Build Event Managernt System using Salesforce

INTRODUCATION

Eventmangement is the process of crwating and maintaining an event.thiss process spans from the very beginning og planninjg all the way to post-event strategizing.

1.1 Over view

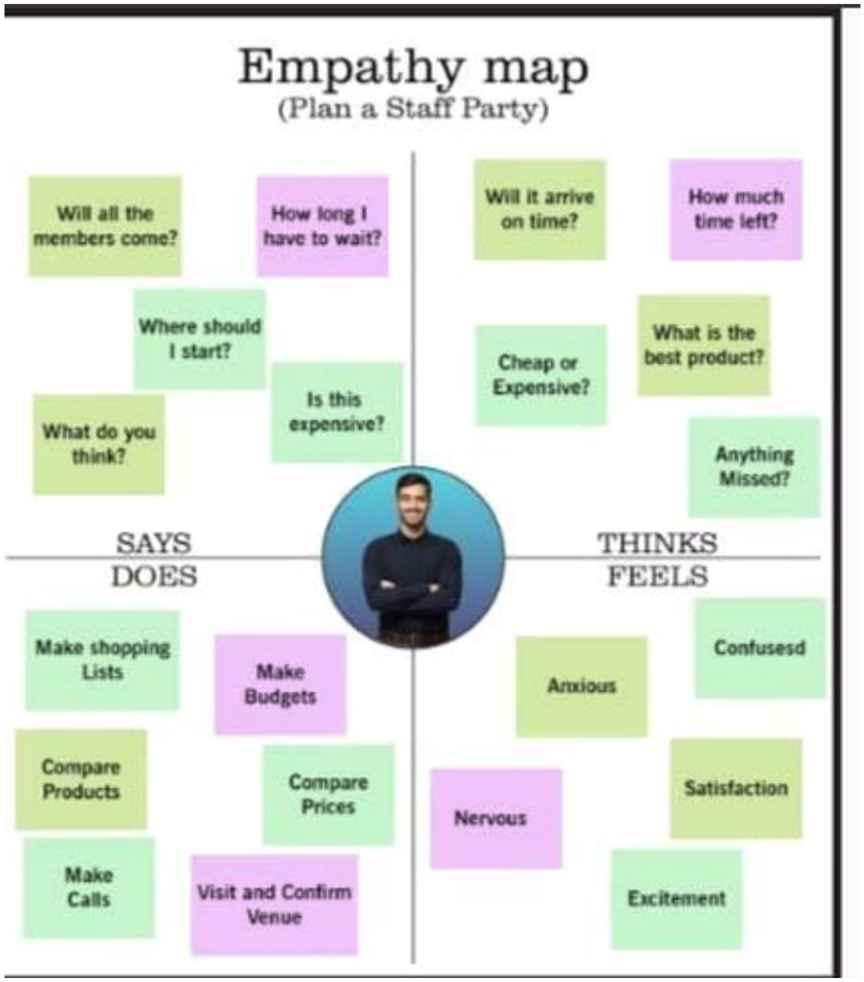
Build an event management system using salesforce. this project helps in managing the on -going and upcomming events in an orgsnization .

1.2 Purpose

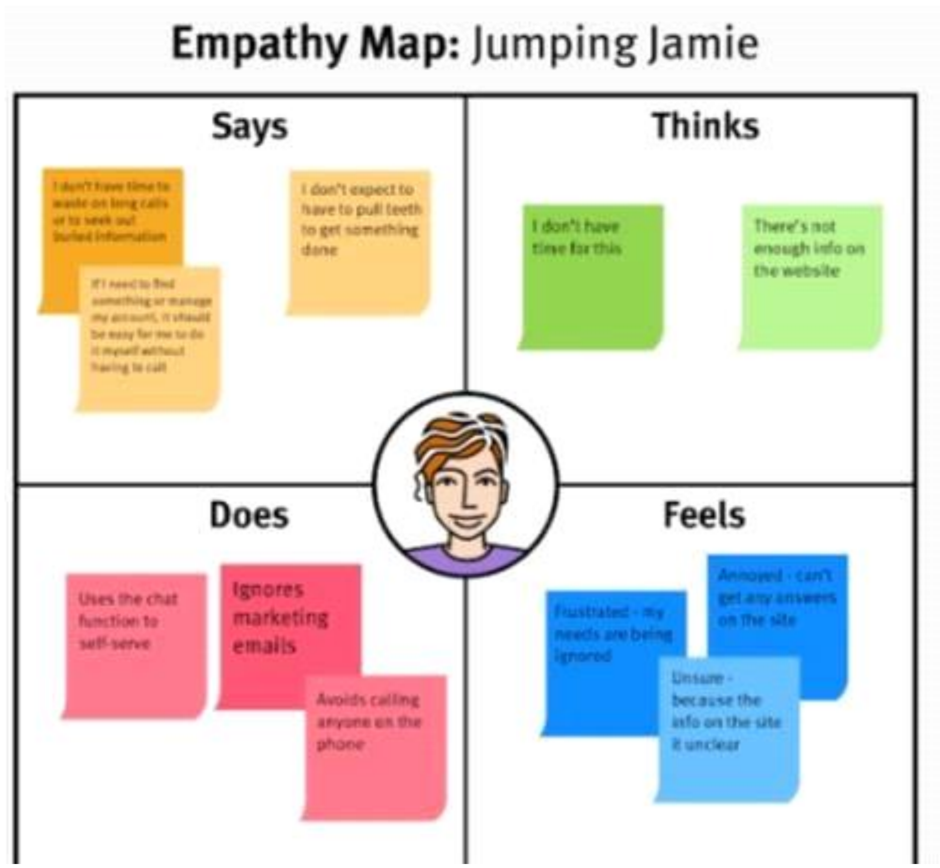
An event management system with salesforce allows you to access all relevent data in one centralised locstion - your database! you will be able to manage all event - relates tasks without leaving salesforce ,providing you with a seamlessand comprehensive event-planning experience.

Proplem definition&design thinking

2.1 Empathymap



2.2 Ideation& brainstorming map



Millestone1-Salesforce?

Salesforce is yourcustomer success platform,designed to help

you sell,service,market,analyze,and connect your customers

Activity:

creating a Salesforce Developer org:

A Developer org has the features and licness you need to get started with salesforce .

1. search devoleper. com

2. Enter the following details like 1st name, last name, email, role, company,

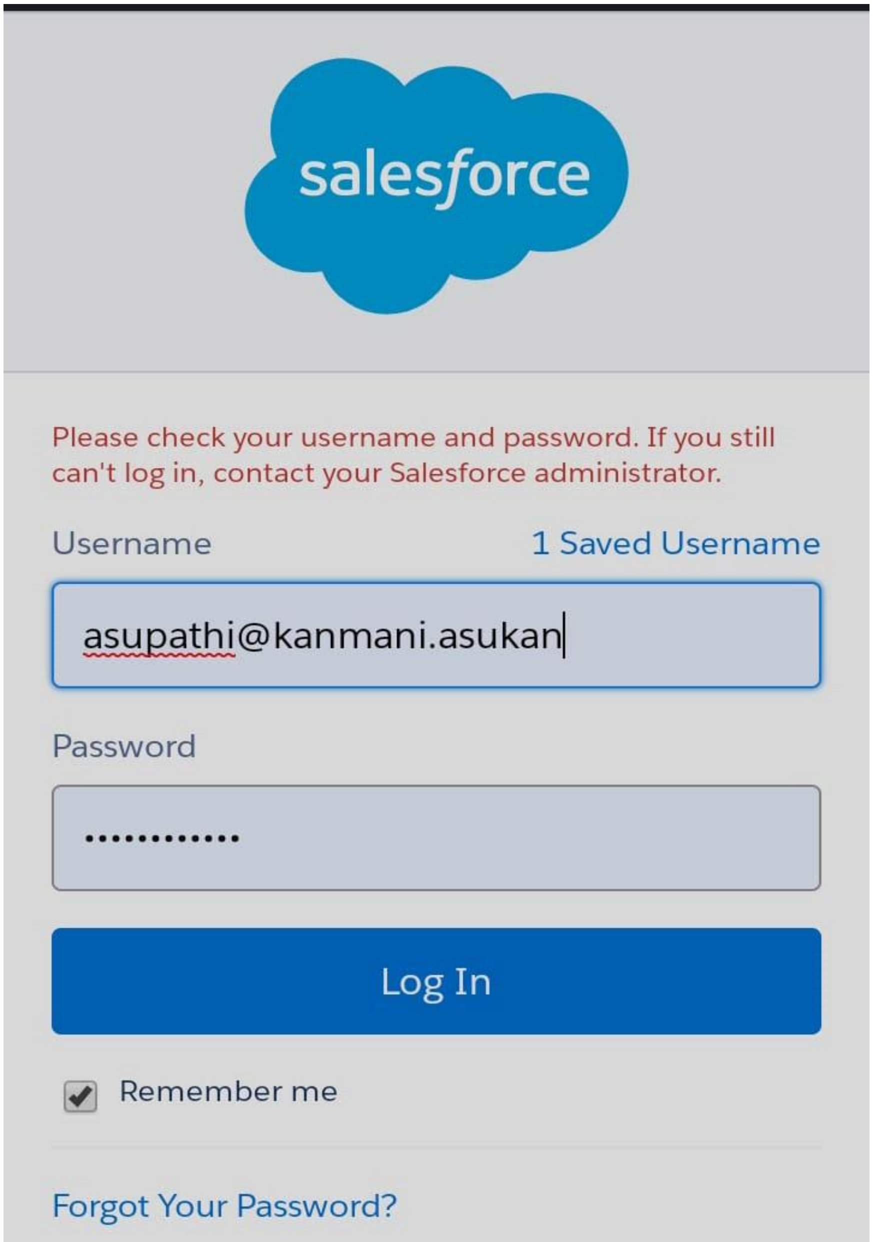
country/religion, postelcode, and user name must be unique.

