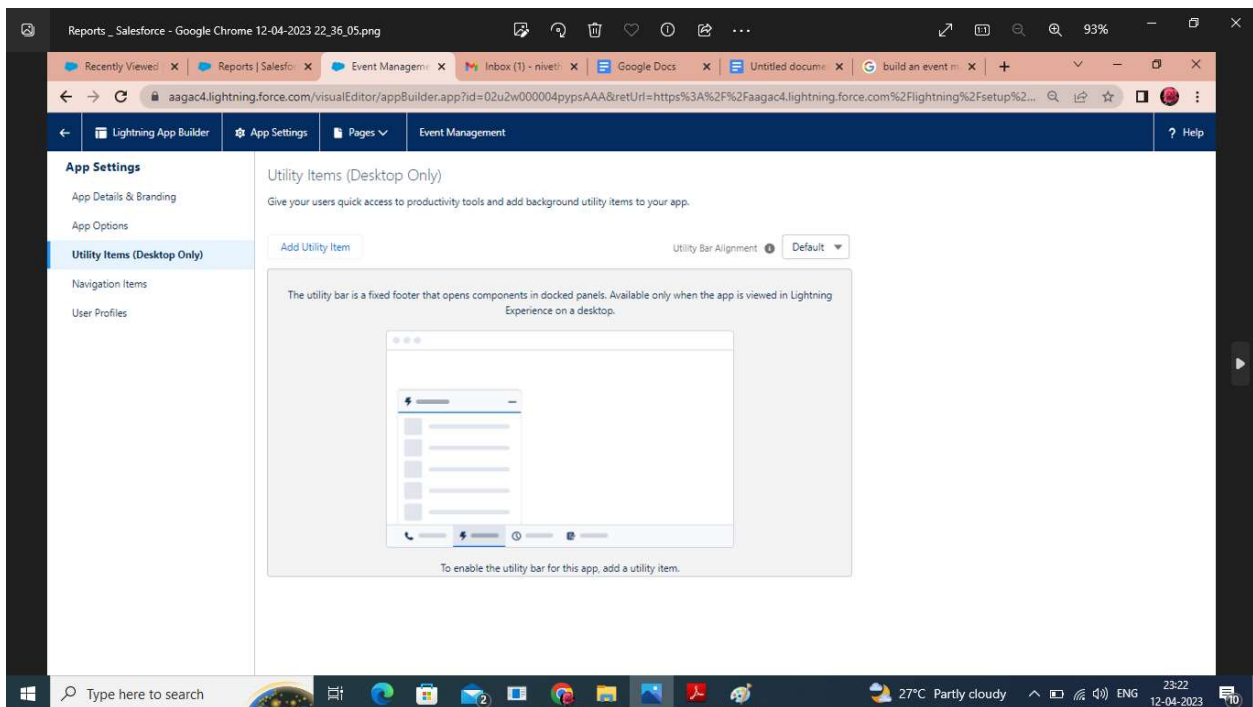
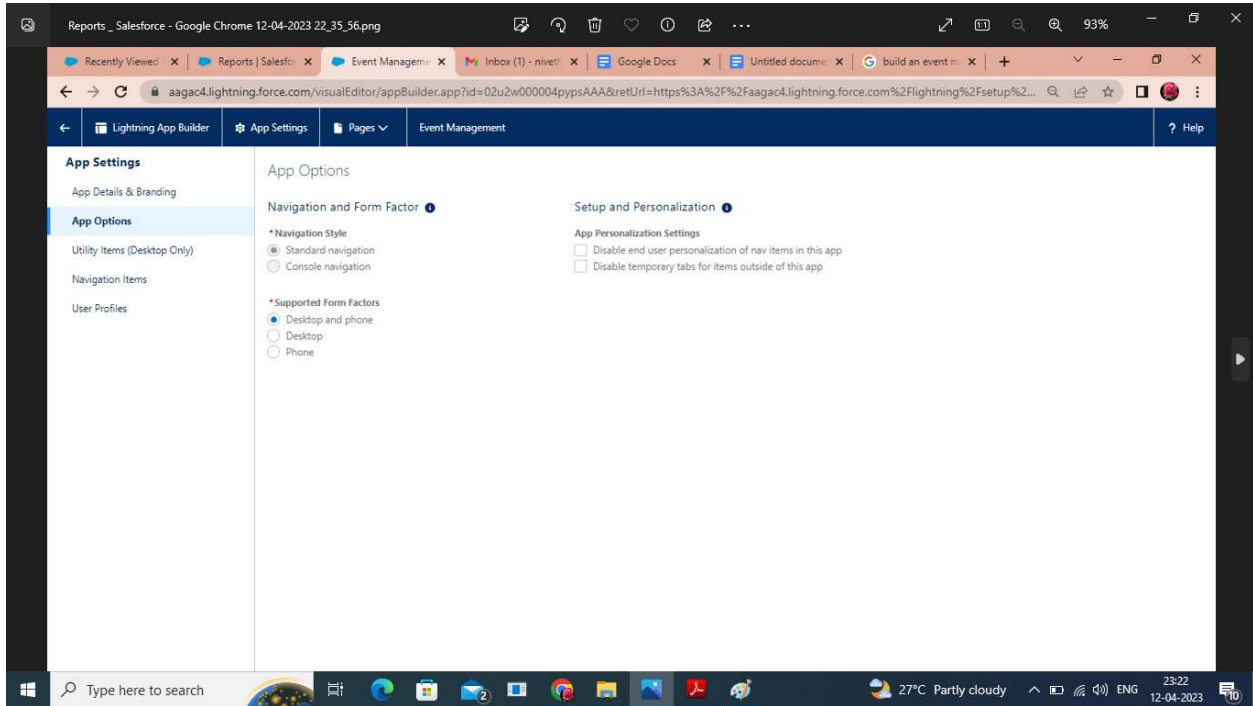
- 1.From Setup, enter App Manager in the Quick Find and select App Manager
- 2.Click New Lightning App. Enter Event Management as the App Name, then click Next

