

PROJECT REPORT TEMPLATE

Build a event management system using salesforce

1. Introduction

Overview

- (i) Event Management is the process of creating and maintaining an event.
- (ii) This process spans from the very beginning of planning all the way to post – event strategizing.
- (iii) At the start, an event manager makes planning decisions, such as the time, location, and theme of their event.
- (iv) During the event, event managers oversee the event live and make sure things run smoothly.
- (v) After an event, event managers are tasked with reviewing event data, submitting KPI and ROI findings, and staying and the ball for any post-event offerings.
- (vi) All different branches of planning go into event management, including various types of sourcing, designing, regulation, checks, and on-site management.
- (vii) 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.
- (viii) Really, any event that requires considerable planning and execution is event management.

Purpose

- (i) Purpose to manage events throughout their lifecycle is the purpose of event management.
- (ii) This lifecycle of activities to detect events, make sense of them and determine the appropriate control action, which is coordinated by the event management process.
- (iii) Promotion of new products or services.
- (iv) Achieving the desired exposure and brand awareness.
- (v) Attracting more prospects and clients from exhibitions and trade shows.
- (vi) Improving brand positioning through professional events and conferences.
- (vii) Creative solutions to drive the highest level of satisfaction from the guests.
- (viii) Handling all permissions, permits, insurance and security concerns.
- (ix) Saving valuable time, efforts and money when hiring experience event managers.

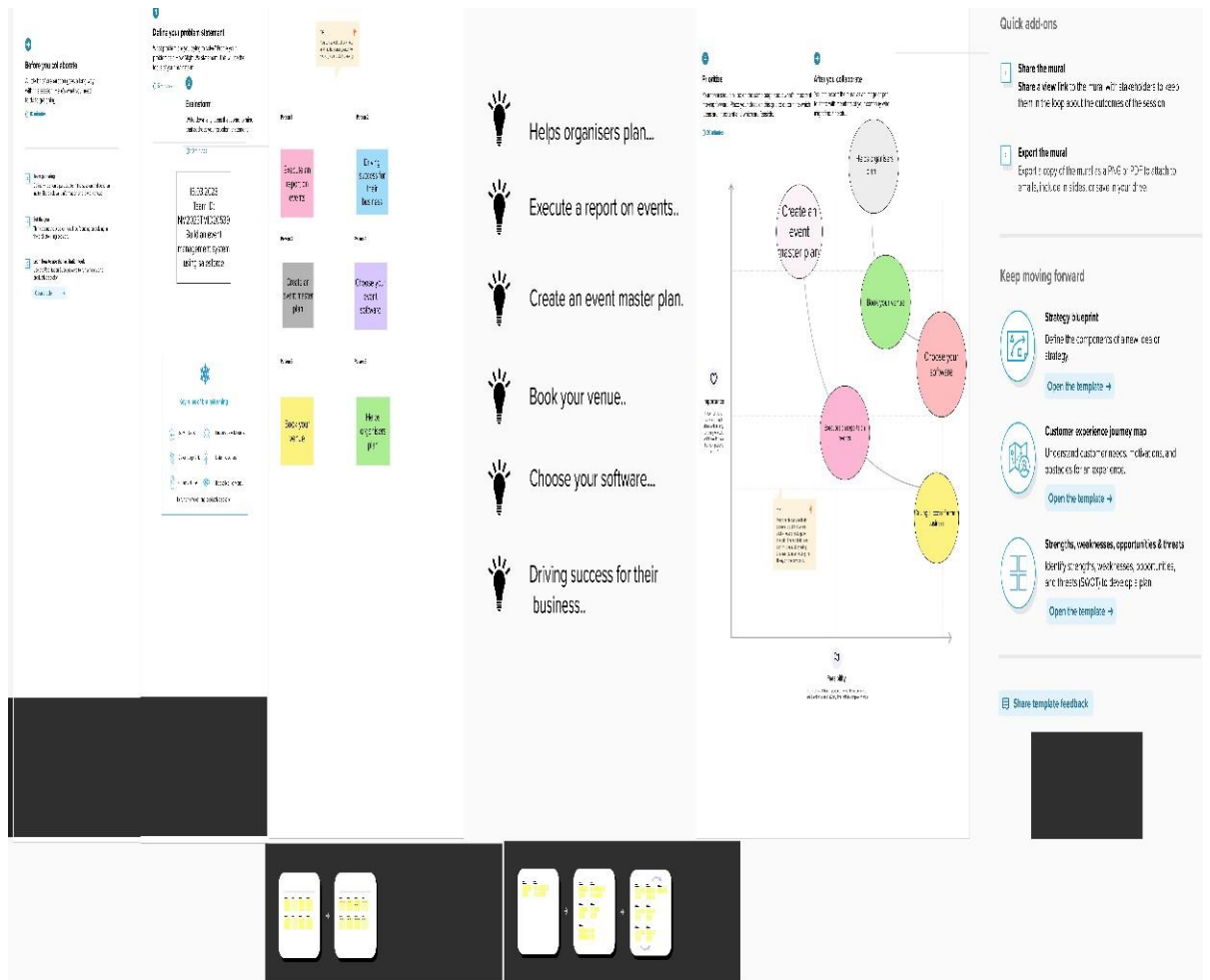
- (x) Reducing the possibility of any incidents that harm the professional atmosphere.

