

# PROJECT REPORT TEMPLATE

## 1.INTRODUCTION

### 1.1 Overview

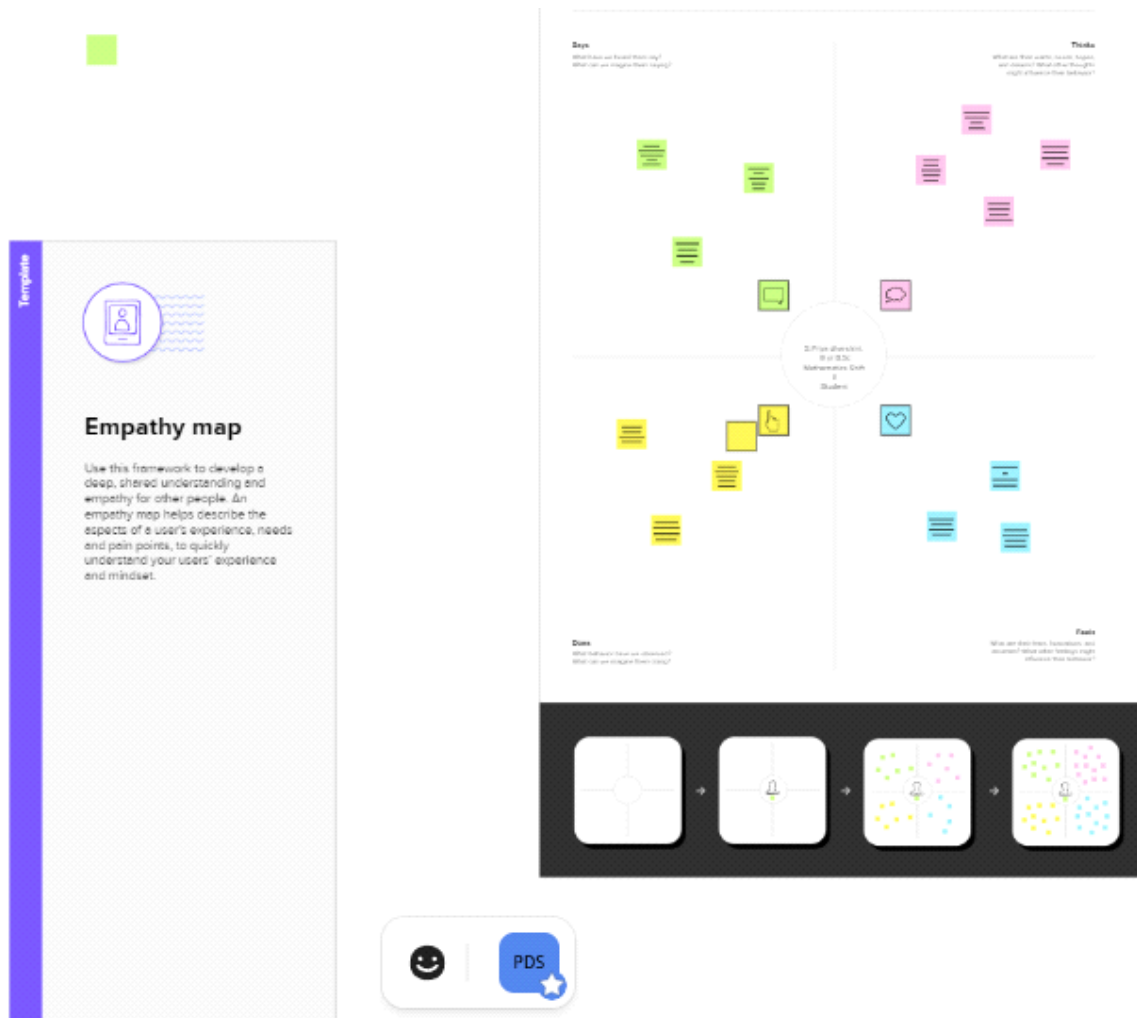
*The Project aim is to provide real-time knowledge for all the students who have basic knowledge of salesforce and looking for a real-time project.This project will also help to those professionals who are in cross-technology and wanted to switch to salesforce with the help of this project they will gain knowledge and can include into their resume as well.*

