

BUILD AN EVENT MANAGEMENT SYSTEM USING SALESFORCE

SUBMITTED BY

TEAM LEADE – K . ABINAYA(CB20S377282)

TEAM MEMBER 1- K.AKALYA(CB20S377283)

TEAM MEMBER 2- C. DEEPIKA(CB20S377284)

TEAM MEMBER 3 – B. DHENIKA(CB20S377285)

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. 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.

1.2 Purpose

Event management software saves you time by having all of your tasks centralized in a single platform . This saves time for the event organizer,the team of professionals involved,and even attendees or exhibitors,making the whole experience more enjoyable.

2 Problem Definition & Design Thinking

2.1 Empathy Map

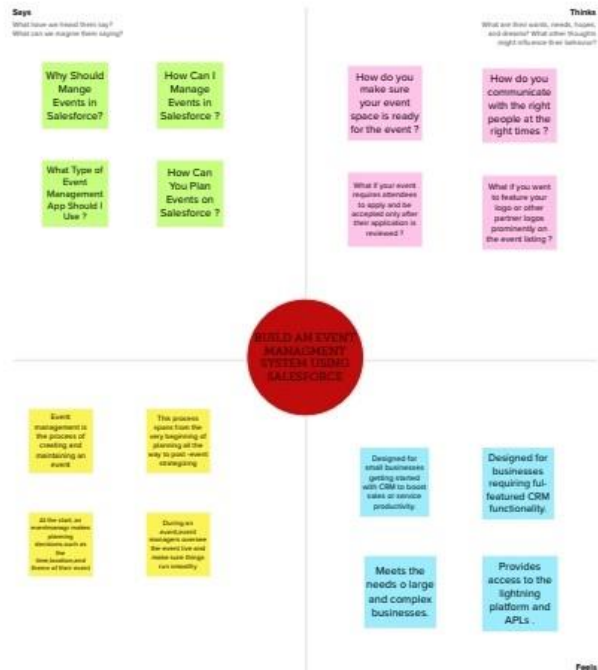


BUILD AN EVENT MANAGEMENT SYSTEM USING SALESFORCE

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

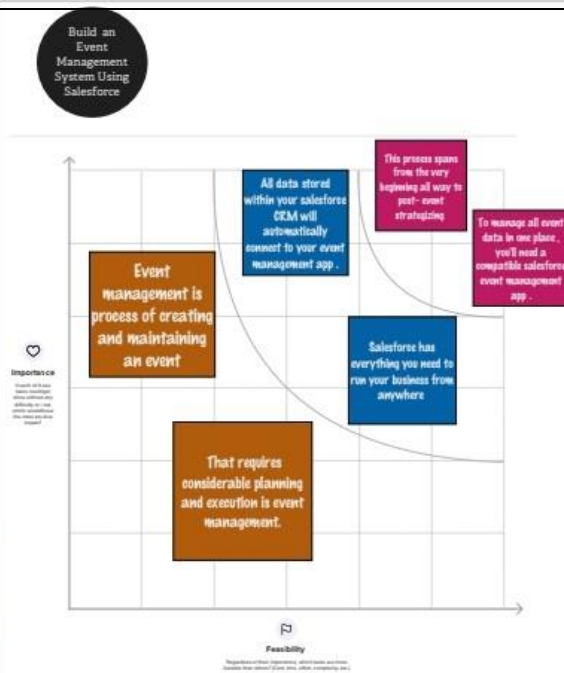
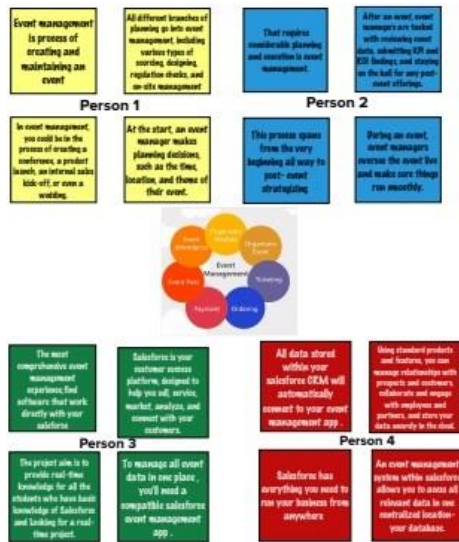
Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners and store your data securely in the cloud.