2 Problem Definition & Design Thinking

Empathy Map



Ideation and Brainstorming Map



3 Result

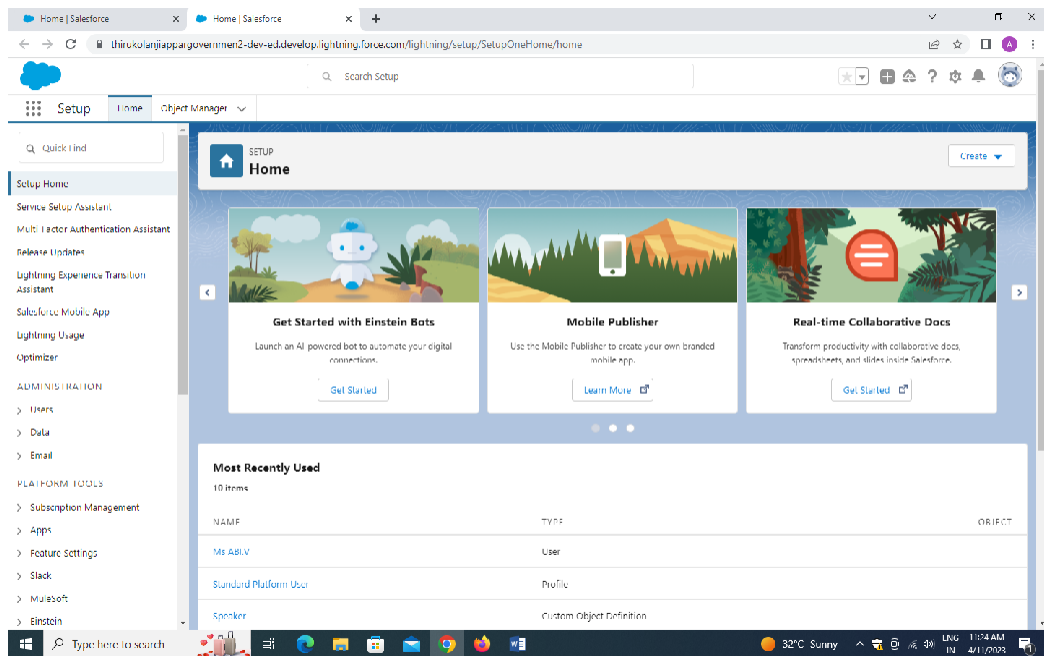
Data Model

| Object Name | Fields in the object | |
|-----------------|----------------------|----------------------------|
| <u>Event</u> | Field label | Data type |
| | City | Text |
| | Start Date | Date/Time |
| | Event Name | Master-detail relationship |
| | End Date | Date/Time |
| <u>Attendee</u> | Field label | Data type |
| | Id | Auto Number |
| | Phone | Phone |
| | Email | Email |
| <u>Speakers</u> | Field label | Data type |
| | Bio | Text Area |

| | | |
|----------------|--------------------|----------------------|
| | e-mail | Email |
| <u>Vendors</u> | Field label | Data type |
| | e-mail | Email |
| | Phone | Phone |
| | Service Provider | Text |
| | Event name | Look-up Relationship |
| <u>Student</u> | Field label | Data type |
| | Tickets | Picklist |

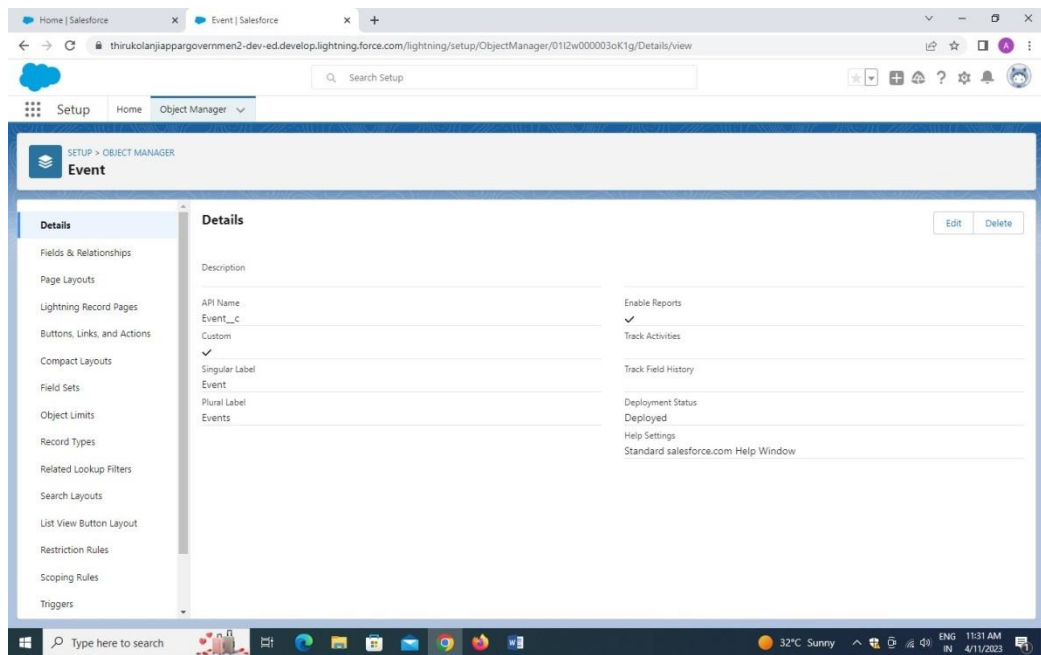
Activity and Screenshot

Milestone 1:

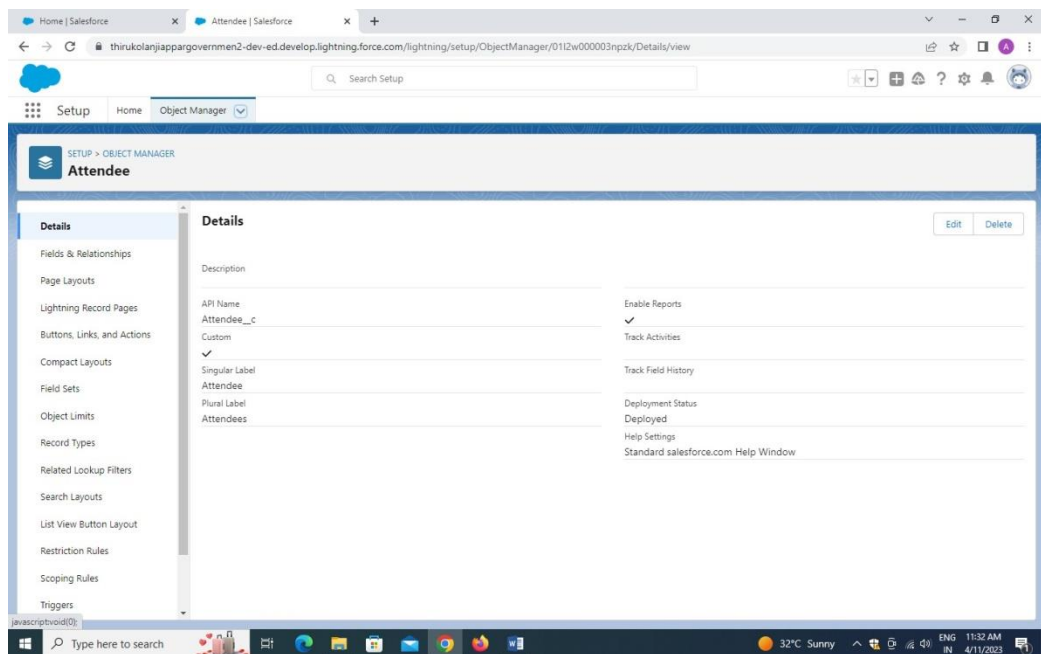


Milestone 2:- Object

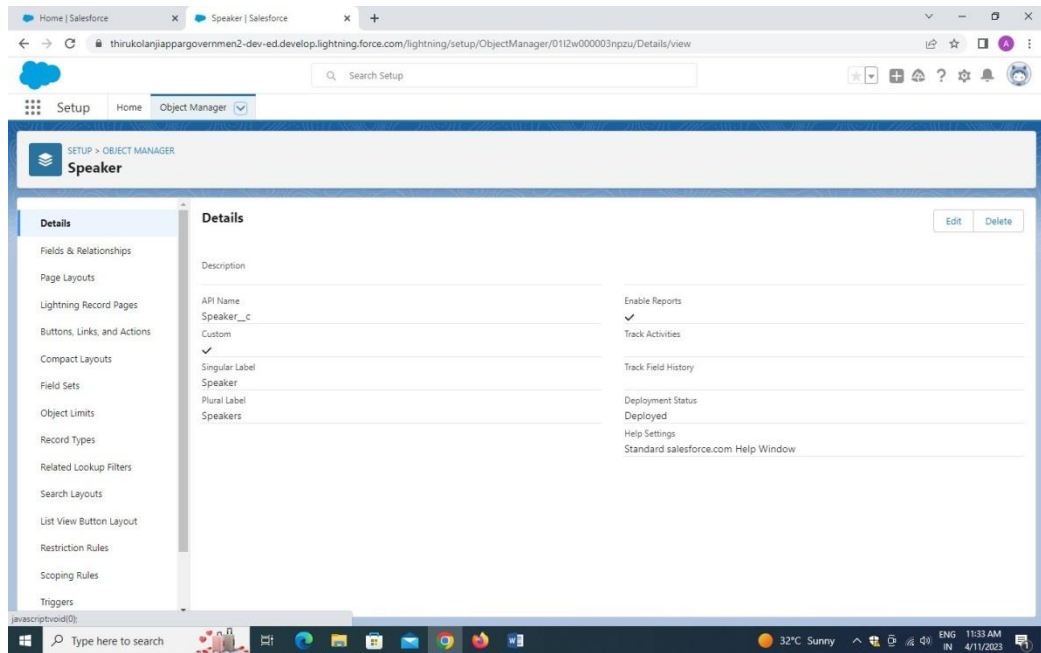
Activity 1:



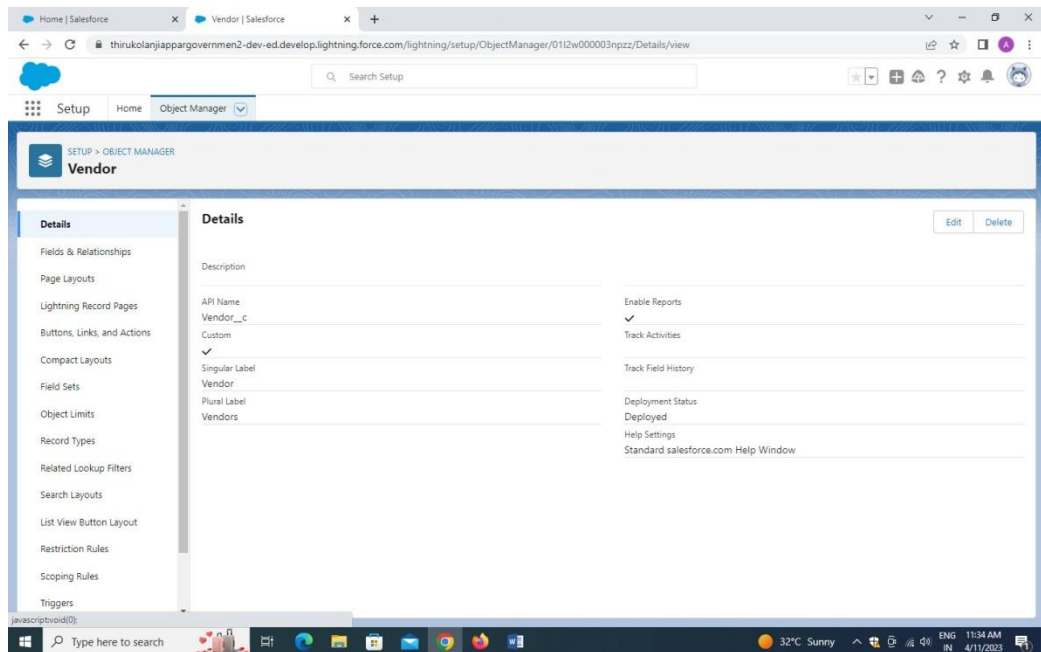
Activity 2:



Activity 3:

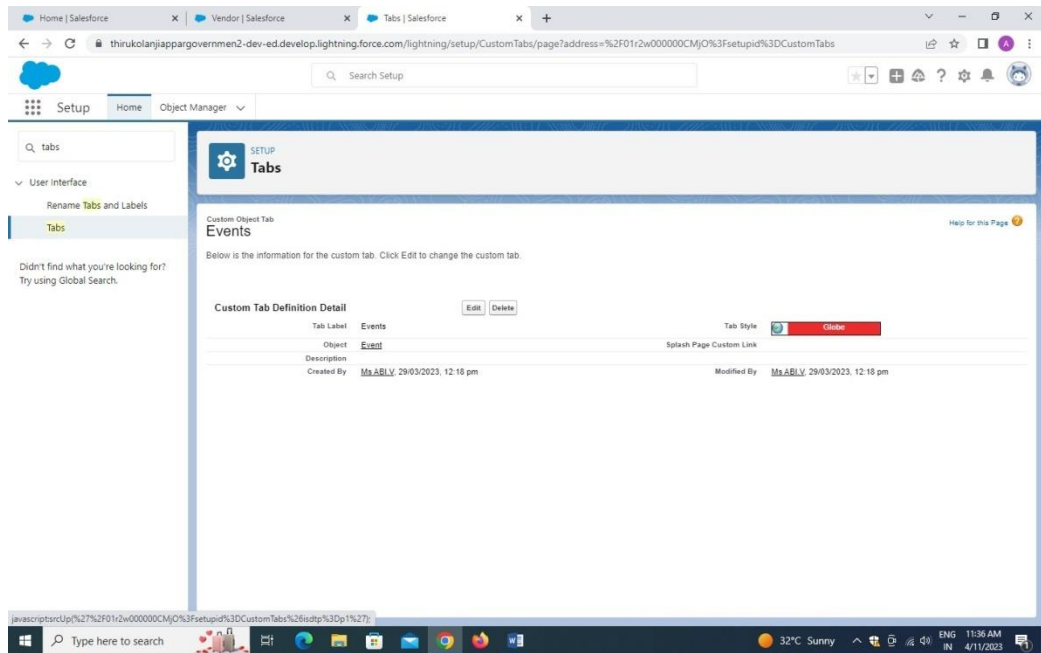


Activity 4:

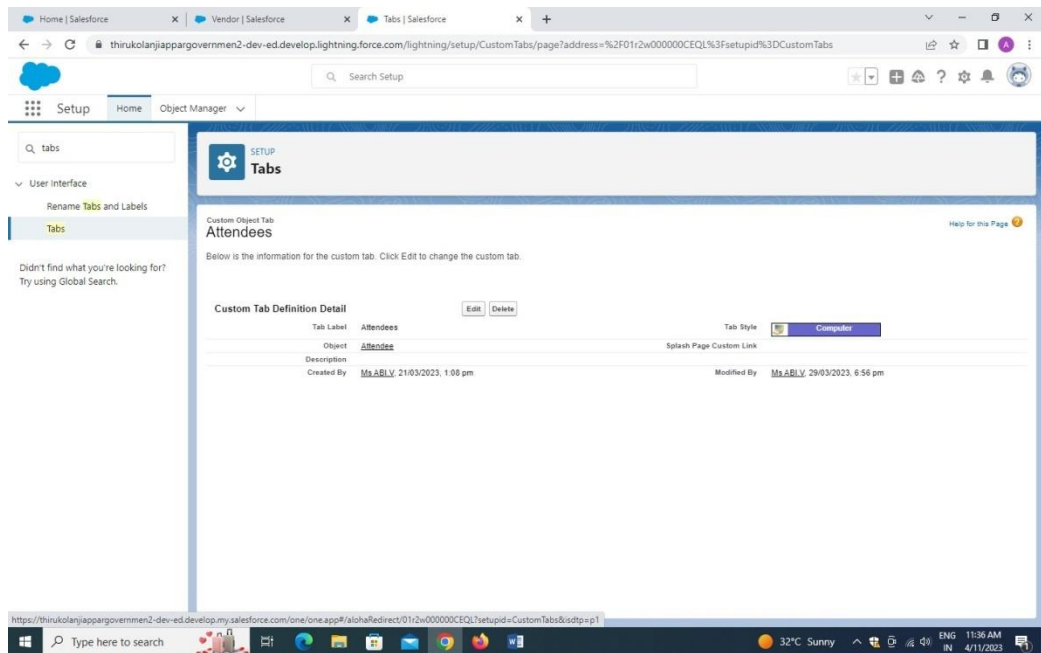


Milestone 3:- Tab

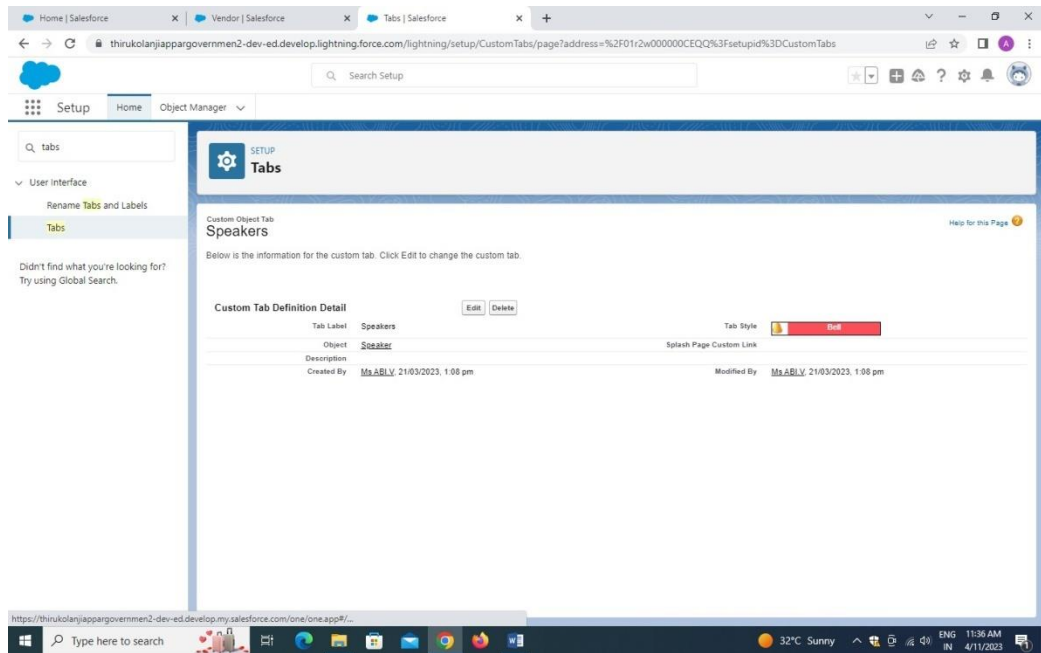
Activity 1: Creation of Event Tab



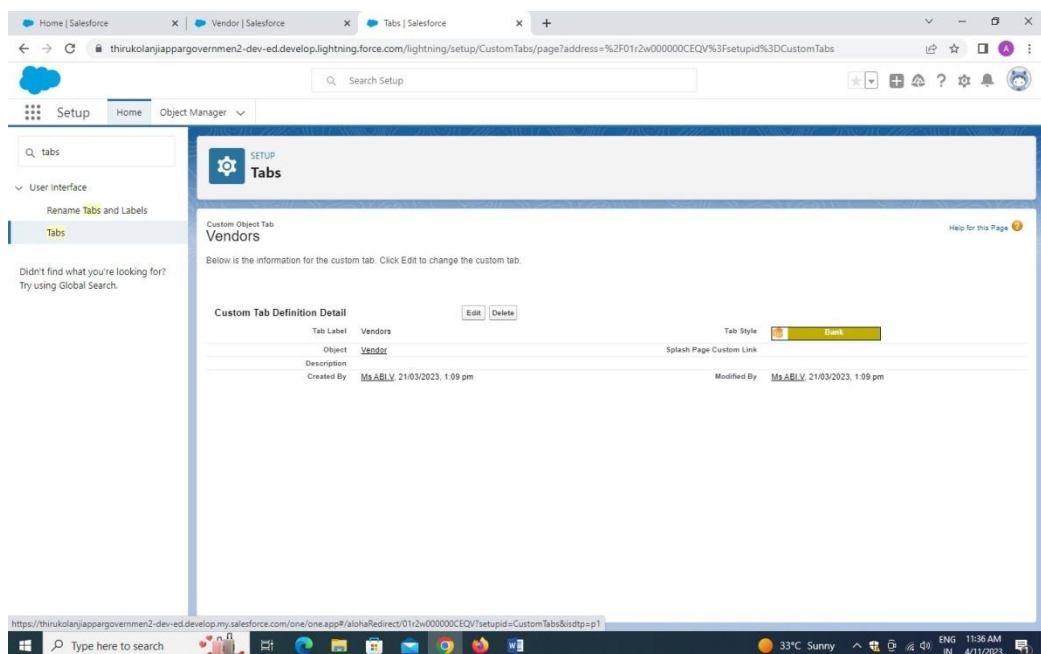
Activity 2: Creation of Attendee Tab



Activity 3: Creation of Speaker Tab

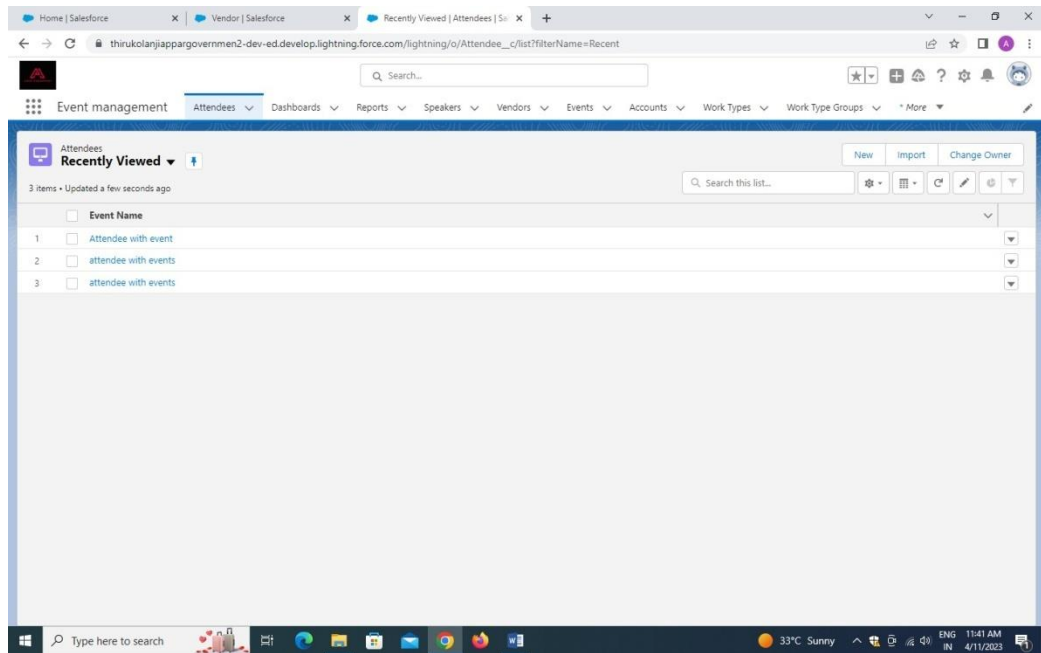


Activity 4: Creation of Vendor Tab



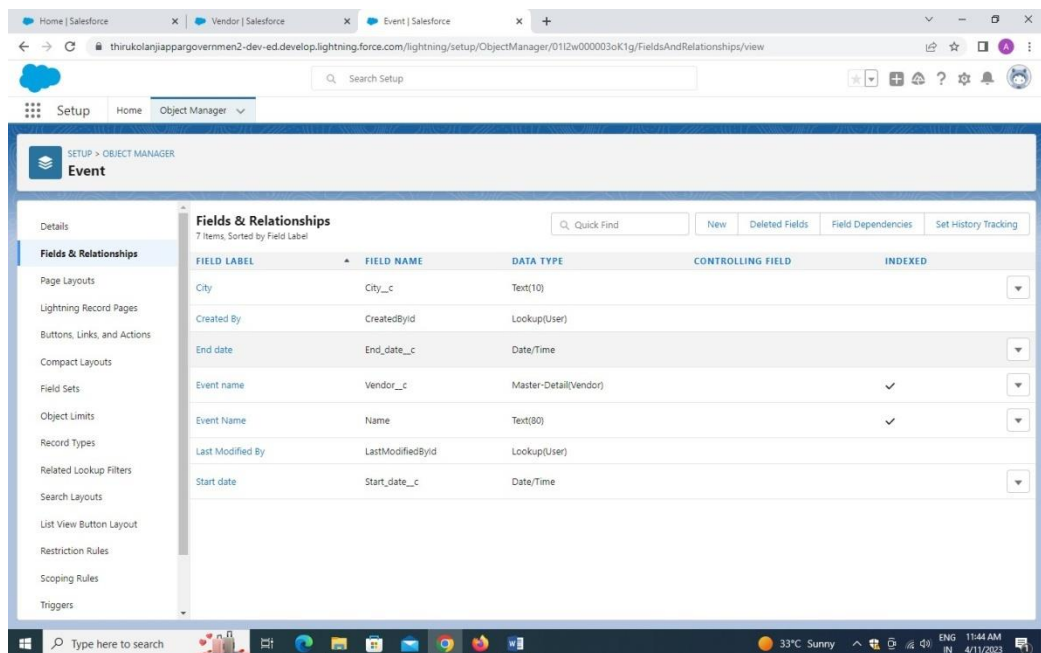
Milestone 3 :- Application

Activity: Create the event management construction App



Milestone 4:- Fields

Activity 1: Creation of Fields for the event objects



Activity 2: Creation of Fields for the Attendee objects

Home | Salesforce | Vendor | Salesforce | Attendee | Salesforce

thirukolanjappargovemen2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w00003npzk/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

Attendee

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

Fields & Relationships

8 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------|------------------|--------------------|-------------------|---------|
| Created By | CreatedById | Lookup(User) | | |
| Email | Email_c | Email | | |
| Event Name | Name | Text(80) | | ✓ |
| Id | Id_c | Auto Number | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Owner | OwnerId | Lookup(User,Group) | | ✓ |
| Phone | Phone_c | Phone | | |
| Tickets | Tickets_c | Picklist | | |

Type here to search

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Home | Salesforce | Vendor | Salesforce | Student | Salesforce

thirukolanjappargovemen2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w00003oSPH/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

Student

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

Fields & Relationships

5 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------|------------------|----------------------|-------------------|---------|
| Created By | CreatedById | Lookup(User) | | |
| Event Name | Event_Name_c | Master-Detail(Event) | | ✓ |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Student Name | Name | Text(80) | | ✓ |
| Tickets | Tickets_c | Picklist | | |

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Activity 3: Creation of Fields for the Speaker objects

thirukolaniappargovernmen2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w00003npzu/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Speaker

Details

Fields & Relationships

7 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------|------------------|--------------------|-------------------|---------|
| Bio | Bio__c | Text Area(255) | | |
| Created By | CreatedById | Lookup(User) | | |
| e-mail | e_mail__c | Email | | |
| Event name | Event__c | Lookup(Event) | | ✓ |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Owner | OwnerId | Lookup(User,Group) | | ✓ |
| Speaker Name | Name | Text(80) | | ✓ |

Type here to search

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Activity 4: Creation of Fields for the Vendor objects

thirukolaniappargovernmen2-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w00003npzz/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Vendor

