PROJECT REPORT TEMPLATE

1.INTRODUCTION

1.1 **Overview**

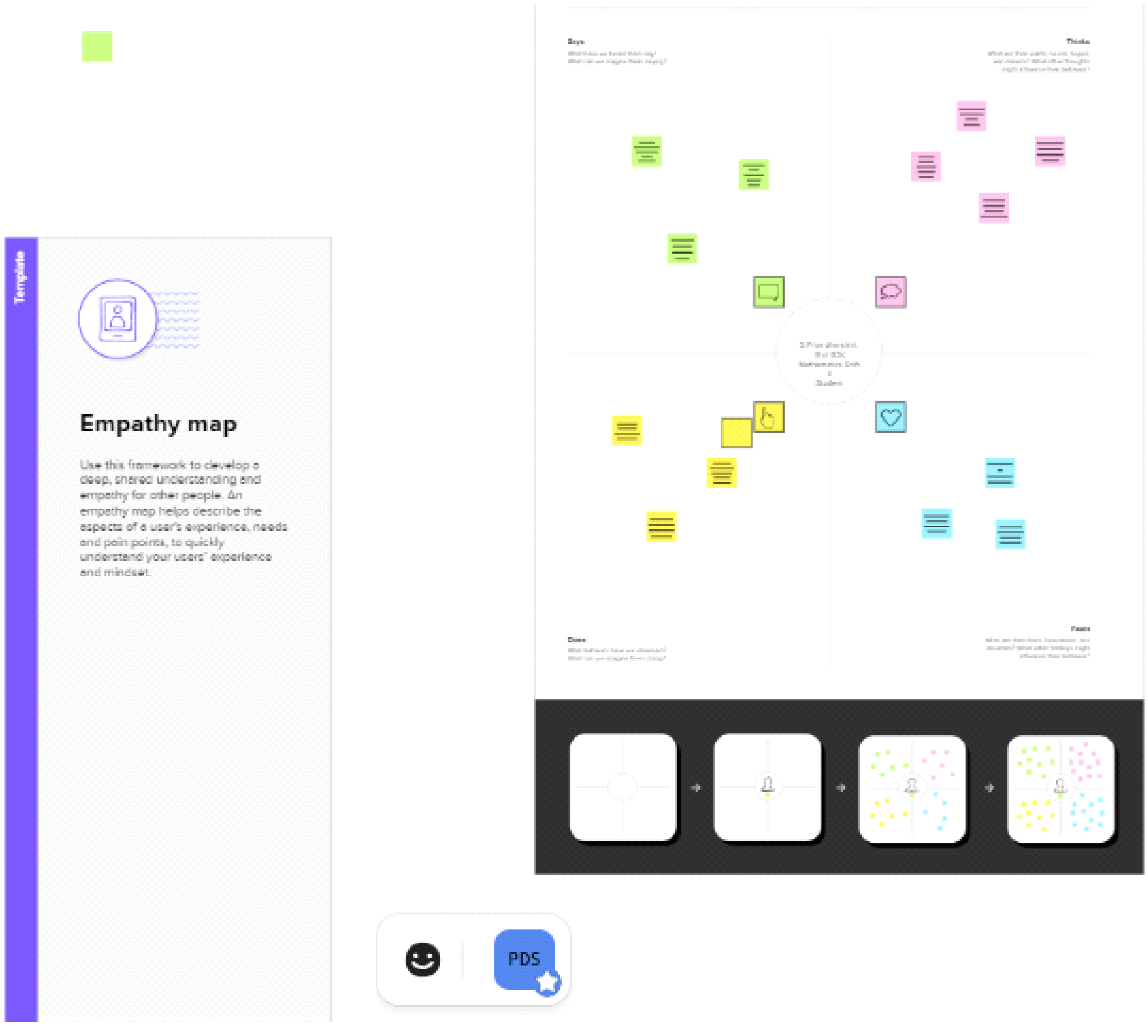
The Project aim is to provide real-time knowledge for all the students who have basic knowledge of salesforce and looking for a real-time project.This project will also help to those professionals who are in cross-technology and wanted to switch to salesforce with the help of this project they will gain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

