NAAN MUDHALVAN

PROJECT REPORT

on

[SALESFORCE]

IMPLEMENTING CRM FOR EVENT MANAGEMENT SYSTEM

TEAM LEADER – SIVARAM S

NM ID - 4709756F5B26C0790324E00F3603A785

TEAM MEMBER1 – JEBIN S

NM ID – 4DCBF87F19A887C8A6940B957A326078

TEAM MEMBER2 – ABIN RJ

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TEAM MEMBER3 – RAHUL KRISHNA S

NM ID – 170EFB06B39D270A47A4FA6FFD1858A7

Developer (Short Term)

Introduction:

"Implementing a CRM in Salesforce for Event Management System" represents a digital tool that streamlines the planning, organization, and execution of events

Project Goals:

- Streamline and modernize the process of Planning and managing events , with a specific focus on attendees.
- Enhance data accuracy and reliability by minimizing manual data entry and human errors.
- Improve accessibility to result tracking data for educational institutions, recruitment agencies, and HR departments.

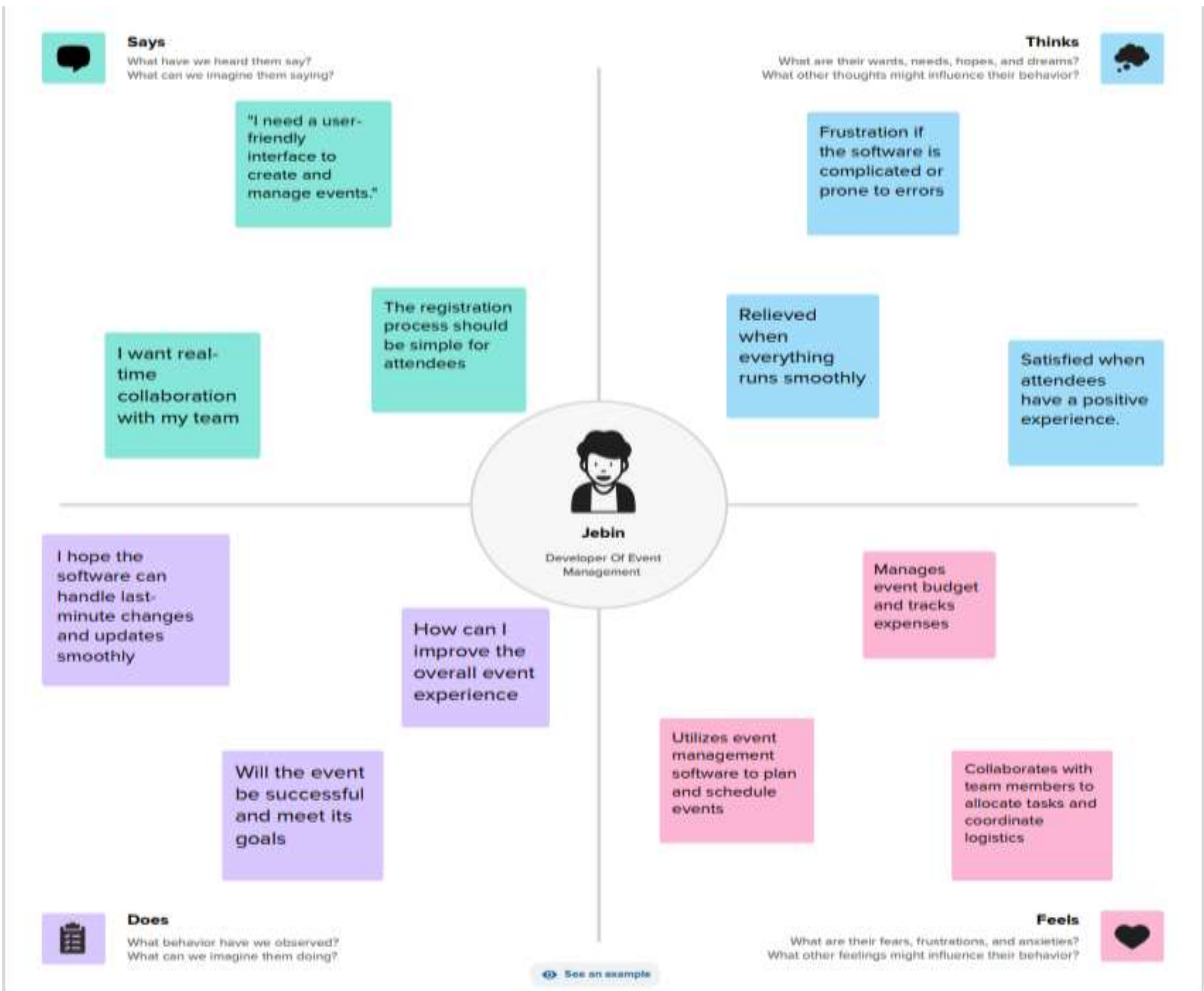
Scope:

- Creation of a comprehensive CRM system in Salesforce.
- Automation of data entry, processing, and event management.
- User-friendly dashboard for real-time data access.