### 1.2 Purpose

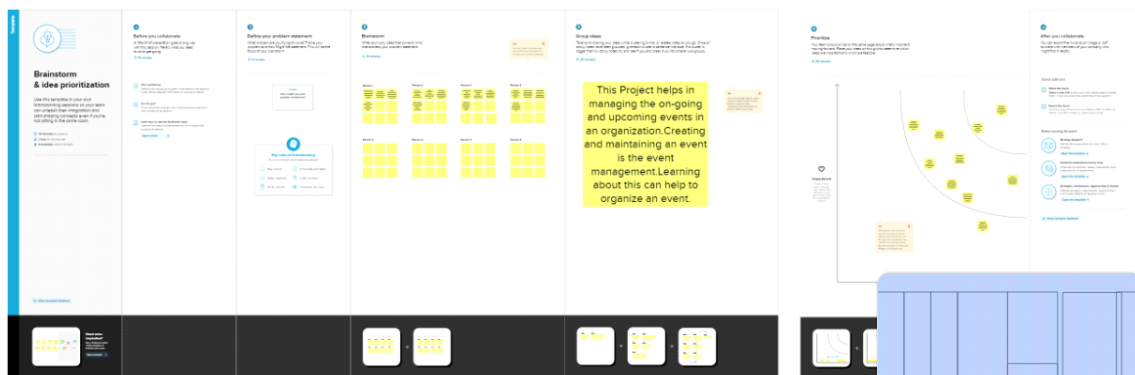
*The purpose of the event is always to make connections. Event management doesn't just involve choosing liners or the right virtual technology provider but also managing contacts as well as you can.*

## 2.Problem Definition & Design Thinking

### 2.1 Empathy Map



## 2.2 Ideation & Brainstorming Map



## 3.Result

### 3.1 Data Model

Object Name	Fields in the object	
Object 1  Event	Field label	Data type
	Events	Event name
Object 2  Attendee	Field label	Data type
	Attendees	Attendee name
Object 3  Speaker	Field label	Data type
	Speakers	speaker name
Object 4  Vendor	Field label	Data type
	Vendors	Vendor name

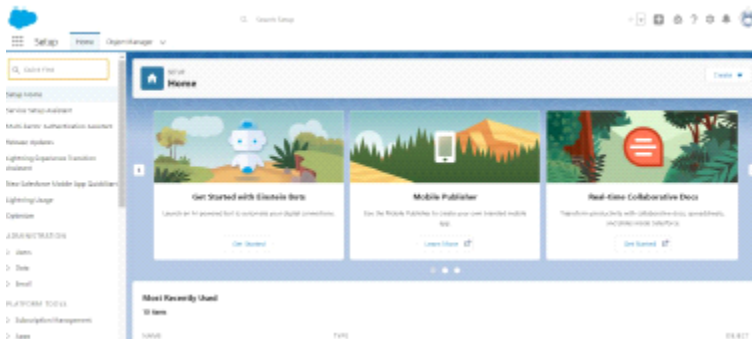
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## 3.2 Activity & Screenshot

### Milestone 1

#### Activity

1. Search Developer.salesforce.com
2. Enter the following details like First name, last name, Email, Role, company, Country/Region, Postal code and Username must be unique.
3. Click sign me up, after a few min you will receive a mail from salesforce org and by using the verify account link you can create your new password.
4. Click save.
5. Search login.salesforce.com
6. By using username and password you can log into the salesforce org.



### Milestone 2-Object

#### Activity 2:

##### Creation of Attendees object:

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
    - f. Check the Allow Search checkbox

g. Click Save.

### **Activity 3:**

#### **Creation of Speaker object:**

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.