BUILD AN EVENT MANAGEMENT SYSTEM USING SALESFORCE



2.2 Ideation & Brainstorming Map

BUILD AN EVENT MANAGEMENT SYSTEM USING SALESFORCE



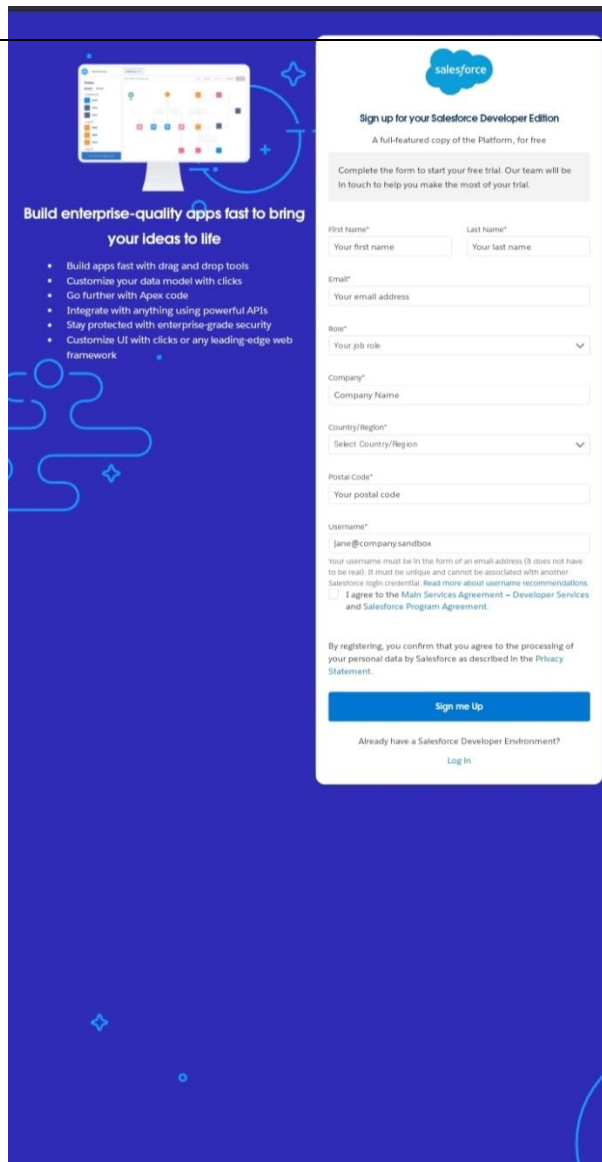
3 RESULT

3.1 Data Model:

Object name	Fields in the Object	
Event management	Field label	Data type
	city	text
	Date/Time	Start date
Attendees	Field label	Data type
	Id	Auto number
	Phone	Phone

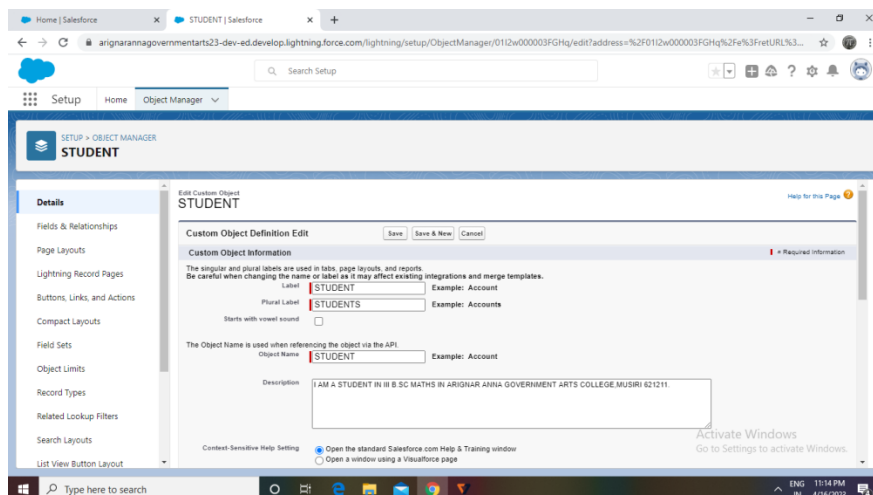
3.2 Activity & Screenshot

MILESTONE 1



MILESTONE 2

Activity 1 Creation of object for event management



Activity 2 Creation of Attendees object

The screenshot shows the Salesforce Setup interface for creating a custom object named "Attendee". The left sidebar lists various setup options, with "Details" selected. The main content area is titled "Edit Custom Object Attendee" and contains the "Custom Object Definition Edit" form. The form includes fields for "Label" (Attendee), "Plural Label" (Attendees), "Object Name" (Attendee), and "Description" (I AM DHENIKA III BSC MATHS I AM ROLE IS ATTENDEES). The "Context-Sensitive Help Setting" is set to "Open the standard Salesforce.com Help & Training window".

Home | Salesforce x Attendee | Salesforce x +

arignarannagovernmentarts23-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003FMJ/edit?address=%2F0112w000003FMJ%2Fe%3FretURL%3D%...

Setup Home Object Manager

SETUP > OBJECT MANAGER
Attendee

Details

- Fields & Relationships
- 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

Edit Custom Object
Attendee

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label: Attendee Example: Account

Plural Label: Attendees Example: Accounts

Starts with vowel sound: ☐

The Object Name is used when referencing the object via the API.

Object Name: Attendee Example: Account

Description: I AM DHENIKA III BSC MATHS I AM ROLE IS ATTENDEES

Context-Sensitive Help Setting: ☒ Open the standard Salesforce.com Help & Training window ☐ Open a window using a Visualforce page

Activate Windows
Go to Settings to activate Windows.

Type here to search

ENG 11:16 PM IN 4/16/2023

Activity 3 creation of speaker object

The screenshot shows the Salesforce Setup interface for creating a custom object named "Speaker". The left sidebar lists various setup options, with "Details" selected. The main content area is titled "Edit Custom Object Speaker" and contains the "Custom Object Definition Edit" form. The form includes fields for "Label" (Speaker), "Plural Label" (Speakers), "Object Name" (Speaker), and "Description" (I AM DHENIKA III BSC MATHS MY ROLE IS SPEAKER). The "Context-Sensitive Help Setting" is set to "Open the standard Salesforce.com Help & Training window".

Home | Salesforce x Speaker | Salesforce x +

arignarannagovernmentarts23-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003FMME/edit?address=%2F0112w000003FMME%2Fe%3FretURL%3D%...

Setup Home Object Manager

SETUP > OBJECT MANAGER
Speaker

Details

- Fields & Relationships
- 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

Edit Custom Object
Speaker

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label: Speaker Example: Account

Plural Label: Speakers Example: Accounts

Starts with vowel sound: ☐

The Object Name is used when referencing the object via the API.