Problem Definition & Design Thinking:

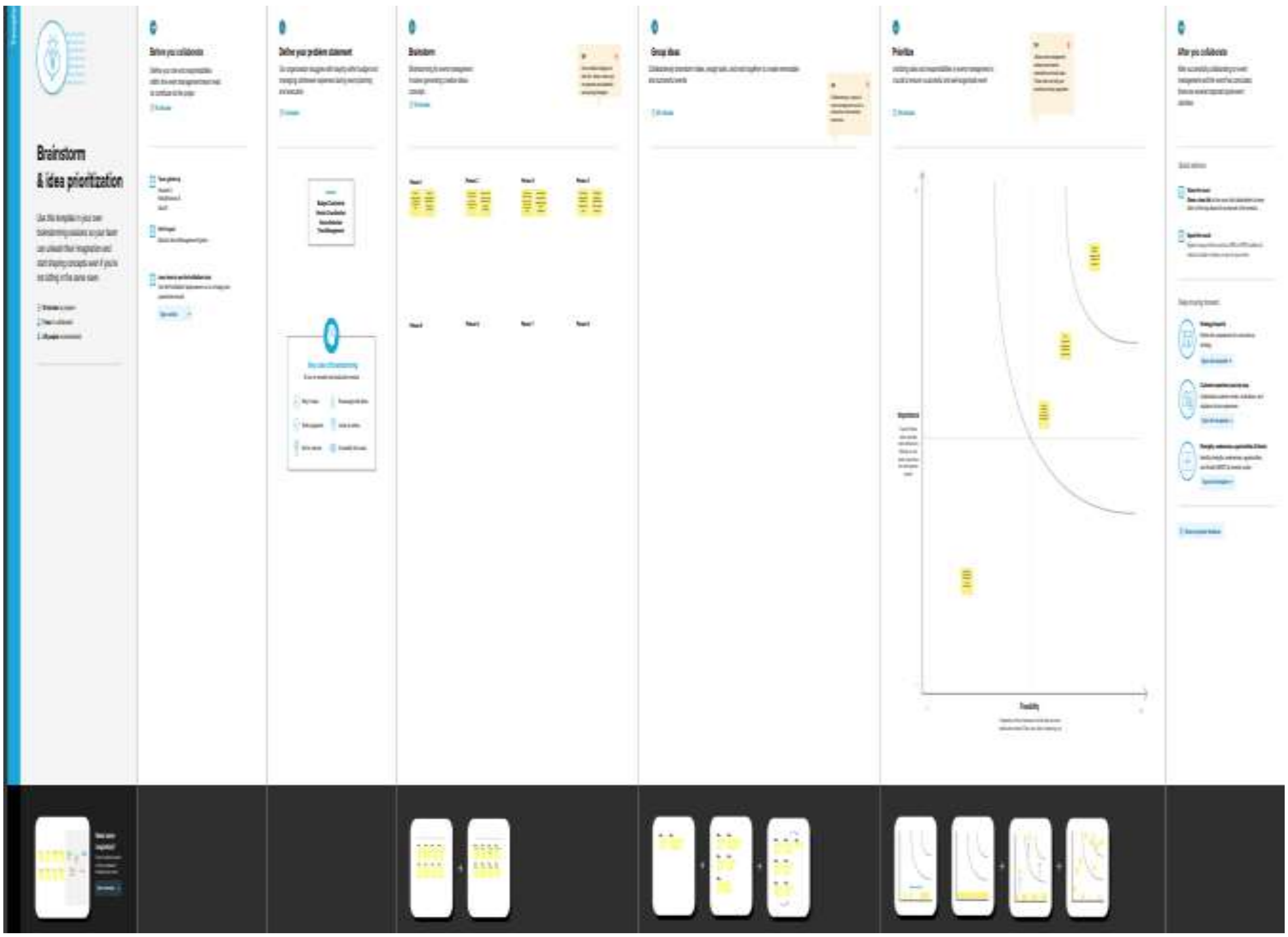
Empathy Map:

Understanding the needs and pain points of users, including educators, HR professionals, and administrators, to create a user-focused system.



Ideation & Brainstorming:

Generating creative solutions to address the identified challenges, using brainstorming and collaboration.



Milestone- 01 [Creation of developer account]

1.Go to developers.salesforce.com/signup

2.Click on sign up.

3.On the sign up form, enter the following details:

a) First name: **Sivaram**

b) Last name: **S**

c) Email: **ssivaram3103@gmail.com**

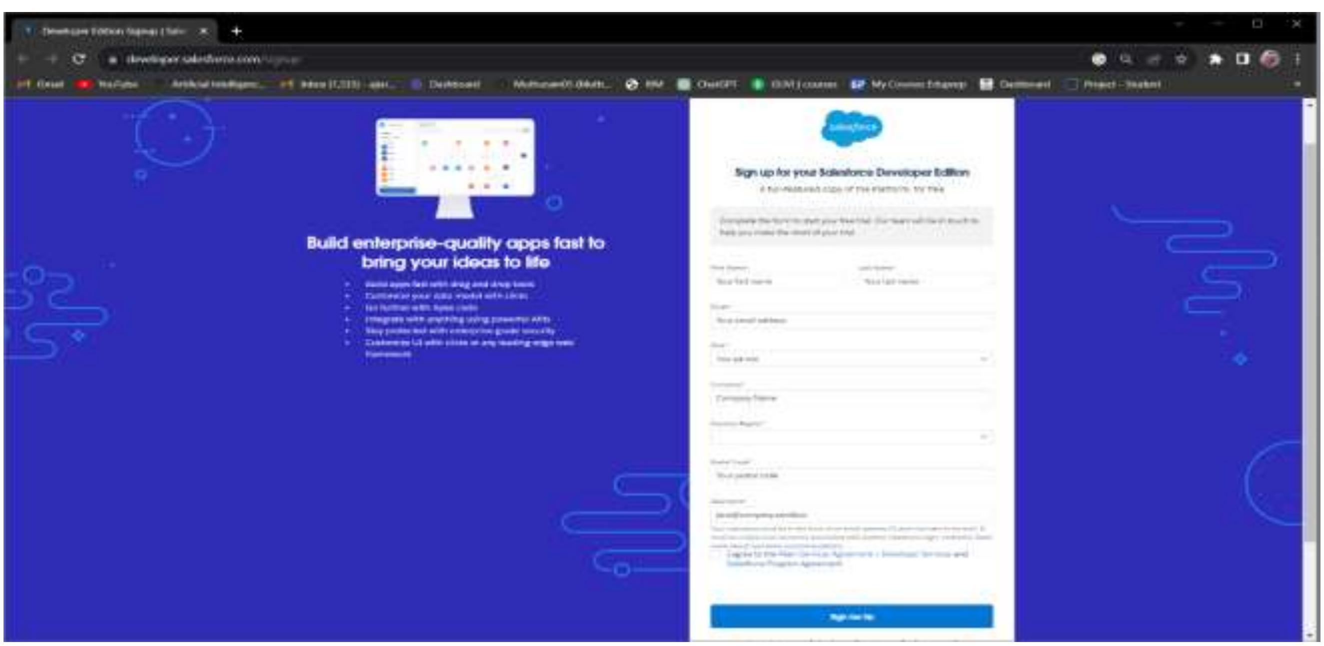
d) Role: **Developer**

e) Company: **Ponjesly College of Engineering**

f) County: **India**

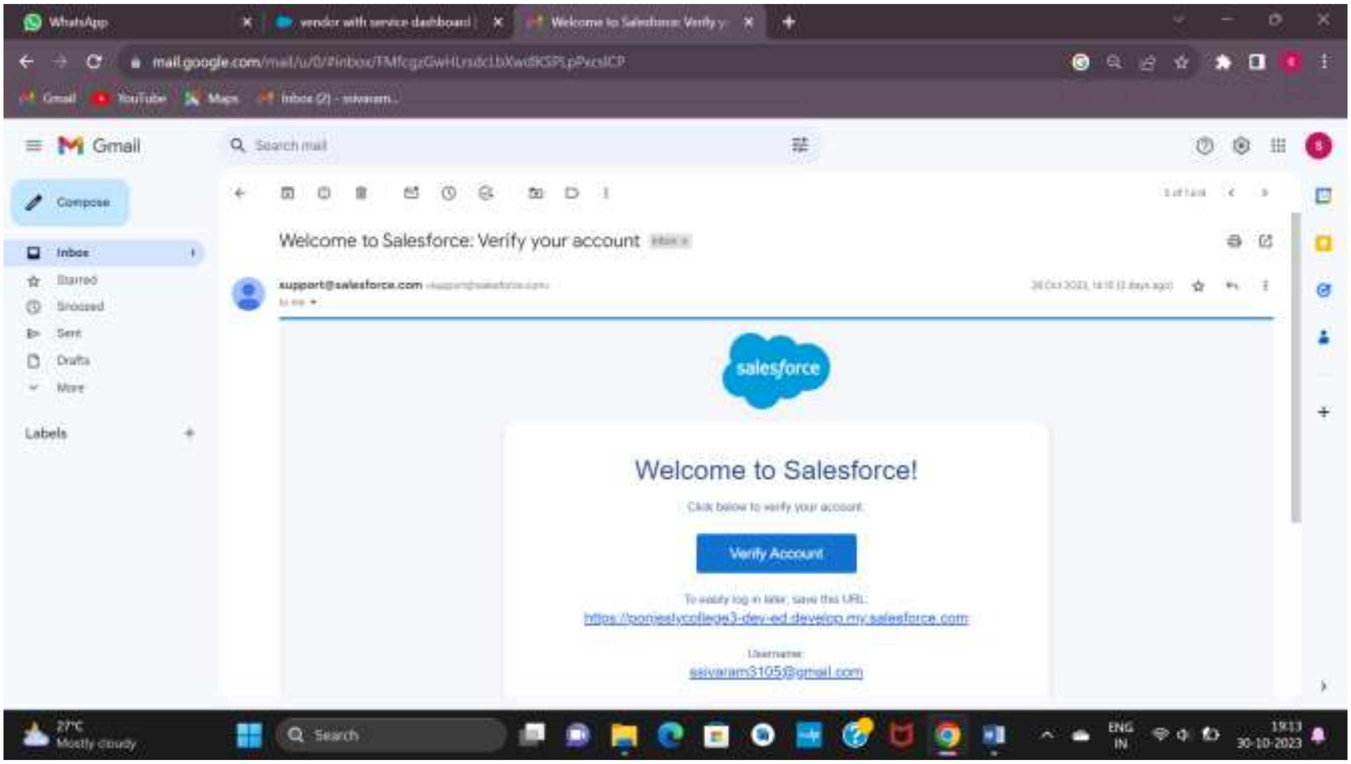
g) Postal Code: **629251**

h) Username: **sivaram@ponjesly.sandbox**



Account Activation

Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account.

