

Build Event Managernt System using Salesforce

INTRODUCTION

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

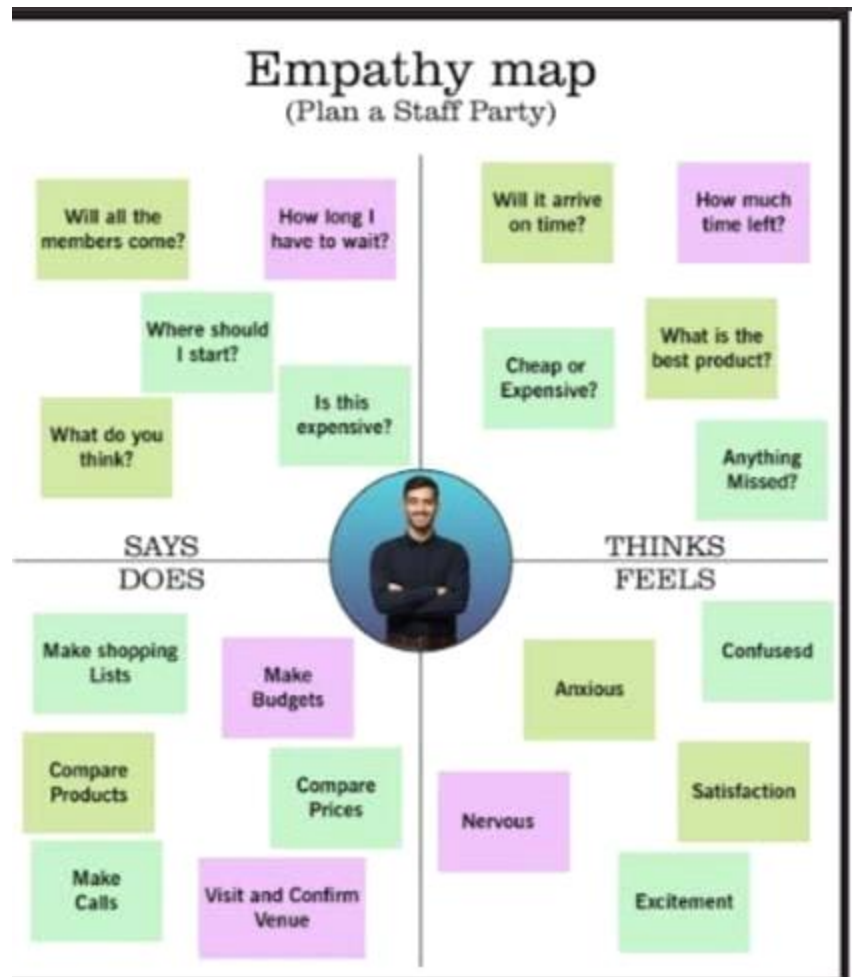
Build an event management system using salesforce. this project helps in managing the on -going and upcomming events in an orgsnization .

1.2 Purpose

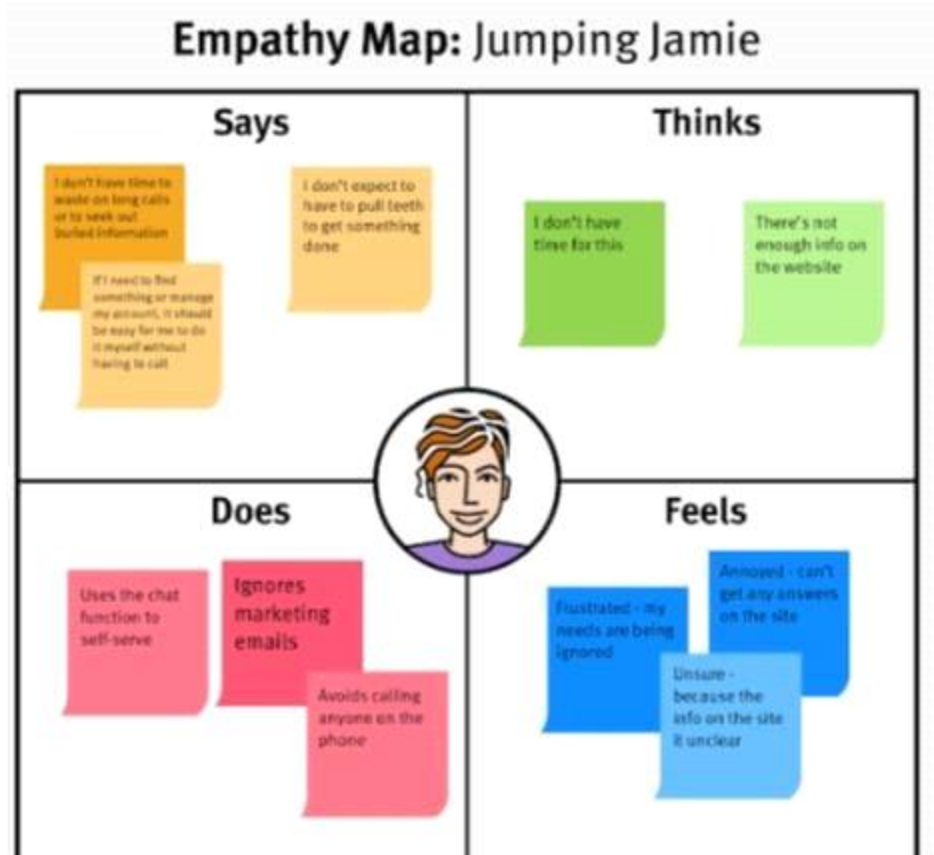
An event management system with salesforce allows you to access all relevent data in one centralised locstion - your database! you will be able to manage all event - relates tasks without leaving salesforce ,providing you with a seamlessand comprehensive event-planning experience.

