

BHARATHI WOMEN'S COLLEGE (AUTONOMOUS)

CHENNAI -600108

**BUILD AN EVENT MANAGEMENT SYSTEM USING A SALES
FORCE**

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OBJECTIVE :

- ❖ The main objectives of event management software is to provide basis of service assurance, reporting and service improvement.
- ❖ Event management software helps event planner to speed up process of event planning.
- ❖ Event management software is famous in today's world because it is used for creation and development of large-scale events such as festivals , conferences, ceremonies, weddings, formal parties, or conventions, trade exhibitions etc.,,



1.INTRODUCTION :

1.1 overview :

- **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.**
- **All different branches of planning go into event management, including various types of sourcing, designing, regulation checks, and on-site management. In event management, you could be in the process of creating a conference, a product launch, an internal sales kick-off, or even a wedding. Really, any event that requires considerable planning and execution is event management.**

1.2 PURPOSE :

- **Group of people will convene in one particular place for one particular purpose at a given time**

- Event management is the systematic procedure of creating and developing, organizing and holding of large-scale events such as trade shows and business meets.
- These events also include conferences and conventions.
- There are several high-level steps that you need to follow to ensure that an event is successful.



PROJECT DESCRIPTION :

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. *Real Time Salesforce Project*

2. *Object & Relationship in Salesforce*

3. *Create Salesforce Org*

2.PROBLEM DEFINITION & DESIGN THINKING :

2.1 EMPATHY MAP :

- **Threats to validity**
- **Internal validity**
- **External validity**

1000

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Techniques

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the point as you type and then you
point at the top of the screen. You can do
this if you want.

We do our best but we're not perfect.
Let us know your opinion.

[illegible]

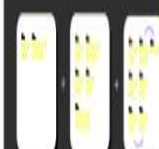
Don't worry about your child with a learning difference or disability in school. They do very well in our program. You can learn a lot more in our class. It's a whole new experience for you and your child. You will love it. We will love you.

Your team should all be on the same page about what's important moving forward. Place your ideas on this grid to determine which ideas are important and which are feasible.

Ⓢ 20 minutes



For an example of how to use images to get a clear idea of what you're getting, visit www.fox.com.



3. RESULT

3.1 DATA MODEL :

Object name	Fields in the object	
	Field label	Data type
Object 1	Event	Event name
	Attendance	Attendance name
Object 2	Speaker	Speaker name
	Vendors	Vendor name

3.2 ACTIVITY & SCREENSHOT

MILESTONE -1 :

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.

So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this: <https://youtu.be/r9EX3lGde5k>

There are 5 types of salesforce editions:

1. Essentials: Designed for small businesses getting started with CRM to boost sales or service productivity. It includes a setup assistant and administration tools to customize your deployment as you grow.
2. Professional: Designed for businesses requiring full-featured CRM functionality. It includes straightforward and easy-to-use customization, integration, and administration tools to facilitate any small to midsize deployment.

3. Enterprise: Meets the needs of large and complex businesses. It gives you advanced customization and administration tools, in addition to all the functionality available in Professional Edition, that can support large-scale deployments. Enterprise Edition also includes access to Salesforce APIs, so you can easily integrate with back-office systems.

4. Unlimited: Maximizes your success and extends it across the entire enterprise through the Lightning Platform. It gives you new levels of platform flexibility for managing and sharing all your information on demand. Includes all Enterprise Edition functionality, Premier Support, full mobile access, unlimited custom apps, increased storage limits, and other features.

5. Developer: Provides access to the Lightning Platform and APIs. It lets developers extend Salesforce, integrate with other applications, and develop new tools and applications. Developer Edition also provides access to many of the features available in Enterprise Edition.