### **Activity 4:**

#### **Creation of Vendors object:**

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

<div>  <b>Object Manager</b> </div> <div>103+ Items, Sorted by Label</div>			<div>  Quick Find         </div>	
Engagement Channel Type	EngagementChannelType	Standard Object		
Entitlement	Entitlement	Standard Object		
Entitlement Contact	EntitlementContact	Standard Object		
Event	Event__c	Custom Object	06/04/202	
Event	Event	Standard Object		
Finance Balance Snapshot	FinanceBalanceSnapshot	Standard Object		
Finance Transaction	FinanceTransaction	Standard Object		
Image	Image	Standard Object		
Incident	Incident	Standard Object		

## Milestone 3

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.

### Activity 2:

#### Creation of Attendee tab:

Now create a custom tab.

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.

### Activity 3:

#### Creation of Speakers tab:

Now create a custom tab.

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.

### Activity 4:

#### Creation of Vendor tab:

Now create a custom tab.

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.

**SETUP Tabs**

## Custom Tabs [Help for this Page](#)

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Action	Label	Tab Style	Description
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Attendees</a>	Bell	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Events</a>	Car	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Speakers</a>	Castle	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Vendors</a>	Bridge	

**Web Tabs** [New](#) [What Is This?](#)

## Milestone 4

### Activity 1:

#### Creation of fields for the Event objects:

1. click the gear icon and select Setup. This launches Setup in a new tab.
  2. Click the Object Manager tab next to Home.
  3. Select Event.
  4. Select Fields & Relationships from the left navigation, and click New
- Now we're ready to make a custom field. Let's do this!
5. Select the Text as the Data Type, then click Next.
  6. For Field Label, enter City.

7. Click Next, Next, then Save & New.

Now let's create the other fields and we must choose the data types of the fields carefully .Let's have a look at it.

For example, a phone number is a number field. For that we need to select the phone as data type. Lets see this

1. Select the Date/time as the Data Type, then click Next.
2. For Field Label, enter Start Date.
3. Check the required check box.

4. Click Next, Next, then Save & New.
5. Similarly create a End Date field also

## **Activity 2:**

### **Creation of fields for the Attendees objects:**

1. Select the Auto number as the Data Type, then click Next.
2. For Field Label, enter Id.
3. Click Next, Next, then Save & New
4. Select the phone as the Data Type, then click Next.
5. For Field Label, Phone.
6. Click Next, Next, then Save & New.
7. Select the Email as the Data Type, then click Next.
8. For Field Label, enter Email.
9. Click Next, Next, then Save & New.
10. From Setup, click Object Manager and select Student.
11. Click Fields & Relationships, then New.
12. Select Picklist as the Data Type and click Next.
13. For Field Label enter Tickets.
14. Select Enter values, with each value separated by a new line and enter these values:
  - Premium
  - Gold
  - Silver
15. Click Next, Next, then Save & New

## **Activity 3:**

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

1. Select master-detail Relationship as the Data Type and click Next.
2. For Related to, enter Event.
3. Click Next.
4. For Field Label, Event Name.
5. Click Next, Next, Next and Save.

## **Activity 4:**

### **Creation of fields for the Speakers objects:**

1. Select the Text Area as the Data Type, then click Next.
2. For Field Label, enter Bio.
3. Click Next, Next, then Save & New.
4. Select the Email as the Data Type, then click Next.
5. For Field Label, e-mail.
6. Click Next, Next, then Save & New



Let's create a Look-up relationship with Event object

1. Select Look-up Relationship as the Data Type and click Next.
2. For Related to, enter Event.
3. Click Next.
4. For Field Label, Event Name.
5. Click Next, Next, Next and Save.