3. click sign me up, after a few min you will recerive a mail salesforce org and by useing the verify account like you create your new password

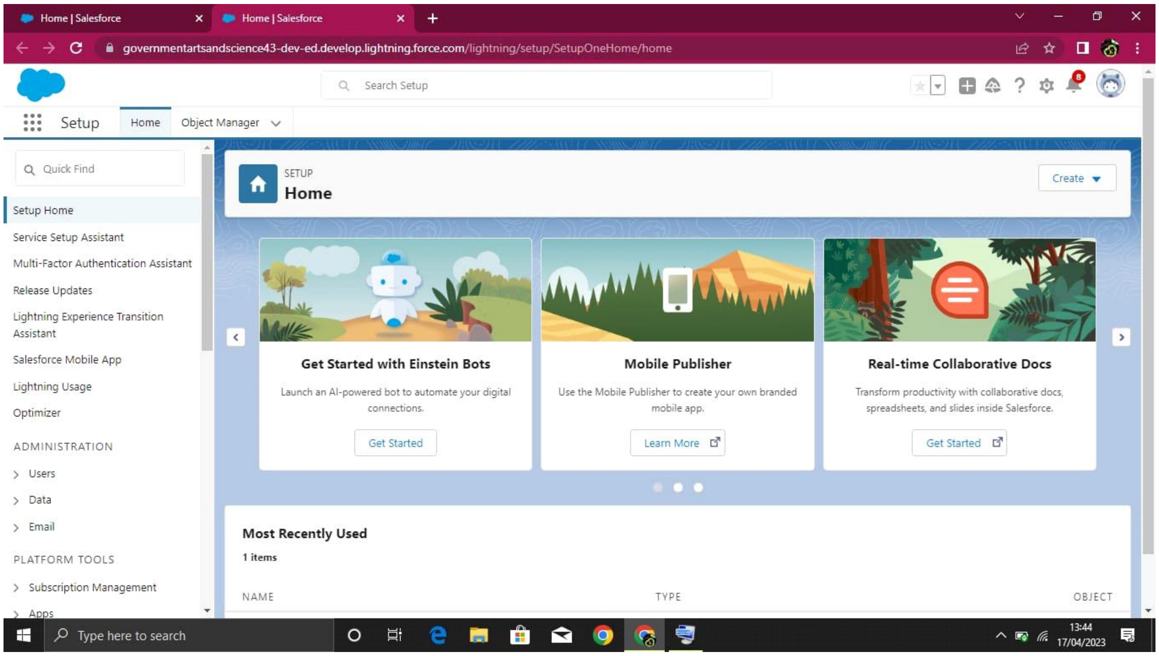
4. click save.

5. search login.salesforce com

6. by using username and password you can into the salesforce org.



The setup page will appear as below.



MILESTONE 2-OBJECT:

What is an object?

salesforce objects are database tables that permit you to store data that is specific to an organization .

Salesforce objects are two types:

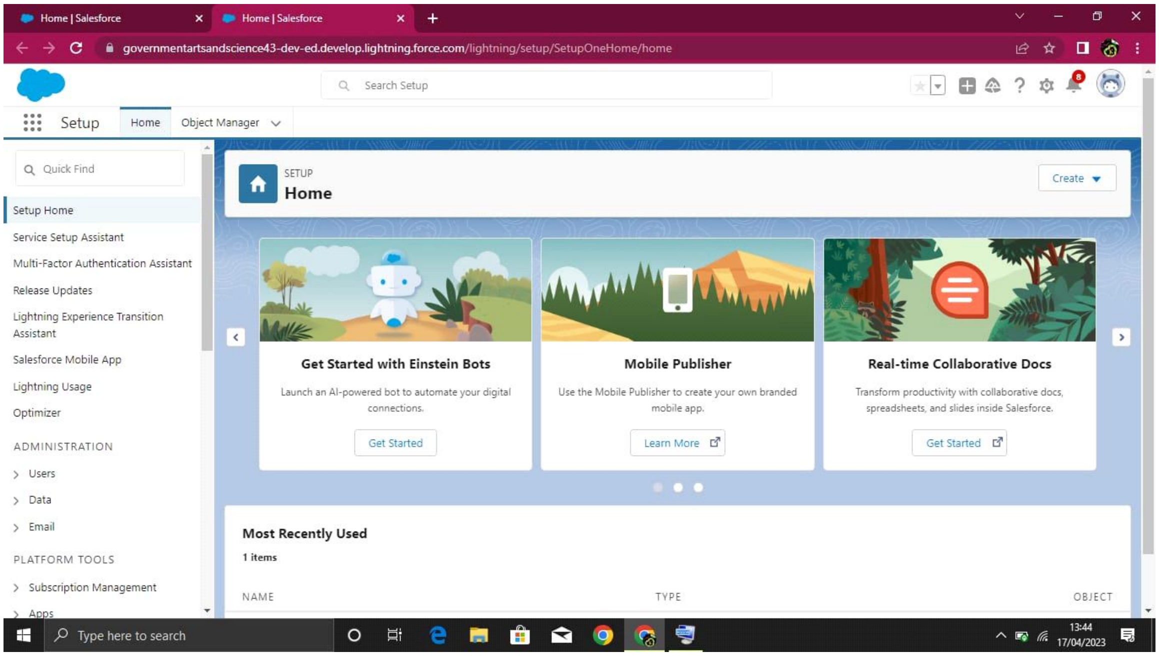
- standard objects: standard objects are the kind of objects that are provided by salesforce . com such as users ,contracts, reports,dashboards , etc.

Activity 1:

Creation of objects for even management :

For this even management we need to create 4 objects i.e evenets , attendies, speakers and vonders. the below steps will be assist you in creating those objects.