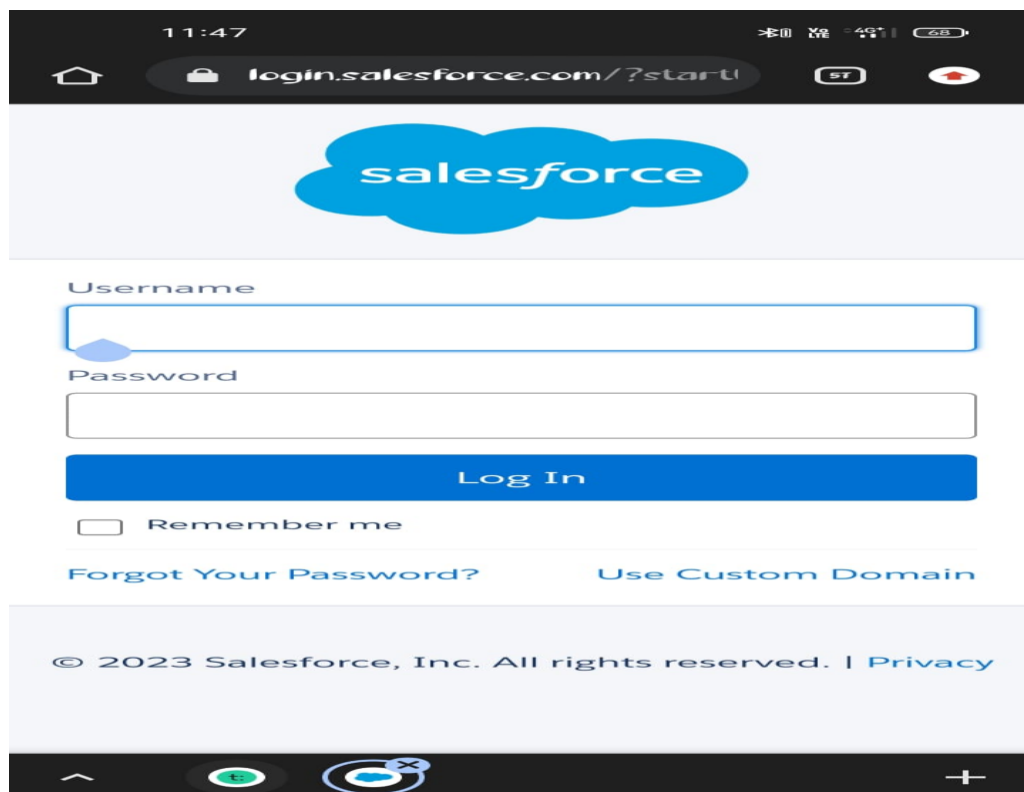
NOTE: Salesforce doesn't provide technical support for Developer Edition. But you can ask for help from developer community message boards after you register for the Lightning Platform developer website: developer.salesforce.com.

ACTIVITY :

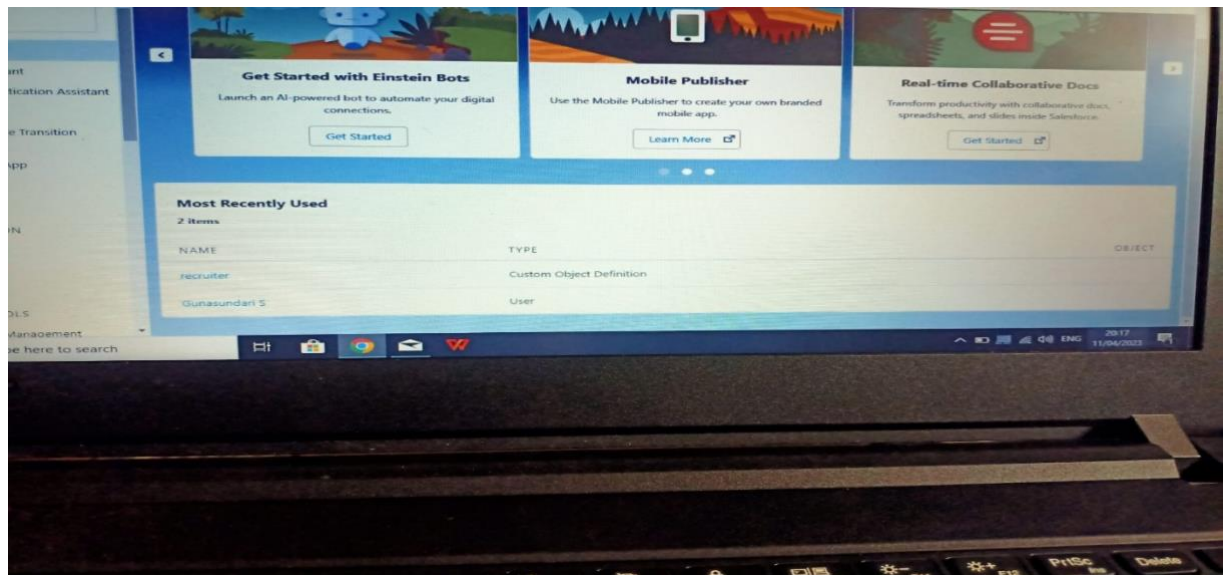
CREATING A SALESFORCE DEVELOPER ORG :

A Developer org has all the features and licenses you need to get started with Salesforce.

1. Search Developer.salesforce.com



The screenshot shows the Salesforce login page on a mobile device. At the top, the status bar displays the time 11:47, signal strength, Wi-Fi, and battery level at 68%. The browser address bar shows the URL login.salesforce.com/?startUrl. The Salesforce logo is centered below the address bar. Below the logo are two input fields: "Username" and "Password". A blue "Log In" button is positioned below the password field. Underneath the button is a checkbox labeled "Remember me". At the bottom of the login section, there are two links: "Forgot Your Password?" and "Use Custom Domain". The footer contains the copyright notice "© 2023 Salesforce, Inc. All rights reserved." and a link to the "Privacy" policy. The mobile home indicator bar is visible at the very bottom.



