

<b>Date</b>	
<b>Team ID</b>	<b>NM2023TMID20344</b>
<b>Project Name</b>	<b>BUILDING AN EVENT MANAGEMENT USING SALEFORCE</b>
<b>Team Leader</b>	<b>PAVITHRA.K</b>
<b>Team Member</b>	<b>NATRINAL.R</b>
	<b>MAHESWARL.S</b>
	<b>MAHADEVI.S</b>

## 1 INTRODUCTION

### Overview

Our project aims to improve the functioning of an existing recruitment app for the event management system using salesforce. We achieve this goal by creating custom salesforce object, tab, application, fields, profile, users, permission sets, report that provide easy access to the relevant data.

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.

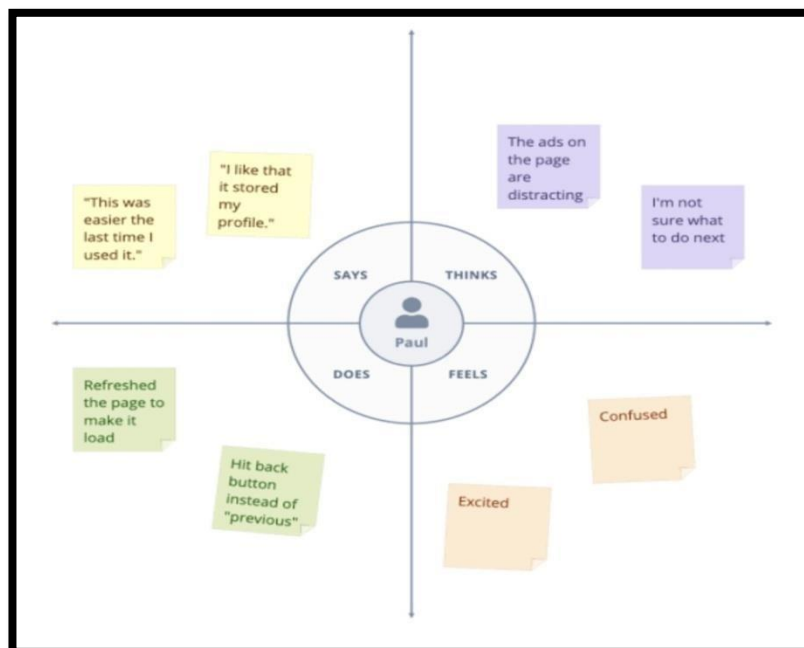
At the start, an event manager makes planning decisions, such as the time, location, and theme of their event. During an event, event managers oversee the event live and make sure things run smoothly. After an event, event managers are tasked with reviewing event data, submitting KPI and ROI findings, and staying on the ball for any post-event offerings.

### Purpose

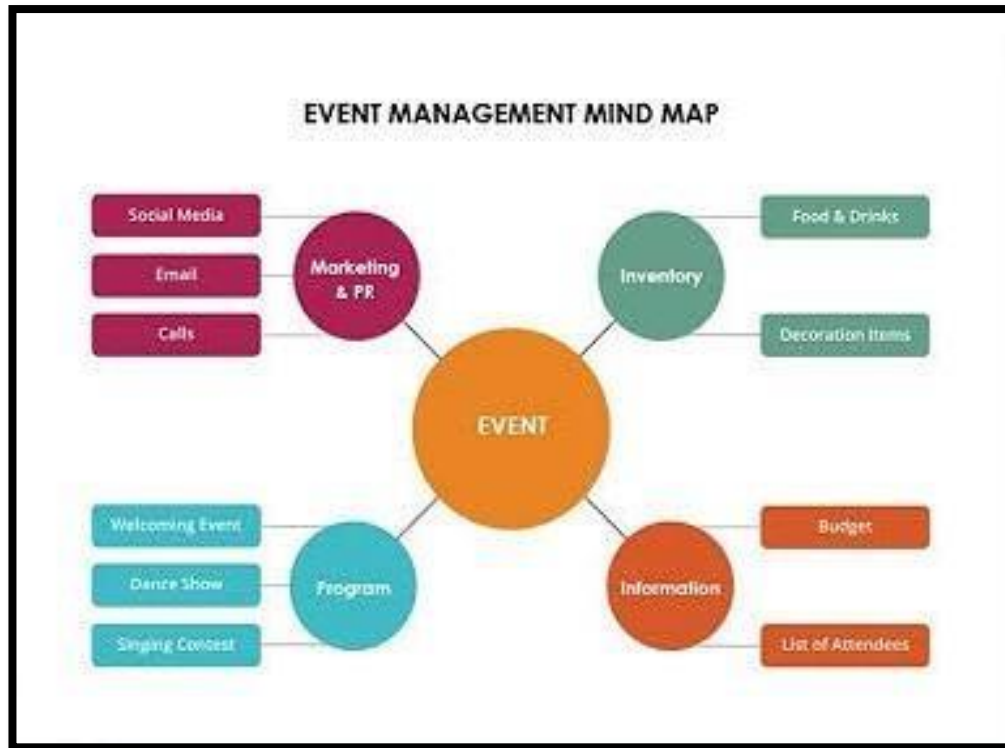
An event management system with salesforce allows you to access all relevant data in one centralized location your database. You will be able to manage all event relevant tasks without leaving salesforce, providing you with seamless and comprehensive event-planes experiences.