Object Name: Speaker Example: Account

Description: I AM DHENIKA III BSC MATHS MY ROLE IS SPEAKER

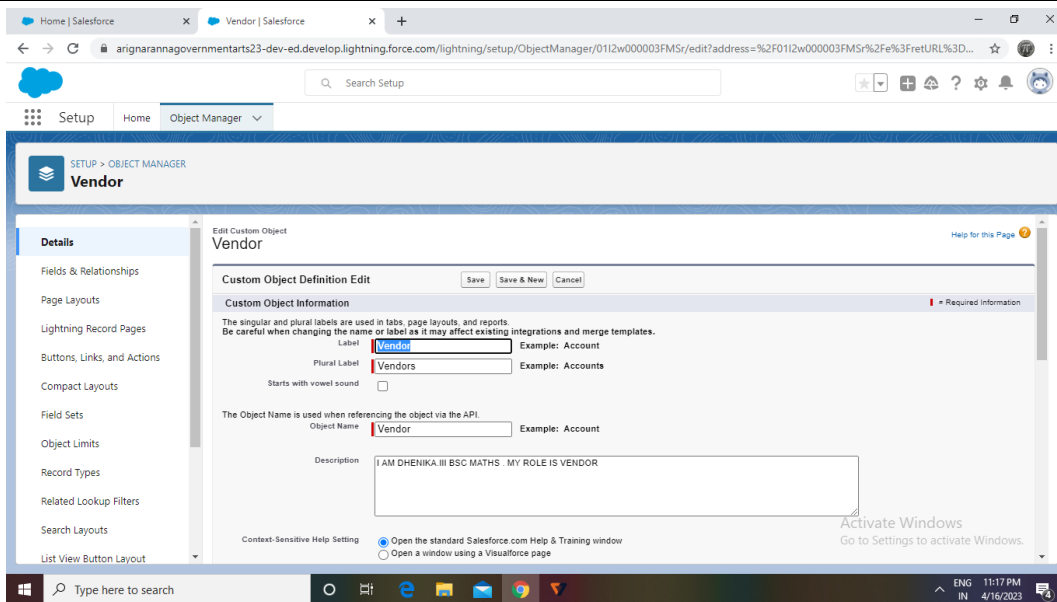
Context-Sensitive Help Setting: ☒ Open the standard Salesforce.com Help & Training window ☐ Open a window using a Visualforce page

Activate Windows
Go to Settings to activate Windows.