Proplem definition&design thinking

2.1 Empathymap



2.2 Ideation& brainstorming map



Milestone 1-Salesforce?

Salesforce is your customer 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 licenses you need to get started with Salesforce.

1. search [developer. com](https://developer.salesforce.com)

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

country/region, postcode, and user name 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 create your new password

4. click save.

5. search login.salesforce.com

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



Please check your username and password. If you still can't log in, contact your Salesforce administrator.

Username

1 Saved Username

asupathi@kanmani.asukan|

Password

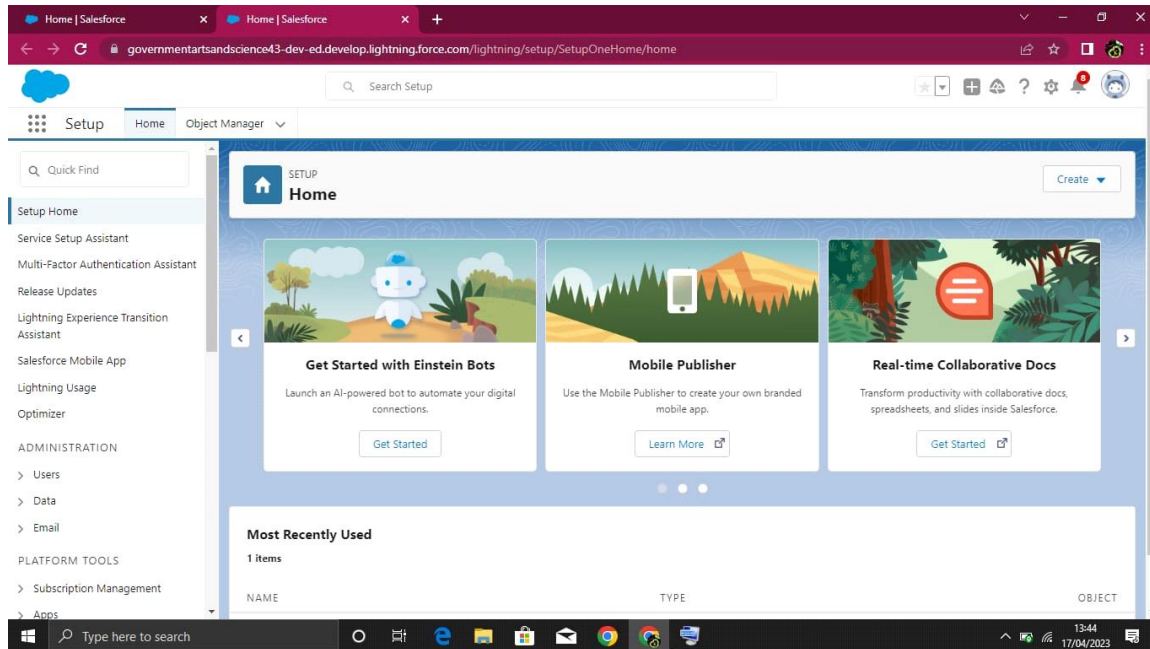
.....

Log In

☒ Remember me

[Forgot Your Password?](#)

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:

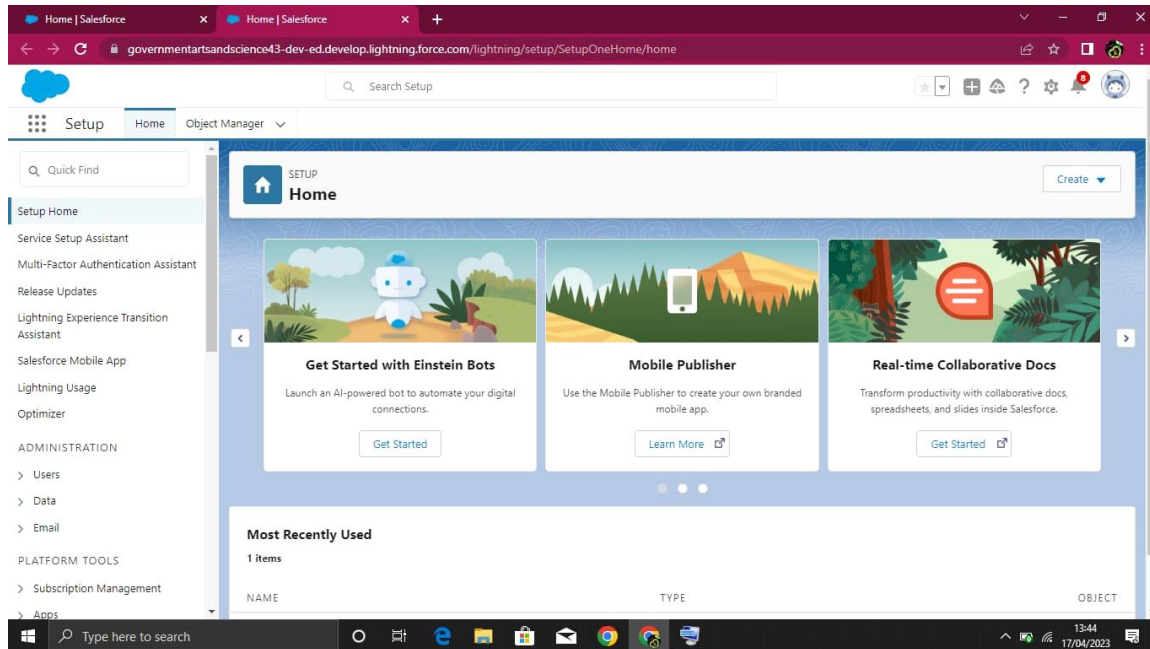
- standard objects: standard objects are the kind of objects that are provided by salesforce . com such as users ,contracts, reports,dashboards , etc.