1.2 **Purpose**

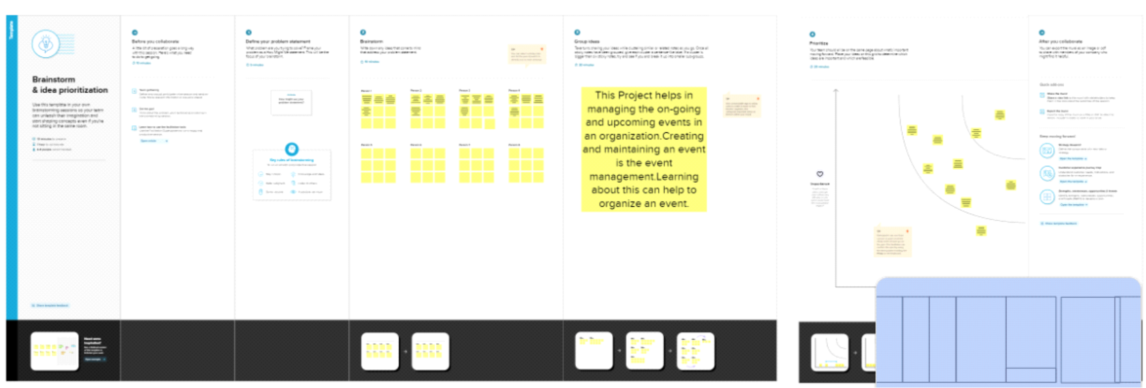
The purpose of the event is always to make connections. Event management doesn't just involve choosing linens or the right virtual technology provider but also managing contacts as well as you can.

2.Problem Definition & Design Thinking

2.1 Empathy Map



2.2 Ideation & Brainstorming Map



3.Result

3.1 Data Model

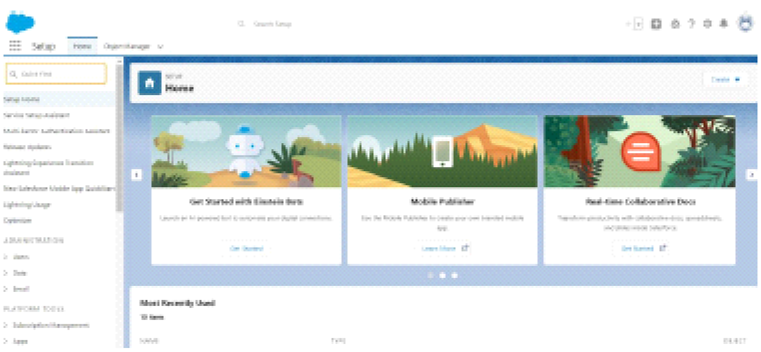
<table>
<tr><th>Object Name</th><th>Fields in the object</th></tr>
<tr><td>Object 1
Event</td><td><table><tr><td>Field label</td><td>Data type</td></tr><tr><td>Events</td><td>Event name</td></tr></table></td></tr>
<tr><td>Object 2
Attendee</td><td><table><tr><td>Field label</td><td>Data type</td></tr><tr><td>Attendees</td><td>Attendee name</td></tr></table></td></tr>
<tr><td>Object 3
Speaker</td><td><table><tr><td>Field label</td><td>Data type</td></tr><tr><td>Speakers</td><td>speaker name</td></tr></table></td></tr>
<tr><td>Object 4
Vendor</td><td><table><tr><td>Field label</td><td>Data type</td></tr><tr><td>Vendors</td><td>Vendor name</td></tr></table></td></tr>
</table>

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,Postalcodeand Username must be unique.
3.Click sign me up,after a few min you will reserve a mail 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 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