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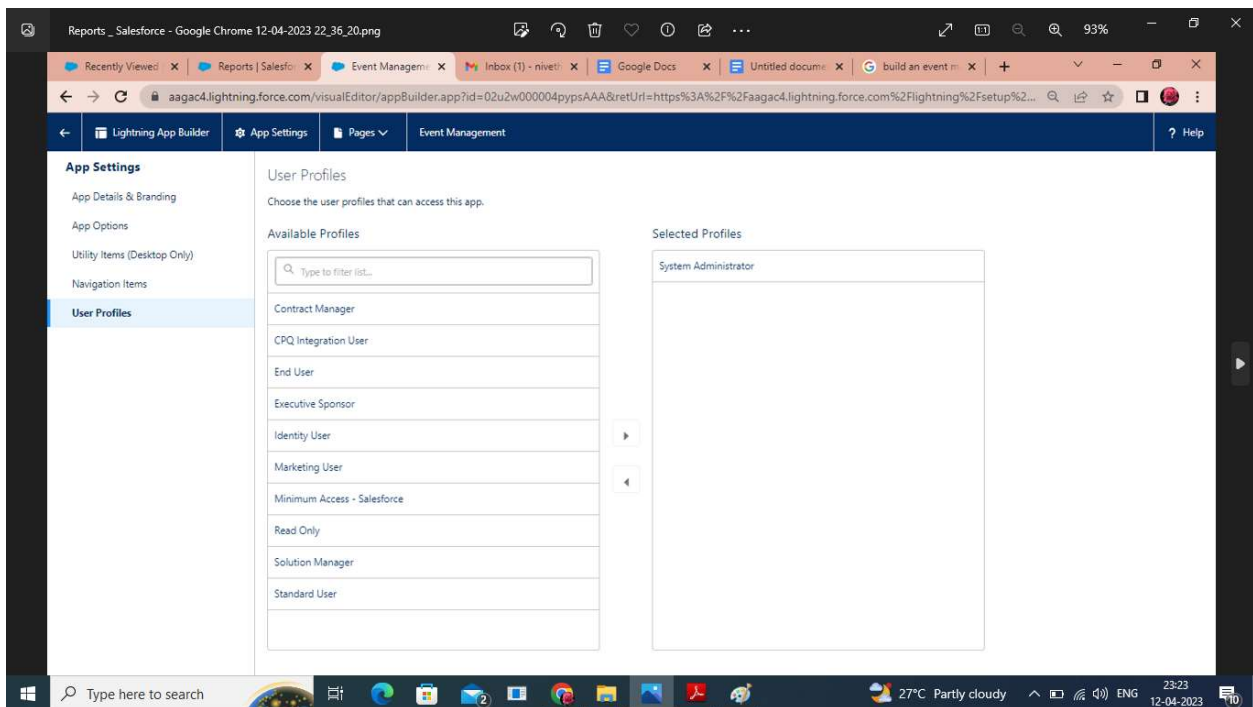
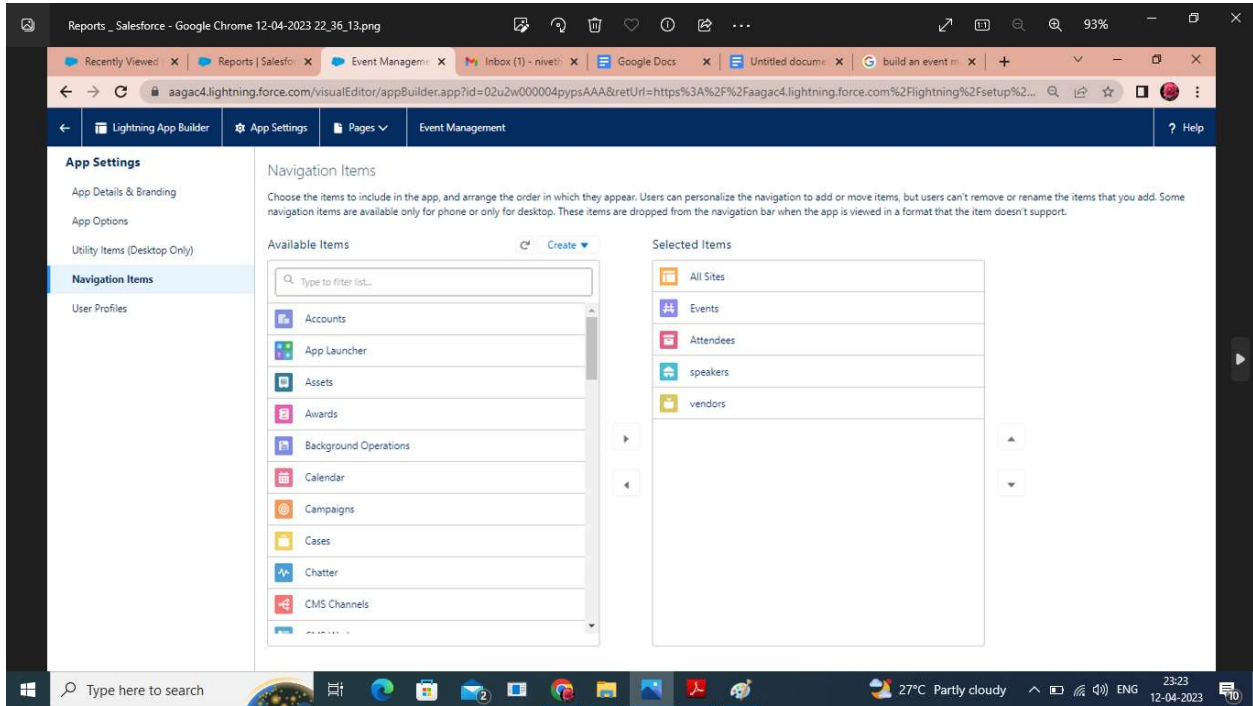
3. Under App Options, leave the default selections and click Next.
4. Under Utility Items, leave as is and click Next.
5. From Available Items, select Events, Attendees, speakers, vendors, Reports, and Dashboards and move them to Selected Items. Click Next.
6. From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.