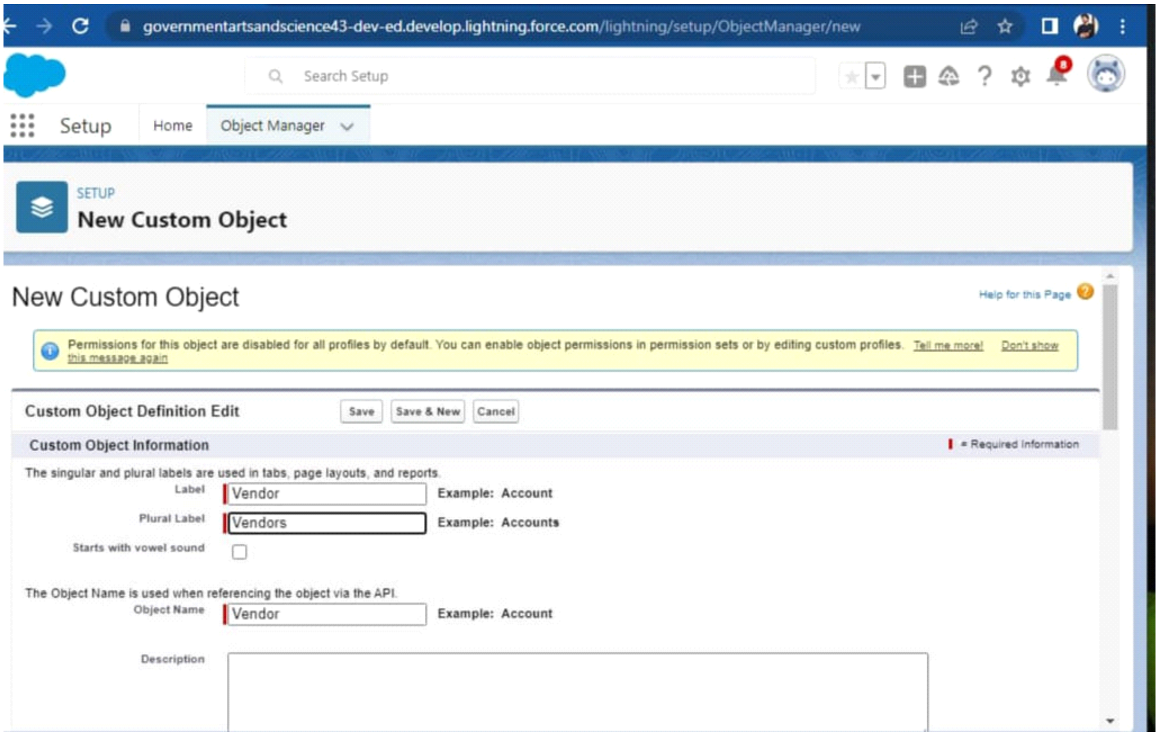
1.Click on gear icon and then select setup.

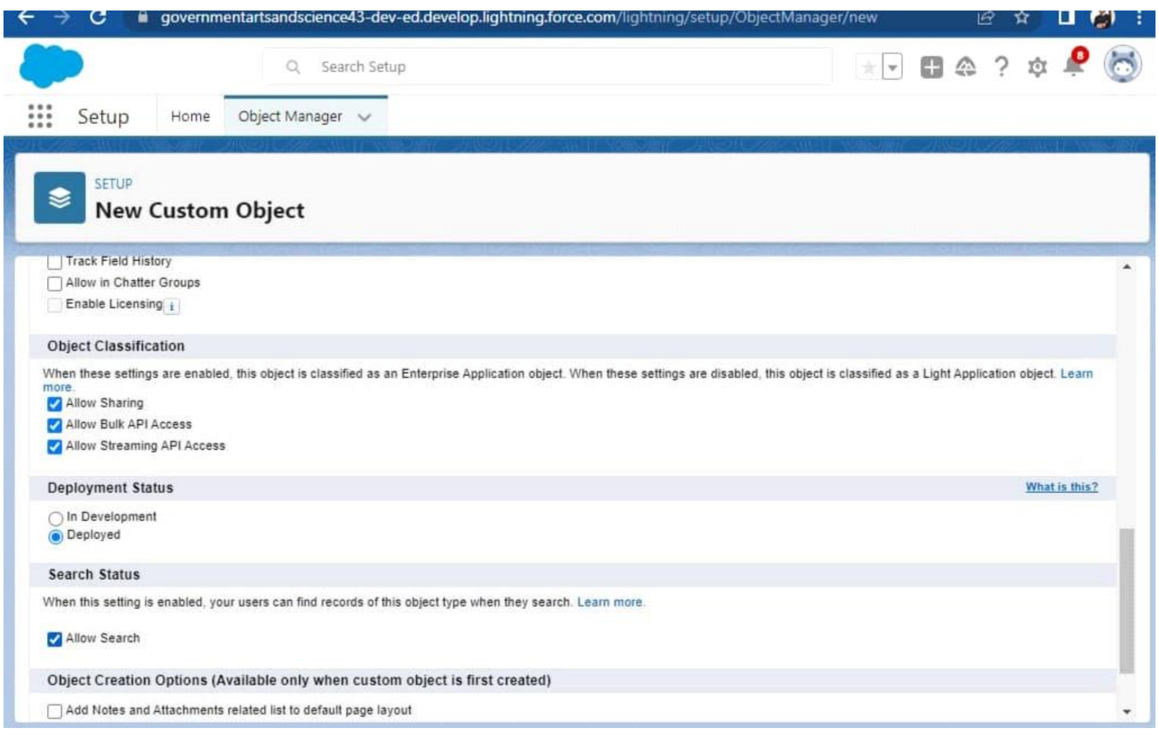


2.click on the object manager tab just beside the home tab.

3.After the above ,have a look on the extreme right you will find a create dropdown clicks on that select custom object.

- label :event
- check the alllow search check box
- click save


governmentartsandscience43-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new
Search Setup
Setup
Home
Object Manager
SETUP
New Custom Object
New Custom Object
Help for this Page
Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. Tell me more! Don't show this message again
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
= Required 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
The Object Name is used when referencing the object via the API.
Object Name
Vendor
Example: Account
Description


governmentartsandscience43-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new
Search Setup
Setup
Home
Object Manager
SETUP
New Custom Object
Track Field History
Allow in Chatter Groups
Enable Licensing
Object Classification
When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. Learn more.
Allow Sharing
Allow Bulk API Access
Allow Streaming API Access
Deployment Status
What is this?
In Development
Deployed
Search Status
When this setting is enabled, your users can find records of this object type when they search. Learn more.
Allow Search
Object Creation Options (Available only when custom object is first created)
Add Notes and Attachments related list to default page layout

Activity 2:

creation of attendees object :

1. click on the gear icon and then select setup.

2.click on the objects manager tab just beside the home tab.

3. after the above steps, have the look on the extreme right you will find a create dropdownclick on that and select custom object.

a. label: attendee

b.check the allow reports checkbox

c. 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 exterme the home tab.

dropdownclick 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

Activity 4

creation of vendors object:

1.click on the gear icon and than select setup.

a.on the custom object definition page, creatte the object as follows:

b.label:vendor

c.plural label:vendor name

d.record name:vendor name

e.check the allow reports checkbox

f.click save.

Milestone 3-Tab:

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:

standerd object tabs:

standard object tabs display data related to standard objects.

custom object tabs:

custom object tabs display data related to custed objects.these tabs look and function just like custdard 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 visualfforce tabs later.

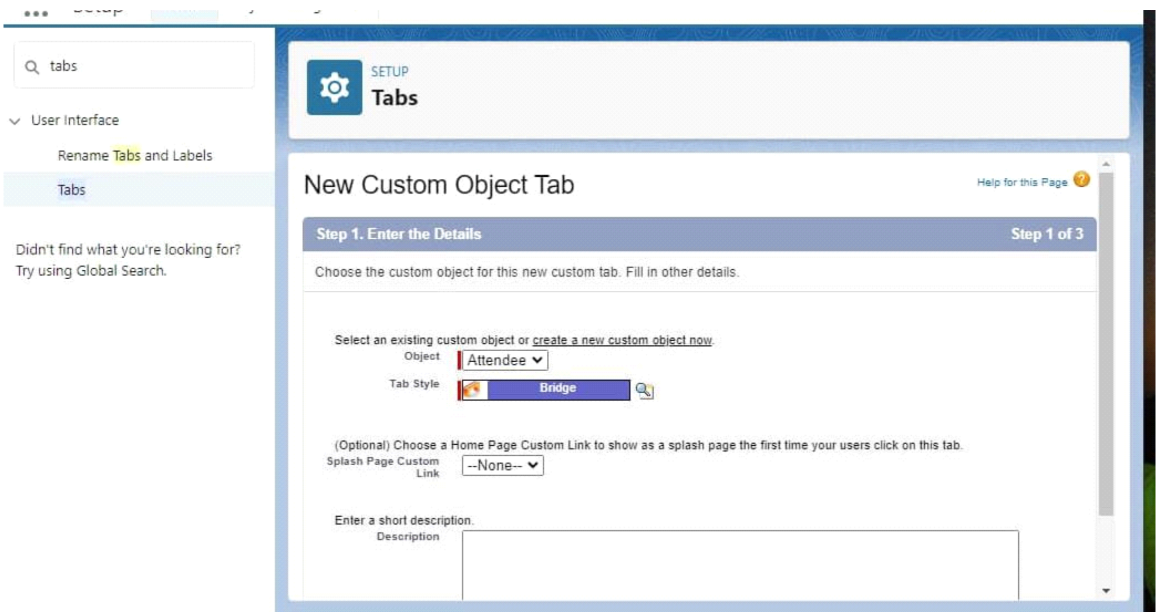
Activity 1:

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.