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 allow 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

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](#)

Custom Object Definition Edit

Save Save & New Cancel

Custom Object 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

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 [i](#)

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 a look on the extreme right you will find a create dropdown click 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 extreme the home tab.
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

Activity 4

creation of vendors object:

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

a.on the custom object definition page, create 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:

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:

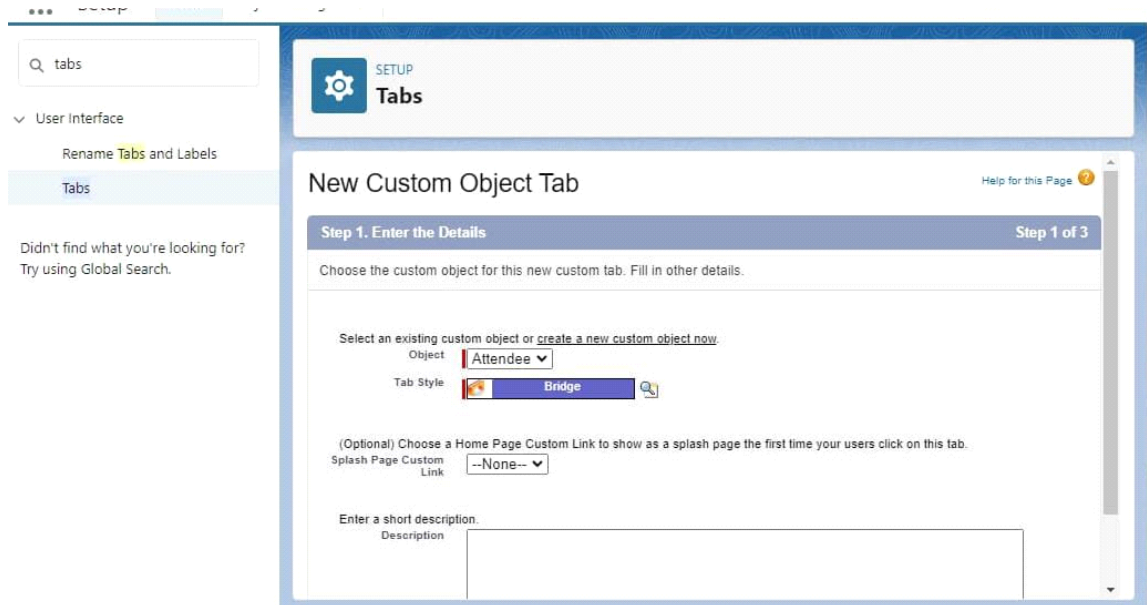
we wont be dealing with web tabs and visualfforce tabs later.

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.



The screenshot shows the Salesforce 'New Custom Object Tab' setup page. On the left, a sidebar contains a search bar with 'tabs' entered, and a list of options under 'User Interface', including 'Rename Tabs and Labels' and 'Tabs'. The main content area is titled 'New Custom Object Tab' and 'Step 1 of 3: Enter the Details'. It prompts the user to 'Choose the custom object for this new custom tab. Fill in other details.' Below this, there are three fields: 'Object' (a dropdown menu showing 'Attendee'), 'Tab Style' (a button with an icon and the text 'Bridge'), and 'Splash Page Custom Link' (a dropdown menu showing '--None--'). At the bottom, there is a text area labeled 'Enter a short description.'.

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

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name ⓘ
Build an Event Management

* Developer Name ⓘ
Build_an_Event_Management

Description ⓘ

App Branding

Image ⓘ

Upload

Primary Color Hex Value ⓘ

Progress bar with 5 dots, the first dot is active.

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.

New Lightning App

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

Selected Items

Events

Attendees

Speakers

Vendors

Back

Progress bar with 5 dots, the fourth dot is active.

Next

- From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.

New Lightning App

User Profiles

Choose the user profiles that can access this app.

Available Profiles

Analytics Cloud Integration ...
Analytics Cloud Security User
Authenticated Website
Authenticated Website

Selected Profiles

System Administrator

Back Progress bar with 5 steps, 5th step active 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.