Type here to search

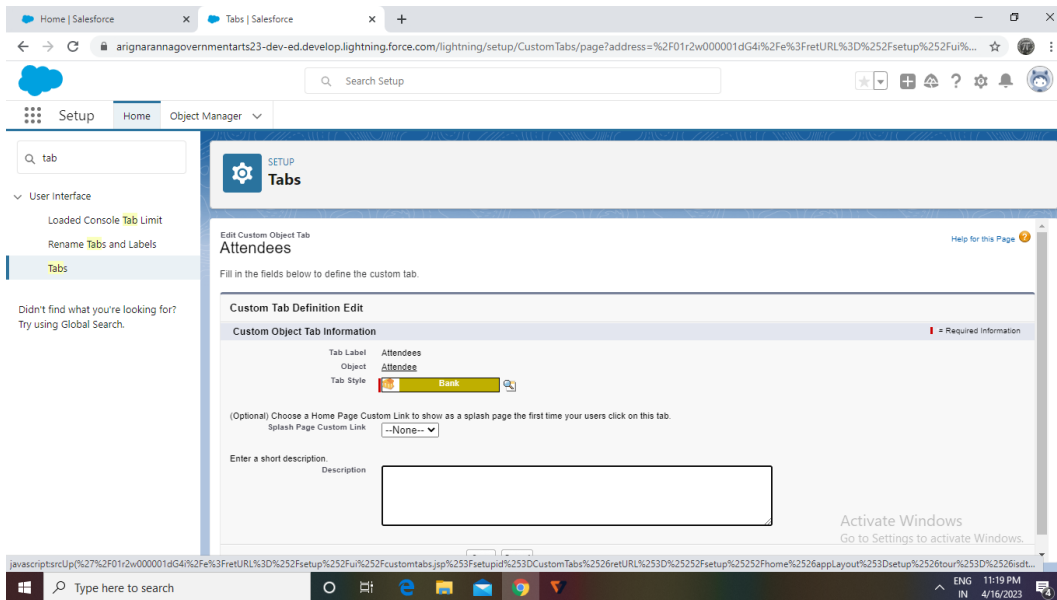
ENG 11:16 PM IN 4/16/2023

Activity 4 creation of vendors object

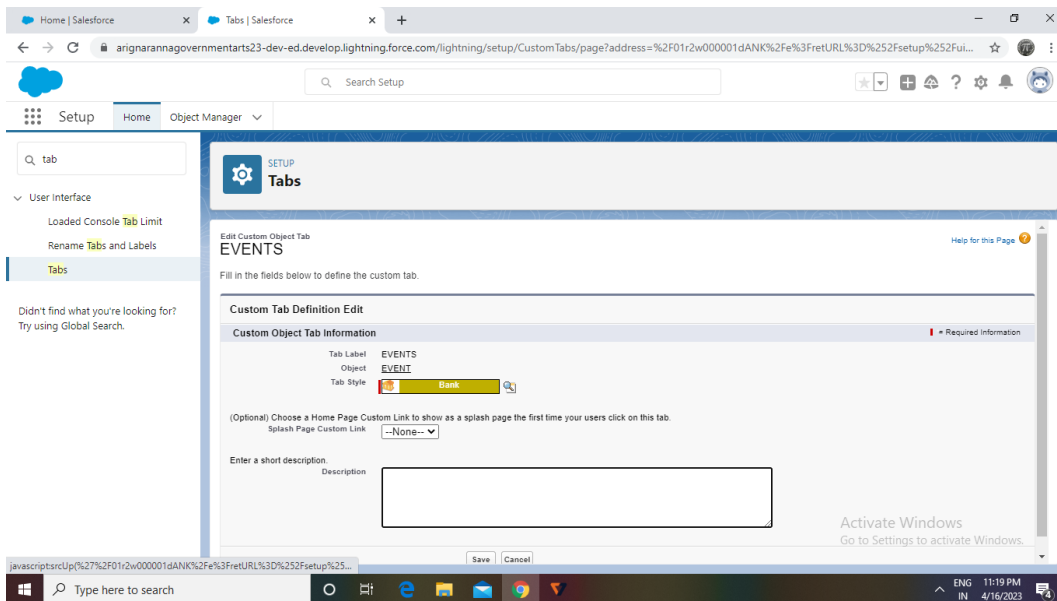


MILESTONE 3-TAB

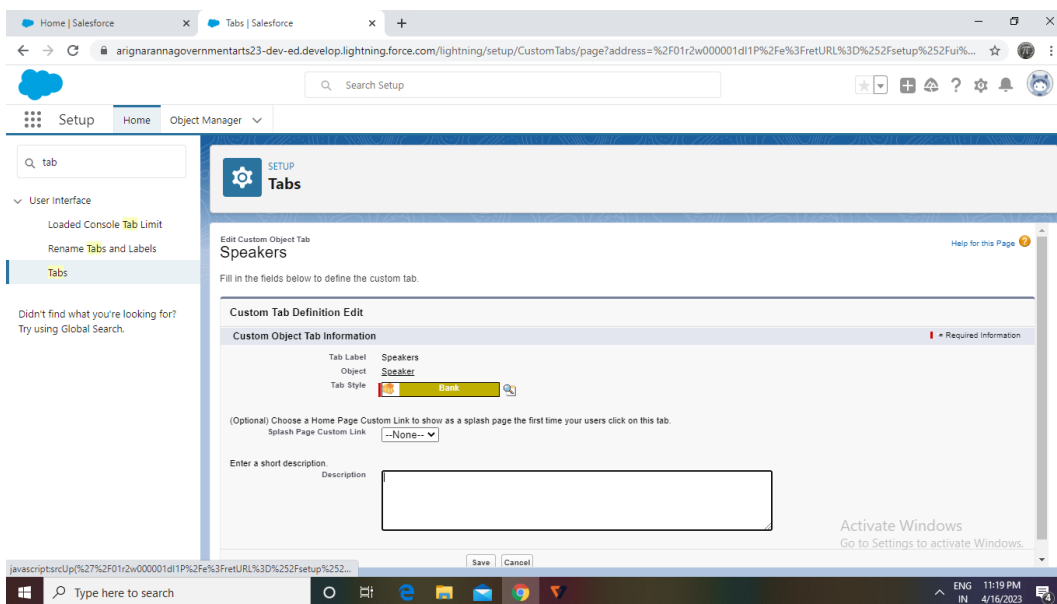
Activity 1 creation of event tab



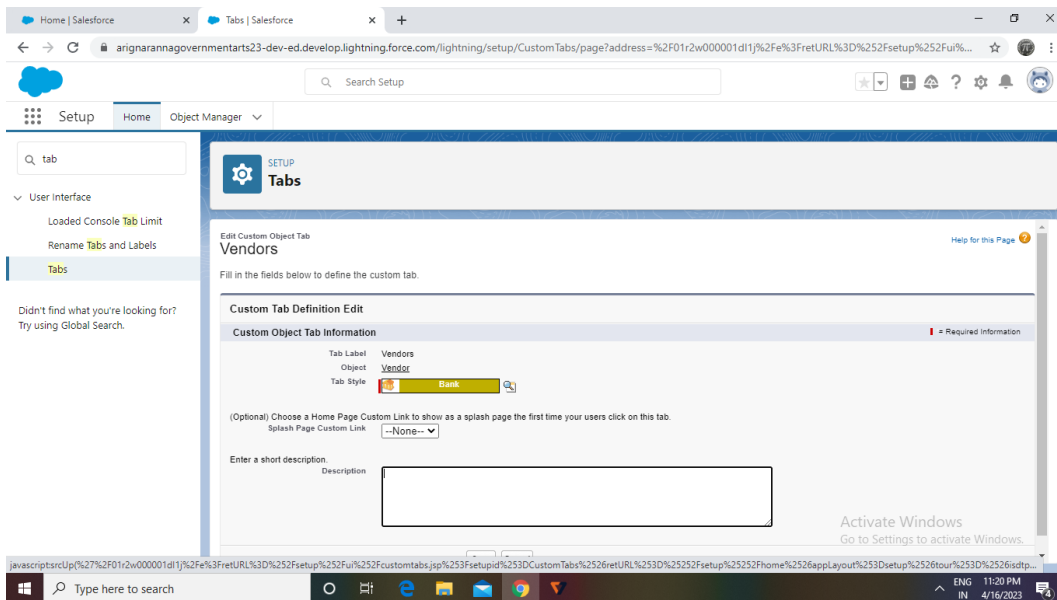
Activity 2 creation of attendee tab



Activity 3 creation of speakers tab

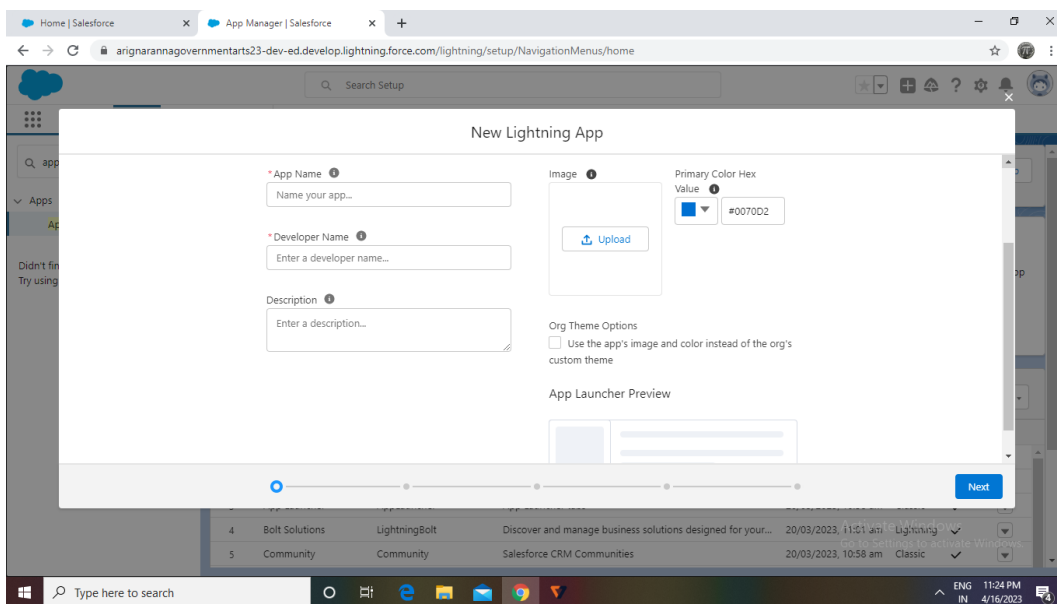


Activity 4 creation of vendors object



MILESTONE 3-APPLICATION

Activity create the event management construction app



MILESTONE 4-FIELD

Activity1 creation of field for the event objects

Home | Salesforce x EVENT | Salesforce x +

arignarannagovernmentarts23-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003FMav/FieldsAndRelationships/00N2w00000Zmktw/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
EVENT

Details
Fields & Relationships
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

EVENT Custom Field
City
[Back to EVENT](#)

Validation Rules

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label	City	Object Name	EVENT
Field Name	City	Data Type	Text