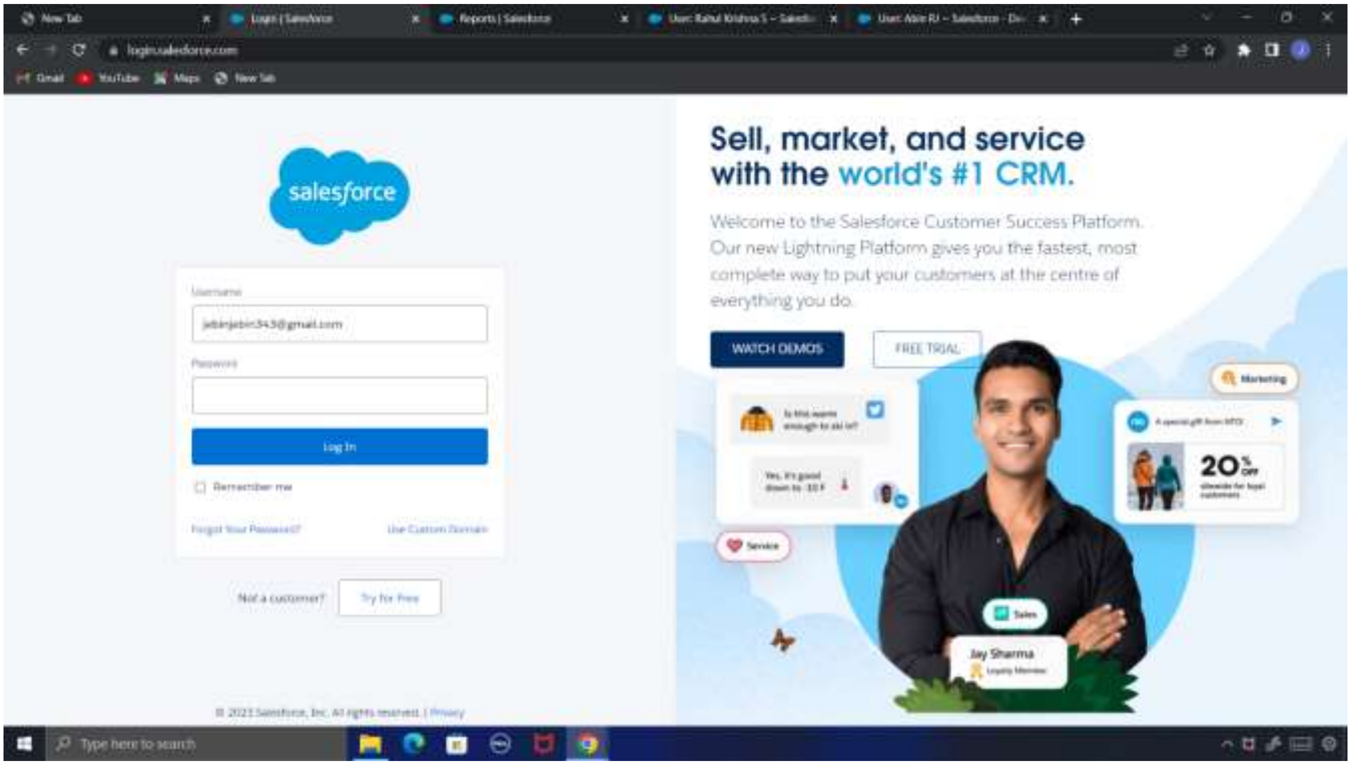


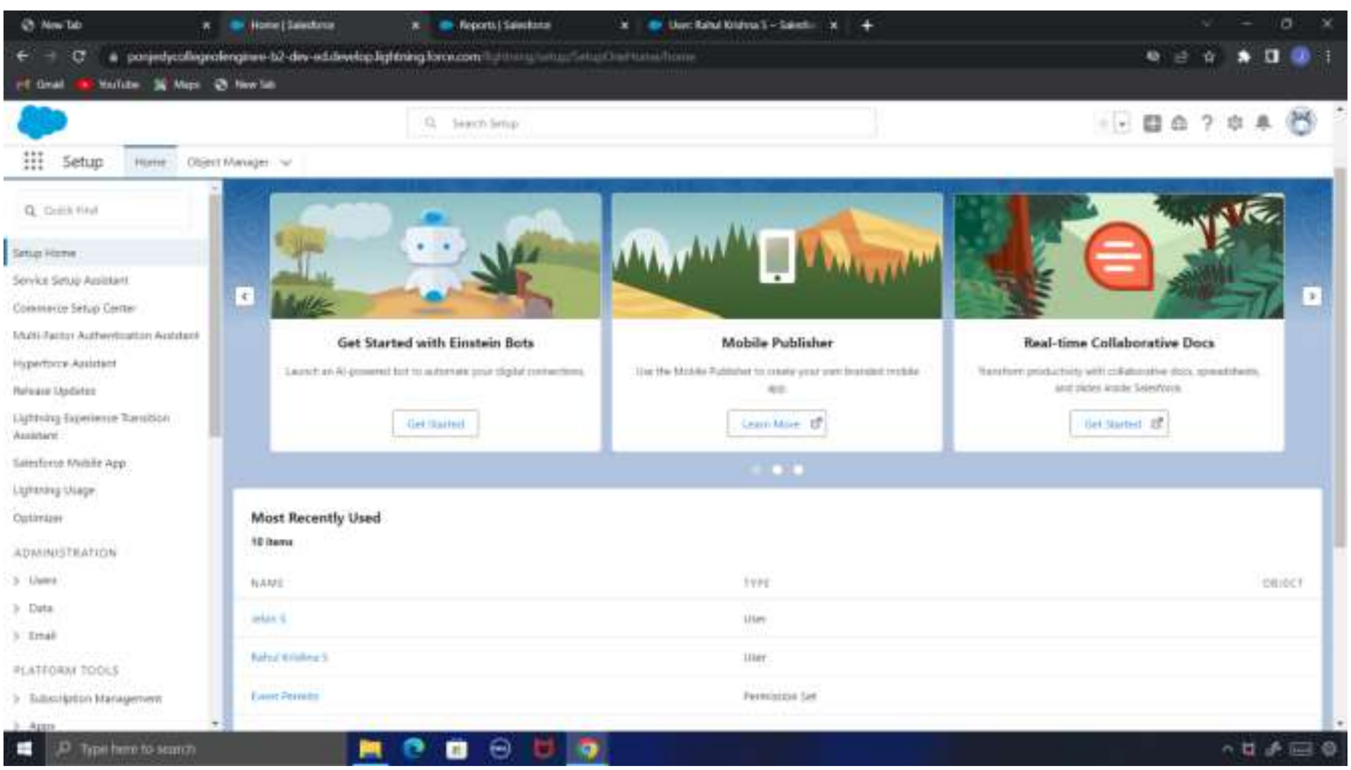
Login to Your Salesforce Account

1.Go to salesforce.com and click on login.