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 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 enter the salesforce org.

OBJECT :

Milestone 2 – Object:

What is an object?

Salesforce objects are database tables that permit you to store data that is specific to an organization. It consists of fields (columns) and records (rows).

Salesforce objects are of two types:

- **Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
- **Custom Objects:** Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization.

They are the heart of any application and provide a structure for sharing data.

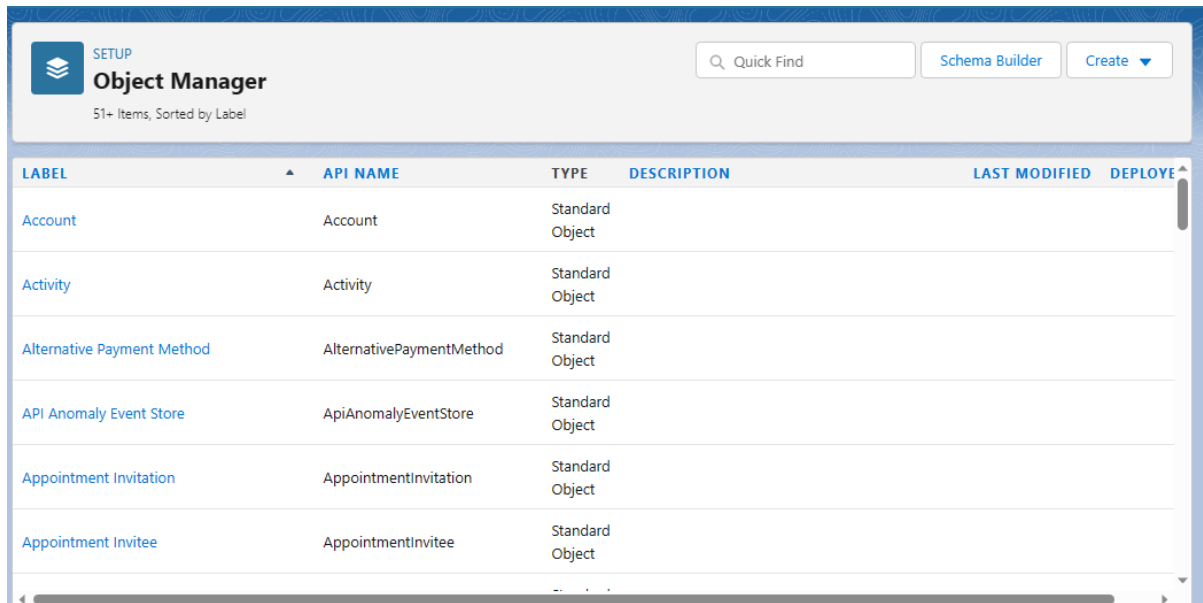
Activity 1:

Creation of Objects for Event Management:

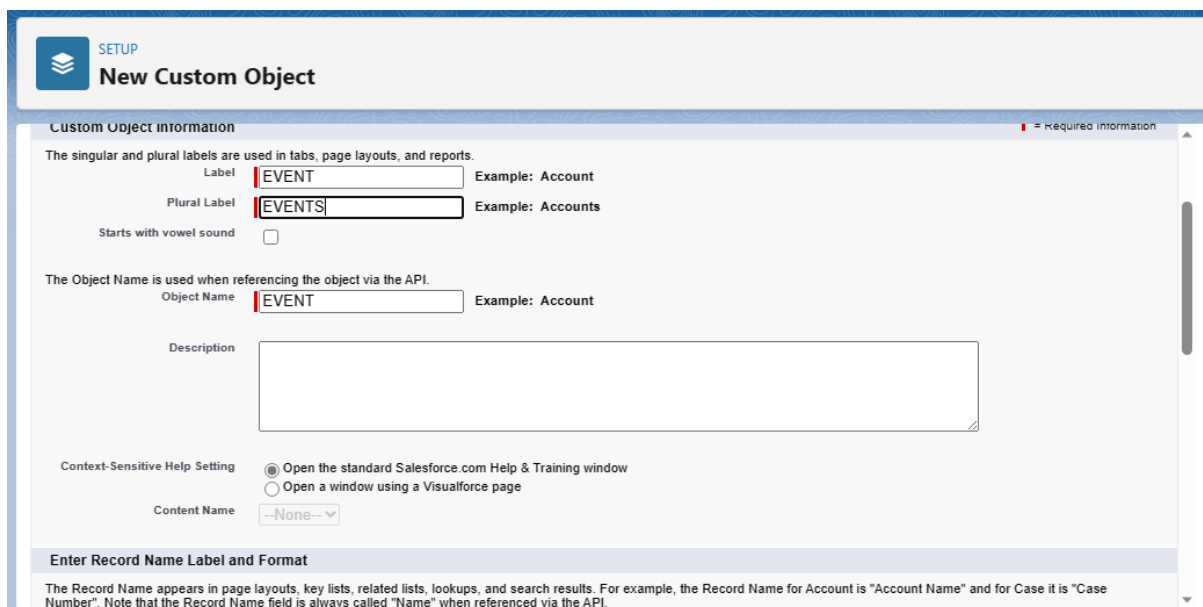
For this Event management we need to create 4 objects

i.e Events, Attendees, Speakers and vendors. The below steps will assist you in creating those objects.