API Name	City__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	DHENIKA BALAKRISHNAN, 30/03/2023, 9:35 pm	Modified By	DHENIKA BALAKRISHNAN, 30/03/2023, 9:35 pm

General Options

Required	<input type="checkbox"/>
Unique	<input type="checkbox"/>
Case Sensitive	<input type="checkbox"/>

Activate Windows
Go to Settings to activate Windows.

Activity 2 creation of field for the attendees objects

Home | Salesforce x Attendee | Salesforce x +

arignarannagovernmentarts23-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003FMJj/FieldsAndRelationships/00N2w00000Zmkyl/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Attendee

Details
Fields & Relationships
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

Attendee Custom Field
id
[Back to Attendee](#)

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label	id	Object Name	Attendee
Field Name	id	Data Type	Auto Number
API Name	id__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	DHENIKA BALAKRISHNAN, 30/03/2023, 9:46 pm	Modified By	DHENIKA BALAKRISHNAN, 30/03/2023, 9:46 pm

General Options

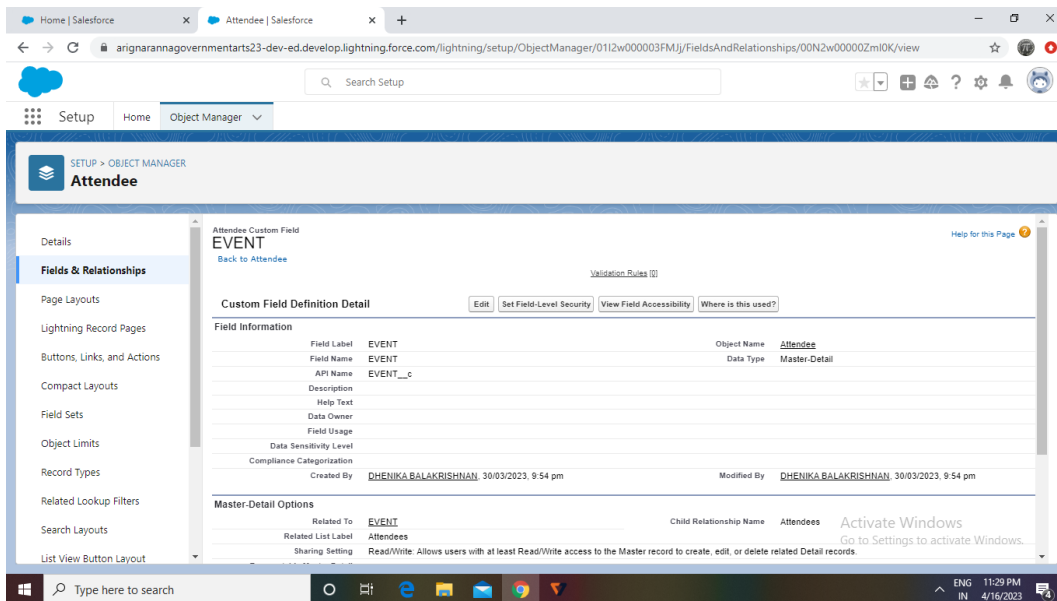
External ID	<input type="checkbox"/>
-------------	--------------------------

