

BUILD AN EVENT MANAGEMENT SYSTEM USING SALESFORCE

1.INTRODUCTION:

1.1 Over view:

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.

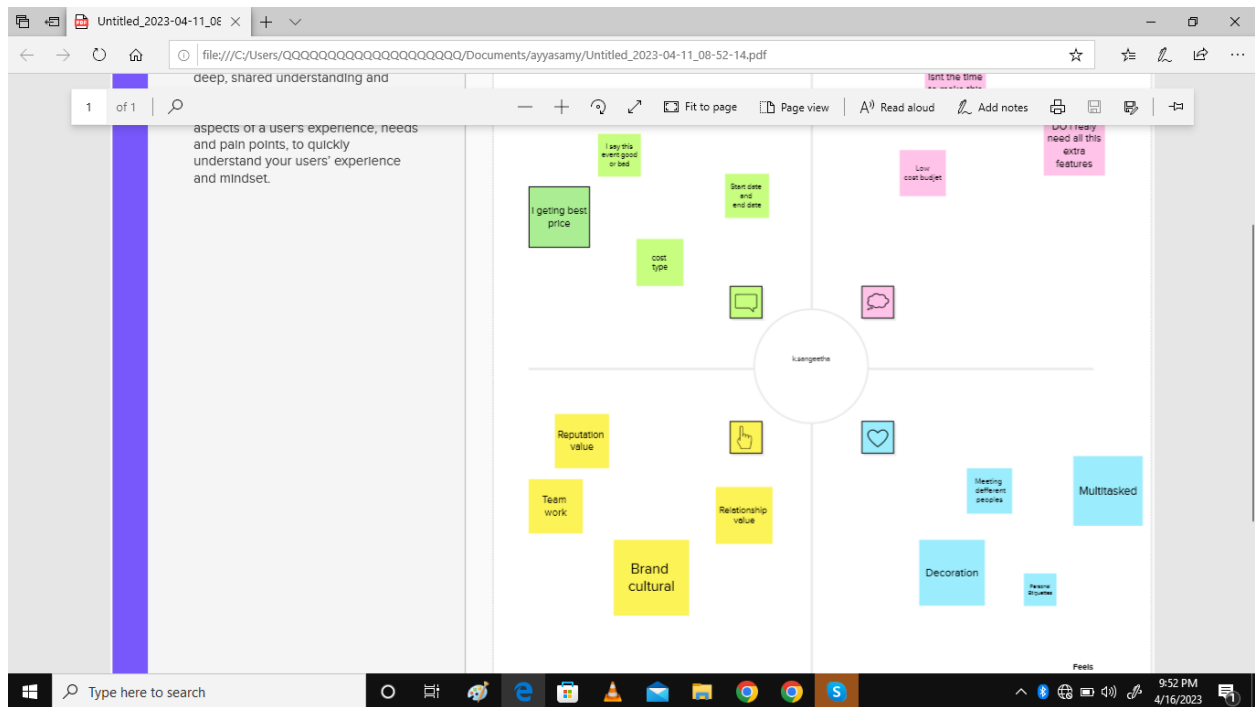
All different branches of planning go into event management, including various types of sourcing, designing, regulation checks, and on-site management. In event management, you could be in the process of creating a conference, a product launch, an internal sales kick-off, or even a wedding. Really, any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