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



LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOY
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			



SETUP New Custom Object

Custom Object Information * Required information

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

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

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

Object Name Example: Account

Description

Context-Sensitive Help Setting

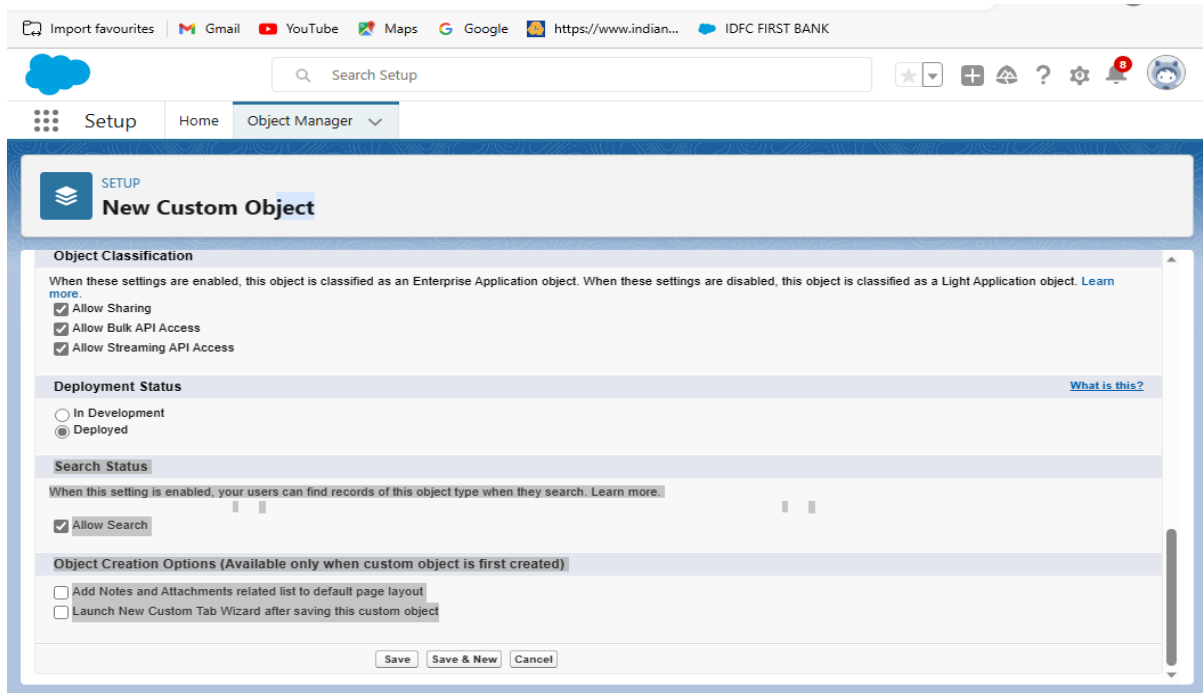
☒ Open the standard Salesforce.com Help & Training window

☐ Open a window using a Visualforce page

Content Name

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.



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.

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

APPLICATION :

Milestone 3— Application:

What is an App?

Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs

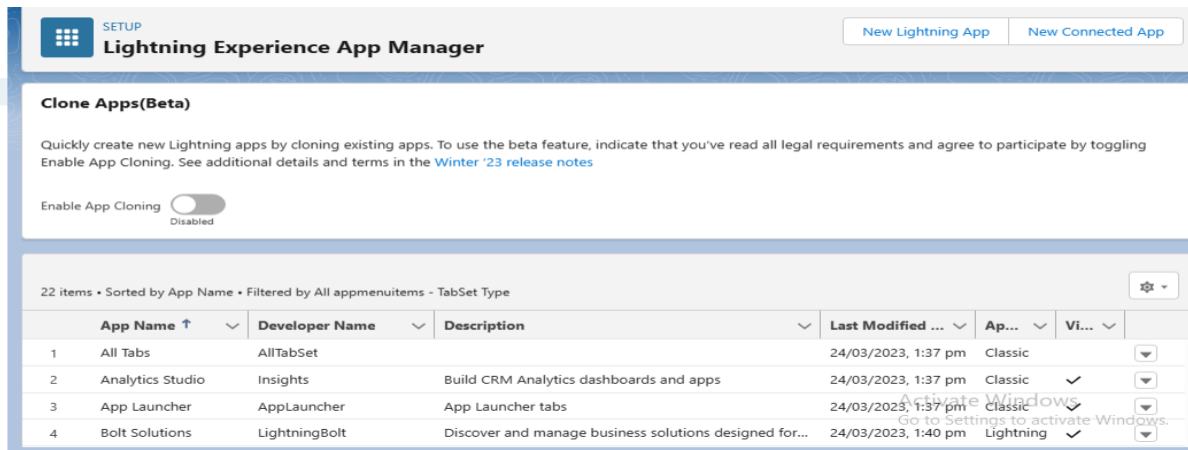
There are 2 types of Salesforce applications:

- Standard apps: these apps come with every occurrence of Salesforce as default. Community, Call Center, Content, Sales, Marketing, Salesforce Chatter, Site.com, and App Launcher are included in these apps. The description, logo, and label of a standard app cannot be altered
- Custom apps: these apps are created according to the needs of a company. They can be made by putting custom and standard tabs together. Logos for custom apps can be changed. Activity Create the Event Management Construction app
- From Setup, enter App Manager in the Quick Find and select App Manager.
- Click New Lightning App. Enter Event Management as the App Name, then click Next
- Under App Options, leave the default selections and click Next.
- Under Utility Items, leave as is and click Next.
- From Available Items, select Events, Attendees, speakers, vendors, Reports, and Dashboards and move them to Selected Items. Click Next.
- From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.
- To verify your changes, click the App Launcher, type School Management and select the School Management app.

Note: 1. App Launcher-Displays available apps.

2. App Name-Displays the current selected app.

3. Navigation menu-Displays the tabs available inside the app.



TABS :

Milestone 4 – Tab:

Tabs in Salesforce help users view the information at a glance. It displays the data of objects and other web content in the application.

There are mainly 4 types of tabs:

Standard Object Tabs:

Standard object tabs display data related to standard objects.

Custom Object Tabs:

Custom object tabs display data related to custom objects.

These tabs look and function just like standard tabs. Web Tabs: Web Tabs display any external Web-based application or Web page in a Salesforce tab. Visualforce Tabs: Visualforce Tabs display data from a Visualforce Page.

NOTE: we wont be dealing with web tabs and visualforce tabs later.

Activity 1: Creation of Event 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 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.

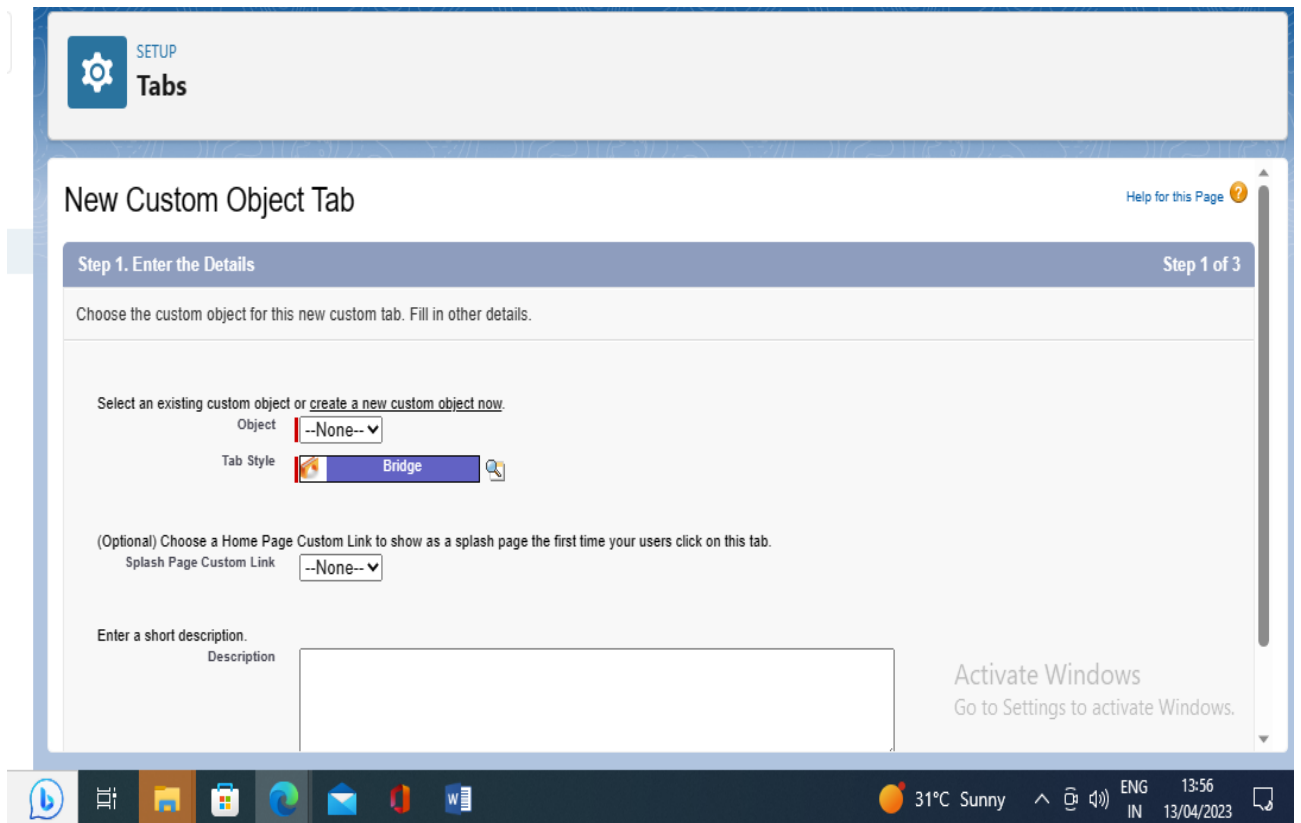
1. Click on Home tab, enter Tabs in Quick Find and select Tabs.
2. Under custom object tabs, click New.
3. For Object, select Speaker.
4. For Tab Style, select any icon.
5. Leave all defaults as is. Click Next, Next, and Save.