## 2 PROBLEM DEFINITION & DESING THINKING

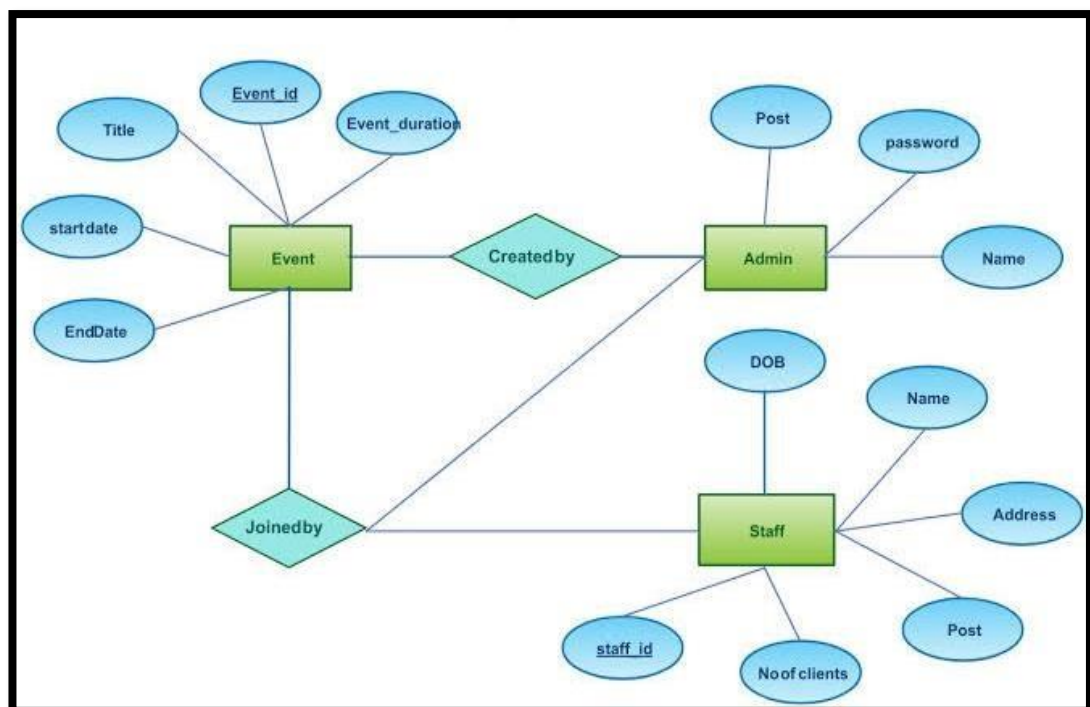
### Empathy Map



## Ideation & Brainstorming Map BRAINSTORM



## GROUP IDEAS



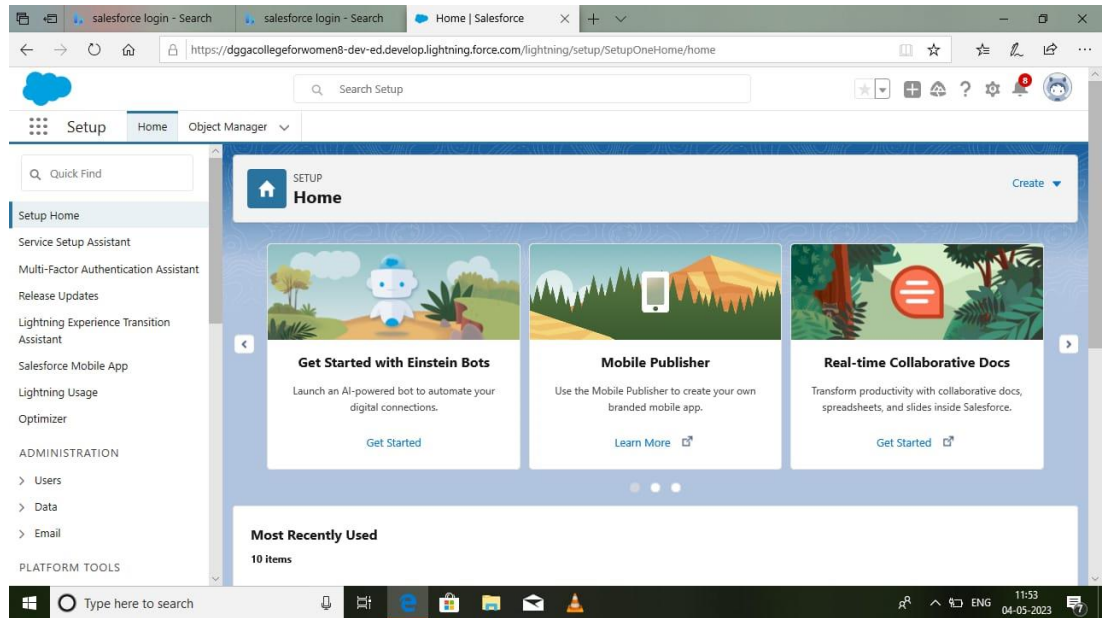
### 3 RESULT

#### Data Model

Object Name	Fields in the Object	
	Field Label	Date Type
Event	City	Text
	Start date	Date\Time
	End date	Date\Time
Attendees	Enter ID	Auto number
	Phone	Phone
	E mail	E mail
	Enter tickets	Pick list
Speaker	Bio	Area
	E mail	E mail
vendors	E mail	E mail
	Phone	Phone
	Enter Service Provider	Text

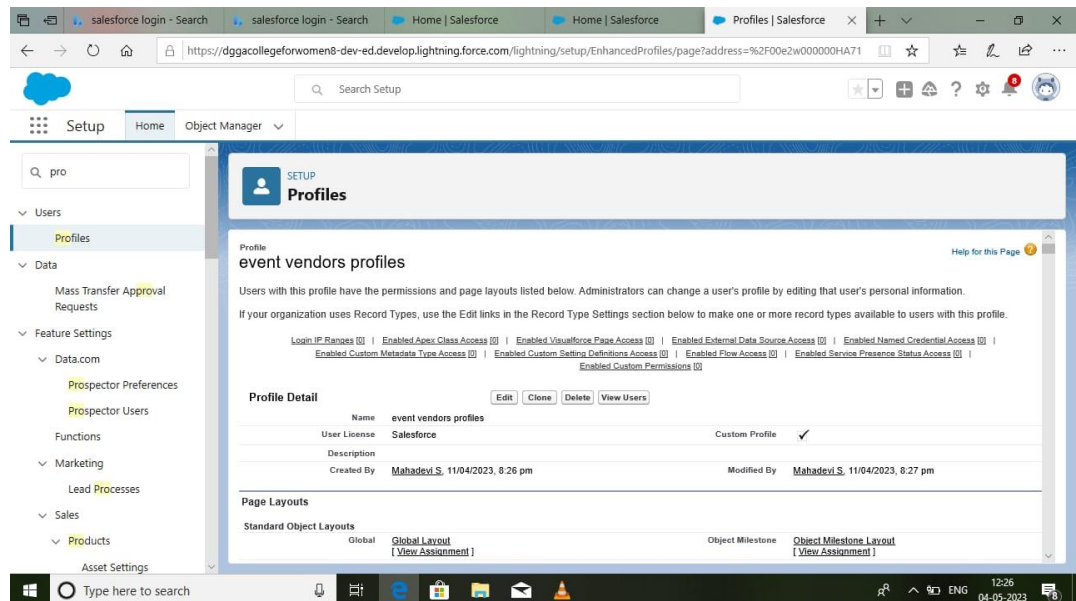
## Activity & Screenshot

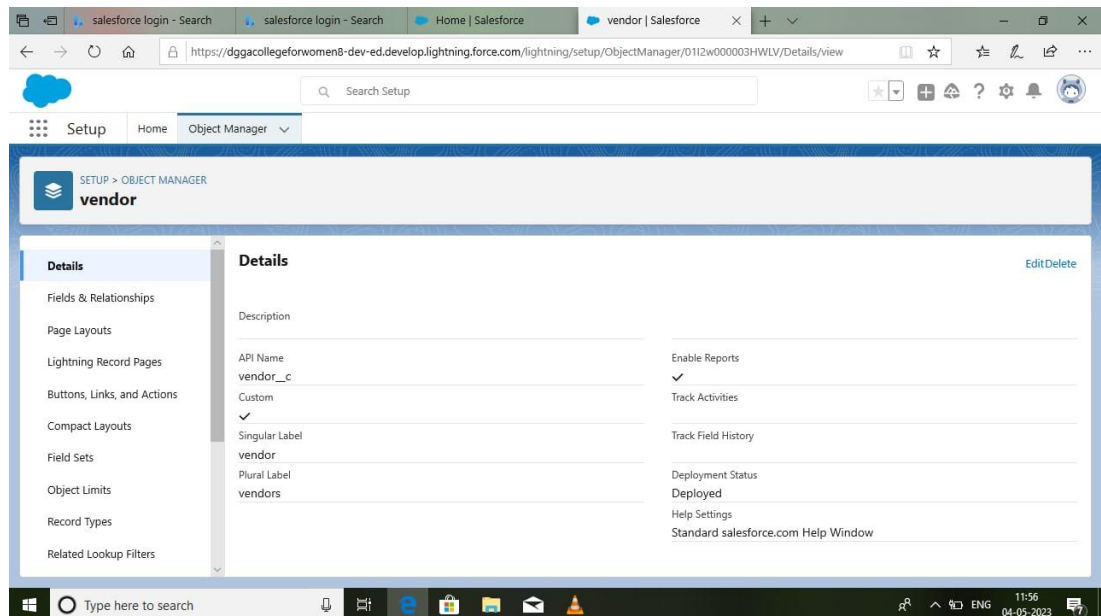
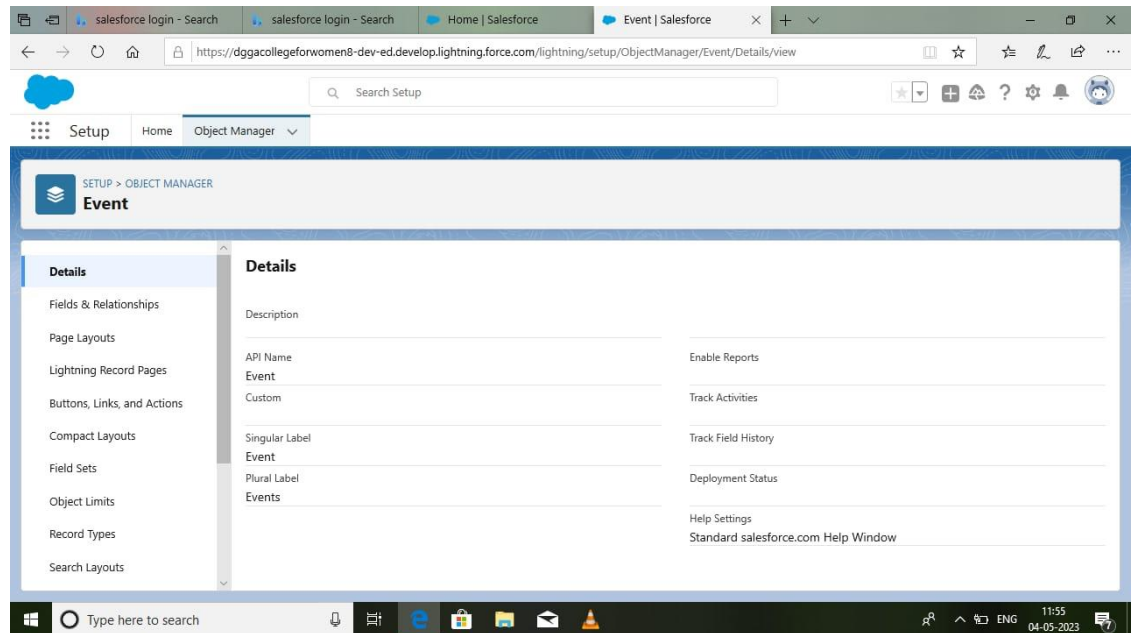
### Milestone 1:

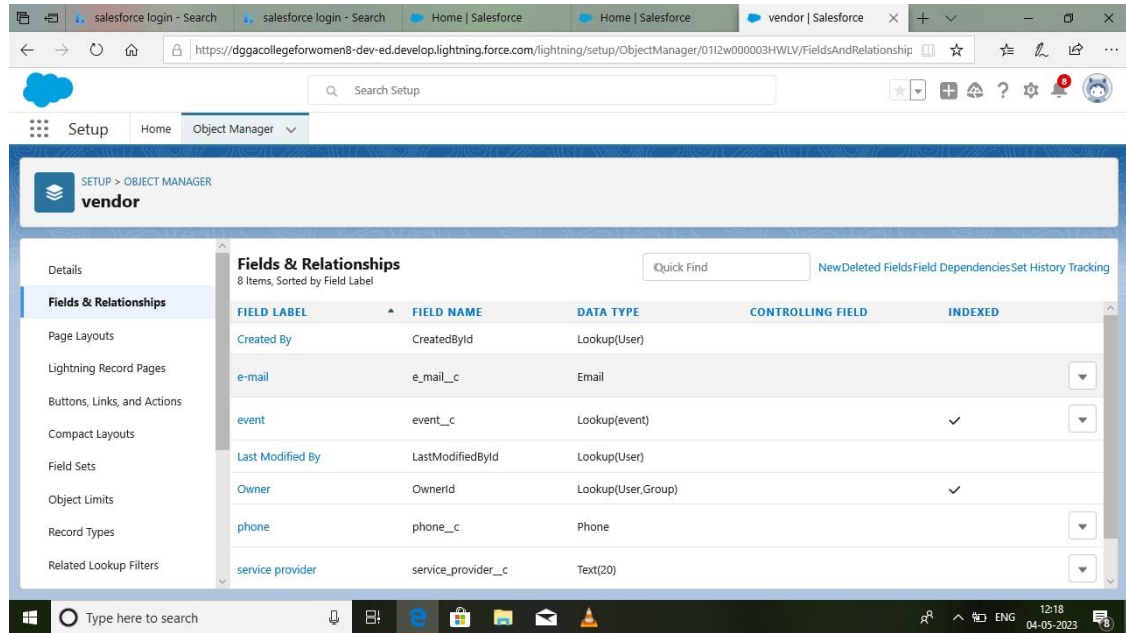


### Creation of Salesforce Account

### Milestone 2:





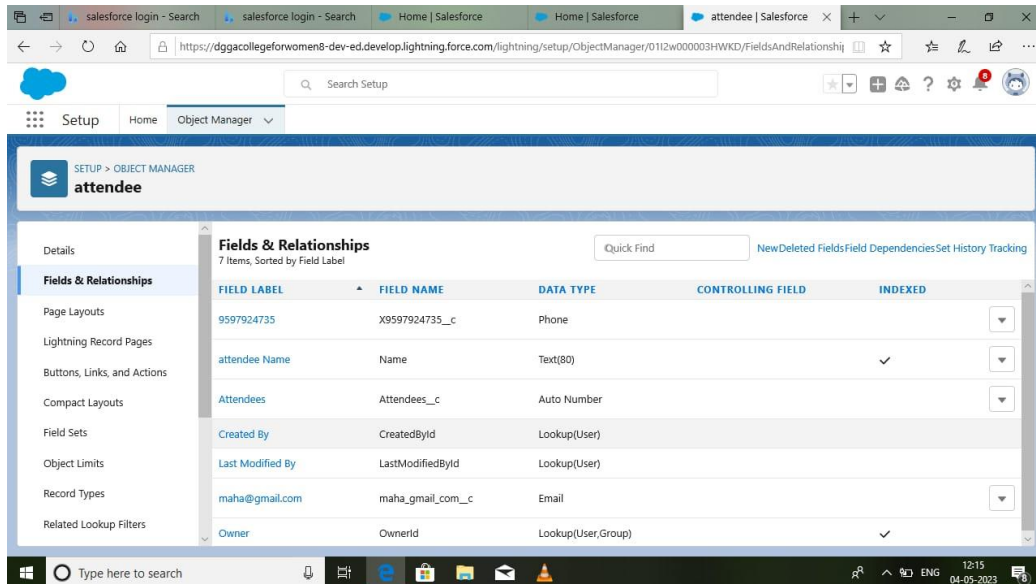


The screenshot shows the Salesforce Object Manager interface for the 'vendor' object. The 'Fields & Relationships' section is active, displaying a table of 8 items sorted by Field Label. The table includes fields like 'Created By', 'e-mail', 'event', 'Last Modified By', 'Owner', 'phone', and 'service provider'.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
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)		✓
phone	phone__c	Phone		
service provider	service_provider__c	Text(20)		

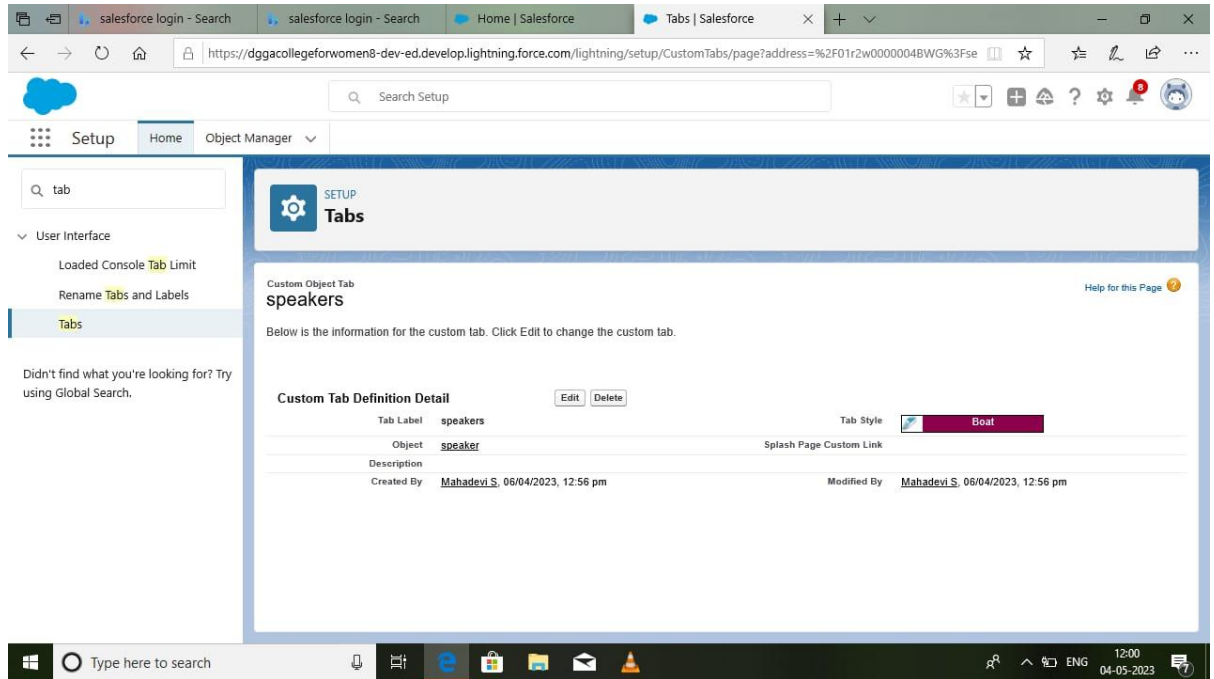
## Creation of object (Event, Attendees, Speaker, Venders)