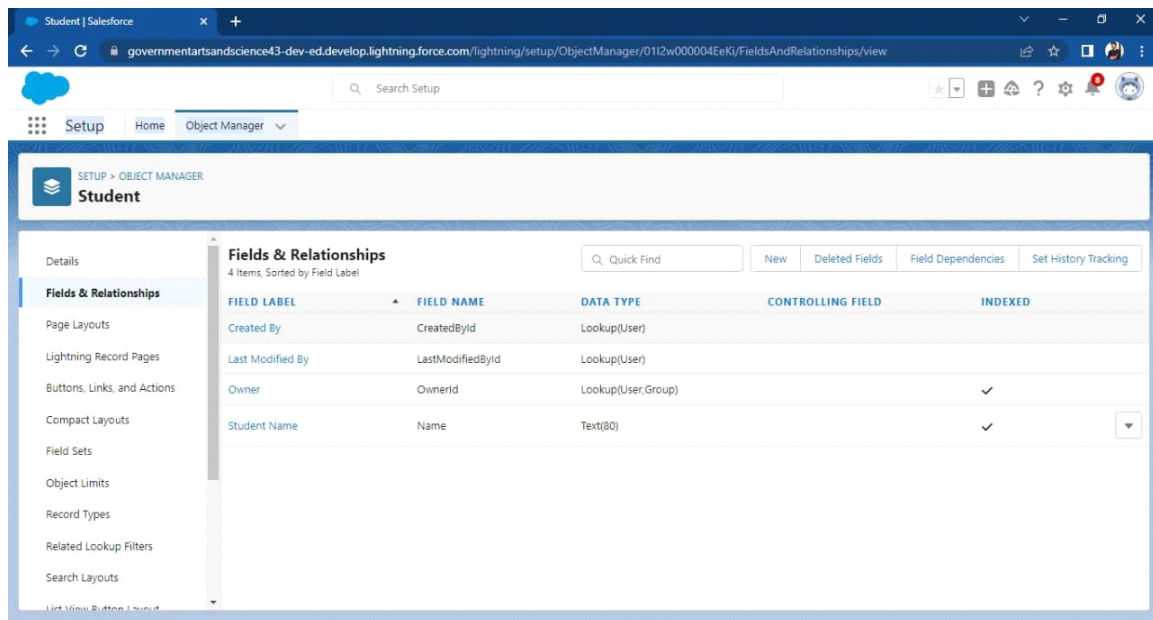
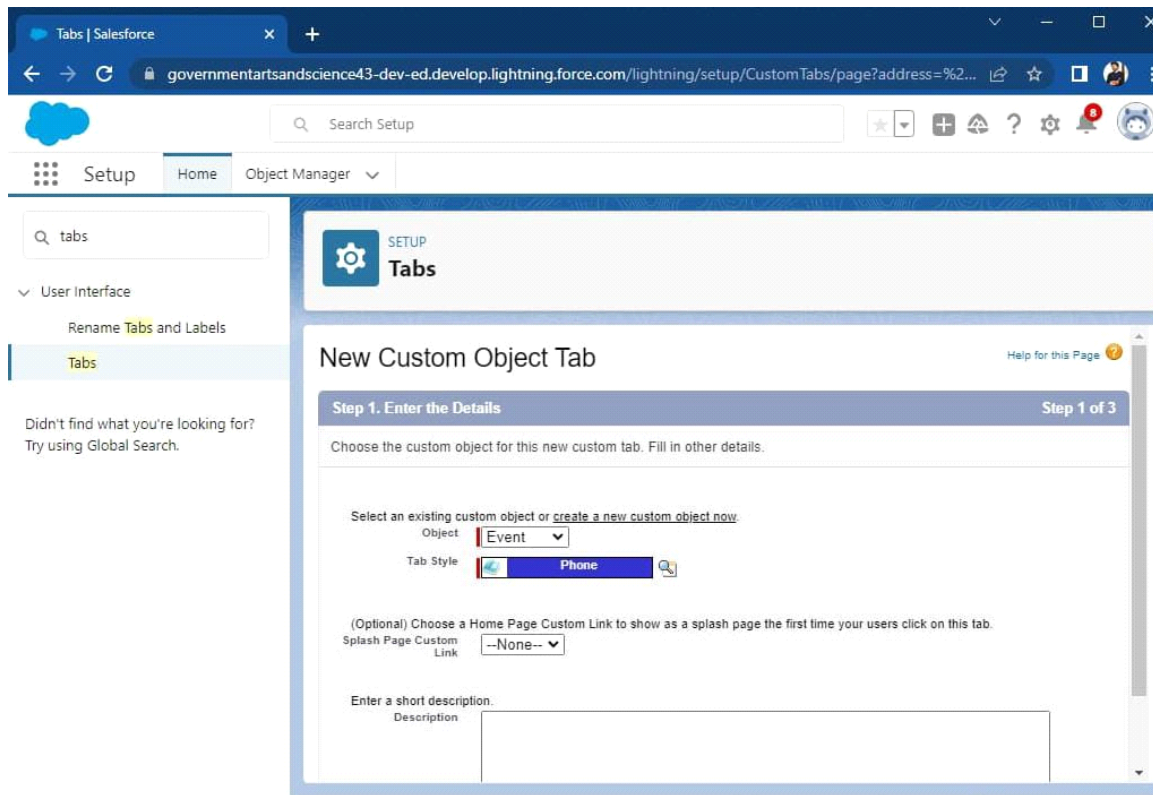
There are 2 types of fields in salesforce:

- **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.