2.Enter the username and password that you just created.

3.After login this is the home page which you will see.


salesforce
Sell, market, and service with the world's #1 CRM.
Welcome to the Salesforce Customer Success Platform. Our new Lightning Platform gives you the fastest, most complete way to put your customers at the centre of everything you do.
WATCH DEMOS
FREE TRIAL
Log In
Not a customer?
Try for Free
Jay Sharma


Setup
Object Manager
Get Started with Einstein Bots
Mobile Publisher
Real-time Collaborative Docs
Most Recently Used
ADMINISTRATION
PLATFORM TOOLS

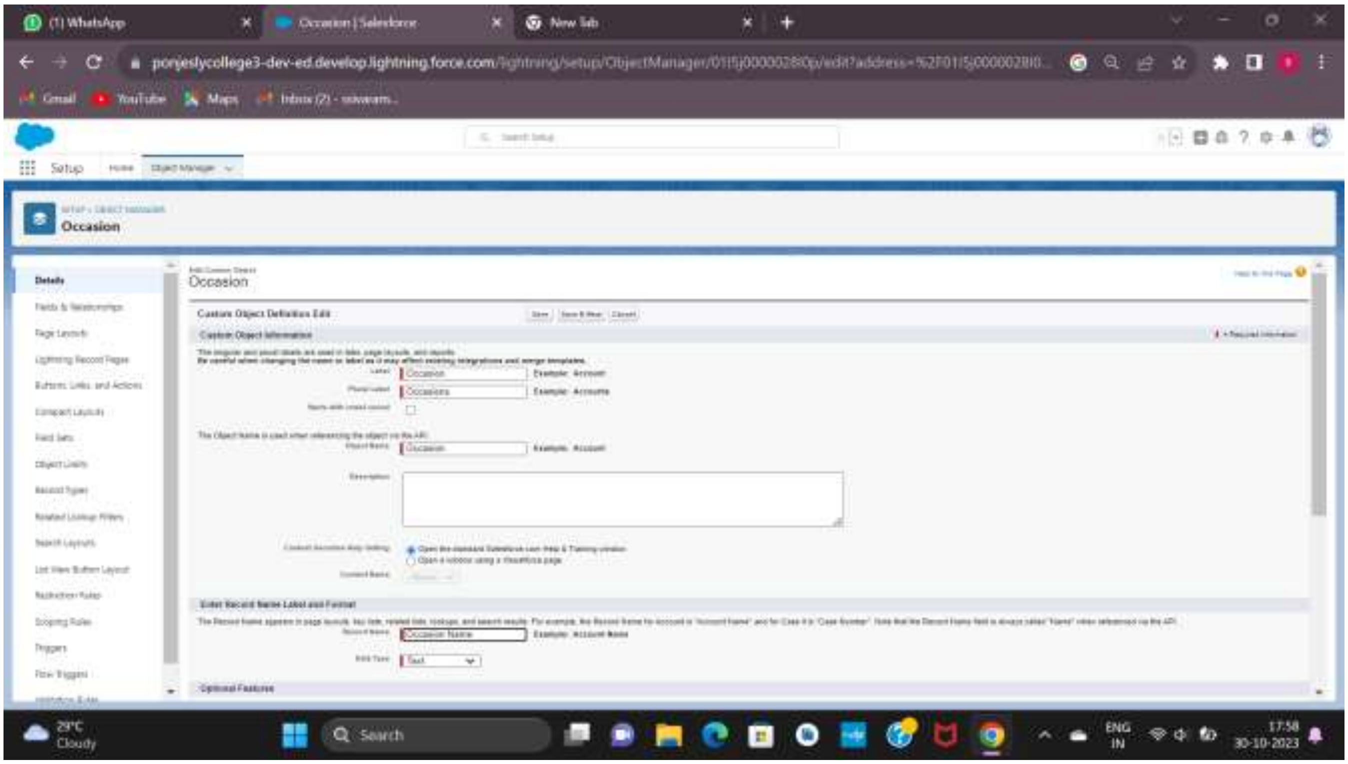
Milestone- 02 [Object Creation]

Creating Custom Object:

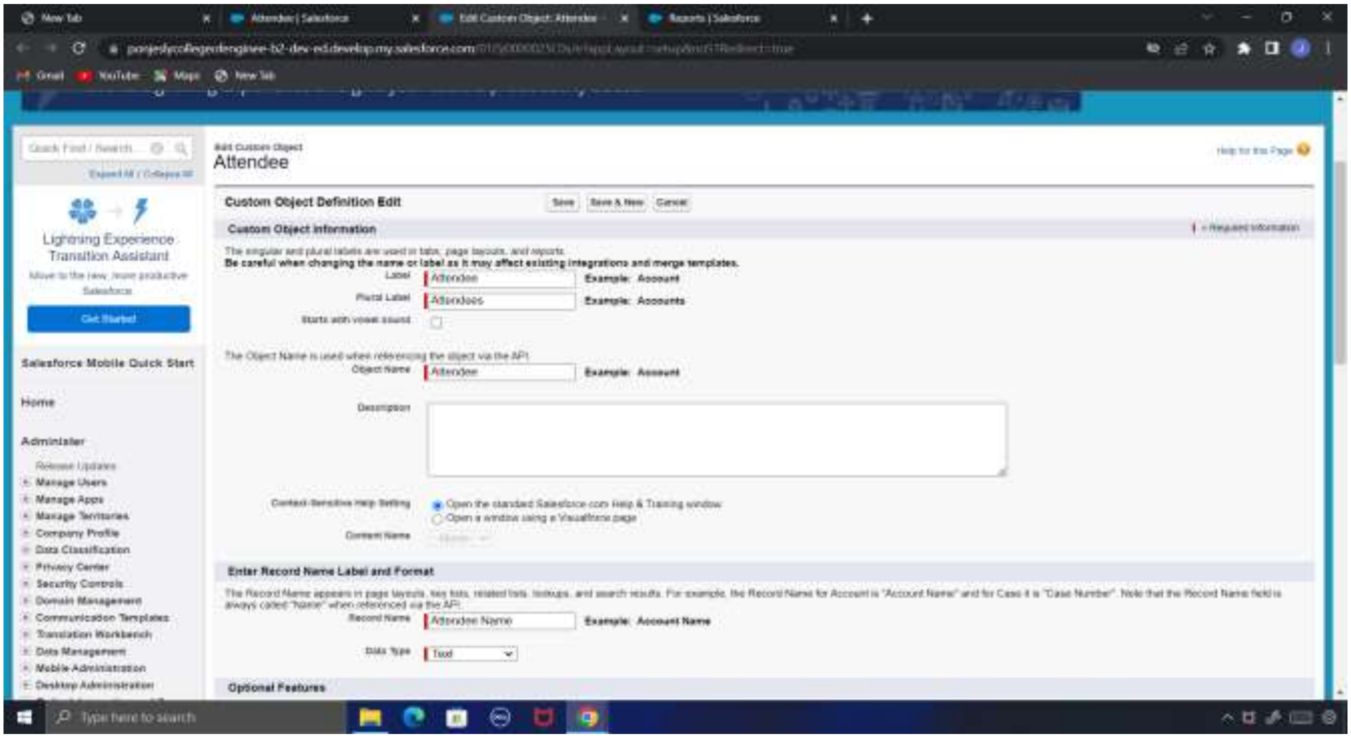
1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
4. On the Custom Object Definition page, create the object as follows:
5. Label: **Occasion**
6. Plural Label: **Occasions**
7. Record Name: **Event** Name
8. Check the **Allow Reports**
9. Check the **Allow Search** and Click Save.

Create objects as **Occasion, Attendee, Speaker,** and **Vendor, Event Service.**

Object Name - Occasion

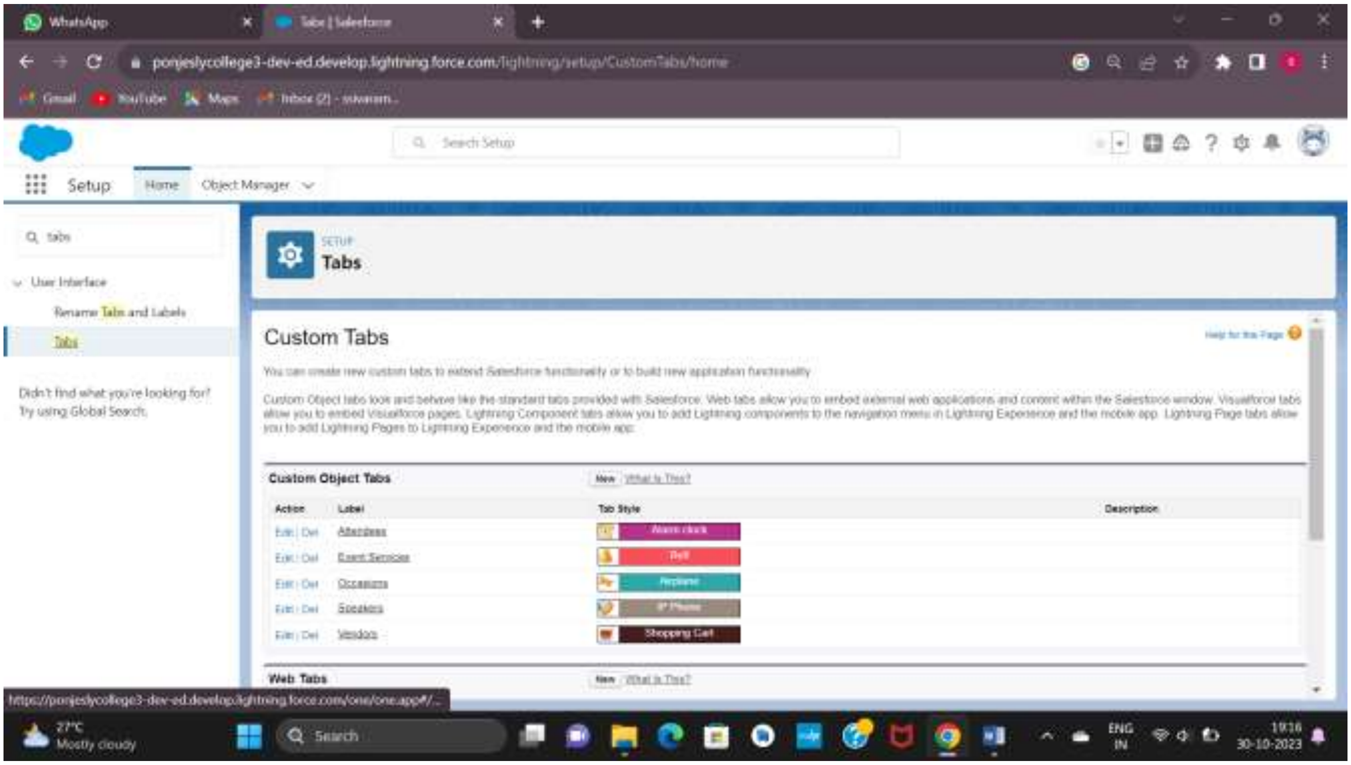


Object Name – Attendee



Milestone- 03 [Tabs Creation]