### Milestone 3:



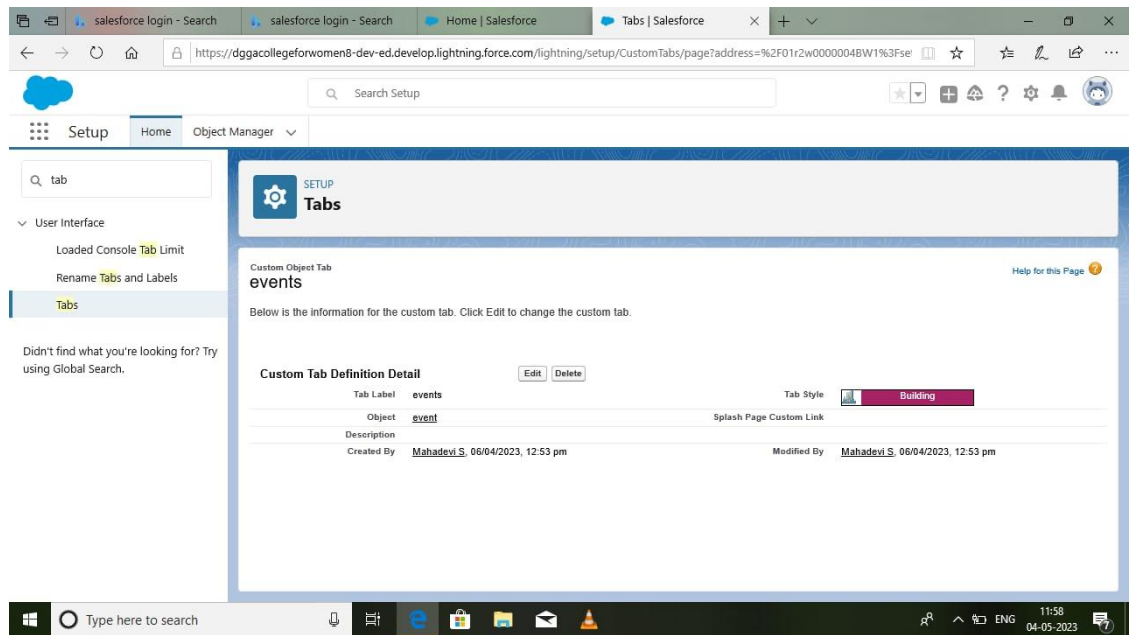
The screenshot shows the Salesforce Object Manager interface for the 'attendee' object. The 'Fields & Relationships' section is active, displaying a table of 7 items sorted by Field Label. The table includes fields like '9597924735', 'attendee Name', 'Attendees', 'Created By', 'Last Modified By', 'maha@gmail.com', and 'Owner'.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
9597924735	X9597924735__c	Phone		
attendee Name	Name	Text(80)		✓
Attendees	Attendees__c	Auto Number		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
maha@gmail.com	maha_gmail_com__c	Email		
Owner	OwnerId	Lookup(User,Group)		✓



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'tab' entered. Under 'User Interface', the 'Tabs' link is selected. The main content area is titled 'SETUP Tabs' and shows the configuration for a custom object tab named 'speakers'. Below the title, it says 'Below is the information for the custom tab. Click Edit to change the custom tab.' The 'Custom Tab Definition Detail' table shows the following information:

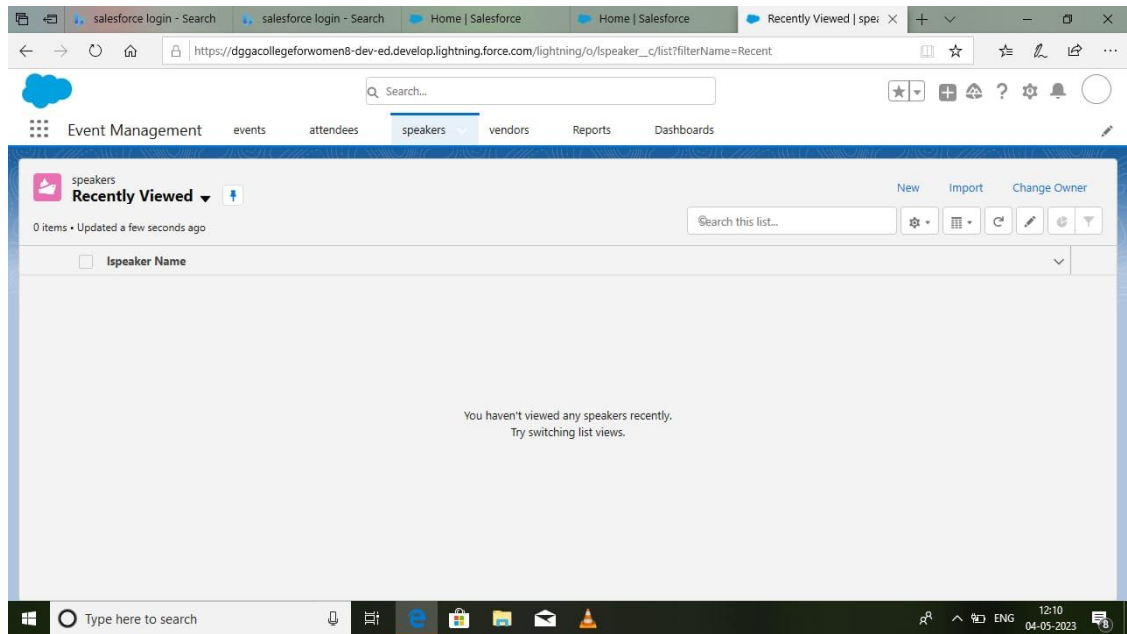
Tab Label	speakers	Tab Style	Boat
Object	speaker	Splash Page Custom Link	
Description			
Created By	Mahadevi S. 06/04/2023, 12:56 pm	Modified By	Mahadevi S. 06/04/2023, 12:56 pm



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'tab' entered. Under 'User Interface', the 'Tabs' link is selected. The main content area is titled 'SETUP Tabs' and shows the configuration for a custom object tab named 'events'. Below the title, it says 'Below is the information for the custom tab. Click Edit to change the custom tab.' The 'Custom Tab Definition Detail' table shows the following information:

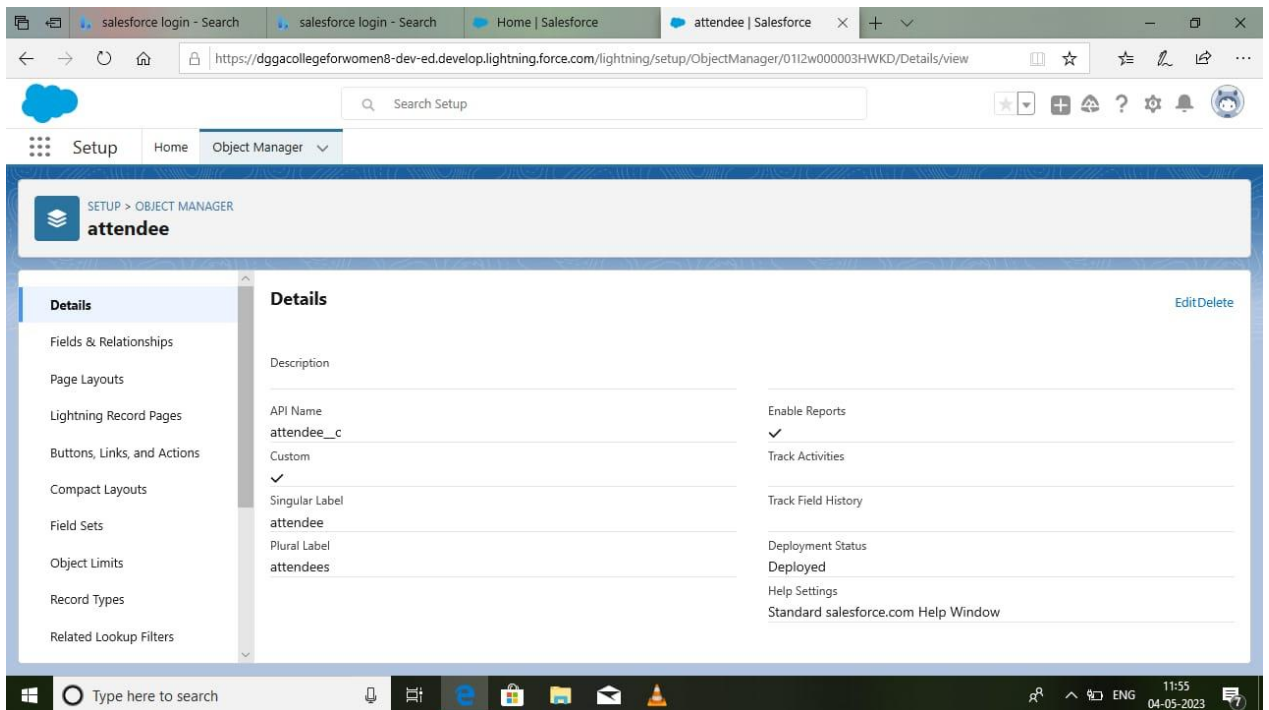
Tab Label	events	Tab Style	Building
Object	event	Splash Page Custom Link	
Description			
Created By	Mahadevi S. 06/04/2023, 12:53 pm	Modified By	Mahadevi S. 06/04/2023, 12:53 pm