1.2 Purpose :

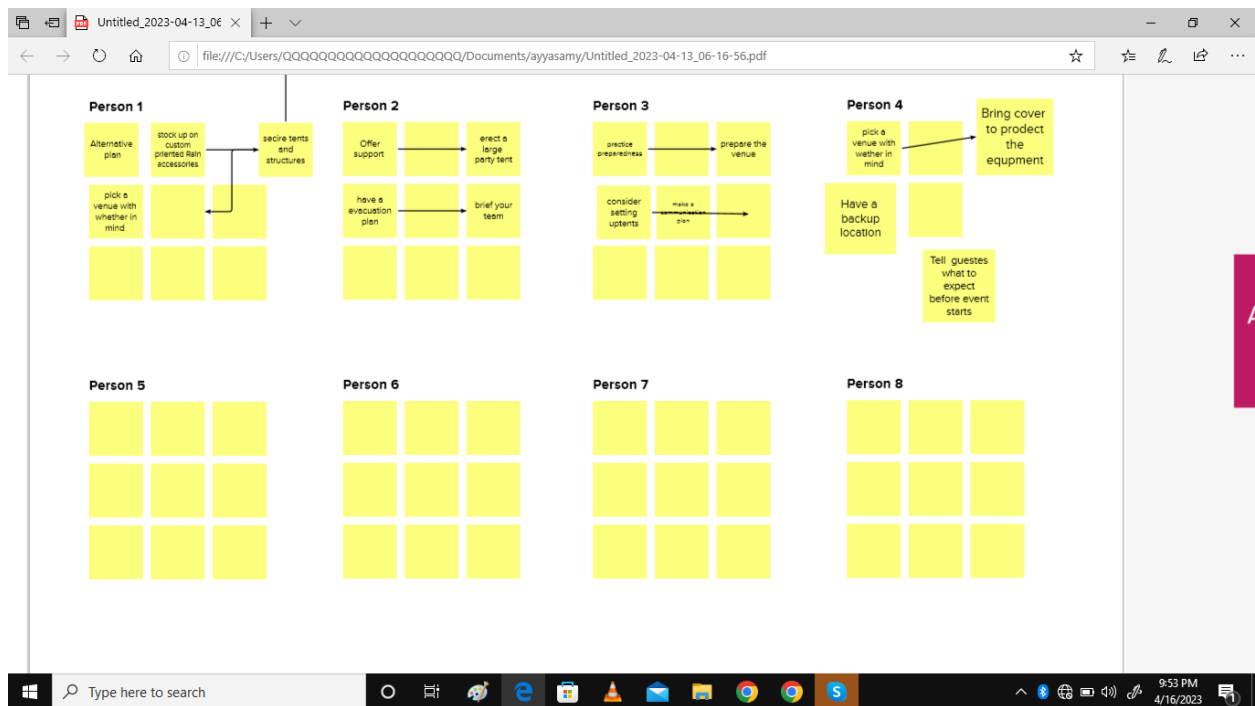
Customer relationship management (CRM) is a technology for managing all your company's relationships and interactions with customers and potential customers. The goal is simple: Improve business relationships. A CRM system helps companies stay connected to customers, streamline processes, and improve profitability

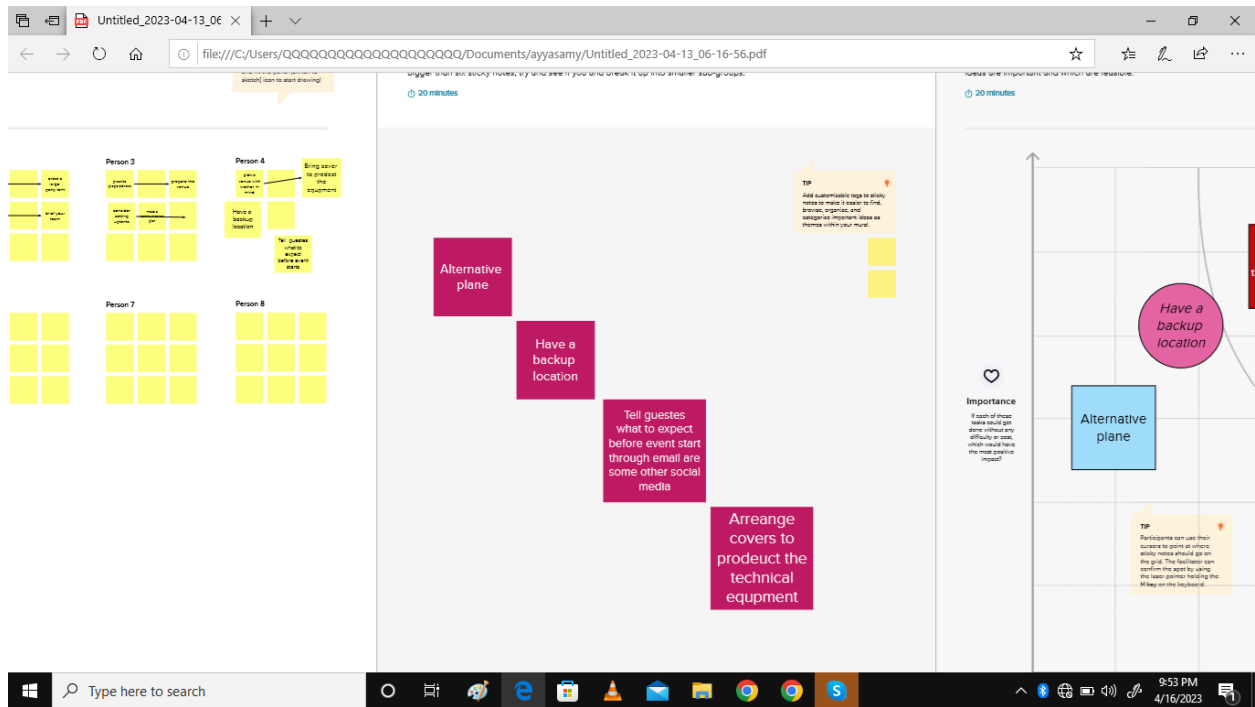
2. PROBLEM DEFINITION&DESIGN THINKING:

2.1 Empathy map:



2. Ideation & Brainstorming Map:2





Result

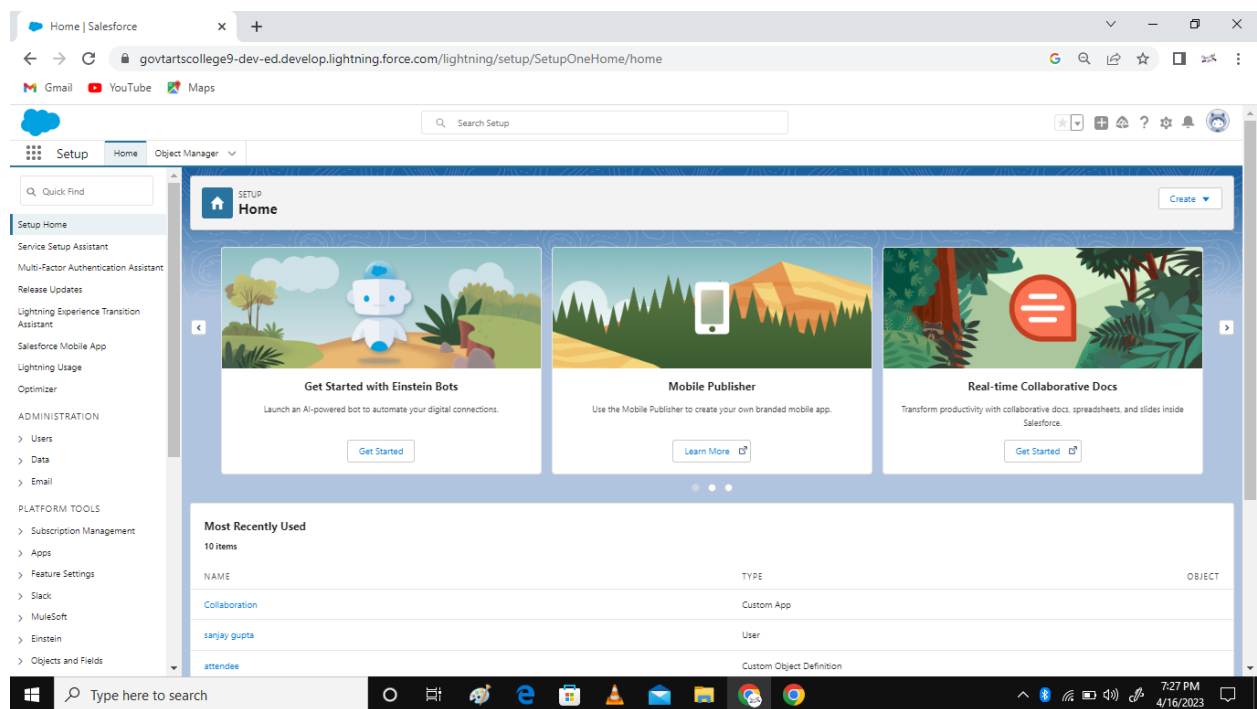
Data model:

Object name	Field in the lable	
Events	Field lable	Data Type
	Enter city	Text
	Enter start date	Date\time

Attendees	Enter ID	Number	
	Phone	Phone	
	Email	Email	
	Enter tickets	Pick list	
	Event	Master – details relationship	
Speakers	Enter Bio	Text area	
	e-mail	Email	
	Event	Look-up relationship	
Vendors	e-mail	E-mail	
	Phone	Phone	
	Service provider	Text	
	Event	Look-up relation	