SETUP > OBJECT MANAGER
Vendor

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

Vendor
New Custom Field
Help for this Page

Step 2. Enter the details
Step 2 of 4
Previous Next Cancel

Field Label Phone ⓘ

Field Name Phone ⓘ

Description

Help Text ⓘ

Required ☐ Always require a value in this field in order to save a record

Auto add to custom report type ☒ Add this field to existing custom report types that contain this entity ⓘ

Default Value Show Formula Editor

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?

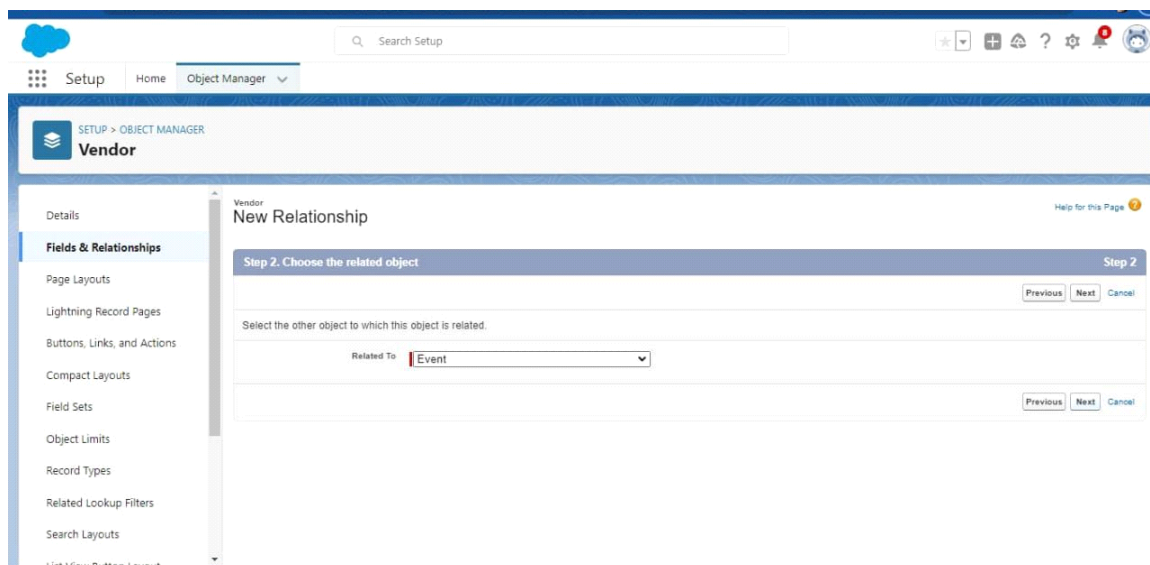
A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login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

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

Activity 1:

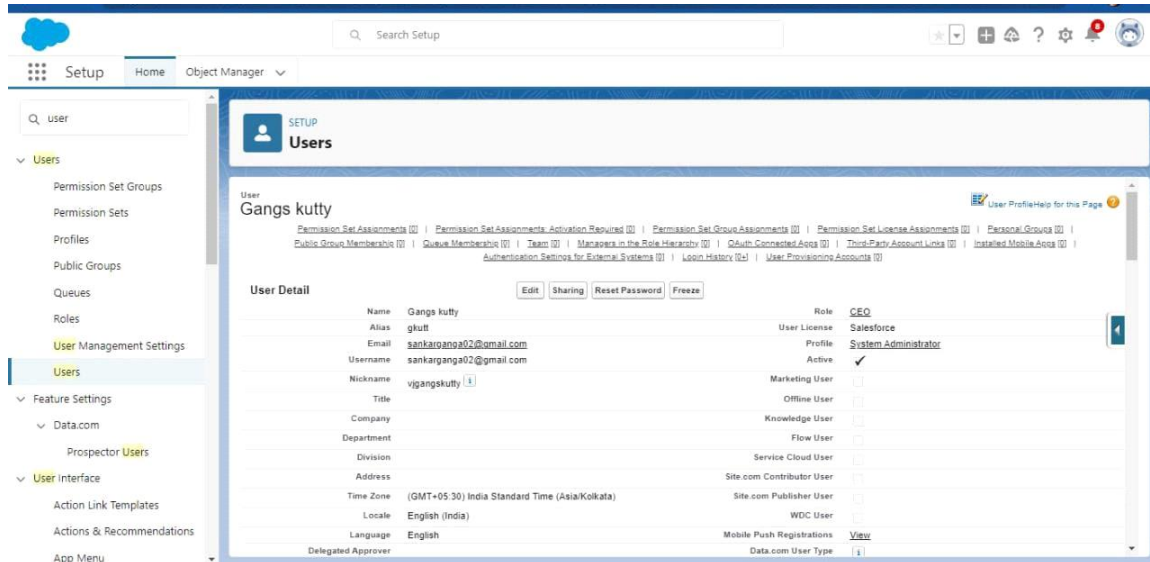
Creation on profile:

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**.