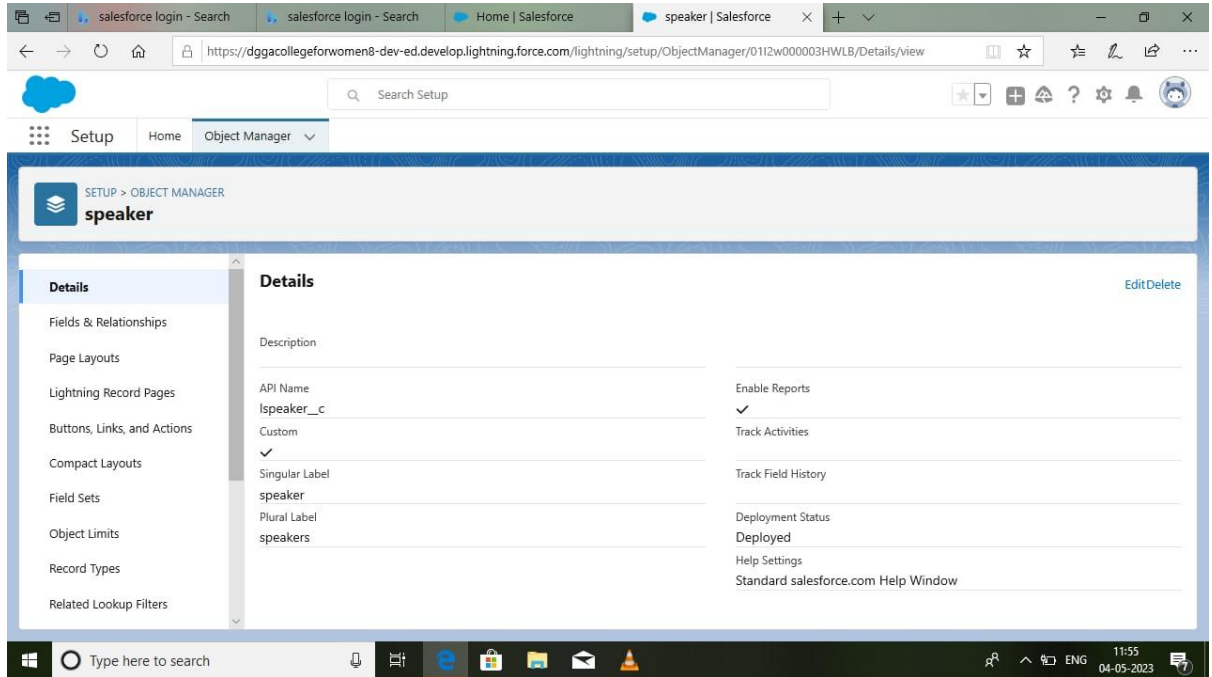
Creation of Tabs (Event, Attendees, Speaker, Vendors)

## Milestone 4 :

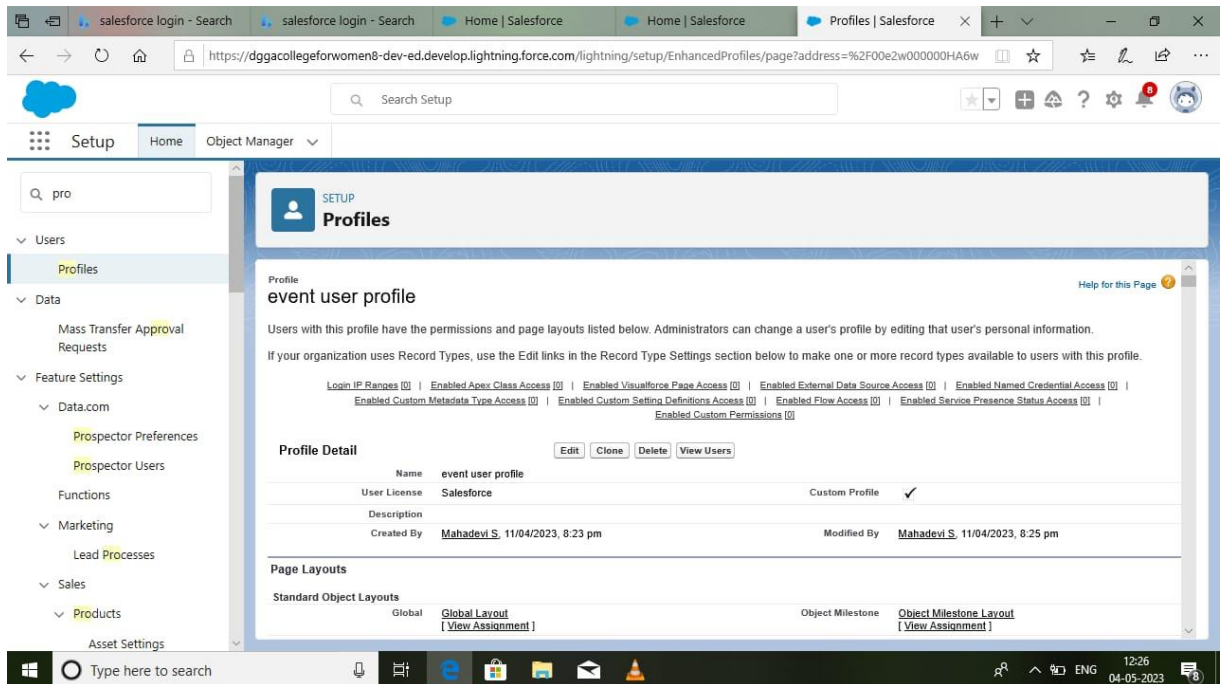


Creation of Event Management Construction Application

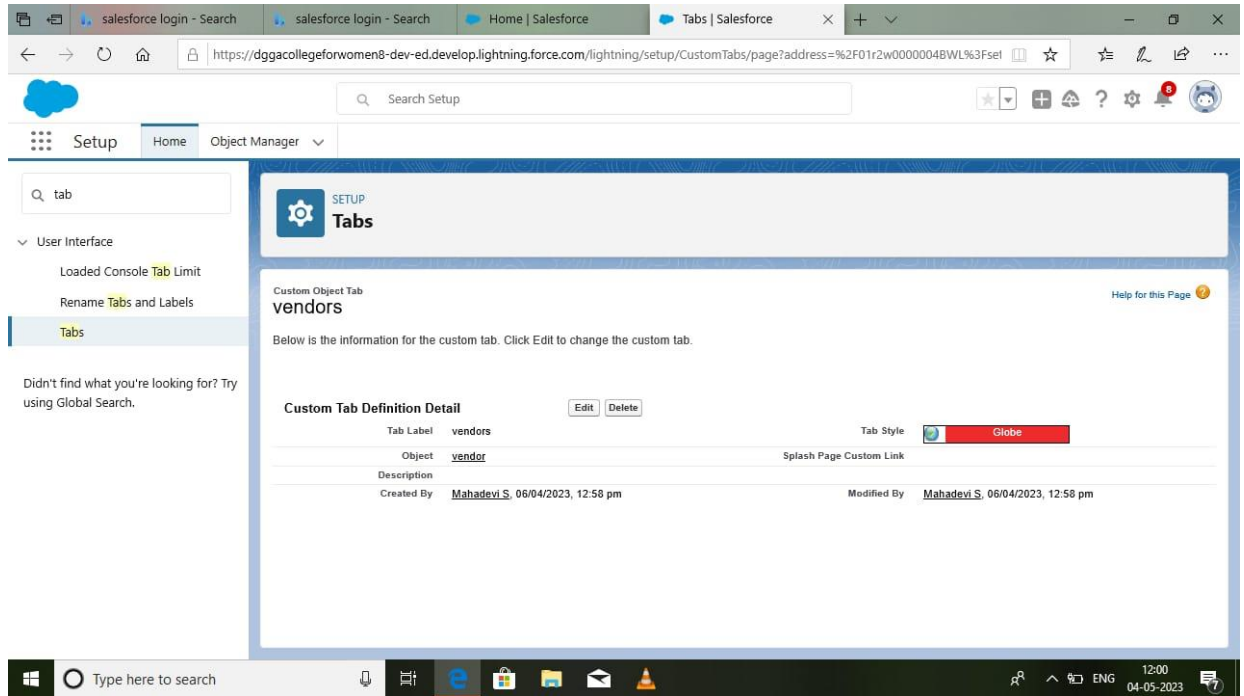
## Milestone 5 :



The screenshot shows the Salesforce Object Manager setup page for the 'speaker' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Details' and includes a description field, API Name (Ispeaker\_c), Custom checkbox, Singular Label (speaker), Plural Label (speakers), and a list of settings: Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), Help Settings, and a link to Standard salesforce.com Help Window. The top navigation bar shows 'Setup' and 'Object Manager' tabs. The bottom status bar displays the Windows taskbar with the search bar and system clock showing 11:55 on 04-05-2023.