3.2 Activity & screenshot:

MILESTONE -01:



MILESTONE -02:

OBJECT:

VONDER OBJECTS:

Account | Salesforce

govtartscollege9-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Account/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

Account

Details

Fields & Relationships

33 Items. Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account Name	Name	Name		✓
Account Number	AccountNumber	Text(40)		
Account Owner	OwnerId	Lookup(User)		✓
Account Site	Site	Text(80)		
Account Source	AccountSource	Picklist		
Active	Active__c	Picklist		
Annual Revenue	AnnualRevenue	Currency(18, 0)		
Billing Address	BillingAddress	Address		
Clean Status	CleanStatus	Picklist		✓
Created By	CreatedBy	Lookup(User)		
Customer Priority	CustomerPriority__c	Picklist		
D&B Company	DandbCompanyId	Lookup(D&B Company)		✓
D-U-N-S Number	DunsNumber	Text(9)		

Type here to search

7:28 PM 4/16/2023

Screenshot of the Salesforce Setup interface for the 'vendor' object.

Browser Tabs: Student, vendor | Salesforce

URL: govartscollege9-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003GvIN/Details/view

Setup Navigation: Setup > Object Manager > vendor

Details Panel:

- Description:**
 - API Name: vendor__c
 - Custom: ☒
 - Singular Label: vendor
 - Plural Label: vendors
- Enable Reports:** ☒
- Track Activities:** ☐
- Track Field History:** ☐
- Deployment Status:** Deployed
- Help Settings:** Standard salesforce.com Help Window

Left Navigation Menu:

- Details
- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules
- Triggers

Footer: 1:48 PM 4/21/2023

EVENT OBJECT:

Student event | Salesforce

govtartscollege9-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003GvI3/Details/view

Setup Home Object Manager

event

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Details

Description

API Name
event__c

Custom

Singular Label
event

Plural Label
events

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Edit Delete

Type here to search

1:47 PM
4/21/2023

SPECKER OBJECT:

Student speaker | Salesforce

govtartscollege9-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003GvI/Details/view

Setup Home Object Manager

speaker

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Details

Description

API Name
speaker__c

Custom

Singular Label
speaker

Plural Label
speakers

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

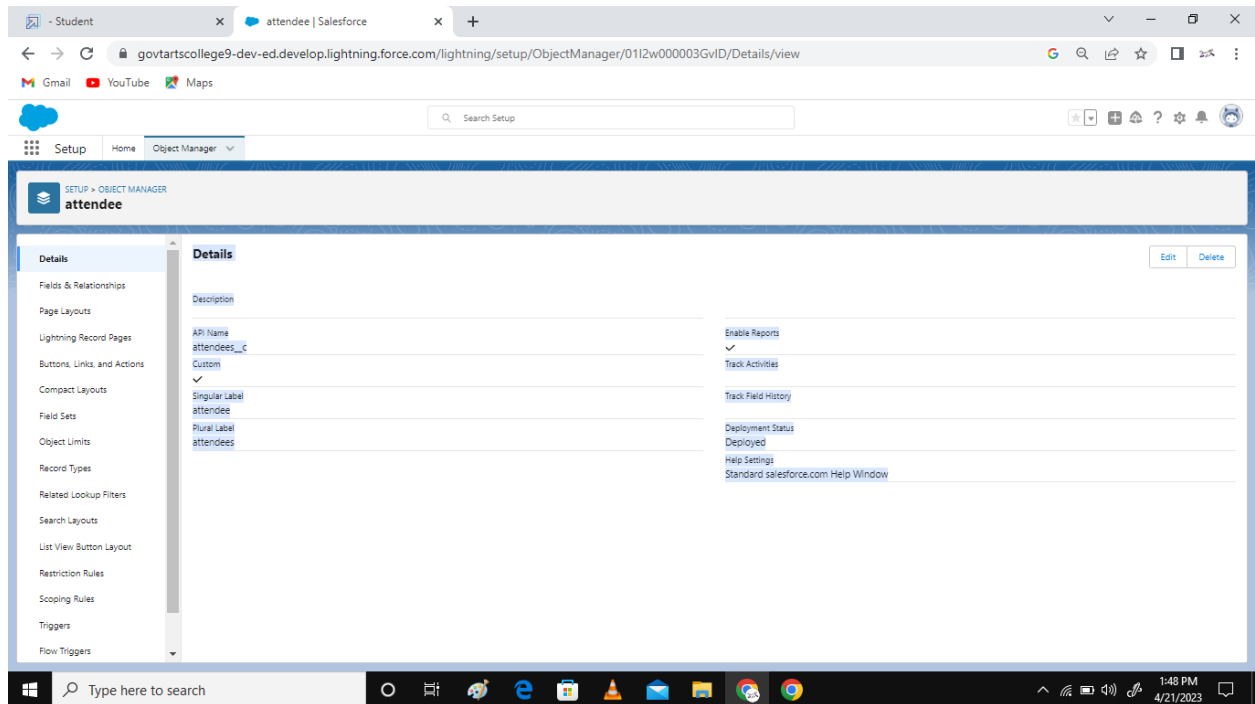
Help Settings
Standard salesforce.com Help Window