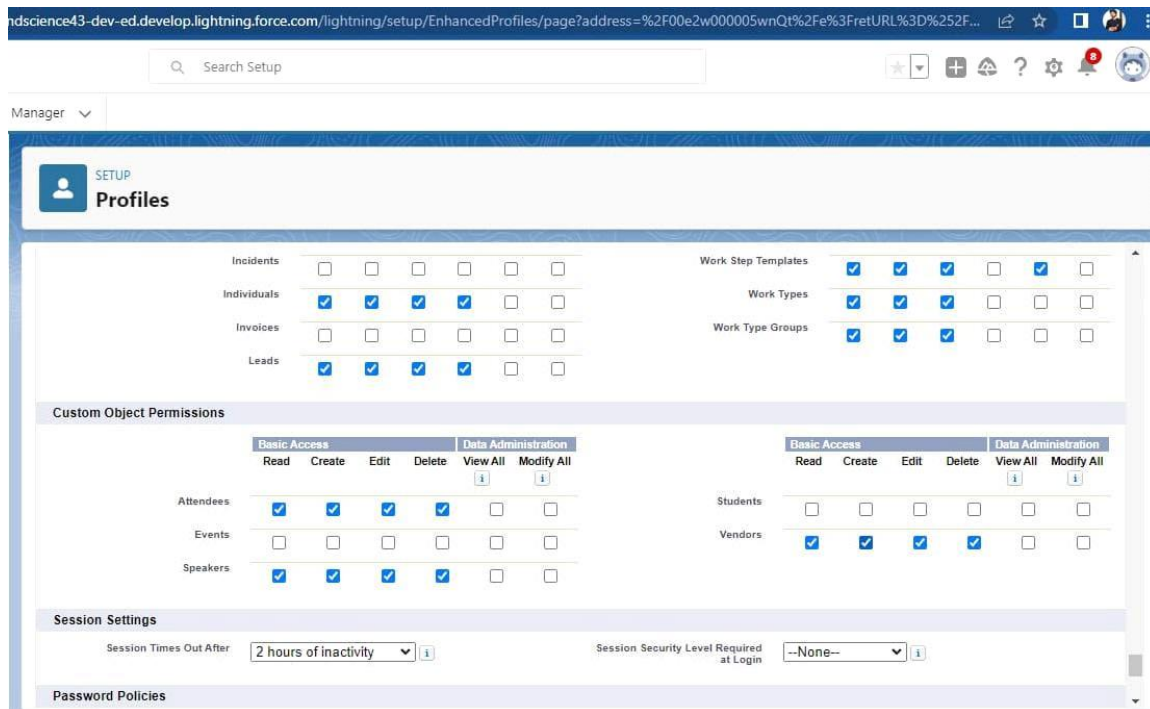


The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Setup icon, a search bar, and various utility icons. The left sidebar shows the Setup menu with 'Object Manager' selected. The main content area displays the 'Vendor' object details, specifically the 'Fields & Relationships' section. The 'New Relationship' step is active, showing a dropdown menu for 'Related To' with 'Event' selected. The page includes navigation buttons like 'Previous', 'Next', and 'Cancel'.

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:

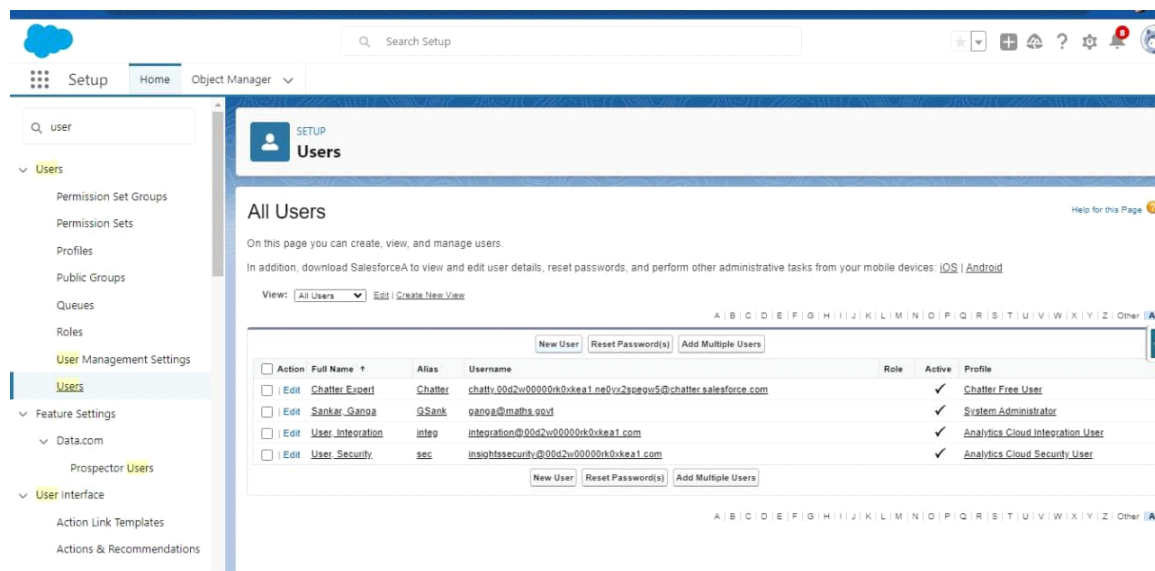
What is a user?

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

The screenshot shows the Salesforce Setup interface. On the left, a sidebar contains a search bar with 'user' entered, and a list of navigation items including 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', 'Users', 'Feature Settings', 'Data.com', 'Prospector Users', 'User Interface', 'Action Link Templates', and 'Actions & Recommendations'. The main content area is titled 'New User' and contains a 'User Edit' form. The form has tabs for 'General Information', 'Permissions', and 'Advanced'. The 'General Information' tab is active, showing fields for First Name (Rahul), Last Name (Sharma), Alias (Rahus), Email (rahulsharma@thesmartbridge.com), Username (rahulsharma@thesmartbridge.com), Nickname (Rahu), Title, Company, Department, and Division. On the right side of the form, there are dropdown menus for Role (None Specified), User License (Salesforce Platform), and Profile (Standard Platform User). Below these are checkboxes for Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, and Data.com User Type (None).