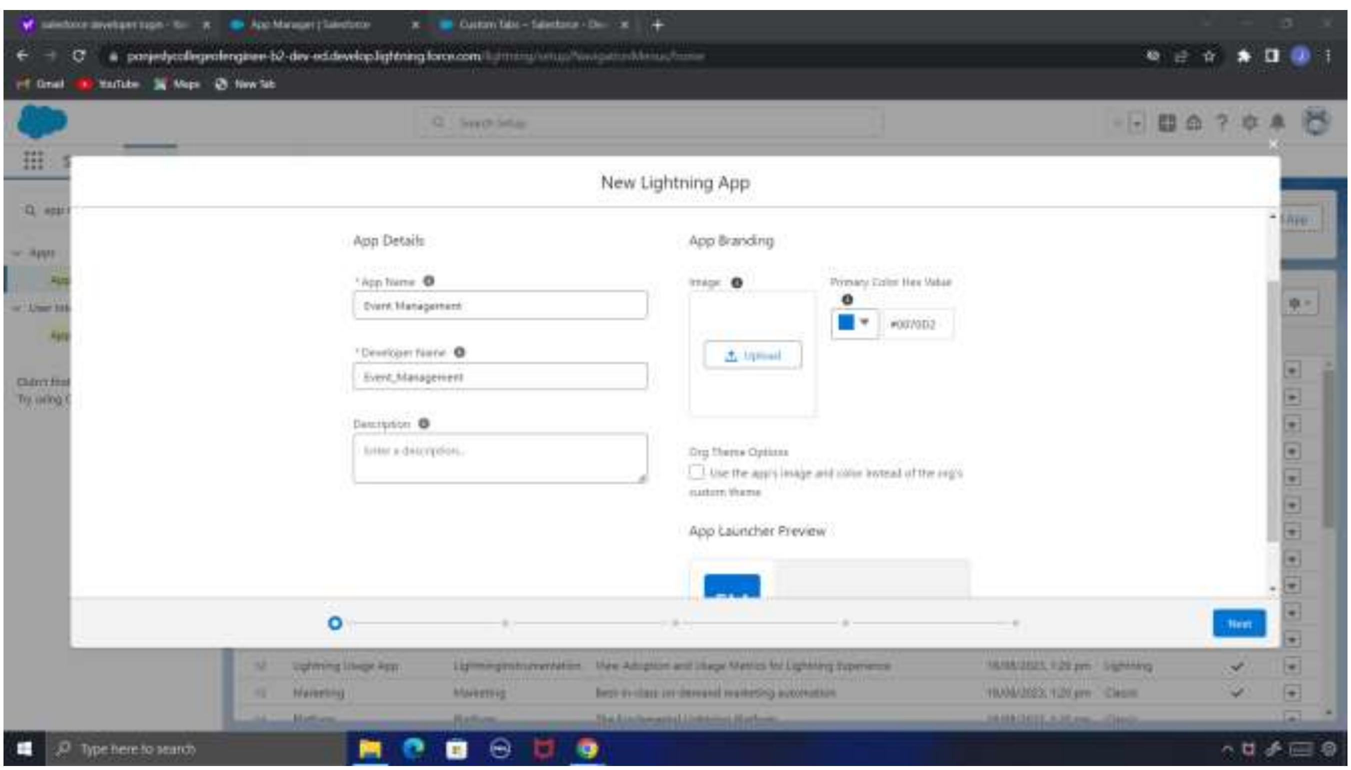
1. Enter Tabs in Quick Find and select Tabs.
2. Under Custom Object Tabs, click New.
3. For Object, select Occasion.
4. For Tab Style, select any icon.
5. Leave all defaults as is. Click Next, Next, and Save
6. In the same way create Tabs for all Custom Objects -Attendee, Occasion , Speaker ,Vendor, Event Service.



Milestone- 04 [Create App]

1. From Setup, enter App Manager in the Quick Find and select App Manager.
2. Click New Lightning App.
3. Enter **Event Management** as the App Name, then click next
4. Under App Options, leave the default selections and click next.
5. Under Utility Items, leave as is and click Next.