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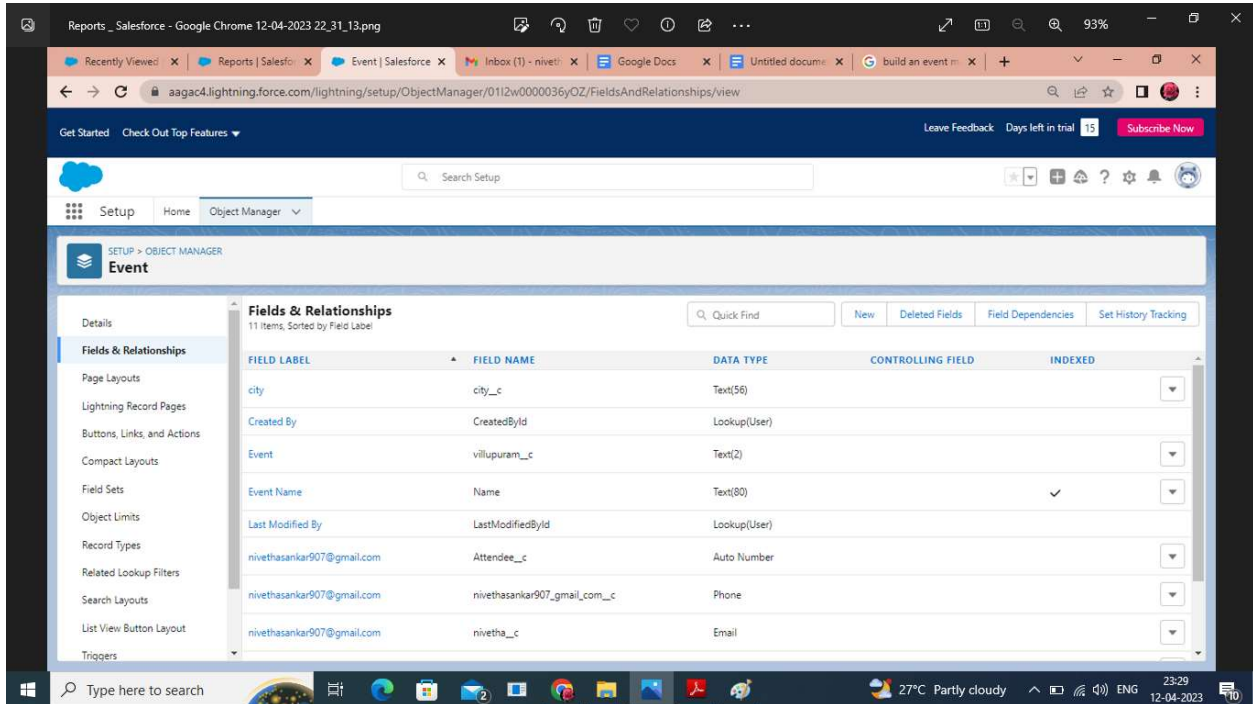
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Field:

Fields for the Event objects:



The screenshot displays the Salesforce Object Manager interface for the 'Event' object. The 'Fields & Relationships' tab is active, showing a list of 11 fields. The fields are sorted by Field Label. The table below represents the data shown in the screenshot.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
city	city__c	Text(50)		
Created By	CreatedById	Lookup(User)		
Event	villupuram__c	Text(2)		
Event Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
nivethasankar907@gmail.com	Attendee__c	Auto Number		
nivethasankar907@gmail.com	nivethasankar907_gmail_com__c	Phone		
nivethasankar907@gmail.com	nivetha__c	Email		

Field for the Attendee object:

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The screenshot shows the Salesforce Object Manager interface for the 'Attendee' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Triggers. The main content area is titled 'Fields & Relationships' and shows a table of 8 fields. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: attendee Name (Name, Text(80), indexed), Created By (CreatedBy, Lookup(User)), Email (Email_c, Email), iid (id_c, Auto Number), Last Modified By (LastModifiedBy, Lookup(User)), Owner (OwnerId, Lookup(User,Group), indexed), phone (phone_c, Phone), and tickets (tickets_c, Picklist).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
attendee Name	Name	Text(80)		✓
Created By	CreatedBy	Lookup(User)		
Email	Email_c	Email		
iid	id_c	Auto Number		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
phone	phone_c	Phone		
tickets	tickets_c	Picklist		

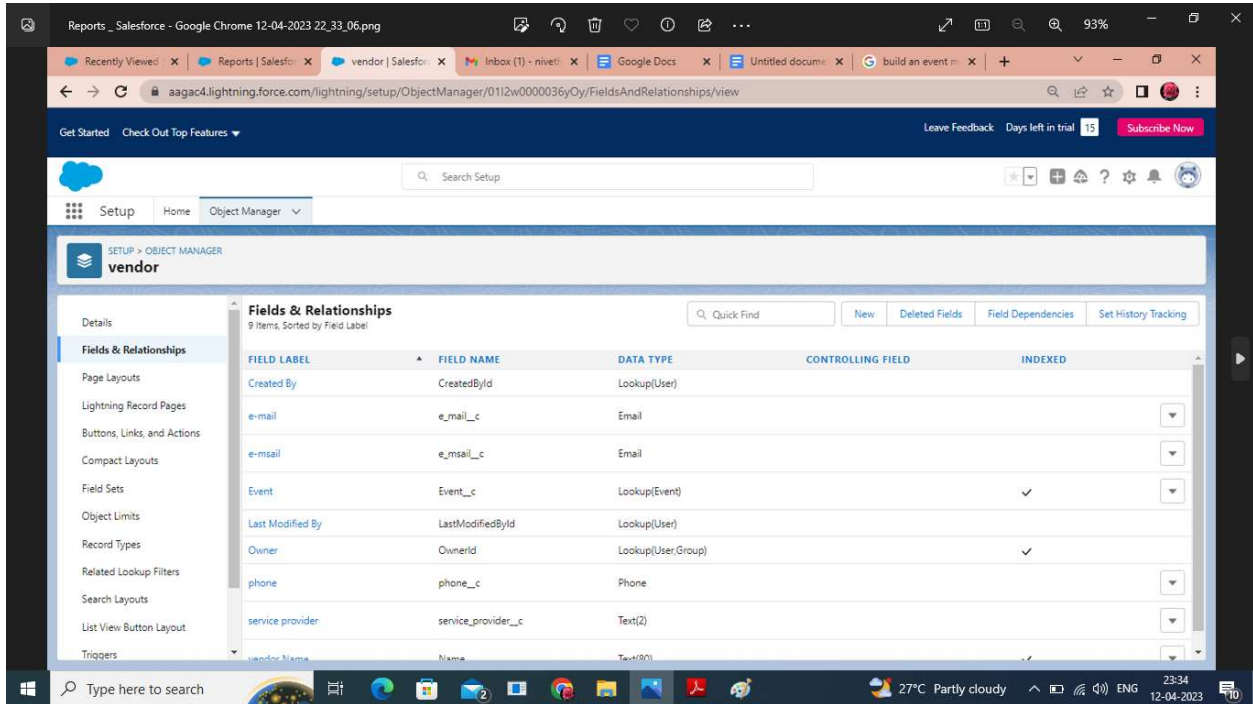
Field for the Speaker object:

The screenshot shows the Salesforce Object Manager interface for the 'Speaker' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Triggers. The main content area is titled 'Fields & Relationships' and shows a table of 8 fields. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Bio (Bio_c, Text Area(255)), Created By (CreatedBy, Lookup(User)), e-mail (e_mail_c, Email), Event (Event_c, Lookup(Event), indexed), event name (event_name_c, Text(2)), Last Modified By (LastModifiedBy, Lookup(User)), Owner (OwnerId, Lookup(User,Group), indexed), and speaker Name (Name, Text(80), indexed).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Bio	Bio_c	Text Area(255)		
Created By	CreatedBy	Lookup(User)		
e-mail	e_mail_c	Email		
Event	Event_c	Lookup(Event)		✓
event name	event_name_c	Text(2)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
speaker Name	Name	Text(80)		✓

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Field for the vendor object:



The screenshot displays the Salesforce Object Manager interface for the 'vendor' object. The 'Fields & Relationships' section is active, showing a list of 9 fields. The table below represents the data shown in the screenshot.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
e-mail	e_email__c	Email		
e-mail	e_email__c	Email		
Event	Event__c	Lookup(Event)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓
phone	phone__c	Phone		
service provider	service_provider__c	Text(2)		
Vendor Name	Name	Text(80)		

Profile:

Event profile:

Project Report Template

This screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains a search bar and a navigation menu with 'Users' and 'Profiles'. The main content area is titled 'Event user profiles' and includes a description: 'Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information. If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.' Below this, there are links for 'Login IP Ranges', 'Enabled Custom Metadata Type Access', and 'Enabled Custom Setting Definitions Access'. The 'Profile Detail' section shows the following information:

Field	Value
Name	Event user profiles
User License	Chatter External
Description	
Created By	Nivetha Nivetha
Created	04/04/2023, 12:34 pm
Modified By	Nivetha Nivetha
Modified	04/04/2023, 12:35 pm

The 'Connected App Access' section shows 'CPQ Integration User Connected App' with a checkbox. The 'Service Provider Access' section is empty. The 'Administrative Permissions' section includes:

Permission	Value
Add People to Direct Messages	<input checked="" type="checkbox"/>
Allow Inclusion of Code Snippets from UI	<input type="checkbox"/>
Apex REST Services	<input checked="" type="checkbox"/>
Lightning Experience User	<input checked="" type="checkbox"/>
Password Never Expires	<input type="checkbox"/>
Pin Posts in Feeds	<input type="checkbox"/>

Attendee profile

This screenshot shows the Salesforce Setup interface for the 'Profiles' section, specifically for 'Event attendee profiles'. The layout is similar to the previous screenshot, with the same sidebar and main content area. The 'Profile Detail' section shows the following information:

Field	Value
Name	Event attendee profiles
User License	Chatter External
Description	
Created By	Nivetha Nivetha
Created	04/04/2023, 12:39 pm
Modified By	Nivetha Nivetha
Modified	04/04/2023, 12:40 pm

The 'Connected App Access' section shows 'CPQ Integration User Connected App' with a checkbox. The 'Service Provider Access' section is empty. The 'Administrative Permissions' section includes:

Permission	Value
Add People to Direct Messages	<input checked="" type="checkbox"/>
Allow Inclusion of Code Snippets from UI	<input type="checkbox"/>
Apex REST Services	<input checked="" type="checkbox"/>
Lightning Experience User	<input checked="" type="checkbox"/>
Password Never Expires	<input type="checkbox"/>
Pin Posts in Feeds	<input type="checkbox"/>

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Speaker profile:

The screenshot displays the Salesforce Setup interface in a Google Chrome browser window. The address bar shows the URL: `aagac4.lightning.force.com/lightning/setup/Profiles/page?address=%2F00e2w000005hVLX`. The page title is "Profiles". The left sidebar contains a search bar with "profile" entered and a list of items under "Users", including "Profiles". The main content area shows the "Standard User" profile configuration. It includes a "Profile Detail" section with fields for Name, User License, Created By, and Modified By. Below this is a "Page Layouts" section with a table of assignments for various objects.