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?

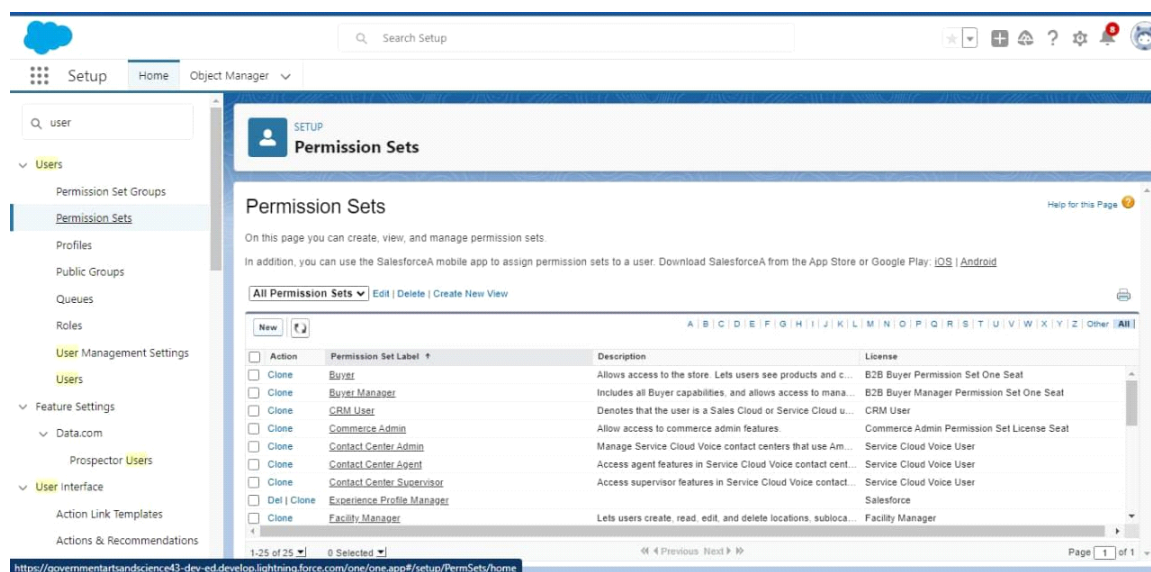
A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles.

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.

Search Setup

Setup Home Object Manager

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

User Interface

Action Link Templates

Actions & Recommendations

App Menu

SETUP

Permission Sets

Permission Set Create

Save Cancel

Enter permission set information

Label Vendor Permits

API Name Vendor_Permits

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 auto-assigned with the permission set.

Not sure what a permission set license is? [Learn more here.](#)

License None...

- After saving the permission click on the Manage assignment

Search Setup

Setup Home Object Manager

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

User Interface

Action Link Templates

Actions & Recommendations

App Menu

SETUP

Permission Sets

Permission Set Event Permits

Find Settings Clone Delete Edit Properties Manage Assignments

Permission Set Overview

Description

License

Session Activation Required ☐

Last Modified By Ganga Sankar 17/04/2023, 4:24 pm

API Name Event_Permits

Namespace Prefix

Created By Ganga Sankar 17/04/2023, 4:24 pm

Apps

Assigned Apps
Settings that specify which apps are visible in the app menu

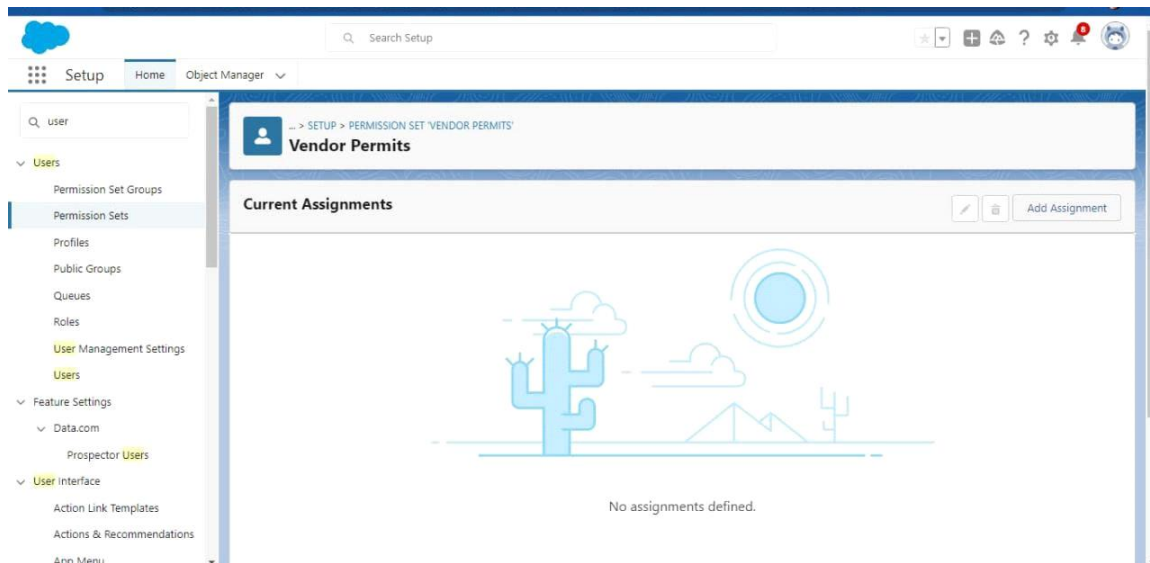
Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings such as tab availability