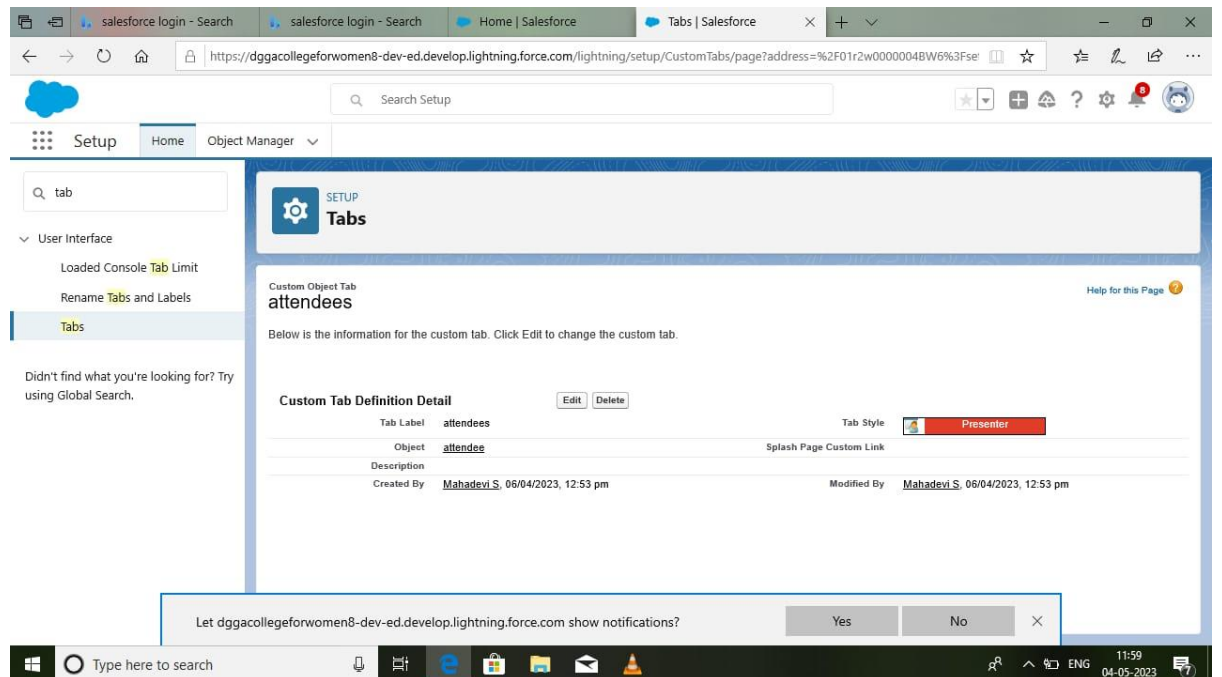


The screenshot shows the Salesforce Profiles setup page for the 'event user profile'. The left sidebar contains a navigation menu with options: Users, Profiles, Data, Mass Transfer Approval Requests, Feature Settings, Data.com, Prospector Preferences, Prospector Users, Functions, Marketing, Lead Processes, Sales, Products, and Asset Settings. The main content area is titled 'Profiles' and includes a description of the profile, a list of permissions (Login IP Ranges, Enabled Apex Class Access, Enabled Visualforce Page Access, Enabled External Data Source Access, Enabled Named Credential Access, Enabled Custom Metadata Type Access, Enabled Custom Setting Definitions Access, Enabled Flow Access, Enabled Service Presence Status Access, Enabled Custom Permissions), and a table for Page Layouts. The table has columns for Standard Object Layouts and Object Milestone. The bottom status bar displays the Windows taskbar with the search bar and system clock showing 12:26 on 04-05-2023.



The screenshot shows the Salesforce Setup page for a Custom Object Tab named 'vendors'. The left sidebar shows the 'Setup' menu with 'User Interface' expanded, and 'Tabs' selected. The main content area displays the 'Custom Object Tab' details for 'vendors'. The 'Tab Label' is 'vendors', the 'Object' is 'vendor', and the 'Tab Style' is 'Globe'. The 'Created By' and 'Modified By' are both 'Mahadevi S.' on 06/04/2023 at 12:58 pm.

Custom Tab Definition Detail	
Tab Label	vendors
Object	vendor
Description	
Created By	Mahadevi S., 06/04/2023, 12:58 pm
Modified By	Mahadevi S., 06/04/2023, 12:58 pm

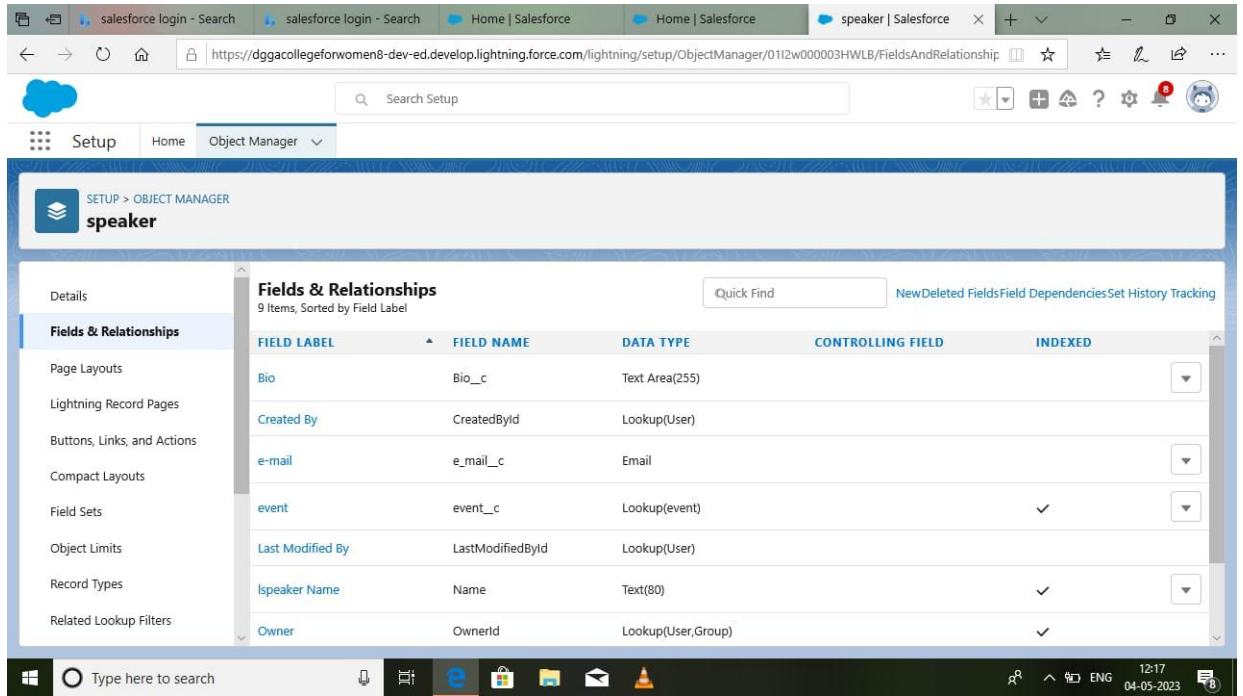


The screenshot shows the Salesforce Setup page for a Custom Object Tab named 'attendees'. The left sidebar shows the 'Setup' menu with 'User Interface' expanded, and 'Tabs' selected. The main content area displays the 'Custom Object Tab' details for 'attendees'. The 'Tab Label' is 'attendees', the 'Object' is 'attendee', and the 'Tab Style' is 'Presenter'. The 'Created By' and 'Modified By' are both 'Mahadevi S.' on 06/04/2023 at 12:53 pm.