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:

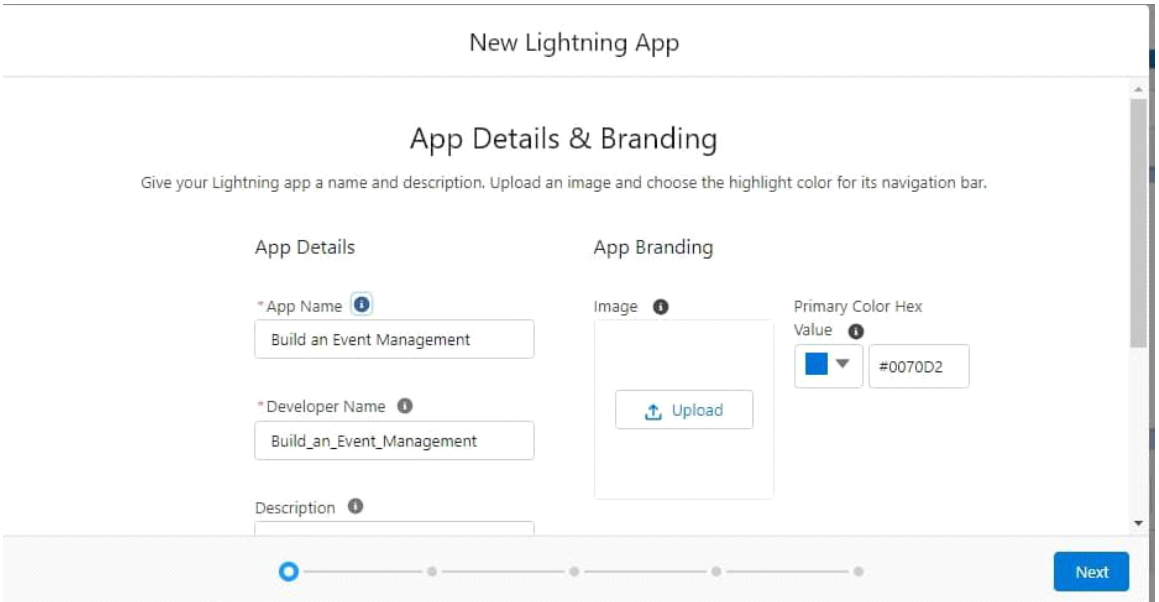
- Standard apps: these apps come with every occurrence of Salesforce as default. Community, Call Center, Content, Sales, Marketing, Salesforce Chatter, Site.com, and App Launcher are included in these apps. The description, logo, and label of a standard app cannot be altered.
- Custom apps: these apps 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

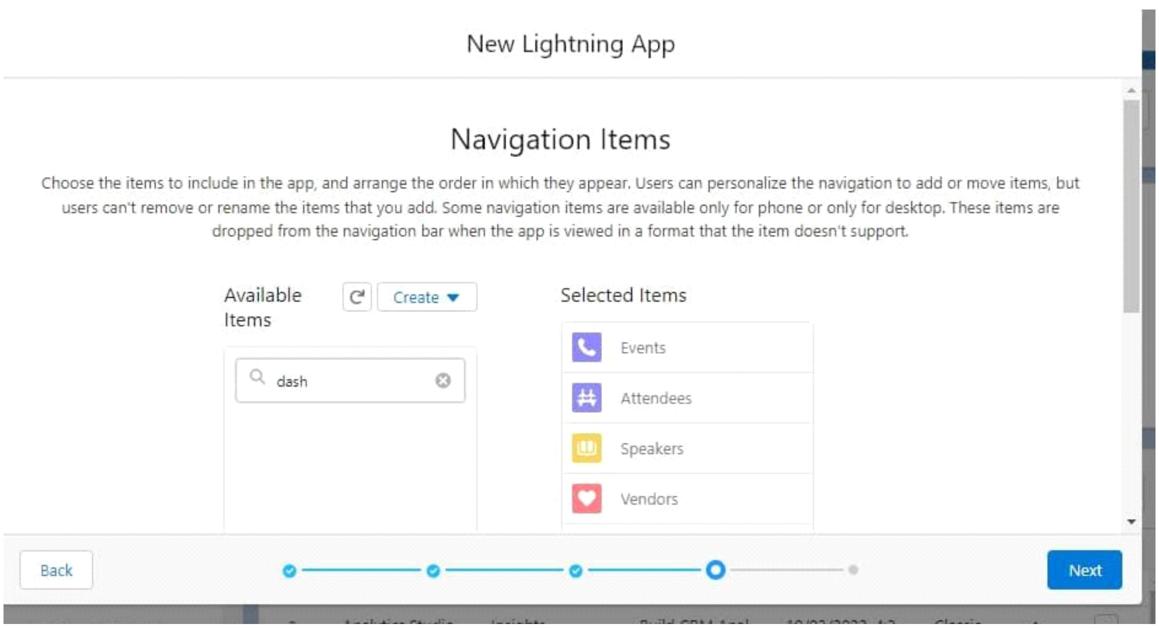
● From Setup, enter App Manager in the Quick Find and select App Manager.

●Click New Lightning App. Enter Event Management as the App Name, then click Next

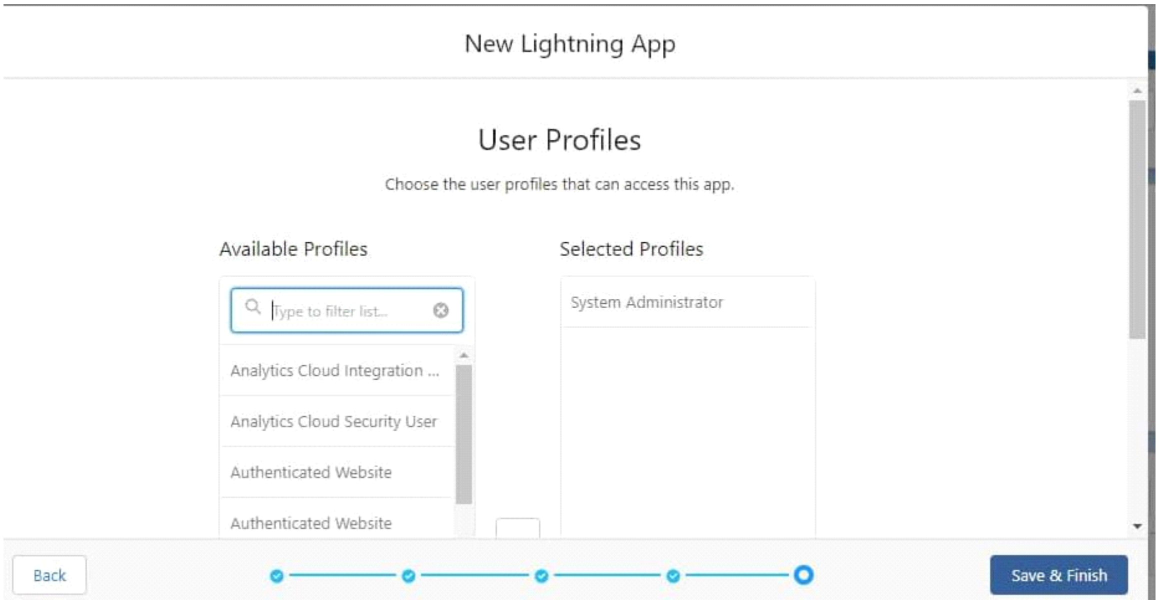


- Under App Options, leave the default selections and click Next.
- Under Utility Items, leave as is and click Next.
- From Available Items, select Events, Attendees, speakers, vendors,

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.

Milestone 4 – 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.