Profile Detail

Field	Value
Name	Standard User
User License	Salesforce
Created By	Nivetha Nivetha
Modified By	Nivetha Nivetha

Page Layouts

Object	Layout
Global	Global Layout
Email Application	Not Assigned
Home Page Layout	Dashboard Home Page Default
Access	Access Layout
Account	Account Layout
Opportunity	Opportunity Layout
Opportunity Product	Opportunity Product Layout
Order	Order Layout
Order Product	Order Product Layout
Price Book	Price Book Layout

Vendor profile:

The screenshot shows the Salesforce Setup interface. The top navigation bar includes links for 'Setup', 'Home', and 'Object Manager'. The left sidebar shows the 'Setup' menu with 'Profiles' selected. The main content area displays the 'Event vendor profiles' profile details. The profile is named 'Event vendor profiles' and is associated with the 'Chatter External' user license. It was created by 'Nivetha Nivetha' on 04/04/2023 at 12:37 pm. The profile is currently active, as indicated by the 'Enabled' checkbox. The 'Connected App Access' section shows 'CPQ Integration User Connected App' is disabled. The 'Service Provider Access' section is empty. The 'Administrative Permissions' section shows that 'Add People to Direct Messages', 'Allow Inclusion of Code Snippets from UI', and 'Apex REST Services' are all enabled. The 'Lightning Experience User' checkbox is also checked. The bottom of the screen shows the Windows taskbar with various application icons and the system clock indicating 23:45 on 12-04-2023.

Reports_ Salesforce - Google Chrome 12-04-2023 22_37_52.png

Recently Viewed | Reports | Salesforce | Profiles | Salesforce | Inbox (1) - nivet | Google Docs | Untitled docum | build an event m | +

aagac4.lightning.force.com/lightning/setup/Profiles/page?address=%2F00e2w000000s27E

Get Started Check Out Top Features

Leave Feedback Days left in trial 15 Subscribe Now

Setup Home Object Manager

Search Setup

profile

Users Profiles

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

SETUP Profiles

Profile Event vendor profiles

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information. If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges](#) | [Enabled Custom Metadata Type Access](#) | [Enabled Custom Setting Definitions Access](#)

Profile Detail

Edit Clone Delete View Users

Name Event vendor profiles

User License Chatter External Custom Profile ☒

Description

Created By Nivetha Nivetha 04/04/2023, 12:37 pm Modified By Nivetha Nivetha 04/04/2023, 12:38 pm