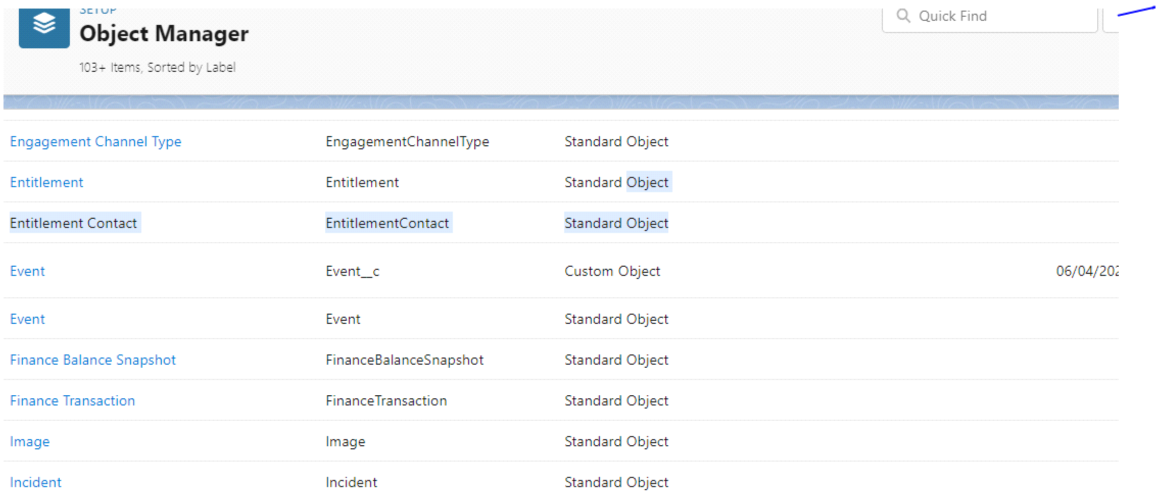
c. Plural Label: Vendors

d. Record Name: Vendor Name

e. Check the Allow Reports checkbox

f. Check the Allow Search checkbox

g. Click Save



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.

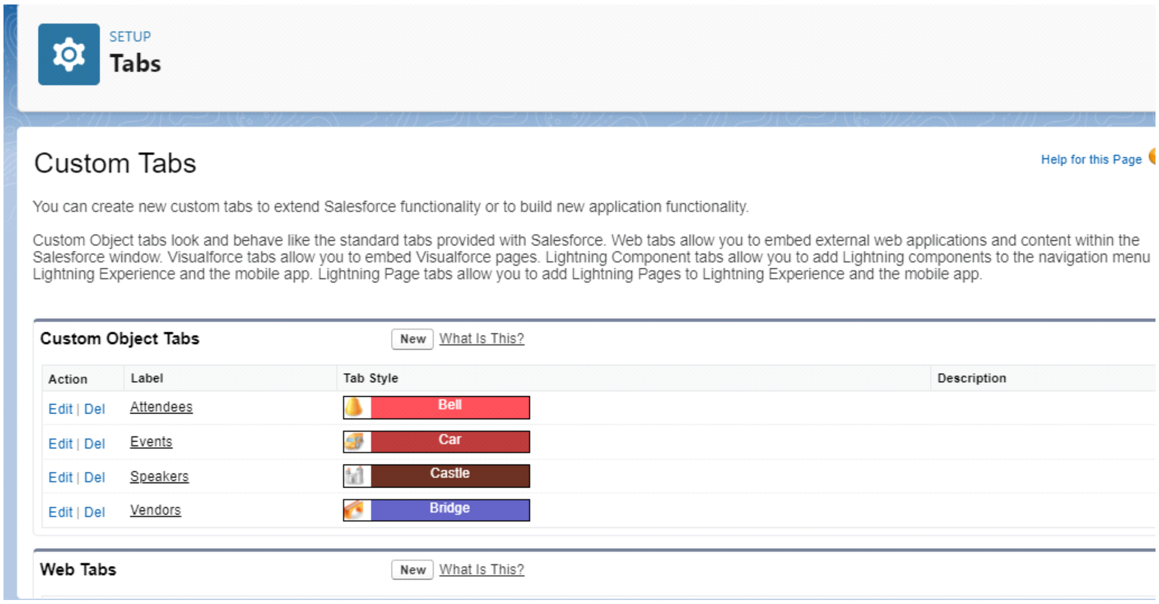
1. Click on Home tab, enter Tabs in Quick Find and select Tabs.

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.