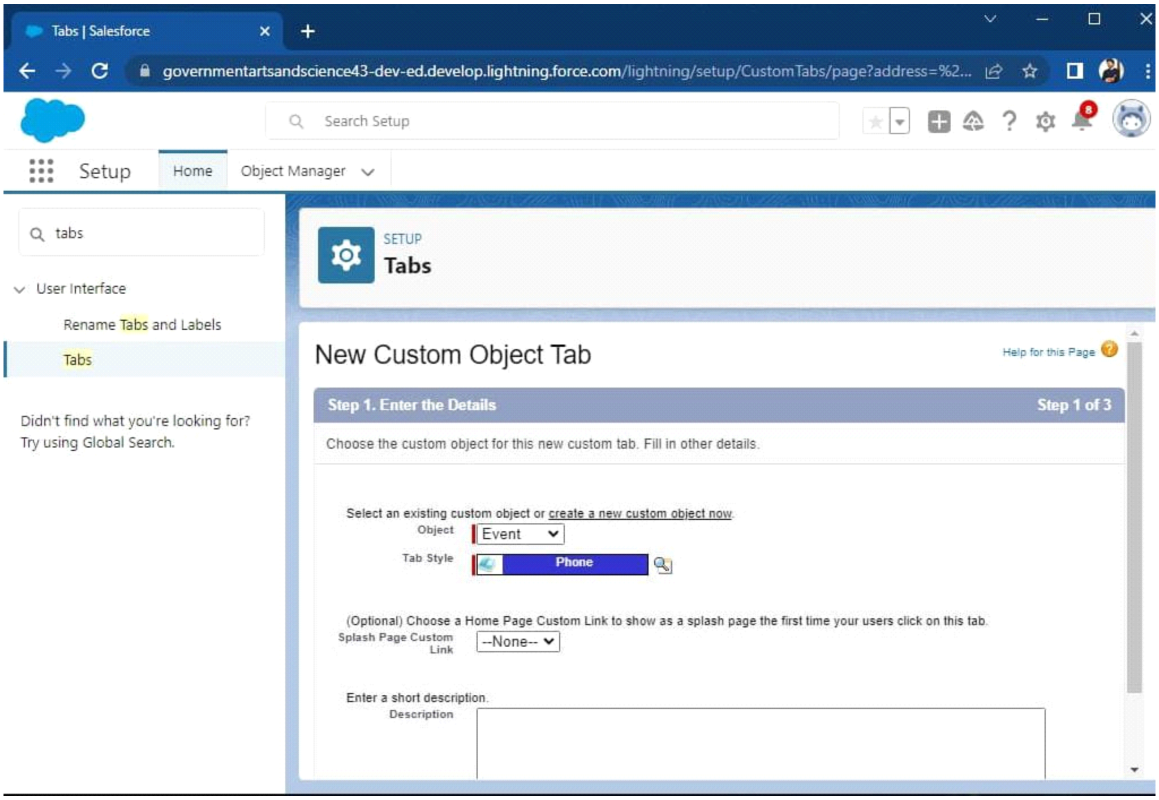
There are 2 types of fields in salesforce:

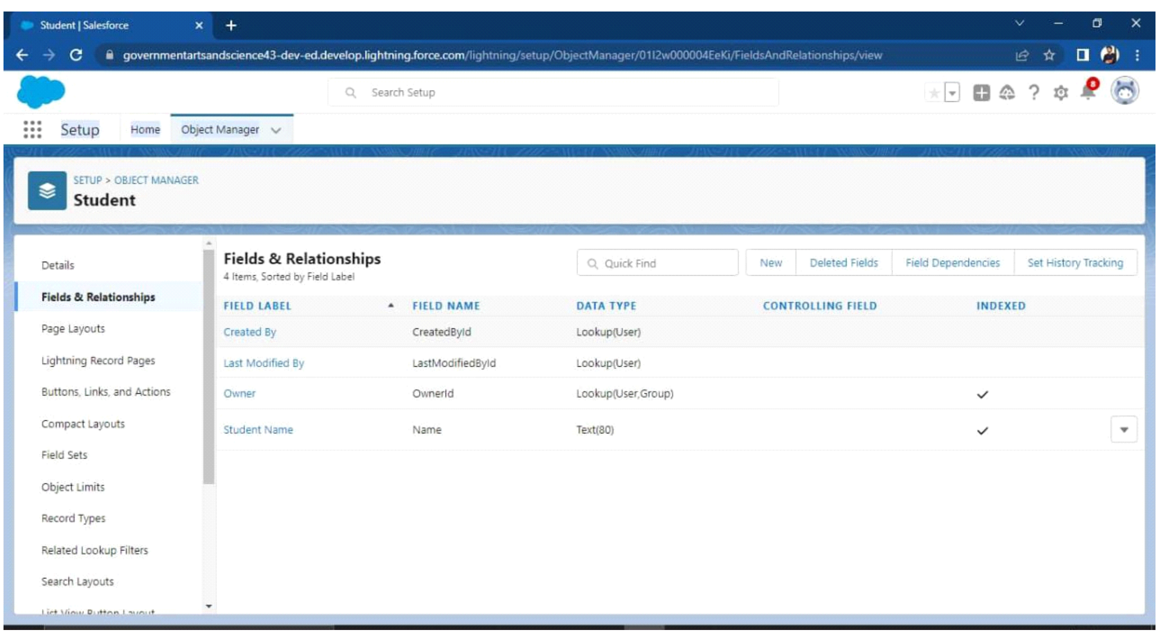
- Standard fields: There are four standard fields in every custom object that are Created By, Last Modified By, Owner, and the field created at the time of the creation of an object. These fields cannot be deleted or edited and they are always required. For standard objects, the fields which are present 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:

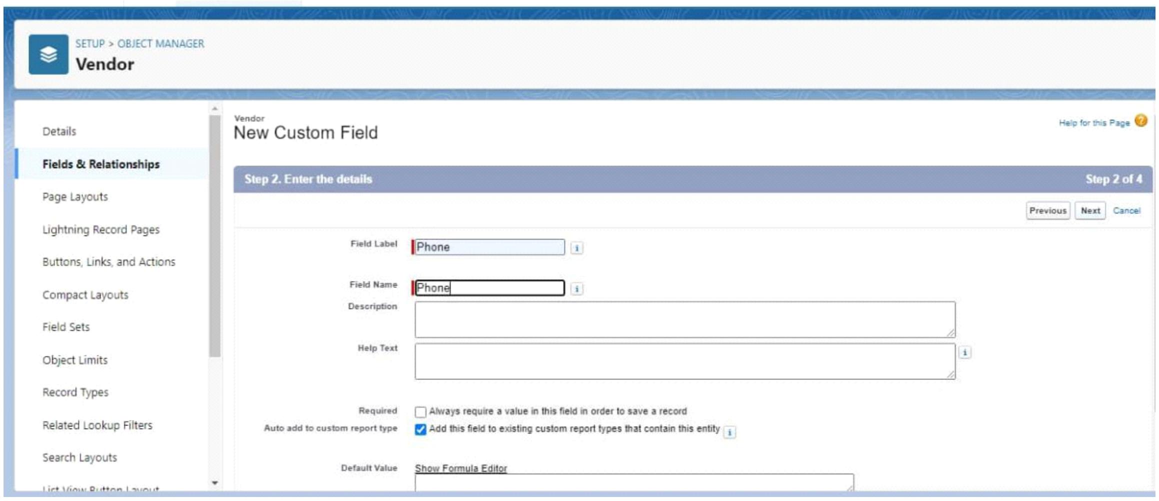
1. click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Event.
4. Select Fields & Relationships from the left navigation, and click New
s





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 – 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.