Custom Tab Definition Detail	
Tab Label	attendees
Object	attendee
Description	
Created By	Mahadevi S., 06/04/2023, 12:53 pm
Modified By	Mahadevi S., 06/04/2023, 12:53 pm

**Creation of Fields (Event, Attendee, Speaker, Vendors)**

## Milestone 6:



SETUP > OBJECT MANAGER

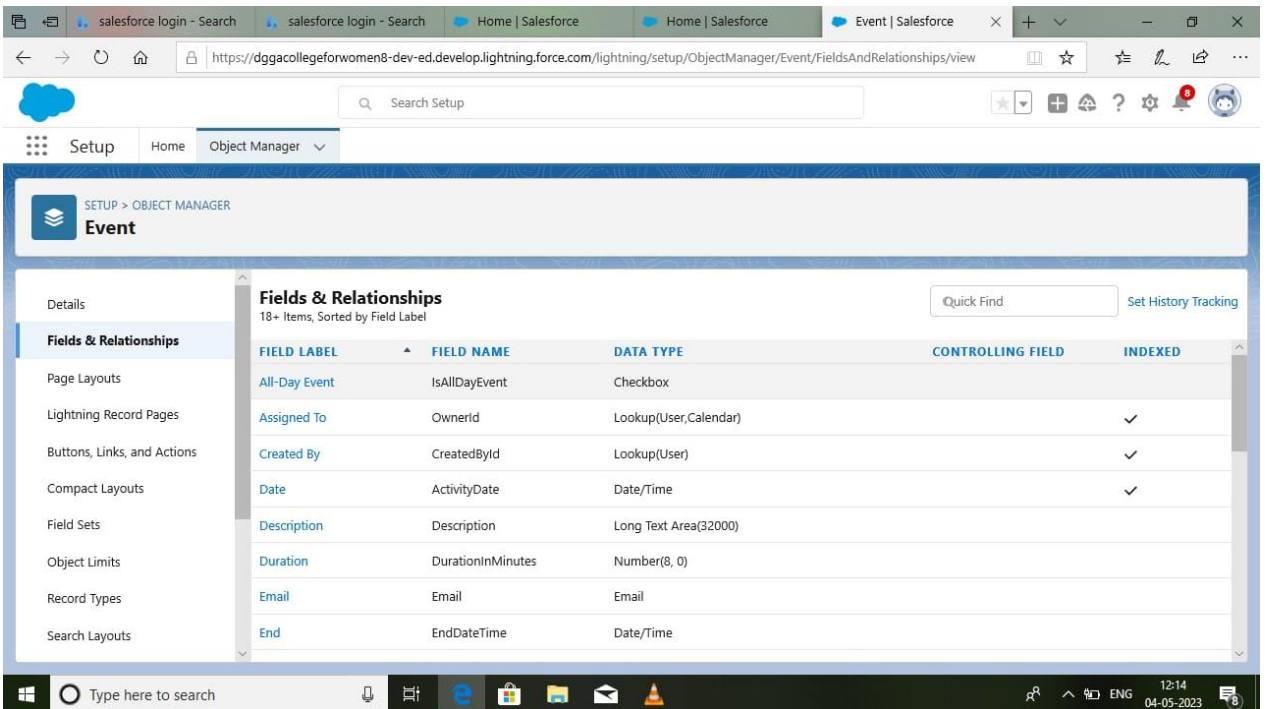
**speaker**

Details

**Fields & Relationships**  
9 Items, Sorted by Field Label

Quick Find New Deleted FieldsField DependenciesSet History Tracking

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)		
Ispeaker Name	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓



SETUP > OBJECT MANAGER

**Event**

Details

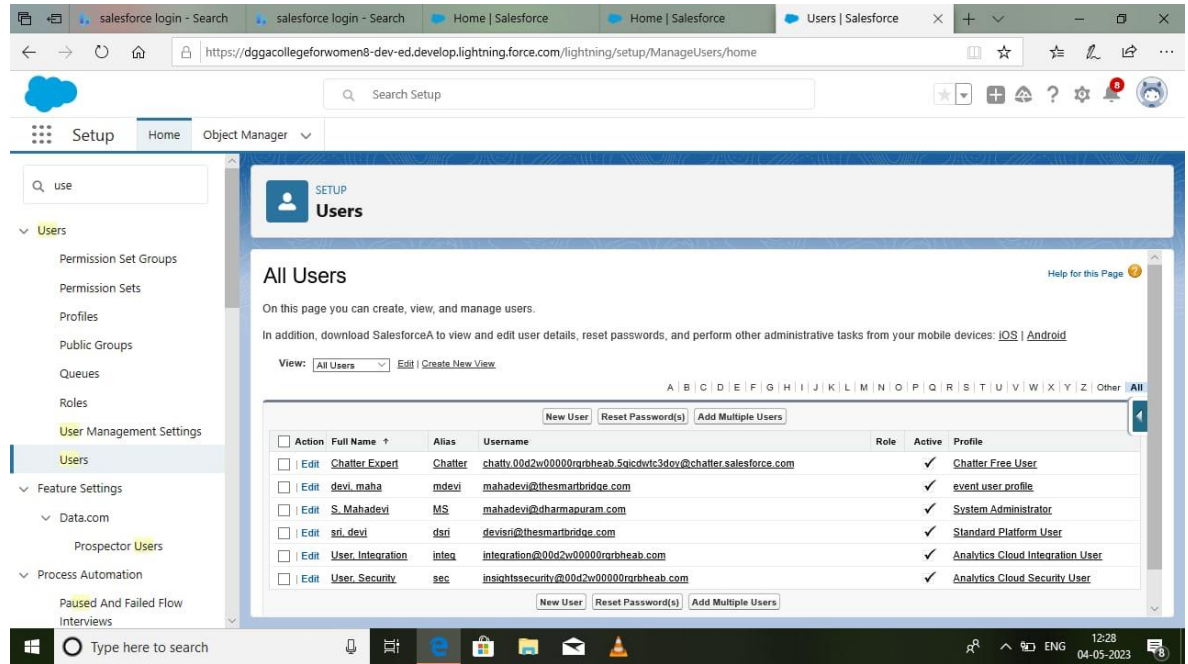
**Fields & Relationships**  
18+ Items, Sorted by Field Label

Quick Find Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
All-Day Event	IsAllDayEvent	Checkbox		
Assigned To	OwnerId	Lookup(User,Calendar)		✓
Created By	CreatedById	Lookup(User)		✓
Date	ActivityDate	Date/Time		✓
Description	Description	Long Text Area(32000)		
Duration	DurationInMinutes	Number(8, 0)		
Email	Email	Email		
End	EndDateTime	Date/Time		