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

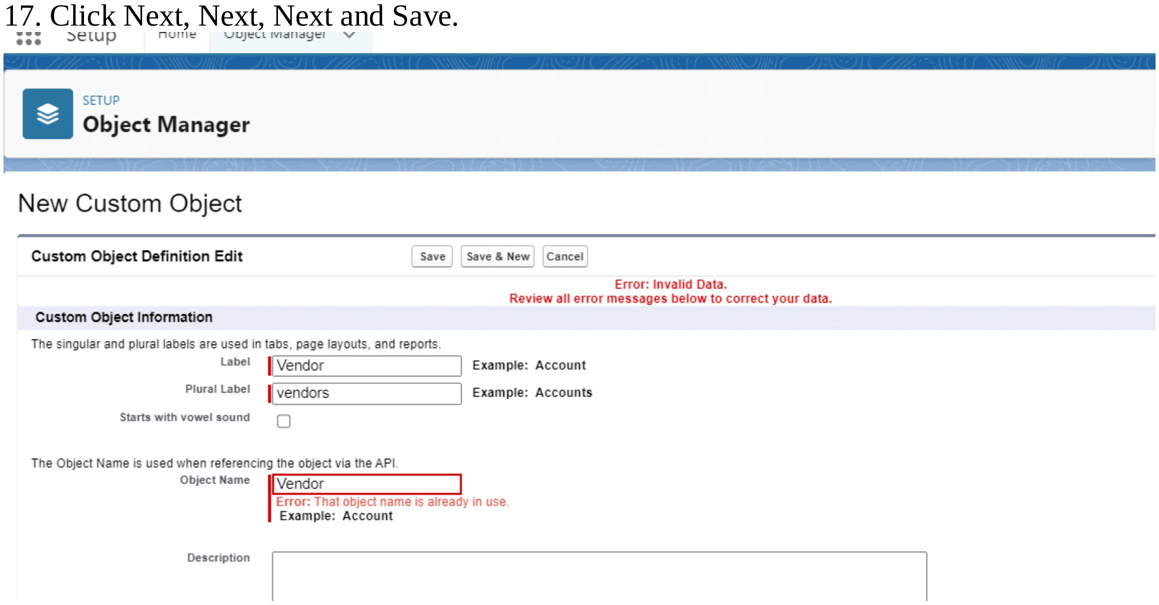
Let's create a Look-up relationship with Event object

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.



Milestone 5.

Activity 1:

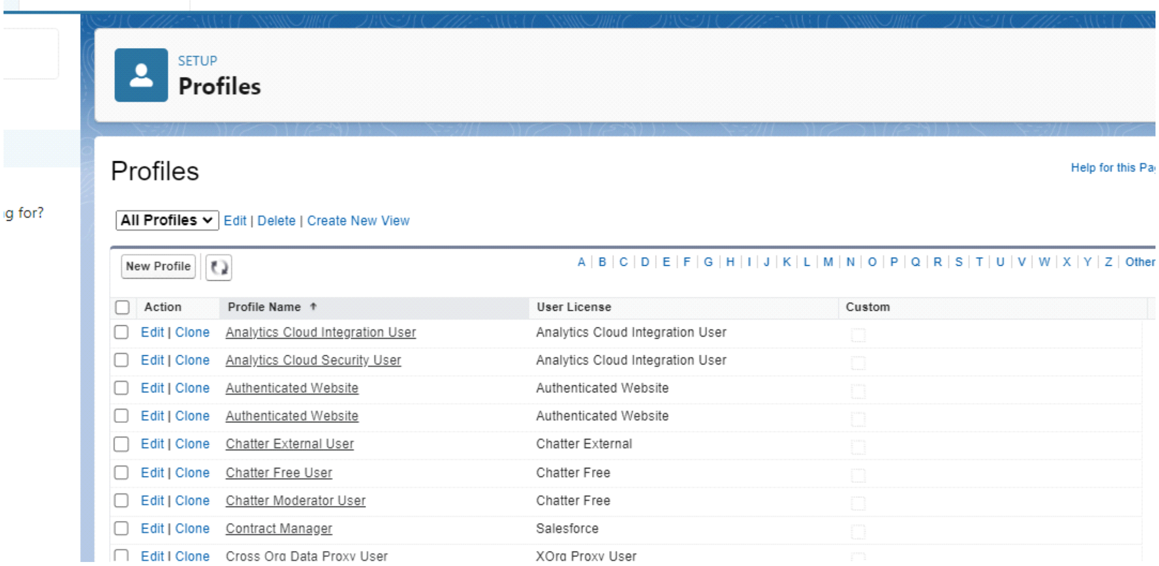
Creation on profile:

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.