Auto Number Options

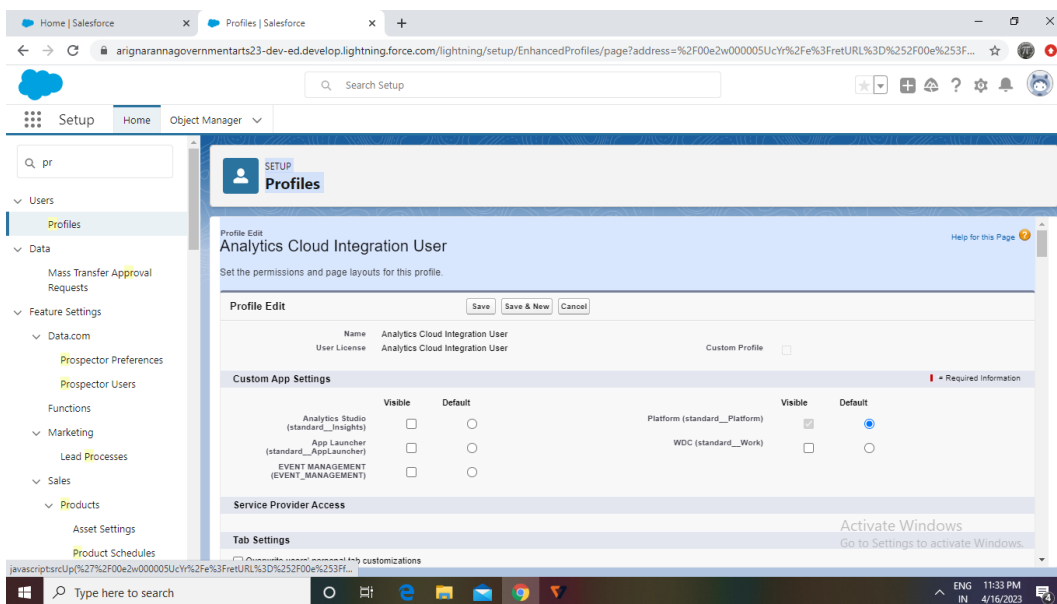
Activate Windows
Go to Settings to activate Windows.

Activity 3

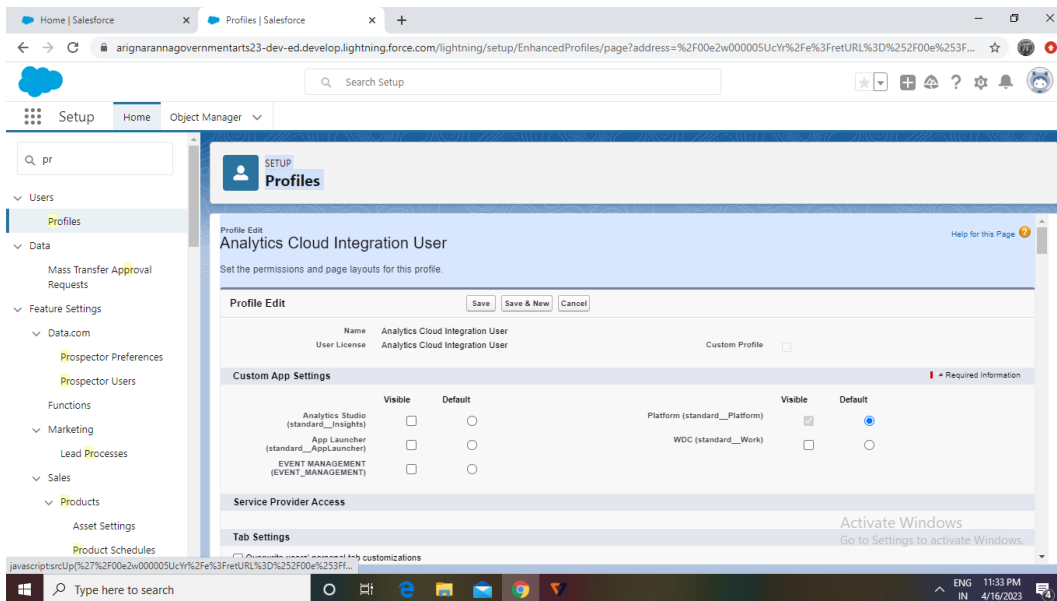
Let's create a master-detail relationship with event object