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.



USERS :

Milestone 5 – User:

What is a user?

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

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

SETUP
Users

All Users

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](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other

New User
Reset Password(s)
Add Multiple Users

<input type="checkbox"/> Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d2w00000rqcrkeaf.i2k4cjnzpiri@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	sulthana, sameera	ssult	ss.sameerasulthana.e@gmail.com		<input checked="" type="checkbox"/>	Cross Org Data Proxy User
<input type="checkbox"/> Edit	Sulthana E, Sameera	SSult	sameera@bwc.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User, Integration	integ	integration@00d2w00000rqcrkeaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User, Security	sec	insightssecurity@00d2w00000rqcrkeaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User
Reset Password(s)
Add Multiple Users

Activate Windows
Go to Settings to activate Windows.

PROFILE :

Milestone 6 – Profile:

What is a profile?

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges. A profile can be assigned to many users, but user can be assigned single profile at a time.

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.




SETUP
Profiles

Profiles

[Help for this Page](#)

All Profiles ▼
 [Edit](#)
[Delete](#)
[Create New View](#)

New Profile 

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other A

<input type="checkbox"/>	Action	Profile Name ↑	User License	Custom
<input type="checkbox"/>	Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Chatter External User	Chatter External	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Contract Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/>	Edit Del ...	Custom: Marketing Profile	Salesforce	<input checked="" type="checkbox"/>

1-25 of 40 ▼
 0 Selected ▼
 << < Previous Next >>

Activate Windows
 Go to Settings to activate Windows

 Page | 1 | 0

PERMISSION SET :

Milestone 7 – Permission sets:

What is a permission set?

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles. Create permission sets to grant access among logical groupings of users, regardless of their primary job function. For example, let's say you have several users who must delete and transfer leads. You can create a permission set based on the tasks that these users must perform and include the permission set within permission set groups based on job functions.

Activity 1: Creating a Permission Set:

- From setup search "permission sets" in quick find and select permission set then click
- 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:

- 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

SETUP
Permission Sets

Permission Set
Create

Save Cancel

Enter permission set information ■ = Required Information

Label

API Name

Description

Session Activation Required ☐

Select the type of users who will use this permission set

Who will use this permission set?

-Choose 'None' if you plan to assign this permission set to multiple users with different user and permission set licenses.
-Choose a specific user license if you want users with only one license type to use this permission set.
-Choose a specific permission set license if you want this permission set license only assigned with the permission set.

Activate Windows
Go to Settings to activate Windows.

FIELD :

Milestone 8 – Fields:

What are fields?

Fields in Salesforce represents what the columns represent in relational databases. It can store data values which are required for a particular object in a record.

There are 2 types of fields in salesforce:

- Standard fields: There are four standard fields in every custom object that are Created By, Last Modified By, Owner, and the field created at the time of the creation of an object. These fields cannot be deleted or edited and they are always required. For standard objects, the fields which are present by default in them and cannot be deleted from standard objects are standard fields.
- Custom fields: The Custom fields which are added by the administrator/developer to meet the business requirements of any organization. They may or may not be required.

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 datatype. 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.