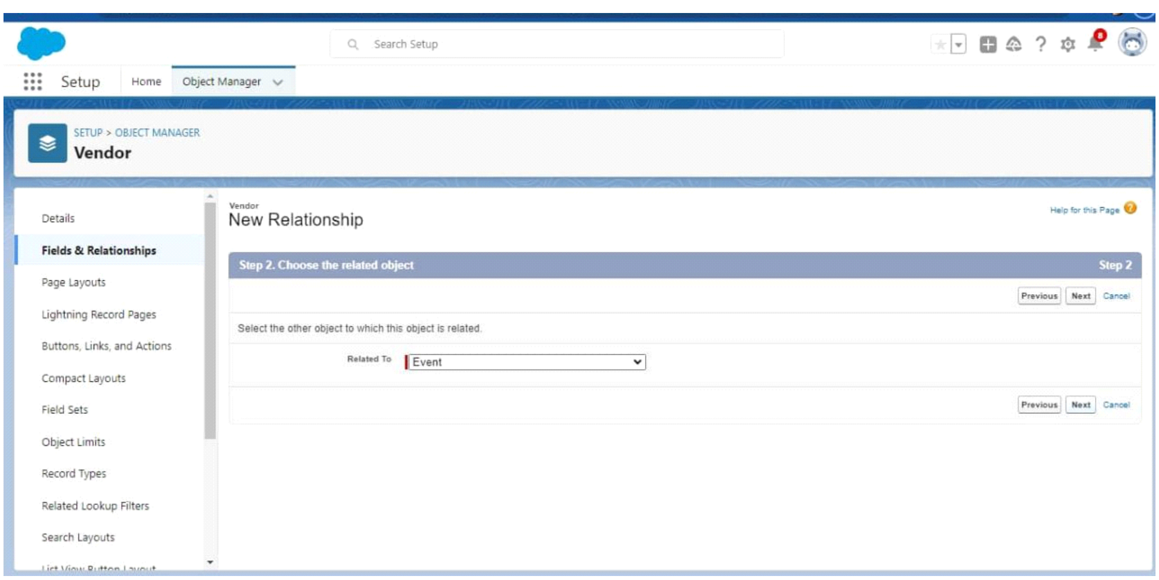
A profile can be assigned to many users, but user can be assigned single profile at a time.

Activity 1:

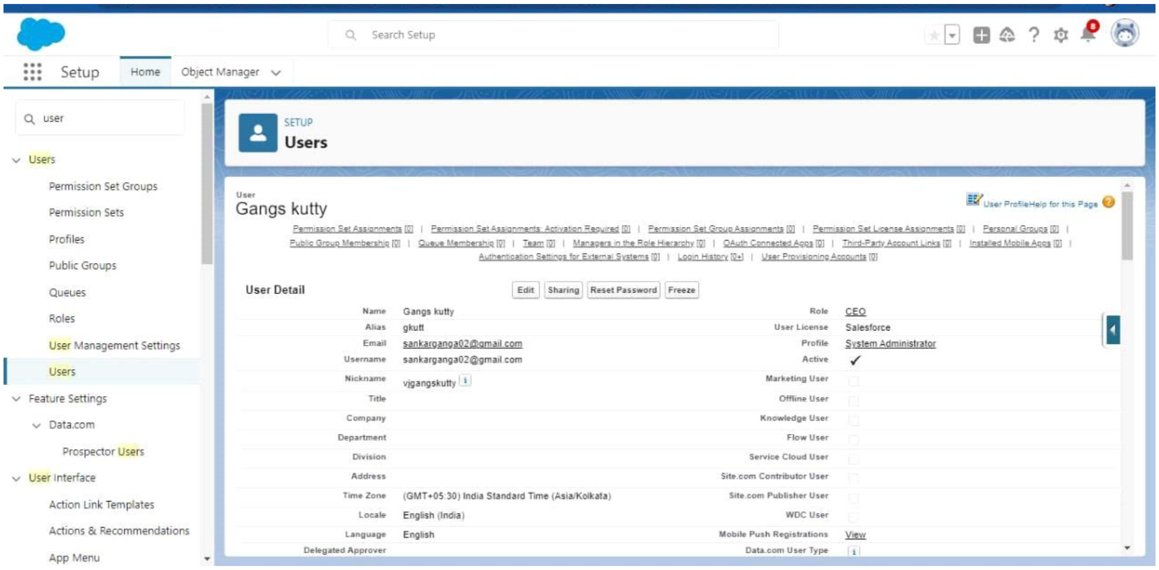
Creation on profile:

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.

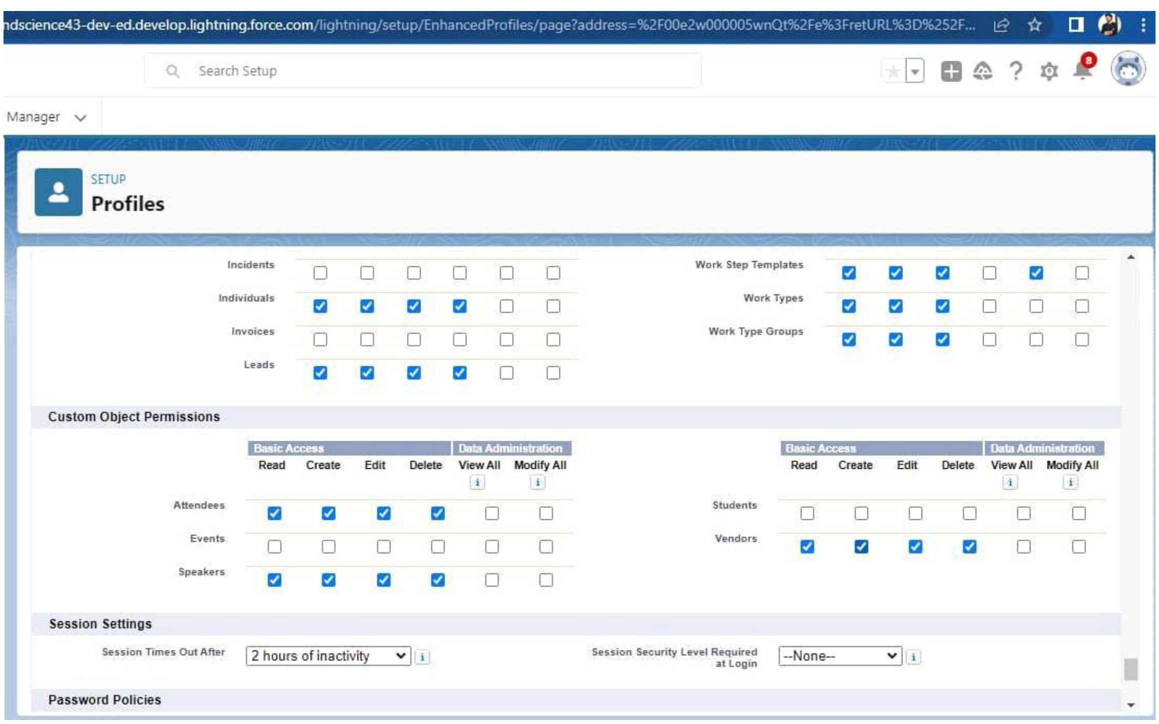
4. For Profile Name, enter Event user profile.
5. Click **Save**.



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.

Milestone 6 – User:

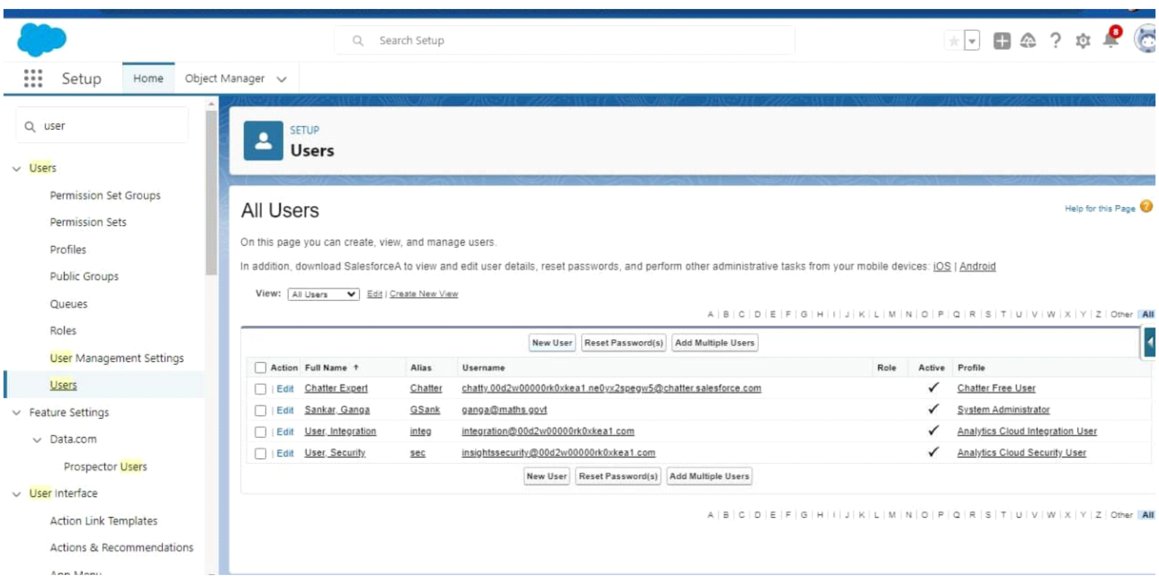
What is a user?