Activity 4 creation of fields for the speakers objects

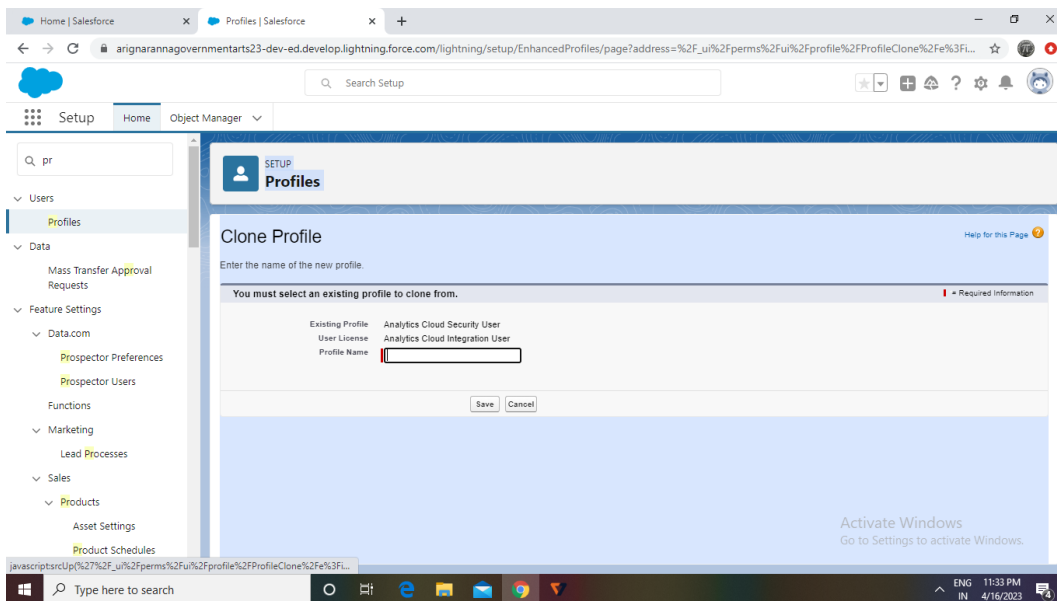


Activity 5 creation of fields for the vendors objects

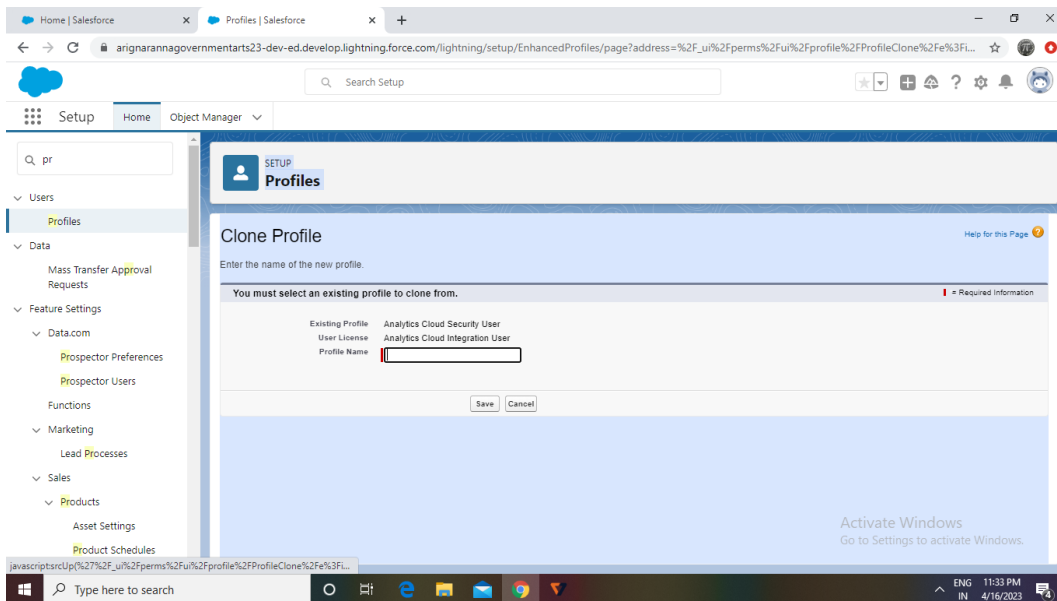


MILESTONE 5-PROFILE

Activity 1 creation on profile

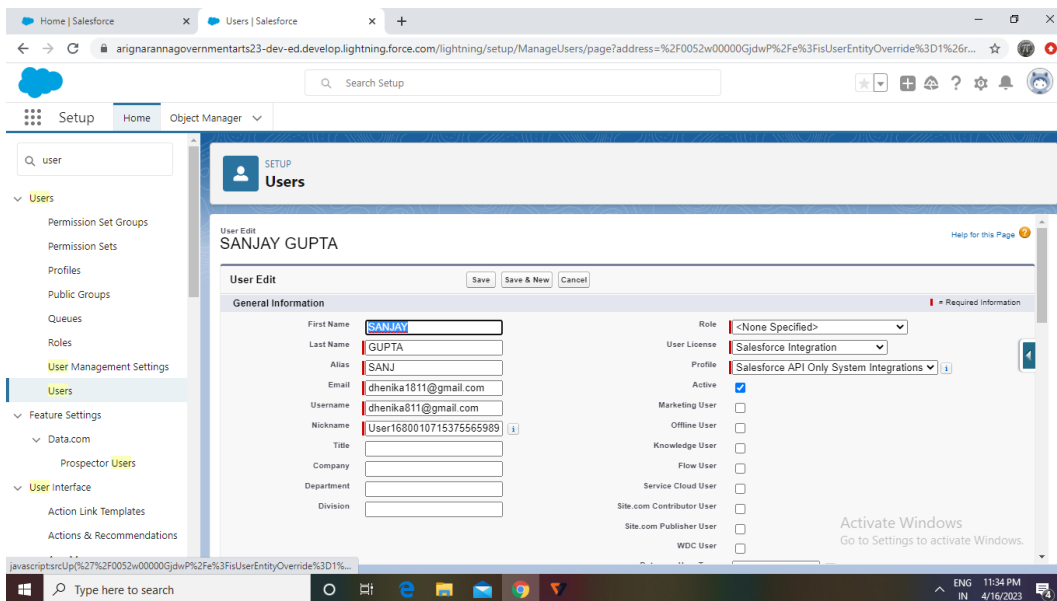


Activity 2



MILESTONE6 –USER

Activity1 creating on user



Activity 2

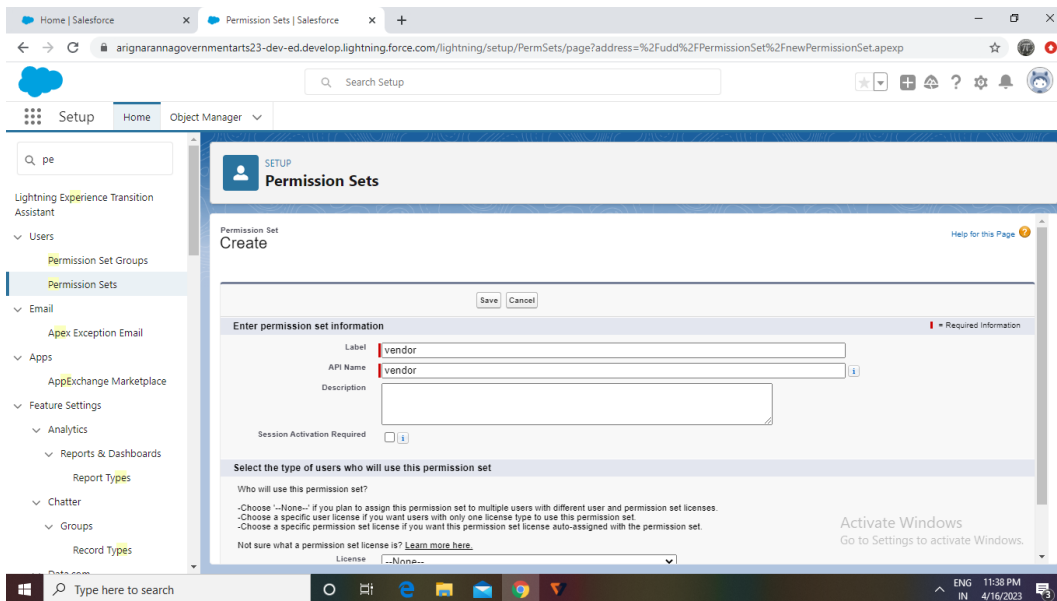
The screenshot shows the Salesforce 'Users' management page. The left sidebar contains navigation links: Setup, Home, Object Manager, and a search bar. Below these are links for Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings. The main content area displays the 'User Detail' for RAHUL SHARMA. The user's email is dhenika1811@gmail.com, and their username is rahulsharma@themartforidge.com. The user is active and has the role of Marketing User. The page also shows various system settings and a warning to activate Windows.