## Activity 5:

### Creation of fields for the Vendors objects:

1. Select the Email as the Data Type, then click Next.
2. For Field Label, e-mail.
3. Click Next, Next, then Save & New.
4. Select the phone as the Data Type, then click Next.
5. For Field Label, Phone.
6. Click Next, Next, then Save & New.
7. Select the Email as the Data Type, then click Next.
8. For Field Label, e-mail.
9. Click Next, Next, then Save & New
10. Select the Text as the Data Type, then click Next.
11. For Field Label, enter Service Provider.
12. Click Next, Next, then Save & New.
13. Select Look-up Relationship as the Data Type and click Next.
14. For Related to, enter Event.
15. Click Next.
16. For Field Label, Event Name.
17. Click Next, Next, Next and Save.

Setup Home Object Manager

### Object Manager

#### New Custom Object

**Custom Object Definition Edit** Save Save & New Cancel

Error: Invalid Data.  
Review all error messages below to correct your data.

**Custom Object Information**

The singular and plural labels are used in tabs, page layouts, and reports.

Label	Vendor	Example: Account
Plural Label	vendors	Example: Accounts
Starts with vowel sound	<input type="checkbox"/>	

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

Object Name	Vendor	Error: That object name is already in use. Example: Account
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Description

## Milestone 5.

### Activity 1:

#### Creation on profile:

1. From Setup enter Profiles in the Quick Find box, and select Profiles.
2. From the list of profiles, find Standard User.
3. Click Clone.
4. For Profile Name, enter Event user profile.
5. Click **Save**.
6. While still on the Event profile page, then click **Edit**.
7. Scroll down to Custom Object Permissions and Give view all access permissions to the Attendees, speakers and vendors.

### Activity 2:

Create a profile with the profile name as “Event vendors profile”.

1. From Setup enter Profiles in the Quick Find box, and select Profiles.
2. From the list of profiles, find Standard User.
3. Click Clone.
4. For Profile Name, enter Event vendors profile.
5. Click **Save**.
6. While still on the Event profile page, then click **Edit**.
7. Scroll down to Custom Object Permissions and Give view all access permissions to the Attendees, speakers and vendors.

The screenshot shows the Salesforce 'Profiles' setup page. At the top, there's a 'SETUP Profiles' header. Below it, the 'Profiles' section is active, with a 'Help for this Page' link. A 'New Profile' button is visible. A table lists existing profiles with columns for Action, Profile Name, User License, and Custom. The table includes profiles like 'Analytics Cloud Integration User', 'Analytics Cloud Security User', 'Authenticated Website', 'Chatter External User', 'Chatter Free User', 'Chatter Moderator User', 'Contract Manager', and 'Cross Org Data Proxv User'. Each row has an 'Edit | Clone' link in the Action column.

Action	Profile Name	User License	Custom
<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Analytics Cloud Integration User</a>	Analytics Cloud Integration User	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Analytics Cloud Security User</a>	Analytics Cloud Integration User	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Authenticated Website</a>	Authenticated Website	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Authenticated Website</a>	Authenticated Website	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Chatter External User</a>	Chatter External	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Chatter Free User</a>	Chatter Free	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Chatter Moderator User</a>	Chatter Free	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Contract Manager</a>	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Cross Org Data Proxv User</a>	XOrg Proxv User	<input type="checkbox"/>

## Milestone 6

### Activity 1:

#### Creating a User:

From setup type “users” in quick find and select users, then click **New User**

- First Name: Sanjay
- Last Name: Gupta
- Alias: Sanj
- Email: provide your personal email id for future reference
- Username: sanjaygupta@thesmartbridge.com
- Nickname: Sanju
- Role: leave it as default
- User License: Salesforce
- ☐ Profile: Event User Profile

## Activity 2:

Create a user with a username as “Rahul Sharma”, and assign him the sales executive profile. From setup type “users” in quick find and select users, then click **New User**

- First Name: Rahul
- Last Name: Sharma
- Alias: Rahu
- Email: provide your personal email id for future reference
- Username: rahulsharma@thesmartbridge.com
- Nickname: Rahu
- Role: leave it as default
- User License: Salesforce
- Profile: Event vendors profile

On this page you can create, view, and manage users. In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: [All Users](#) | [Edit](#) | [Create New View](#)