The screenshot shows the Salesforce Setup interface for the 'Loan' object. The left sidebar contains a navigation menu with 'Details' selected. The main content area is titled 'Edit Loan Custom Field' and 'Loan amount'. Below this is the 'Custom Field Definition Edit' form. The form includes fields for 'Field Label' (Loan amount), 'Field Name' (Loan_amount), 'Description', and 'Help Text'. There are also dropdown menus for 'Data Owner' (User), 'Field Usage' (--None--), and 'Data Sensitivity Level' (--None--). At the bottom, there is a 'Compliance Categorization' section with 'Available' and 'Chosen' lists. The 'Available' list contains 'PII', 'HIPAA', and 'GDPR'. The 'Chosen' list is empty. The form has 'Save', 'Quick Save', and 'Cancel' buttons at the top right. A 'Help for this Page' link is also present. The bottom right corner of the page has a watermark that says 'Activate Windows Go to Settings to activate Windows.'

8. REPORTS :

Milestone 9 - Reports

What are Reports?

Reports in Salesforce is a list of records that meet a particular criterion which gives an answer to a particular question. These records are displayed as a table that can be filtered or grouped based on any field.

There are 4 types of report formats in Salesforce:

1. **Tabular Reports:** This is the most basic report format. It just displays the row of records in a table with a grand total. While easy to set up they can't be used to create groups of data or charts and also cannot be used in Dashboards. They are mainly used to generate a simple list or a list with a grand total.
2. **Summary Reports:** It is the most commonly used type of report. It allows grouping of rows of data, view subtotal, and create charts.
3. **Matrix Report:** It is the most complex report format. Matrix report summarizes information in a grid format. It allows records to be grouped by both columns and rows. It can also be used to generate dashboards. Charts can be added to this type of report.
4. **Joined Reports:** These types of reports let us create different views of data from multiple report types. The data in joined reports are organized in blocks. Each block acts as a subreport with its own fields, columns, sorting, and filtering.

They are used to group and show data from multiple report types in different views. Report types: Report type determines which set of records will be available in a report. Every report is based on a particular report type. The report type is selected first when we create a report.

Every report type has a primary object and one or more related objects. All these objects must be linked together either directly or indirectly.

- A report type cannot include more than 4 objects.
- Once a report is created its report type cannot be changed.

There are 2 types of report types:

1. **Standard Report Types:** Standard Report Types are automatically included with standard objects and also with custom objects where "Allow Reports" is checked. Standard report types cannot be customized and automatically include standard and custom fields for each object within the report type. Standard report types get created when an object is created, also when a relationship is created.

Note: Standard report types always have inner joins.

2. **Custom Report Types:** Custom report types are reporting templates created to streamline the reporting process. Custom Reports are created by an administrator or User with "Manage Custom Report Types" permission. Custom report types are created when standard report types cannot

specify which records will be available on reports. In custom report types we can specify objects which will be available in a particular report. The primary object must have a relationship with other objects present in a report type either directly or indirectly.

There are 3 types of access levels of folders:

1. Viewer: With this access level, users can see the data in a report but cannot make any changes except cloning it into a new report.
2. Editor: With this access level, users can view and modify the reports it contains and can also move them to/from any other folders they have access level as Editor or Manager.
3. Manager: With this access level, users can do everything Viewers & Editors can do, plus they can also control other user's access levels to this folder. Also, users with Manager Access levels can delete the report.

Activity Creating a Report:

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 LEADER–E.SAMEERA SULTHANA- <https://trailblazer.me/id/ssulthanae>

TEAM MEMBER1-H.PREETHA-<https://trailblazer.me/id/preeh4>

TEAMMEMBER2-P.THENMOZHI-<https://trailblazer.me/id/thenp2>

TEAM MEMBER3-N.RESHMA- <https://trailblazer.me/id/rnreshma>

TEAM MEMBER4-P.PRIYADHARSHINI- <https://trailblazer.me/id/pdharshini104>

PROJECT REPORT TEMPLATE

5.ADVANTAGES & DISADVANTGES :

Advantages	Disadvantages
<ul style="list-style-type: none">• forces organisations to look ahead	<ul style="list-style-type: none">• can be time consuming and expensive
<ul style="list-style-type: none">• improved fit with the environment	<ul style="list-style-type: none">• may be difficult in rapidly changing markets
<ul style="list-style-type: none">• better use of resources	<ul style="list-style-type: none">• can become a straightjacket
<ul style="list-style-type: none">• provides a direction/vision	<ul style="list-style-type: none">• some unplanned for opportunities may be missed
<ul style="list-style-type: none">• helps monitor progress	<ul style="list-style-type: none">• can become bureaucratic
<ul style="list-style-type: none">• ensures goal congruence	<ul style="list-style-type: none">• is less relevant in a crisis

ADVANTAGES :

1. Easier Management :

Event management software helps you keep track of all of your event's moving parts to help your event run more smoothly. This makes your event much easier to organise than manually managing the project and organising all elements separately. Companies such as ClueGo use event management software and it is a game changer for them.

The EventsAir dashboard acts as a centralised hub where all elements of your event can be managed. From marketing, analytics, schedule, speakers, and guests to communication, venue, registration, payments, reporting, and promotion, EventsAir keeps everything connected. It is holistic and brings everything you need for a successful event together in one place for simpler, more efficient event management software.