MILESTONE 7-PERMISSION SETS

Activity 1 creating a permission set

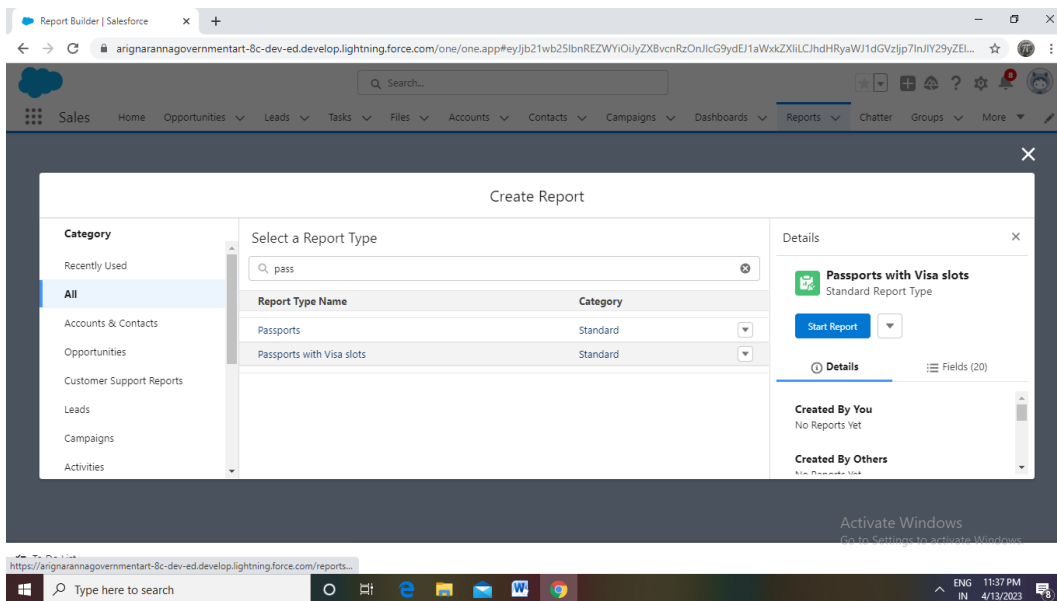
The screenshot shows the Salesforce 'Permission Sets' page in 'Edit View' mode. The left sidebar contains navigation links: Setup, Home, Object Manager, and a search bar. Below these are links for Users, Permission Set Groups, Permission Sets, Email, Apex Exception Email, Apps, AppExchange Marketplace, Feature Settings, Analytics, Reports & Dashboards, Report Types, Chatter, Groups, and Record Types. The main content area displays the 'Edit View' for a permission set. The view name is 'All Permission Sets', created by DHENIKA BALAKRISHNAN on 20/03/2023 at 10:58 am. The page shows the 'Step 2. Specify Filter Criteria' section with a table for setting filter criteria. The table has columns for Setting, Operator, and Value. The current setting is 'Modify All Data equals False'. The page also shows the 'Step 3. Select Columns to Display' section with a warning to activate Windows.

Activity 2



MILESTONE 8 – REPORTS

Activity



4 Trailhead Profile Public URL

Team Lead <https://trailblazer.me/id/ababi108>

Team Member 1 - <https://trailblazer.me/id/akalya08>

Team Member 2 - (LA)

Team Member 3 – <https://trailblazer.me/id/dbalakrishnan7>

5 ADVANTAGES & DISADVANTAGE

Event Expert

We're professional project managers knowledgeable who are extremely

Event management companies are prepared for every eventuality – trust us, we've seen it all before! We know what questions to ask, what's needed when and how long things take. We're highly organised, meet deadlines and know how to manage a budget. If you use our expertise to plan and organise your B2B events, you can focus on your own job.

2 Save Time and Money

With direct links to venues and suppliers, event management companies get preferential rates and can negotiate the best prices based on these relationships and our experience. We'll know the most suitable locations, facilities and support services to meet any clients' needs – which may not always be the most obvious ones. We can also offer alternative options with the information readily available so you don't have to spend time searching on google!

3 Creativity

A successful event management company will no doubt have been involved in a variety of events and will know what will create the wow factor at a huge conference or how to encourage participant involvement at a small training workshop. We're up to speed with the latest trends in event technology and attendee interaction. It's this experience and day to day exposure to the world of events that will bring creativity and a different perspective.

Disadvantages of Event management

- Unconventional work hours
- Time away from family and friends

- Experience requirements
- Job instability
- Multiple events at the same time
- High level of responsibility

6.APPLICATIONS

An event management system helps organizers plan, execute and report on events, driving success for their business. A truly comprehensive event management system will allow users and organizers to access and manage all aspects of an event, including registration, marketing , engagement, integrations, physical planning and preparation, reporting and analytics.

7 CONCLUSION

Event management system is user friendly and cost effective system , it is customerized with activities related to event management life cycle . It provides a new edge to management industry . solutiondot always keep your objectives and goals on top priority while developing any plan of work

8 FUTURE SCOPE

India has plenty of opportunities when it comes to event management and many aspiring managers wonder if there is a good scope of event management as career in india.