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

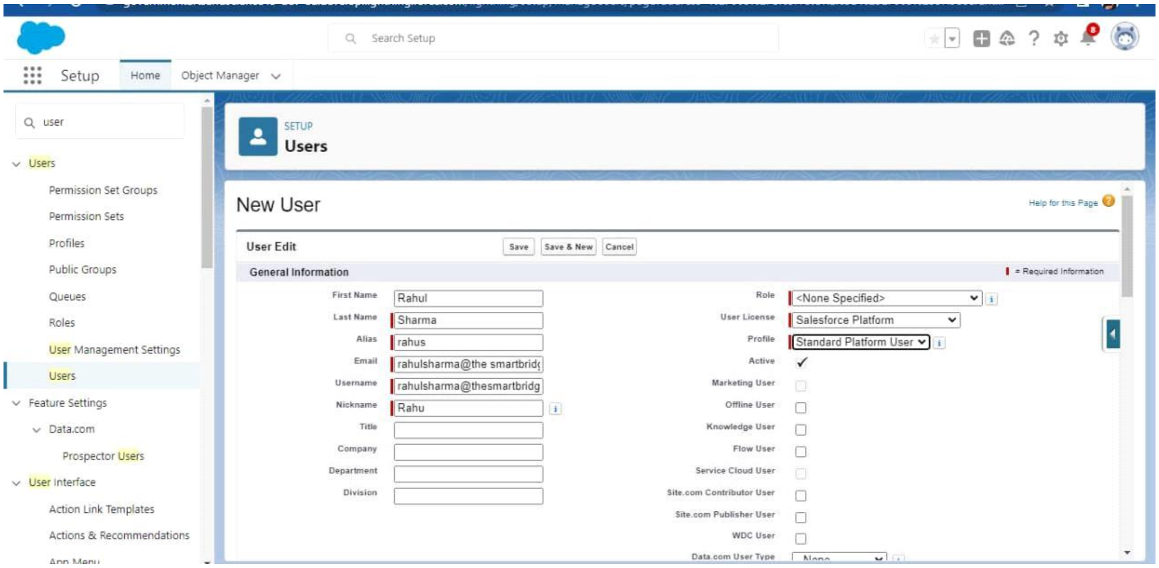
•• Username: sanjaygupta@thesmartbridge.com

•• 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: 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 – Permission sets:

What is a permission set?

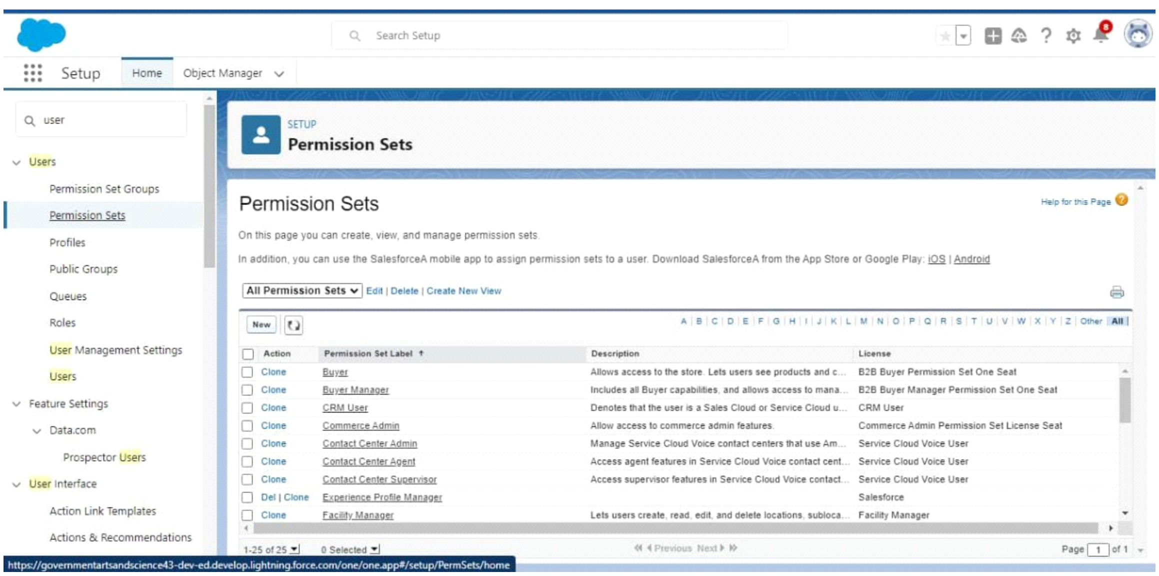
A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles.

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.

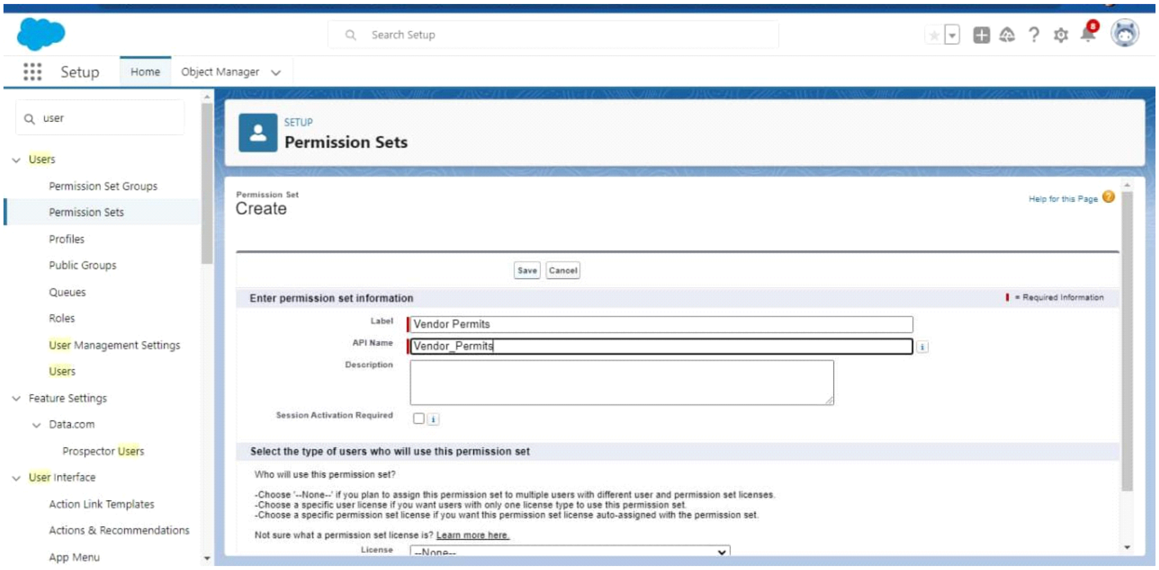
Activity 1:

Creating a Permission Set:

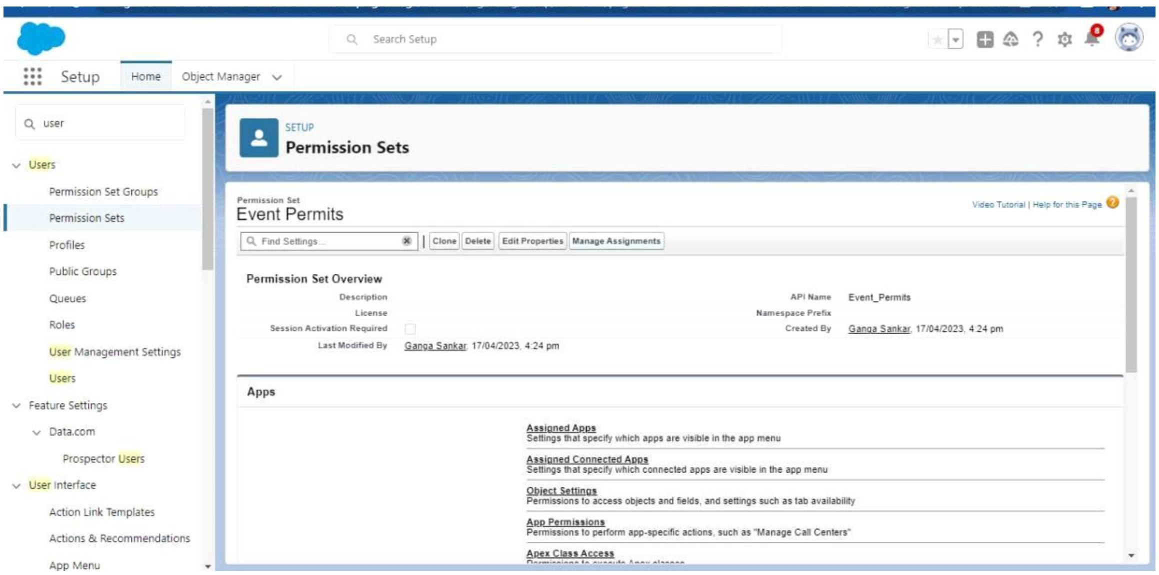
•• From setup search "permission sets" in quick find and select **permission set** then click on **New**



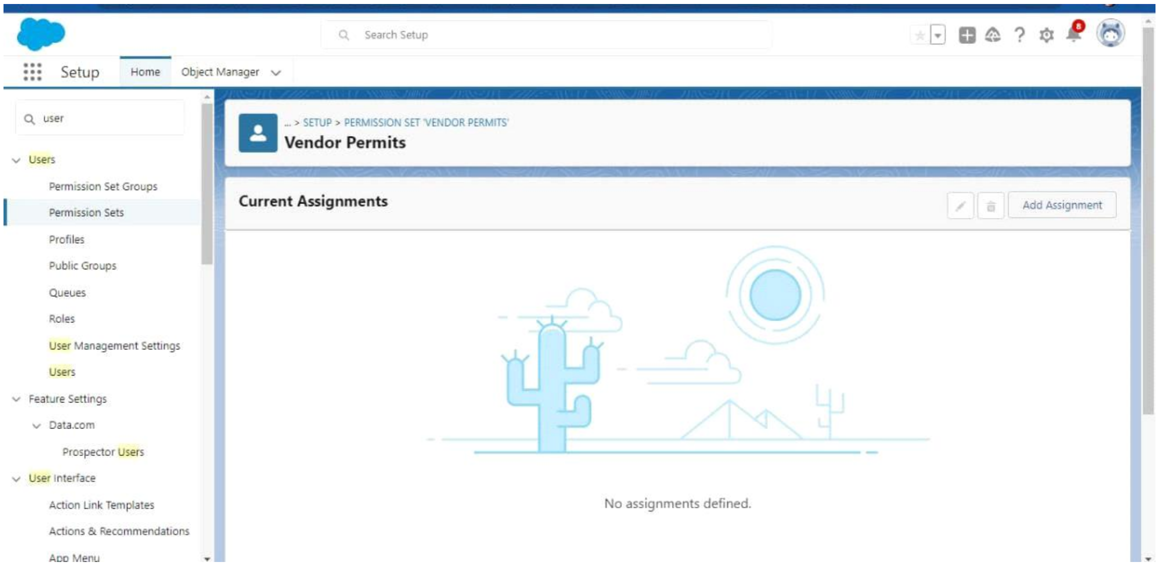
•Enter label as: Event Permits and Save.



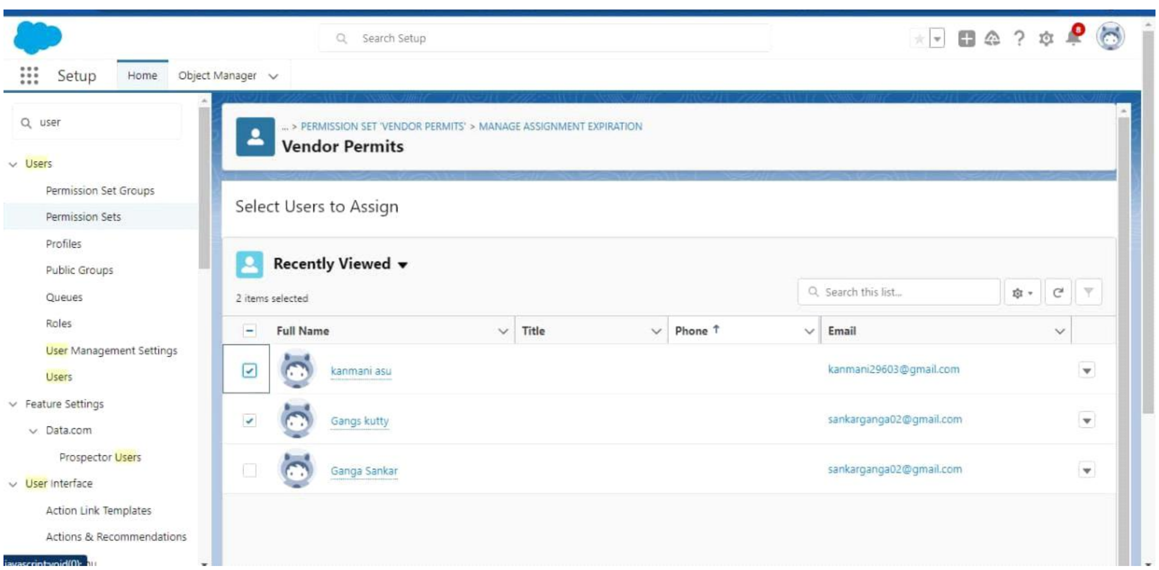
• After saving the permission click on the Manage assignment



• Now click on the Add Assignment



•Now select the users and click on save



Activity 2:

•• 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 - 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 is 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:

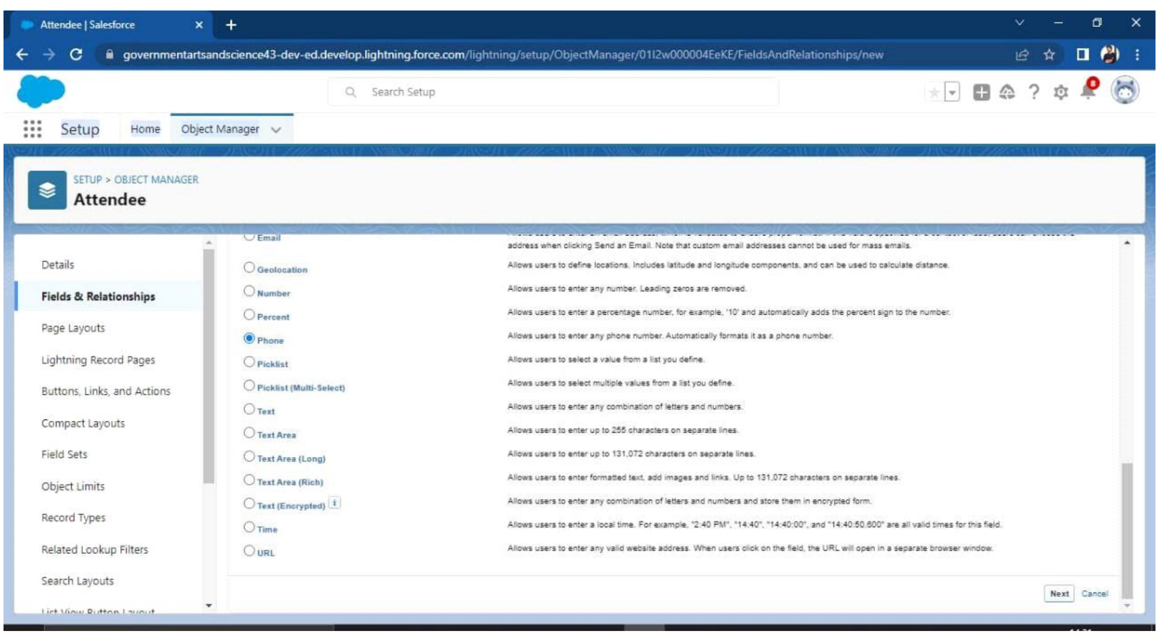
With this access level, users can do everything Viewers & Editors can do, plus they can also control other user's access levels to this folder. Also, users with Manager Access levels can delete the report.

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.