Details

Fields & Relationships

9 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------|---------------------|--------------------|-------------------|---------|
| Created By | CreatedById | Lookup(User) | | |
| e-mail | e_mail__c | Email | | |
| Event Name | Event_Name__c | Lookup(Event) | | ✓ |
| Event name | Event__c | Lookup(Event) | | ✓ |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Owner | OwnerId | Lookup(User,Group) | | ✓ |
| Phone | Phone__c | Phone | | |
| Service provider | Service_provider__c | Text(30) | | |
| Vendor Name | Name | Text(80) | | ✓ |

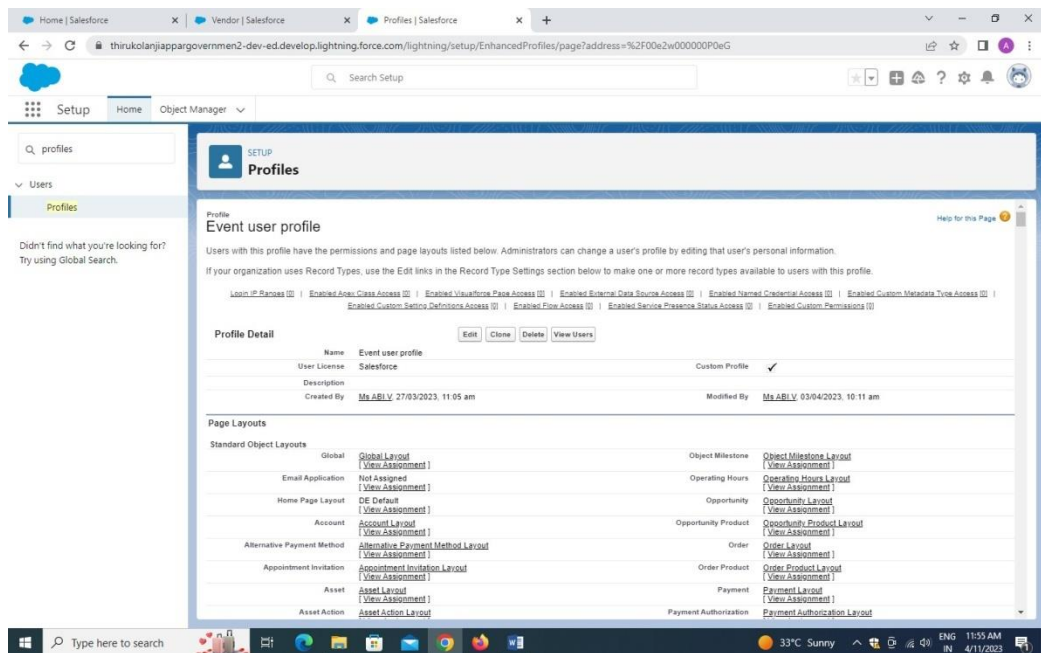
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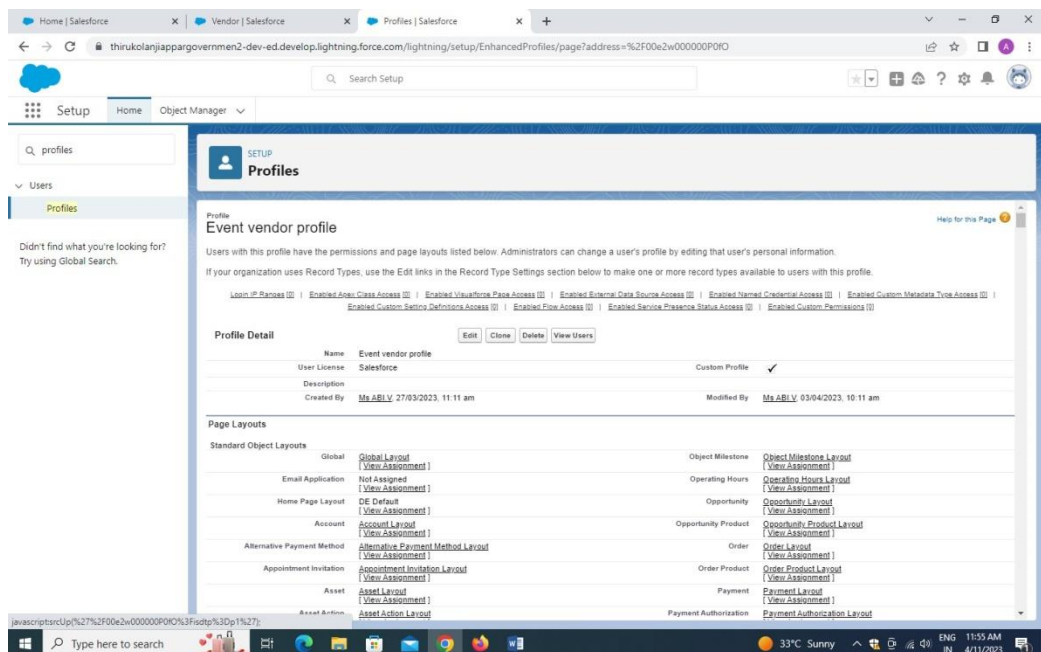
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Milestone 5:- Profile