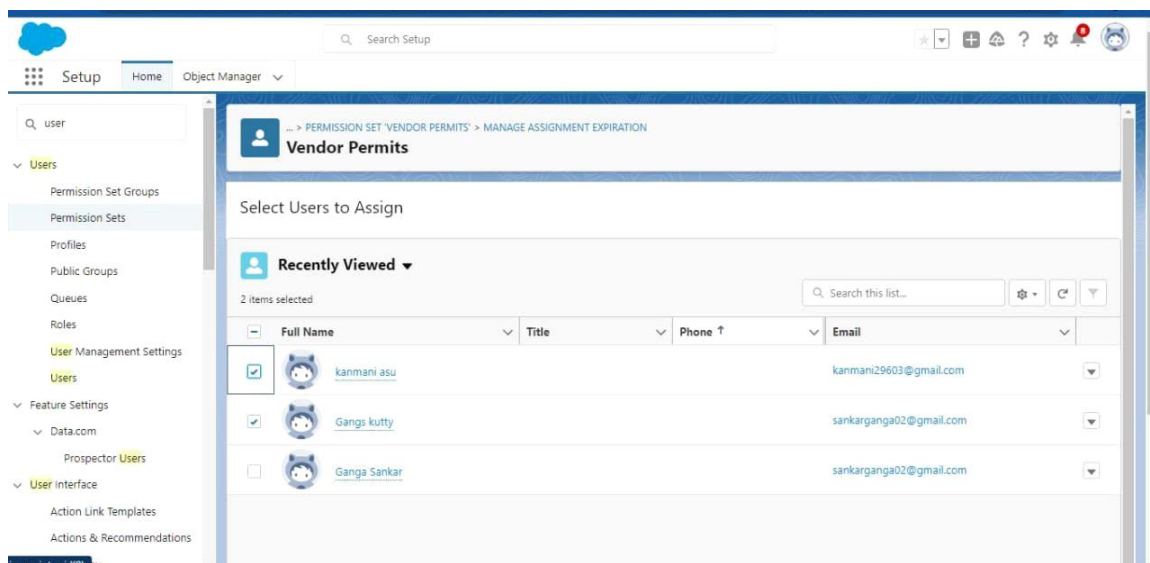
App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access
Permissions to execute Apex classes

- 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 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:

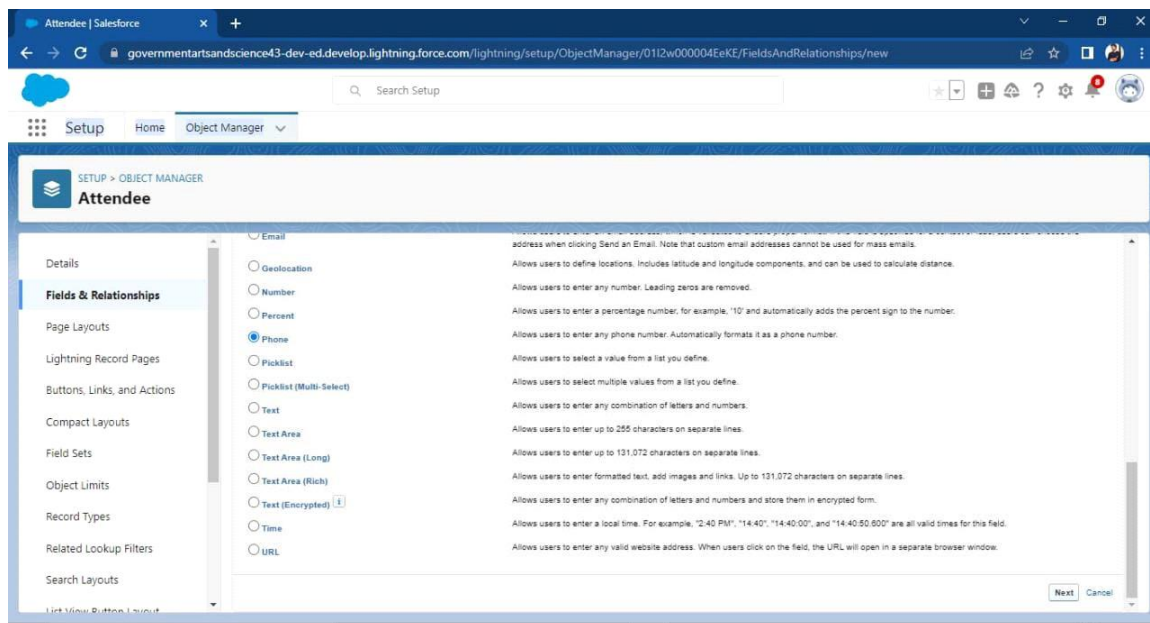
With this access level, users can do everything Viewers & Editors can do, plus they can also control other user's access levels to this folder. Also, users with Manager Access levels can delete the report.

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.