Connected App Access

CPQ Integration User Connected App ☐

Service Provider Access

Administrative Permissions

Add People to Direct Messages ☒ Lightning Experience User ☒

Allow Inclusion of Code Snippets from UI ☐ Password Never Expires ☐

Apex REST Services ☒ Pin Posts in Feeds ☐

Type here to search

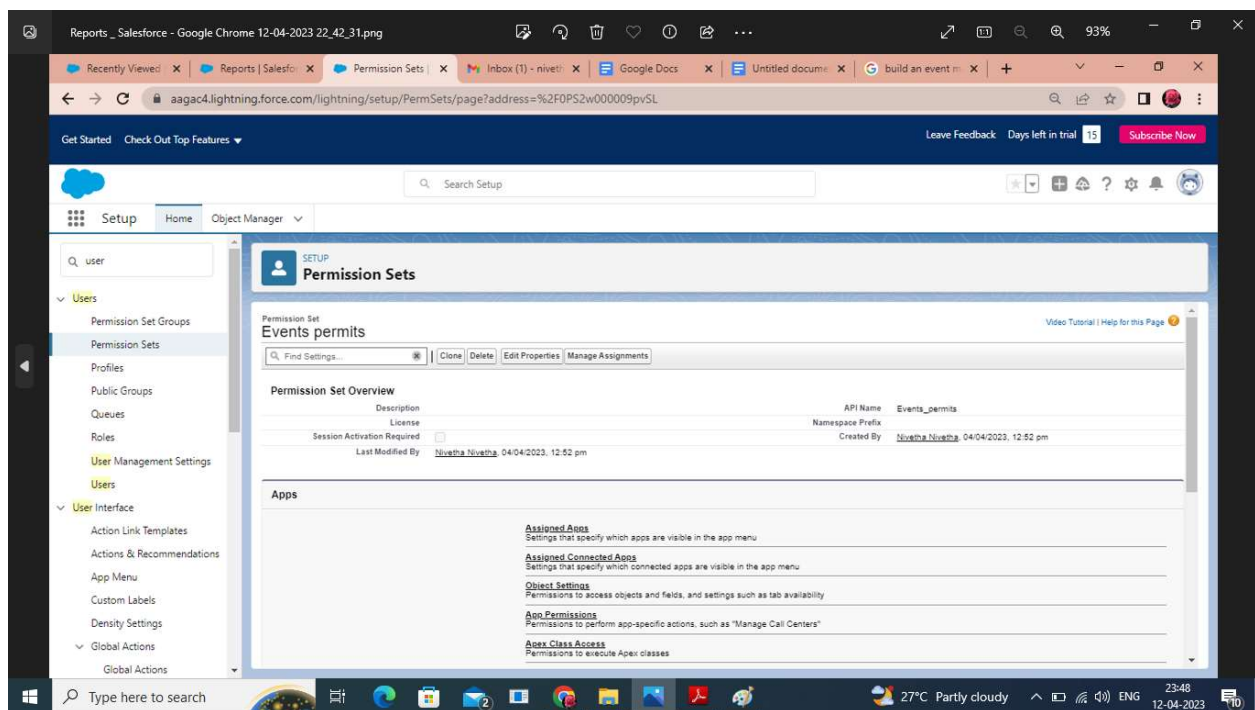
27°C Partly cloudy 23:45 12-04-2023

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links such as "Users", "User Interface", "Action Link Templates", "Actions & Recommendations", "App Menu", "Custom Labels", "Density Settings", "Global Actions", and "Global Actions". The main content area is titled "All Users" and includes instructions on how to manage users. Below the instructions, there are tabs for "New User", "Reset Password(s)", and "Add Multiple Users". A table lists existing users with columns for Action, Full Name, Alias, Username, Last Login, Role, Active status, and Profile. The table contains five entries, including roles like "Chatter Free User", "System Administrator", and "Standard User". At the bottom of the table, there are again tabs for "New User", "Reset Password(s)", and "Add Multiple Users". The browser's address bar shows the URL "aagac4.lightning.force.com/lightning/setup/ManageUsers/home".

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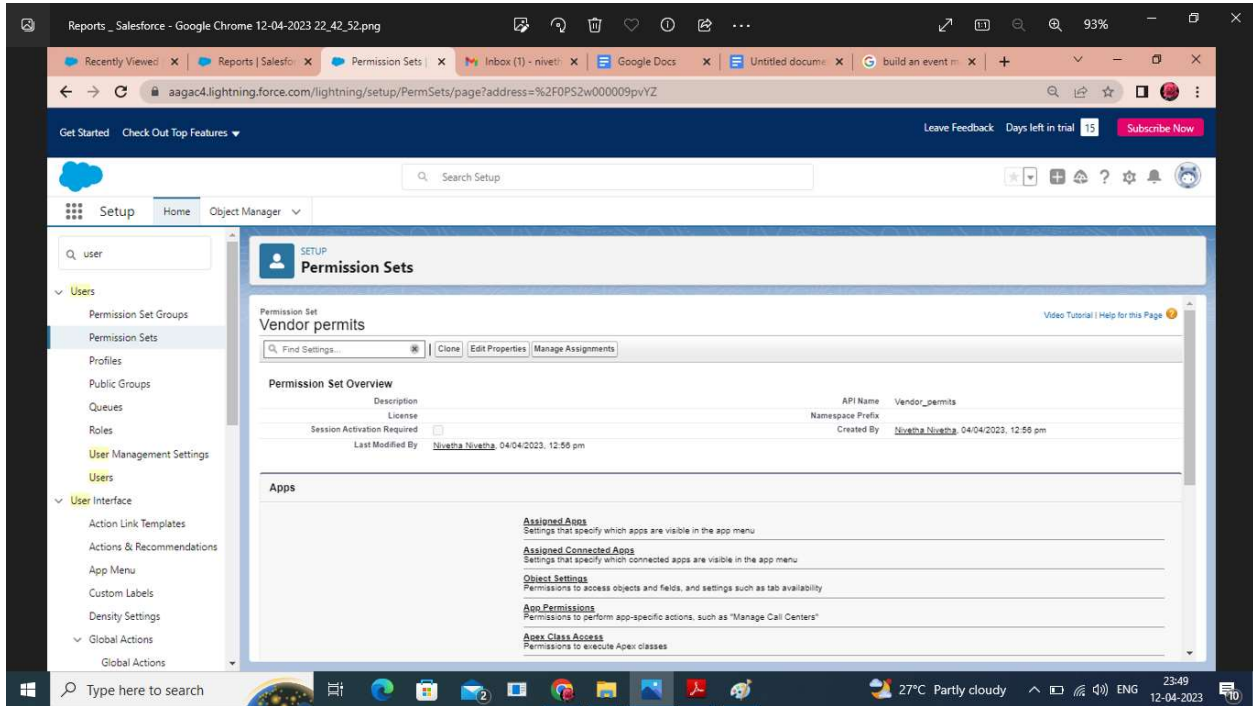
Permission sets:

Event permits

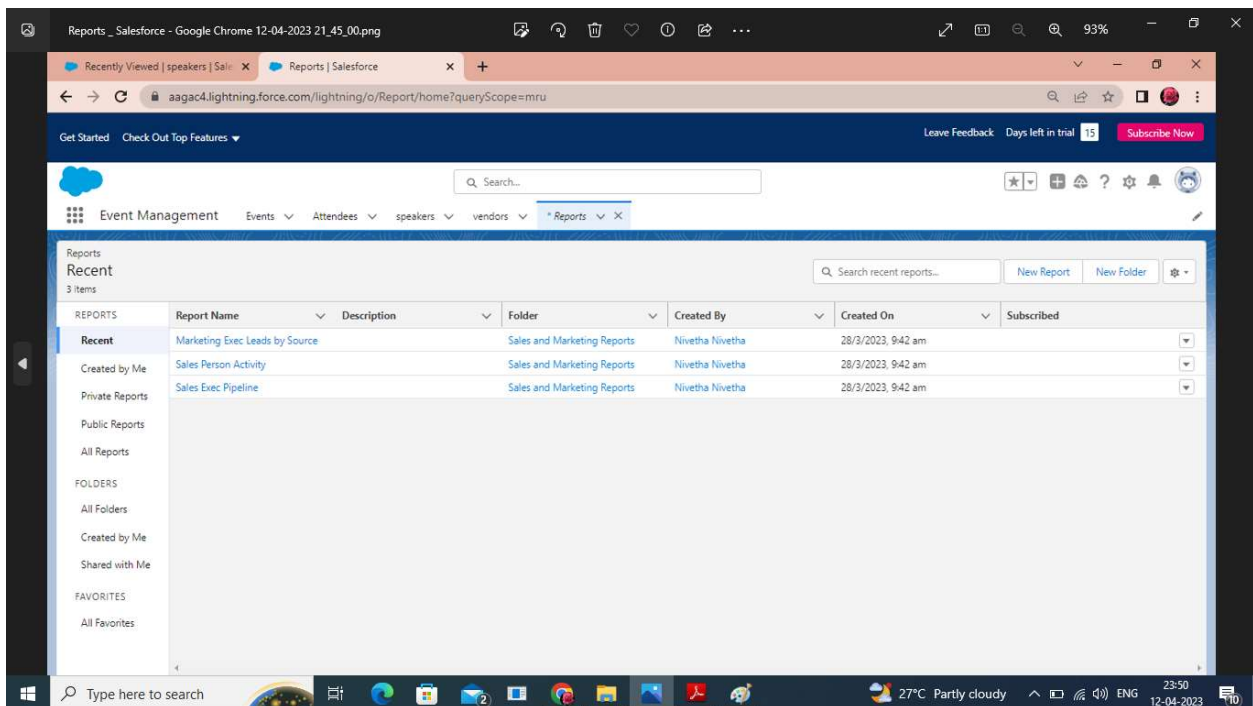


Vendor permits:

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Report:



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4.Trailhead Profile Public URL:

Team lead -<https://trailblazer.me/id/nsankar30>

Team Member 1 -<https://trailblazer.me/id/jayap122>

Team Member 2 - <https://trailblazer.me/id/rpraveena1>

Team Member 3 -<https://trailblazer.me/id/rajar186>

Team Member 4 -<https://trailblazer.me/id/vishnu21>

5.Advantages & Disadvantages:

Advantages:

- 1.Easier Event Management
- 2.Save Time
- 3.Cut costs
- 4.Increase engagement
- 5.Analyze and Improve

Disadvantages:

- 1.Long Hour
- 2.Travel Requirement
- 3.client demands
- 4.High Stress
- 5.Low starting salaries

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6.Applications:

- Understand the objective of the event. ...
- Know Your Audience. ...
- Selection of the right venue is vital. ...
- Suitable Timing. ...
- Draft a plan and follow the timeline. ...
- Create content that attracts your target audience. ...
- Design the event message you want to share. ...
- Lead capture mechanism.

7.Conclusion:

Event Management System is user friendly and cost effective system, it is customized with activities related to event management life-cycle.

8.Future Scop:

The scope of event management as a career in India is vast. It's a thriving industry and is home to a million people. So, if you have a knack for creativity and want to redesign the perceptions of society, the event management industry is all for you