## Creation of Profile (Event User Profile & Event Vendor Profile)

## Milestone 7:



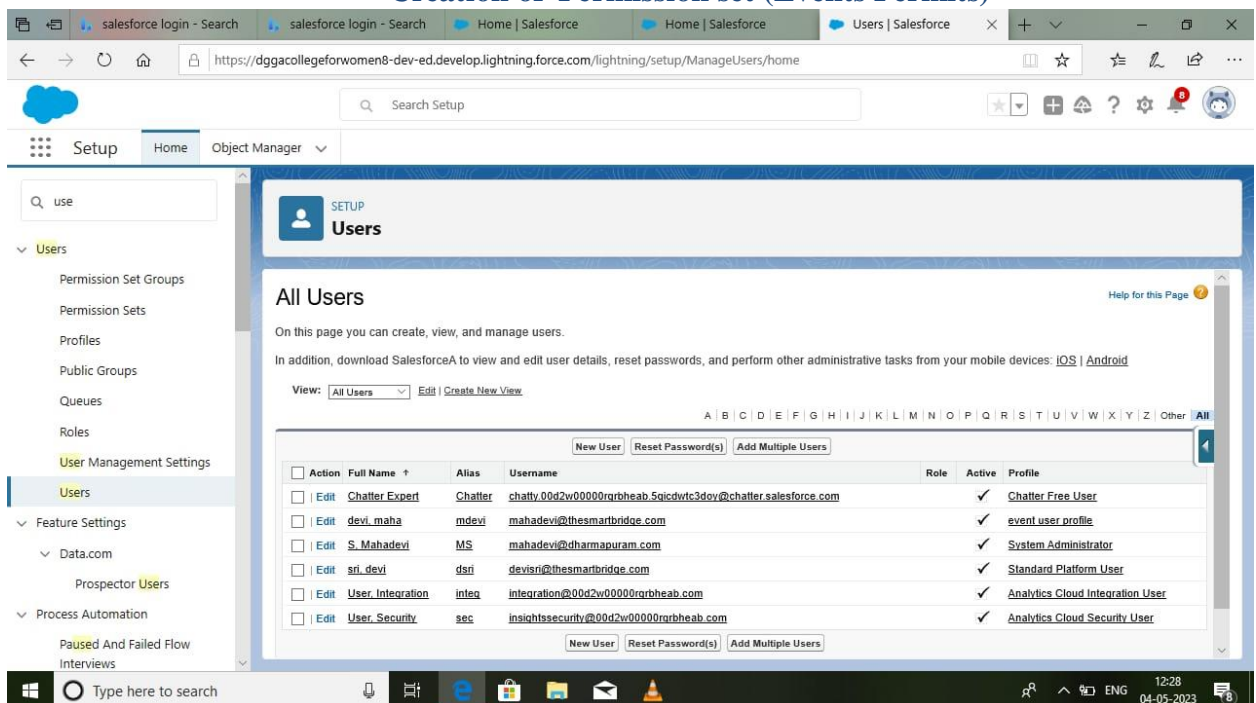
The screenshot shows the Salesforce Setup page for Users. The left sidebar contains the Setup menu with options like Users, Permission Set Groups, Profiles, Public Groups, Queues, Roles, User Management Settings, Feature Settings, Data.com, and Process Automation. The main content area is titled "All Users" and includes a table of users.

Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	Chatter Expert	Chatter	chatty00d2w00000rqrheab.5qicdwtc3doy@chatter.salesforce.com		✓	Chatter Free User
<a href="#">Edit</a>	devi_maha	mdevi	mahadevi@thesmartbridge.com		✓	event user profile
<a href="#">Edit</a>	S. Mahadevi	MS	mahadevi@dharmapuram.com		✓	System Administrator
<a href="#">Edit</a>	sri_devi	dsri	devisri@thesmartbridge.com		✓	Standard Platform User
<a href="#">Edit</a>	User Integration	inteq	integration@00d2w00000rqrheab.com		✓	Analytics Cloud Integration User
<a href="#">Edit</a>	User Security	sec	insightssecurity@00d2w00000rqrheab.com		✓	Analytics Cloud Security User

### Creation of Users

## Milestone 8:

### Creation of Permission set (Events Permits)

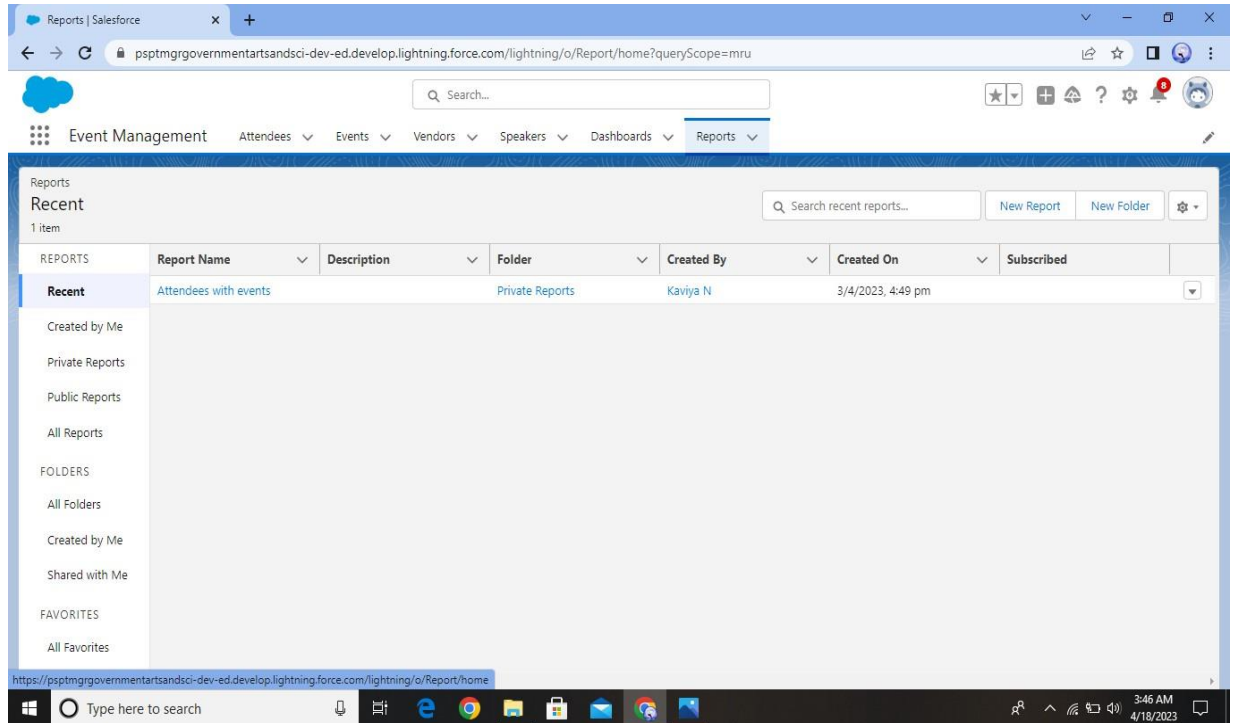


The screenshot shows the Salesforce Setup page for Users, identical to the one in Milestone 7. The left sidebar contains the Setup menu with options like Users, Permission Set Groups, Profiles, Public Groups, Queues, Roles, User Management Settings, Feature Settings, Data.com, and Process Automation. The main content area is titled "All Users" and includes a table of users.

Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	Chatter Expert	Chatter	chatty00d2w00000rqrheab.5qicdwtc3doy@chatter.salesforce.com		✓	Chatter Free User
<a href="#">Edit</a>	devi_maha	mdevi	mahadevi@thesmartbridge.com		✓	event user profile
<a href="#">Edit</a>	S. Mahadevi	MS	mahadevi@dharmapuram.com		✓	System Administrator
<a href="#">Edit</a>	sri_devi	dsri	devisri@thesmartbridge.com		✓	Standard Platform User
<a href="#">Edit</a>	User Integration	inteq	integration@00d2w00000rqrheab.com		✓	Analytics Cloud Integration User
<a href="#">Edit</a>	User Security	sec	insightssecurity@00d2w00000rqrheab.com		✓	Analytics Cloud Security User



## Milestone 9:



The screenshot shows the Salesforce Reports interface. The top navigation bar includes 'Event Management', 'Attendees', 'Events', 'Vendors', 'Speakers', 'Dashboards', and 'Reports'. The 'Reports' section is active, displaying a 'Recent' list with one item: 'Attendees with events'. The report is located in the 'Private Reports' folder, created by 'Kaviya N' on 3/4/2023 at 4:49 pm. The left sidebar shows a tree view with 'REPORTS' (Recent, Created by Me, Private Reports, Public Reports, All Reports), 'FOLDERS' (All Folders, Created by Me, Shared with Me), and 'FAVORITES' (All Favorites).

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Attendees with events		Private Reports	Kaviya N	3/4/2023, 4:49 pm	

## Creation of Reports

#### 4 TRAILHEAD PROFILE PUBLIC URL

Team Lead - <https://trailblazer.me/id/nkaviya2>

Team Member 1 - <https://trailblazer.me/id/mkaviya3>

Team Member 2 - <https://trailblazer.me/id/mahem46>

Team Member 3 - <https://trailblazer.me/id/mvaishnavi17>

## **5 ADVANTAGES**

- ❖ It is highly customizable.
- ❖ It is handle by all the persons of the Institution.
- ❖ It runs on very secure manner.
- ❖ It helps more efficiently.

## **6 DISADVANTAGES**

- ❖ It has some difficulties between transition and transactions.
- ❖ It needs to through multiple screen to process transaction.
- ❖ It is possible that the cost of integrating it can exceed the costs of the software itself.

## **7 APPLICATION**

- ❖ Component Events.
- ❖ Handling Events with Client-Side Controllers
- ❖ Application Event Propagation
- ❖ Advanced Events Example

## **8 CONCLUSION**

- ❖ To enhance efficiency of the app

## **9 FUTURE SCOPE**

In the 21<sup>st</sup> century each and every field is computerized and all works are done by using the modern technologies so it has a good future.