Edit Delete

Type here to search

1:47 PM
4/21/2023

ATTENDESS OBJECT:



ACTIVITY 3:

FIELD AND RELATIONSHIP:

VENDOR FIELD:

Screenshot of the Salesforce Setup page for the 'vendor' object. The browser address bar shows the URL: `govtartscollege9-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003GvIN/FieldsAndRelationships/view`. The page title is 'SETUP > OBJECT MANAGER vendor'. The left sidebar shows the navigation menu with 'Fields & Relationships' selected. The main content area displays the 'Fields & Relationships' table for the 'vendor' object, which has 8 items sorted by Field Label.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Authorization Form Text	Authorization_Form_Text__c	Lookup(Authorization Form Text)		✓
Created By	CreatedById	Lookup(User)		
e-mail	e_mail__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓
phone	phone__c	Phone		
service provided	service_provided__c	Text(30)		
vendor Name	Name	Text(80)		✓

EVENT FIELD:

Screenshot of the Salesforce Setup page for the 'event' object. The browser address bar shows the URL: `govtartscollege9-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003GvI3/FieldsAndRelationships/view`. The page title is 'SETUP > OBJECT MANAGER event'. The left sidebar shows the navigation menu with 'Fields & Relationships' selected. The main content area displays the 'Fields & Relationships' table for the 'event' object, which has 8 items sorted by Field Label.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account	Account__c	Master-Detail(Account)		✓
Business Brand	Business_Brand__c	Lookup(Business Brand)		✓
city	city__c	Text(20)		
Created By	CreatedById	Lookup(User)		
end date	end_date__c	Date/Time		
event Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
start date	start_date__c	Date/Time		

SPEAKER FIELD:

The screenshot shows the Salesforce Object Manager interface for the 'speaker' object. The browser address bar indicates the URL: `govtartscollege9-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003Gvll/Details/view`. The page title is 'speaker' under 'OBJECT MANAGER'. The left sidebar contains a navigation menu with the following items: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Triggers, and Flow Triggers. The 'Details' section is active, showing a table of field settings. The table has two columns: 'Field Name' and 'Field Type'. The rows are: 'API Name' (speaker__c), 'Custom' (checked), 'Singular Label' (speaker), 'Plural Label' (speakers), 'Enable Reports' (checked), 'Track Activities' (checked), 'Track Field History' (checked), 'Deployment Status' (Deployed), and 'Help Settings' (Standard salesforce.com Help Window). The 'Edit' and 'Delete' buttons are visible in the top right corner of the details section. The Windows taskbar at the bottom shows the time as 1:49 PM on 4/21/2023.

Field Name	Field Type
API Name	speaker__c
Custom	✓
Singular Label	speaker
Plural Label	speakers
Enable Reports	✓
Track Activities	✓
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