Activity 1: Creation on event user profile

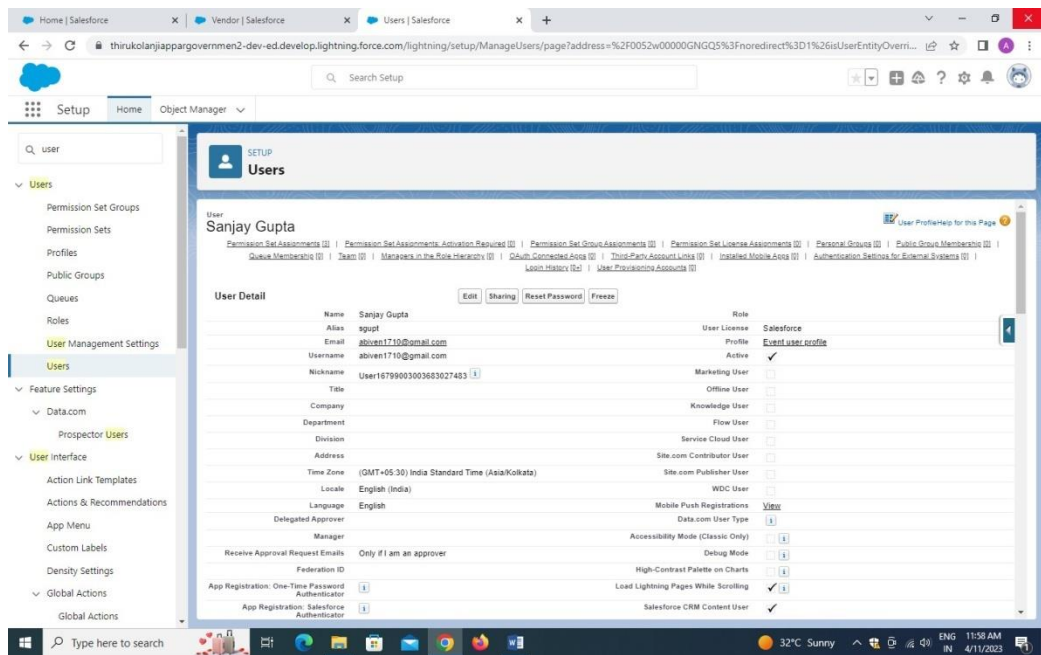


Activity 2: Creation on event vendors profile

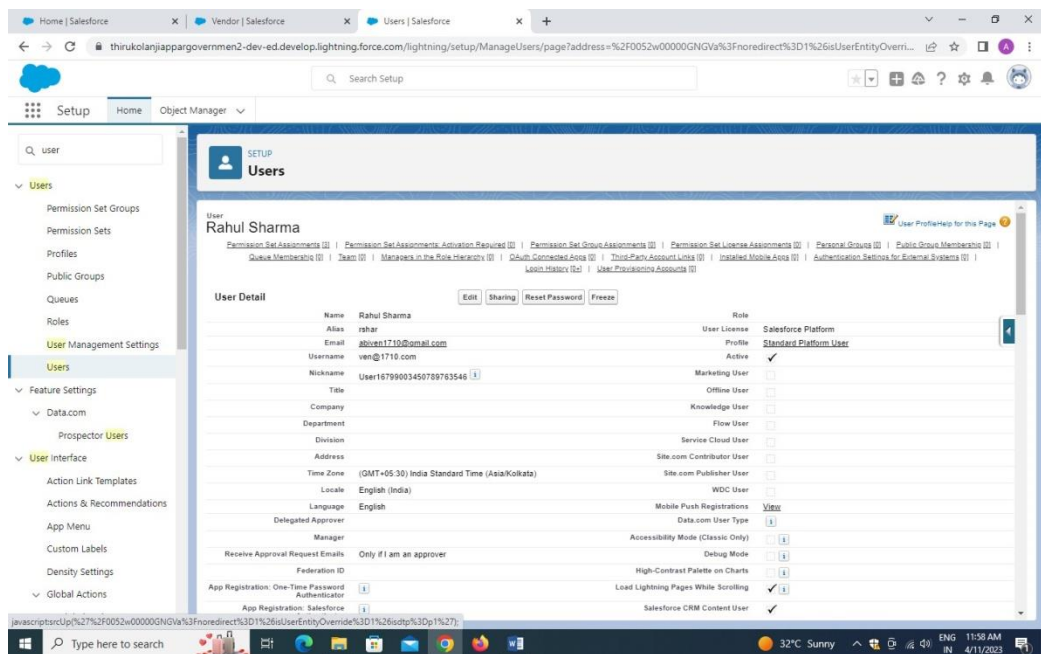


Milestone 6:- User

Activity 1: Creating a User with username as Sanjay Gupta

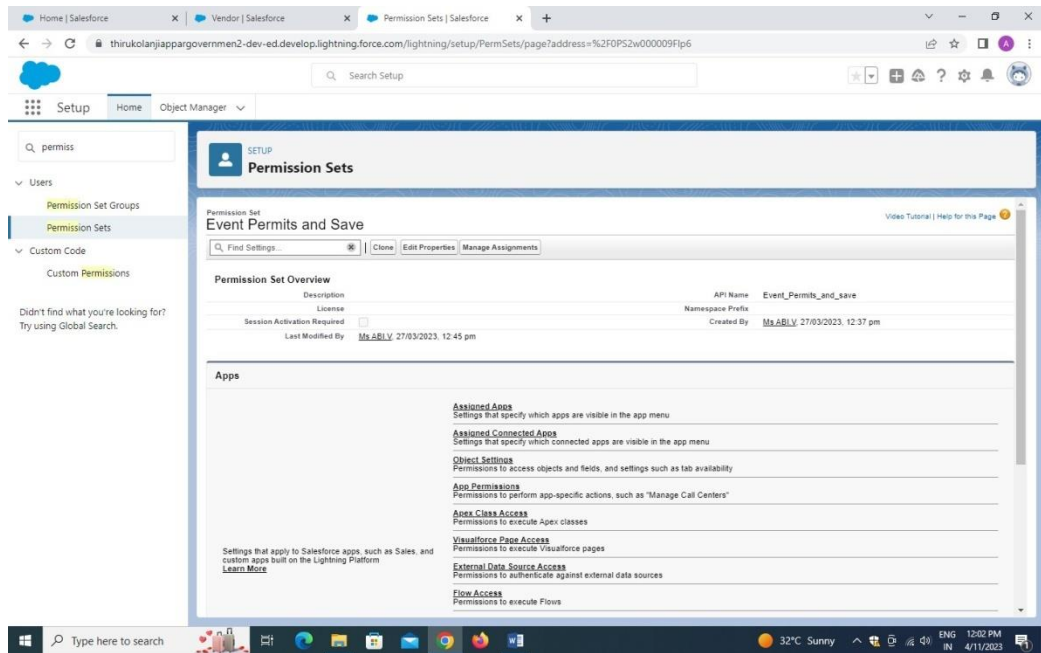


Activity 2: Creating a User with username as Rahul Sharma

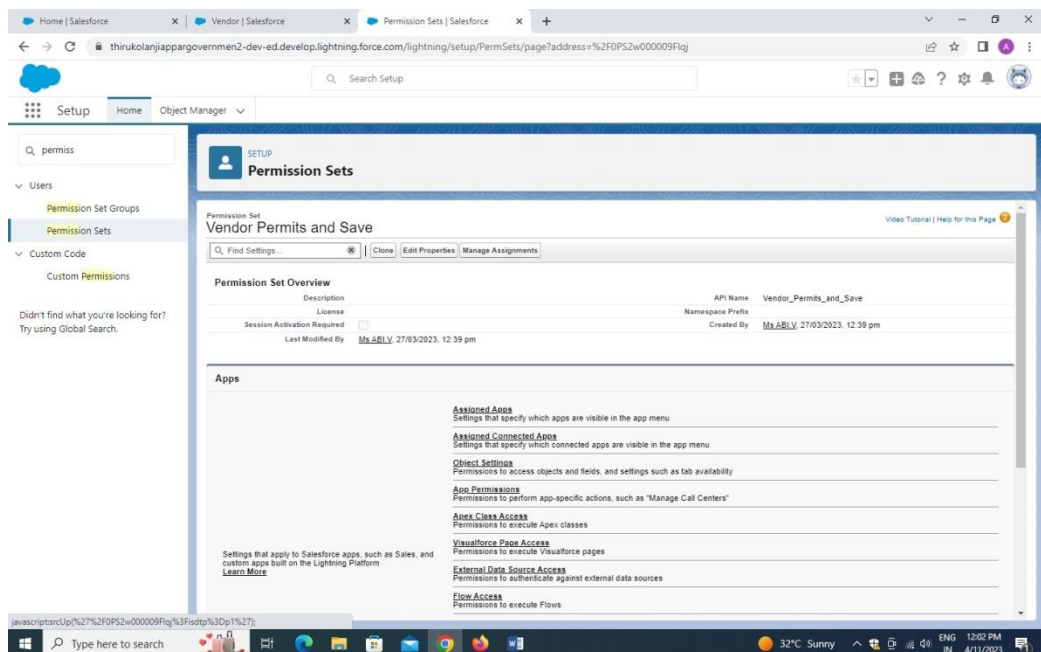


Milestone 7:- Permission Sets

Activity 1:



Activity 2:



Milestone 8:- Reports

Creating a Report:

Home | Salesforce x Vendor | Salesforce x New Attendee with event Report x

thirukolanjappargovenmen2-dev-ed.develop.lightning.force.com/lightning/r/Report/00O2w00000EBRzZEAU/view

Search...

Event management Attendees Dashboards Reports Speakers Vendors Events Accounts Work Types Work Type Groups More

Report: Attendee with event
New Attendee with event Report

Enable Field Editing Add Chart Edit

Total Records: 13 Total Annual Revenue: ₹8,56,90,00,000 Total Employees: 2,41,965

| | Account Name | Account ID | Account Number | Account Owner: Full Name | Account Site | Account Source | Active | Annual Revenue | Employees | Billing Address |
|----|-------------------------------------|-----------------|----------------|--------------------------|--------------|----------------|--------|-----------------|-----------|---------------------------------|
| 1 | GenePoint | 0012w00001OPSKs | CC978213 | Ms ABLV | - | - | Yes | ₹3,00,00,000 | 265 | 345 Shoreline Park->Moun |
| 2 | United Oil & Gas, UK | 0012w00001OPSKq | CD355119-A | Ms ABLV | - | - | Yes | - | 24,000 | Kings Park, 17th Avenue, Team |
| 3 | United Oil & Gas, Singapore | 0012w00001OPSKr | CD355120-B | Ms ABLV | - | - | Yes | - | 3,000 | 9 Tagore Lane->Singapore |
| 4 | Edge Communications | 0012w00001OPSKi | CD451796 | Ms ABLV | - | - | Yes | ₹13,90,00,000 | 1,000 | 312 Constitution Place->Al |
| 5 | Burlington Textiles Corp of America | 0012w00001OPSKj | CD656092 | Ms ABLV | - | - | - | ₹35,00,00,000 | 9,000 | 525 S. Lexington Ave, Burlingt |
| 6 | Pyramid Construction Inc. | 0012w00001OPSKk | CC213425 | Ms ABLV | - | - | Yes | ₹95,00,00,000 | 2,680 | 2 Place Jussieu, Paris, 75251 F |
| 7 | Dickenson plc | 0012w00001OPSKl | CC634267 | Ms ABLV | - | - | Yes | ₹5,00,00,000 | 120 | 1301 Hoch Drive, Lawrence, K |
| 8 | Grand Hotels & Resorts Ltd | 0012w00001OPSKm | CD439877 | Ms ABLV | - | - | Yes | ₹50,00,00,000 | 5,600 | 2334 N. Michigan Avenue, Sui |
| 9 | Express Logistics and Transport | 0012w00001OPSKo | CC947211 | Ms ABLV | - | - | Yes | ₹95,00,00,000 | 12,300 | 620 SW 5th Avenue Suite 400 |
| 10 | University of Arizona | 0012w00001OPSKp | CD736025 | Ms ABLV | - | - | Yes | - | 39,000 | 888 N Euclid ->Halls Cente |
| 11 | United Oil & Gas Corp. | 0012w00001OPSKn | CD355118 | Ms ABLV | - | - | Yes | ₹5,60,00,00,000 | 1,45,000 | 1301 Avenue of the Americas |
| 12 | Sample Account for Entitlements | 0012w00001OIPs | - | Automated Process | - | - | - | - | - | - |
| 13 | sForce | 0012w00001OPSKt | - | Ms ABLV | - | - | - | - | - | The Landmark @ One Market |
| 14 | | | | | | | | ₹8,56,90,00,000 | 2,41,965 | |

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4 Trailhead Profile Public URL

TEAM LEAD: IYYAPPAN.K

<https://trailblazer.me/id/ubscmaths>

TEAM MEMBER 1: VINOTH.T

<https://trailblazer.me/id/gdevil9>

TEAM MEMBER 2: SRIDHARAN.A

<https://trailblazer.me/id/dgovindhasamy>

TEAM MEMBER 3: DHINAKARAN.G

<https://trailblazer.me/id/srari8>

5 Advantages and Disadvantages

List of Advantages

- ✓ Gaining more experience for your business internal public relation and marketing teams collaborating with professional event planning companies.

- ✓ Reducing the possibility of any incidence that harm the professional atmosphere.
- ✓ It is too easy to focus on the details of the event and forget that the intension is to achieve your objectives.
- ✓ An event management company will help with this.
- ✓ The company will tell you about other things you may not have thought of which could enhance the experience.

List of Disadvantages

- ✓ They will do a risk analysis, create plans and implement procedures.
- ✓ You need to pay them in addition to other event costs.
- ✓ The event Management come any does not know anything about your company unless you tell them.
- ✓ Like many other creative fields, this profession demands long hours of hard works it is not a 9-5 job.
- ✓ Candidates should be able to work at off hours and under pressure to meet the expectations of the clients.
- ✓ This profession requires extra amount of responsibilities.

6 Applications

- Event management provides multiple opportunities to meet and interact with celebrities like actors, actresses, politicians and similar high-profile people.
- This profession provides opportunities for free travel.
- Event Management is a personally rewarding career as it provides job satisfaction.
- It is one of rare professions that requires minimum educations qualification to start a career.
- It involves a lot of research about the brand, target audience and the concept of the event before planning the actual event.

7 Conclusion

Event Management system is user friendly and cost-effective system, it is customized with activities related to event management life-cycle. It provides a new edge to management industry. Solution Dot always keep your objectives and goals on top priority while developing any plan of work.

8 Future scope

- Event Management is the process of planning various types of events.
- It involves management, creation and development of events such as corporate conferences, wedding, festivities, formal parties etc.

- It involves a lot of research about the brand, target audience and concept of the event before planning the actual event.
- The event industry manages different sizes of events including Olympics to many even small birthday parties etc.
- The process of planning small or large size events is called event planning.