2.Save Time :

EventsAir will help you save time through automating all processes. From registration tracking and bookings to payment processing and follow up emails, the software enables you to streamline all processes for quick and seamless execution.

Carrying out all these tasks manually would be incredibly time-consuming and inefficient. With EventsAir, all tasks are centralised in an integrated system where everything you need to manage your event is in one place, making for easy, simple, and efficient event management that saves you time.

3. Cut Costs :

EventsAir enables you to track your spending and analyse it against event budgets with clear and user-friendly dashboards and reporting that allows you to visualise your spending to ensure you achieve a maximised return on investment on your event.

It can be difficult and complicated to manually keep track of a budget on a project that is of such a large scale. With EventsAir, you can see exactly where and when money is going in and out of your project at any time. You can see where you are spending your money and when you receive payments so that you can control expenses, save more, and achieve higher returns.

4. Increase Engagement :

EventsAir has the tools you need to increase engagement and encourage participant communication at all stages of the event – before, during, and after. Attract your target audience and generate excitement and buzz around the event with your website, email campaigns, and social media marketing.

Keep your attendees engaged during the event with digital activities and games, live posts and updates, and gain their feedback with polls. Utilise reporting features to analyse engagement post-event and improve for next time. EventsAir will increase engagement to ensure you gain a larger attendance for greater success

5. Improved Data Collection :

At events, it is difficult to keep a manual log of attendee's details and preferences such as who has been invited and who has paid for their ticket. EventsAir simplifies and streamlines this process for easier and more efficient collection of data.

It also makes it easier to capture leads during the event so that you can send personalised emails using segmented email lists. The software also keeps data regularly updated and uses data protection to manage personal data to ensure you comply with current regulations.

DISADVANTAGES :

1.Unconventional work hours :

Event managers often work nights and weekends to complete their responsibilities, sometimes in addition to normal office hours during the weekdays. Event planners may also work during holidays to coordinate seasonal parties and celebrations. While many jobs have a limit to the number of hours for employees to work each day or week, event planners might spend an unlimited amount of time completing their responsibilities. They might work shifts up to 15 hours compared to the traditional nine-hour shift for many professions.

2. Time away from family and friends :

Event planners might travel often to manage their tasks. This can result in time spent away from friends and family members. It might be challenging to maintain relationships when you travel frequently. This profession may also require an event planner to balance their work responsibilities with their responsibilities at home.

3. Job instability :

Event managers that provide their services through freelance opportunities instead of working through an event management company may encounter unstable job conditions. The level of stability for this profession often changes throughout the year. For example, an event manager might plan multiple parties during the holiday season but have fewer clients during the summer months. Consider growing your list of clients throughout your career and searching for new event management opportunities to help with this issue.

4. High level of responsibility :

Event managers are responsible for helping clients plan successful events. This includes resolving any problems that occur in the planning or execution of an event. For example, if a hired vendor is unable to perform their role in an event, you might help find a replacement. It's important for an event manager to stay calm in challenging situations and find solutions to any issues. Another responsibility is managing clients' budgets. Event planners attempt to fulfill their clients' requests while maintaining their monetary resources.

6. APPLICATION :

BUILD AN EVENT MANAGEMENT SYSTEM USING SALESFORCE APPLICATION



**There are many benefits to
using a mobile app for your event
that are listed below**
Promote Your Event
Sounds strange, right?
Sell Event Tickets
Targeted Digital Marketing
Drive Pre-event Engagement
Push Notifications
Enables Effective Communication
Establish An Attendee Network
Event Apps Help With Branding

Event management is the application of project management to the creation and development of small and/or large-scale personal or corporate events such as festivals, conferences, ceremonies, weddings, formal parties, concerts, or conventions. It involves studying the brand, identifying its target audience, devising the event concept, and coordinating the technical aspects before actually launching the event.

7. FUTURE SCOPE :

BUILD AN EVENT MANAGEMENT USING SALESFORCE FUTURE SCOPE



Yes, it is. 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.

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.

Several job designations that you can hold in the event management and exhibition industry are as follows:

- Event planne
- Creative conceptualizer
- Creative director
- Coordinator
- Event manager
- Public relations officer
- Event legal executive
- Event executive
- Finance manager

With that said, it's important to remember the responsibility that is bestowed upon you in the event management industry. You're just not planning out the events of your clients, you are planning and shaping their memories which they will cherish forever.

8. CONCLUSION :

CONCLUSION



- We are trying to achieved our target, to make possible to provide online information to all events which is organized by colleges with thier students details and college name.
- It provides a user friendly, error free environment to manage large amount of data.

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. SolutionDot always keep your objectives and goals on top priority while developing any plan of work.