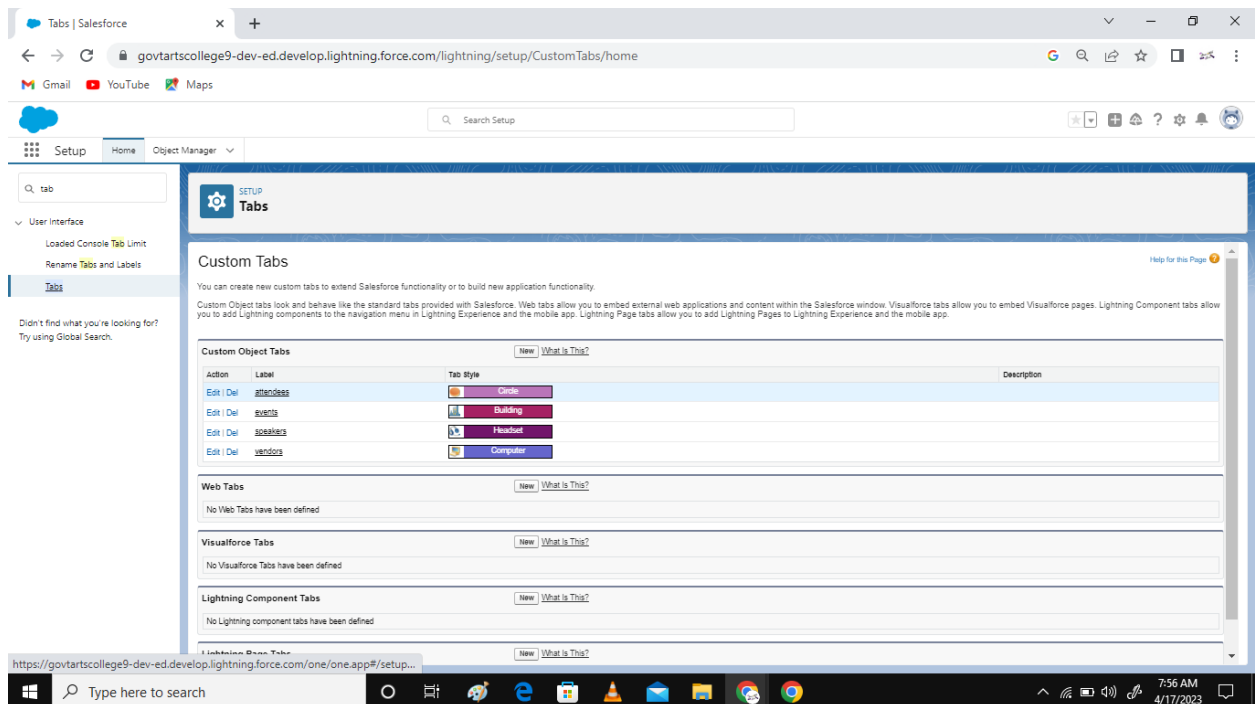
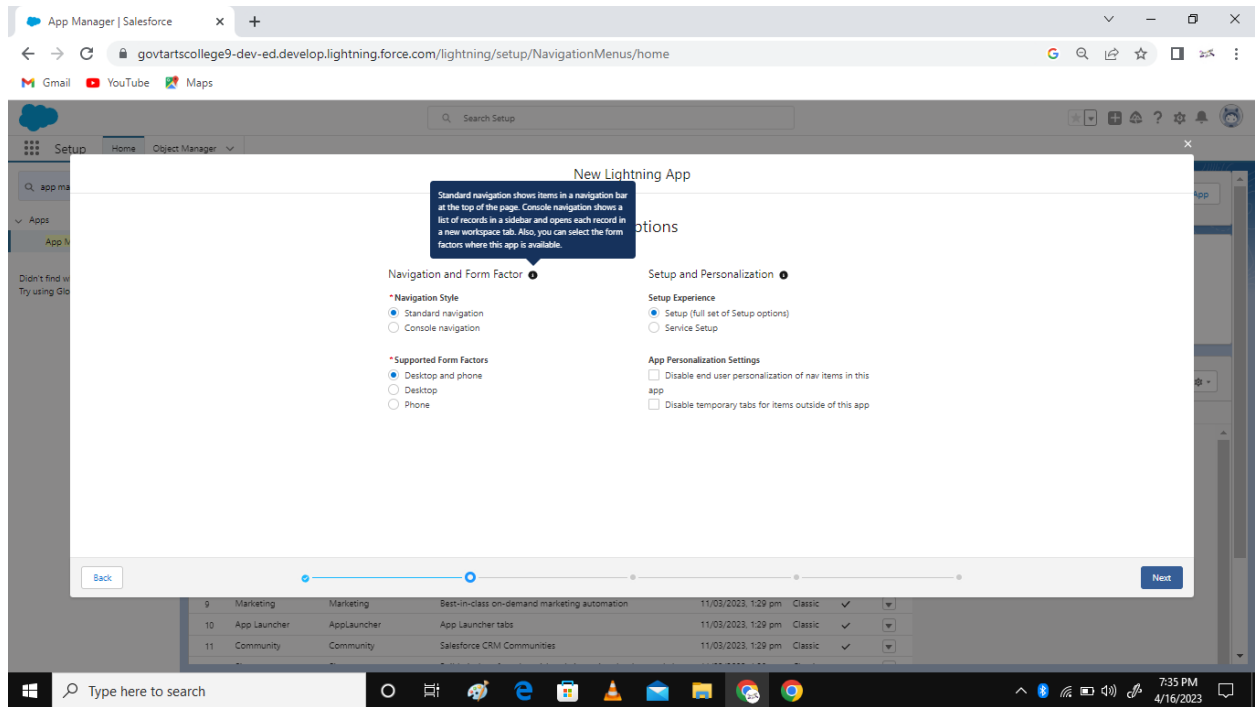
ATTENDESS FIELD:

The screenshot shows the Salesforce Object Manager setup page for the 'attendee' object. The browser address bar displays the URL: `govtartscollege9-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003GvID/Details/view`. The page header includes the Salesforce logo, a search bar, and navigation links for Setup, Home, and Object Manager. The main content area is titled 'SETUP > OBJECT MANAGER attendee' and features a left-hand navigation menu with options like Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Triggers, and Flow Triggers. The 'Details' section on the right contains a table with the following information:

Details	
Description	
API Name	attendees__c
Custom	✓
Singular Label	attendee
Plural Label	attendees
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

The bottom of the image shows the Windows taskbar with the search bar and various application icons.

MILESTONE -04:



MILESTONE -05:

Profiles | Salesforce

govtartscollege9-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home

Search Setup

Setup Home Object Manager

profile

Users

Profiles

Didn't find what you're looking for? Try using Global Search.

SETUP Profiles

Profiles

All Profiles Edit Delete Create New View

New Profile

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

1,25 of 41 0 Selected

Previous Next

Page 1 of 2

https://govtartscollege9-dev-ed.develop.lightning.force.com/one/one.app#/setup/EnhancedProfiles/home

Type here to search

7:57 AM 4/17/2023

MILESTONE -06:

User | Salesforce

govtartscollege9-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/User/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER User

Details

Fields & Relationships

User Page Layouts

User Profile Page Layouts

Lightning Record Pages

Buttons and Links

Compact Layouts

Field Sets

Object Limits

Related Lookup Filters

Search Layouts

List View Button Layout

Triggers

Flow Triggers

Validation Rules

Details

Description

API Name

User

Custom

Singular Label

User

Plural Label

Users

Enable Reports

Track Activities

Track Field History

Deployment Status

Help Settings

Standard salesforce.com Help Window

https://govtartscollege9-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/User/view

Type here to search

7:58 AM 4/17/2023

MILESTONE -07:

Permission Sets | Salesforce

govtartscollege9-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/home

Setup Home Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Didn't find what you're looking for? Try using Global Search.

Permission Sets

On this page you can create, view, and manage permission sets. In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

[All Permission Sets](#) [Edit](#) [Delete](#) [Create New View](#)

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Clone Buyer	Allows access to the store. Lets users see products and categories, make purchases, a...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Clone Buyer Manager	Includes all Buyer capabilities, and allows access to manage carts and orders related to...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Clone CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/>	Clone Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Clone Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Connect as a telephony...	Service Cloud Voice User
<input type="checkbox"/>	Clone Contact Center Agent	Access agent features in Service Cloud Voice contact centers that use Amazon Connect...	Service Cloud Voice User
<input type="checkbox"/>	Clone Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers that use Amazon Co...	Service Cloud Voice User
<input type="checkbox"/>	Del Clone Event permits		
<input type="checkbox"/>	Del Clone Experience Profile Manager		Salesforce
<input type="checkbox"/>	Clone Facility Manager	Lets users create, read, edit, and delete locations, sublocations, queued parties, and qu...	Facility Manager
<input type="checkbox"/>	Clone FieldServiceMobileStandardPermSet	Give your mobile workforce access to the Field Service mobile app. Set them up with th...	Field Service Mobile
<input type="checkbox"/>	Clone Merchandiser	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Seat
<input type="checkbox"/>	Clone Order Management Agent	Read Access to all entities enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Clone Order Management Operations Manager	Access to all features enabled by Order Management	Lightning Order Management User
<input type="checkbox"/>	Clone Order Management Associate	Limited access to Order Management features for Self Service	Lightning Order Management User
<input type="checkbox"/>	Clone Order Management Store Associate	Access to limited features enabled by Order Management	Lightning Order Management User