Milestone 6

Activity 1:

Creating a User:

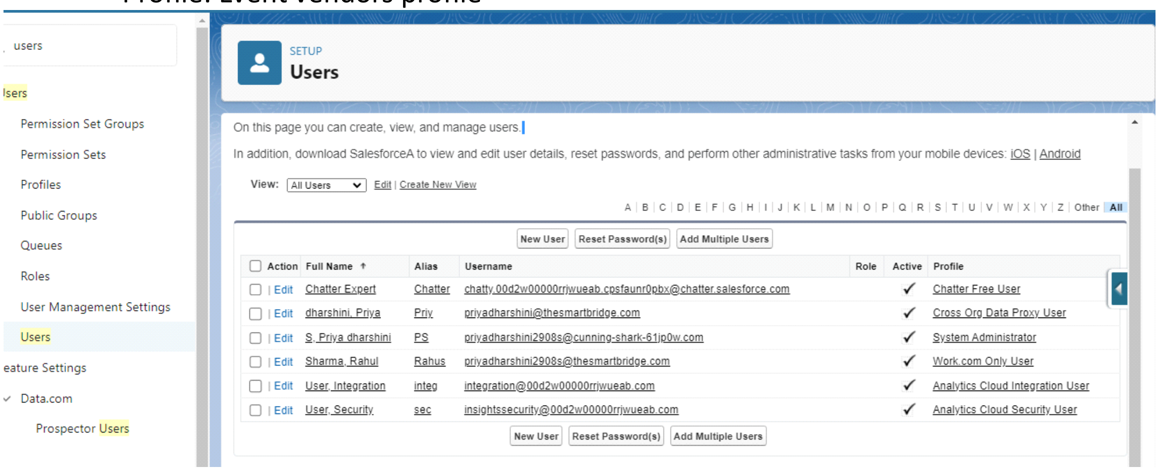
From setup type “users” in quick find and select users, then click **New User**

- • 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: Rahus
- • 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



Milestone 7

Activity 1:

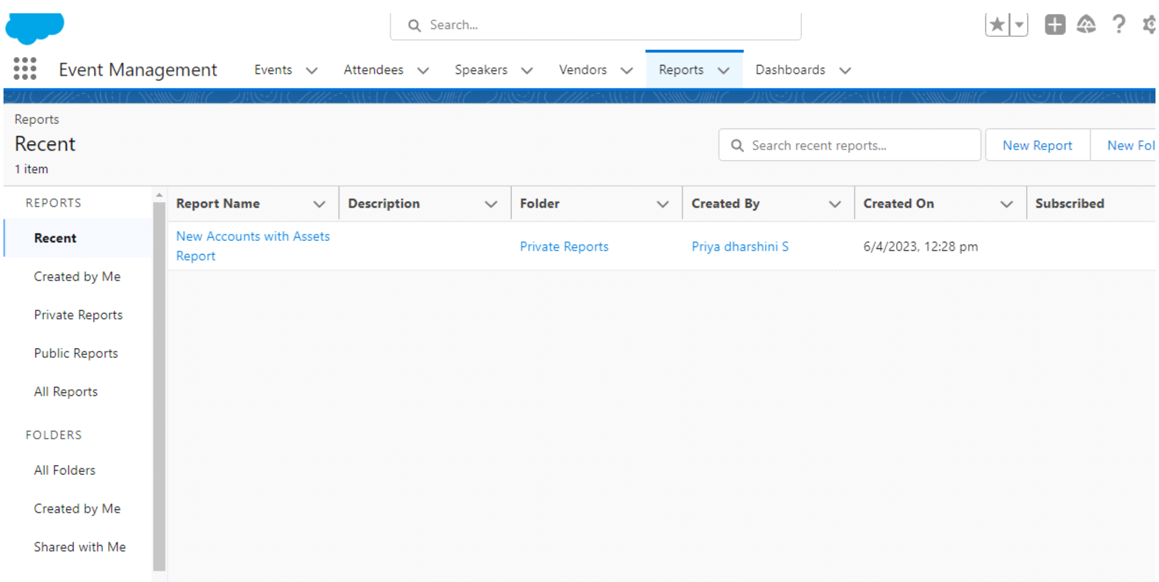
Creating a Permission Set:

- • 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.



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 semanticas problematic.

>cycles may be problamatic.

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

>Indireaction 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 postioning 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 conerns

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.