Action	Full Name *	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	Chatter Expert	Chatter	chattv.00d2w00000rrjvueab.cosfaunt0qbz@chatter.salesforce.com		✓	Chatter Free User
<a href="#">Edit</a>	dharshini.Priva	Priv	priyadharshini@thesmartbridge.com		✓	Cross Org Data Proxy User
<a href="#">Edit</a>	S.Priva dharshini	PS	priyadharshini2908s@cunning-shark-61p0w.com		✓	System Administrator
<a href="#">Edit</a>	Sharma_Rahul	Rahu	priyadharshini2908s@thesmartbridge.com		✓	Work.com Only User
<a href="#">Edit</a>	User_Integration	integ	integration@00d2w00000rrjvueab.com		✓	Analytics Cloud Integration User
<a href="#">Edit</a>	User_Security	sec	insightssec@00d2w00000rrjvueab.com		✓	Analytics Cloud Security User

## Milestone 7

### Activity 1:

### Creating a Permission Set:

- From setup search “permission sets” in quick find and select **permission set** then click on New
- Enter label as: Event Permits and Save.
- After saving the permission click on the Manage assignment.
- Now click on the Add Assignment.
- Now select the users and click on save.

### Activity 2:

#### Activity 2:

- From setup search “permission sets” in quick find and select **permission set** then click on New
- Enter label as: Vendor Permits and Save.
- After saving the permission click on the Manage assignment
- Now click on the Add Assignment
- Now select the users and click on save.

The screenshot displays the Salesforce Event Management interface. At the top, there's a navigation bar with tabs for Event Management, Events, Attendees, Speakers, Vendors, Reports (selected), and Dashboards. Below this, a search bar and several utility icons are visible. The main content area is titled 'Reports' and 'Recent', showing a list of reports. The 'Recent' report is highlighted, showing details for 'New Accounts with Assets Report'. The table has columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. The 'Recent' report is listed with the name 'New Accounts with Assets Report', description 'Private Reports', created by 'Priya dharshini S', and created on '6/4/2023, 12:28 pm'. The left sidebar contains navigation options like Reports, Folders, and Favorites.

## Milestone 8

1. From the Reports tab, click New Report.
2. Select the report type Attendees with events for the report, and click Create.
3. Customize your report accordingly and include all fields, then save or run it.

#### **4.Trailhead Profile Public URL**

Team lead- <https://trailblazer.me/id/priya2908>

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

Team Member 2- <https://trailblazer.me/id/drajadurai1>

Team Member 3- <https://trailblazer.me/id/elak2410>

#### **5.ADVANTAGES & DISADVANTAGES**

##### **ADVANTAGES:**

- 1.Best event planning**
- 2.End to end execution**
- 3.Improve customer services and satisfaction.**
- 4.Smooth execution of planned ideas**
- 5.Saves time and money**
- 6.Maintain best accountant history**
- 7.Easy to manage.**

##### **DISADVANTAGES:**

- 1.Problem Decomposition**
  - >No control over sequencing of invocations.**
  - >Function call semantics problematic.**
  - >cycles may be problematic.**

## **2.System maintenance and reuse**

**>Needs central management to keep track of events,registrations and dispatch policies.**

**>Event Handling may interact badly with over run time mechanisms.**

## **3.Performance**

**>Indirection may incur overhead.**

## **6.APPLICATIONS**

**1.Achieving the desired exposure and brand awareness**

**2.Attracting more prospects and clients from exhibitions and trade shows**

**3.Improving brand positioning through professional events and conferences**

**4.Creative solutions to drive the highest level of satisfaction from the guests**

**5.Handling all permissions,permits,insurance and security concerns**

## **7.CONCLUSION**

**Event Management system is user friendly and cost**

**effective system,it is customized with activities related to event management life-cycle.It provides a new edge to management industry.**

## **8.FUTURE SCOPE**

**>Events and activation industry is expected to grow exponentially due to its ability to adapt and grow with innovative technology.**

**>We will handle Eventbrite registration setup,sales and customer service.**