1:25 of 27 x 0 Selected x Previous Next

Page 1 of 2

MILESTONE -08:

Report Builder | Salesforce

govtartscollege9-dev-ed.develop.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWMiOiJyZXBvcnRzOnJlcG9ydEJ1aWxkZXIiLCJhdHRyaWJ1dGVzIjp7InJlYy...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar People Cases Forecasts events More

Create Report

Category

Recently Used

All

Accounts & Contacts

Opportunities

Customer Support Reports

Leads

Campaigns

Activities

Contracts and Orders

Price Books, Products and Assets

Administrative Reports

File and Content Reports

Select a Report Type

Search Report Types...

Report Type Name	Category
Accounts	Standard
Contacts & Accounts	Standard
Accounts with Partners	Standard
Account with Account Teams	Standard
Accounts with Contact Roles	Standard
Accounts with Assets	Standard
Contacts with Assets	Standard
Accounts with events	Standard
Accounts with events and Business Brand	Standard
Account History	Standard
Contact History	Standard
D&B Company with and without Accounts	Standard

https://govtartscollege9-dev-ed.develop.lightning.force.com/reports/lightningReportApp.app#

4. Trailhead Profile Public URL

TEAM LEAD : <https://trailblazer.me/id/sangee3>

TEAM MEMBER 1: <https://trailblazer.me/id/jraja121>

TEAM MEMBER 2 : <https://trailblazer.me/id/jayap119>

TEAM MEMBER 3: <https://trailblazer.me/id/punim6>

TEAM MEMBER 4: <https://trailblazer.me/id/agilv7>

ADVANTAGES & DISADVANTAGE:

A CRM can help you identify customer needs, track feedback, and manage your customer service improvements. The reporting features also allow you to track customer metrics from several different sources, such as help desk metrics, customer satisfaction scores, and more. Certain businesses where customer transactions are highly standardised may not benefit from a CRM system. A CRM system works best where personalisation is required in client/company interactions and where there are multiple touch-points over time between the client and the business across departments.

The advantages of a CRM system are available to salespeople, marketing teams, customer service professionals, and anybody who interacts with customers in large and small organisations.

The biggest disadvantage is used in more data

The advantage is in learning more ways in online

6. APPLICATIONS :

Customer relationship management (CRM) is a technology for managing all your company's relationships and interactions with customers and potential customers. The goal is simple: Improve business relationships. A CRM system helps companies stay connected to customers, streamline processes, and improve profitability. CRM can analyze data and generate reports whenever required. There are mainly three types of CRM applications – Operational, Analytical and Collaborative to perform all these activities. Web CRM applications are excellent as an add-on service to your desktop application. As such, you will certainly use them when you can not use your own computer or phone. At the same time, they can be used in companies where most employees work with Outlook, but some of them prefer .

7. CONCLUTION :

Customer Relationship Management enables a company to align its strategy with the needs of the customer in order to best meet those needs and thus ensure long-term customer loyalty.

CRM in retail allows businesses to make smarter decisions to better serve their customers and maximize profits from repeat purchases. By implementing a CRM into your retail sales process, you can enhance customer relationships by

providing personalized service that caters to their individual needs

Customer profitability analysis allows you to segment your customers by their profit contribution to your brand and optimize your marketing, customer service, and operations costs around the customer segments who are the most profitable for your brand.

Im completed in my programor assaignment

8. FUTURE SCOPE :

With the help of a CRM system, companies solve sales problems, increase the productivity of employees, and regularly monitor important financial indicators. According to EPCGroup's analytics, CRMs exploded in 2022, achieving an 11.6% CAGR from 2022 to 2027. Customers will become a company's best sales reps through superior products and services as well as customer-oriented messaging. The future of CRM is more than just the future of Customer Relationship Management software. It is really the future of business. Report Overview. The global customer relationship management market size was valued at USD 58.82 billion in

2022 and is expected to expand at a significant compound annual growth rate CAGR of 13.9% from 2023 to 2030.