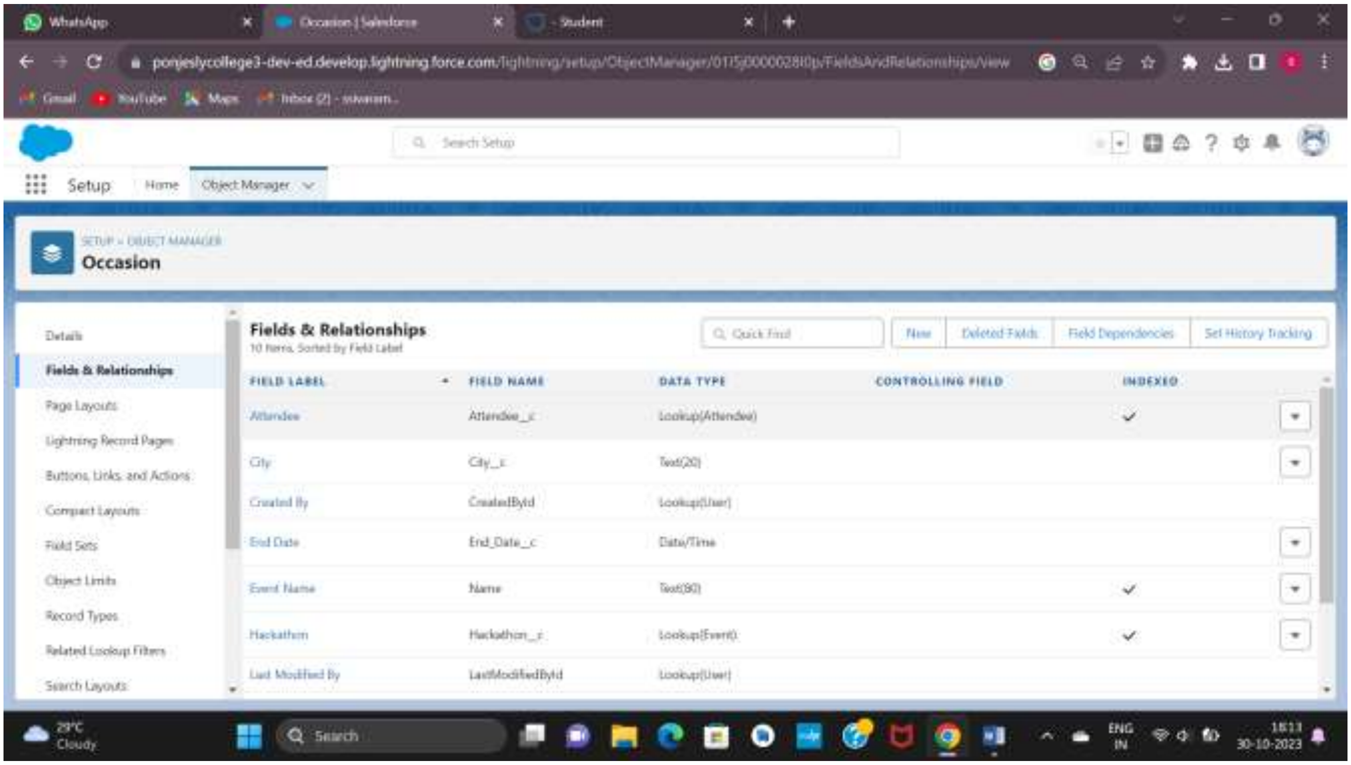
6. From Available Items, select **Occasion, Attendee, Speaker, Vendor, Reports, and Dashboards** and move them to Selected Items.
7. Click Next.
8. From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.



Milestone- 05[Fields & Relationships]

Creation of Text Field for the “Occasion” Object

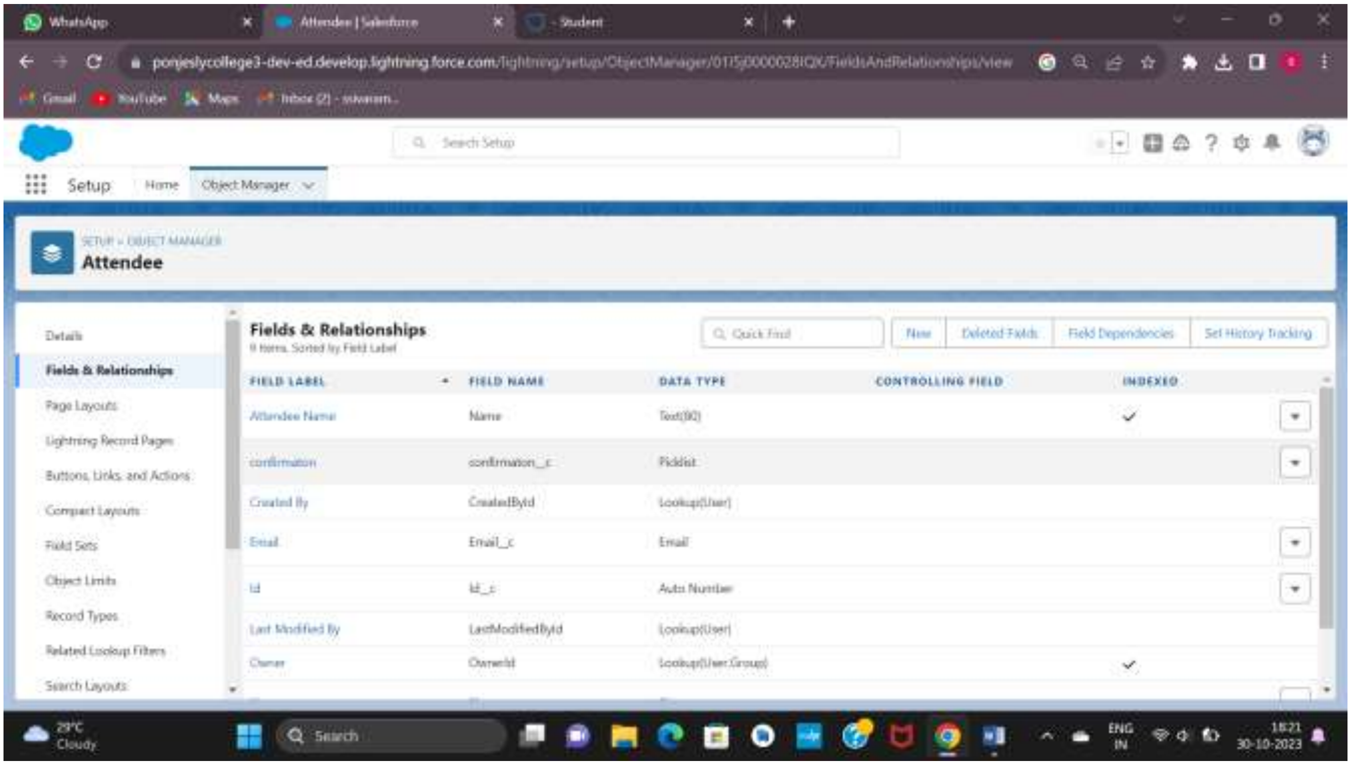
1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select **Occasion**
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the **Text** as the Data Type, click next.
7. For Field Label, enter **Event Name**
8. Enter Length 80
9. Click Next, Next, then Save & New.



Creation of Auto Number for the "Attendee" Object

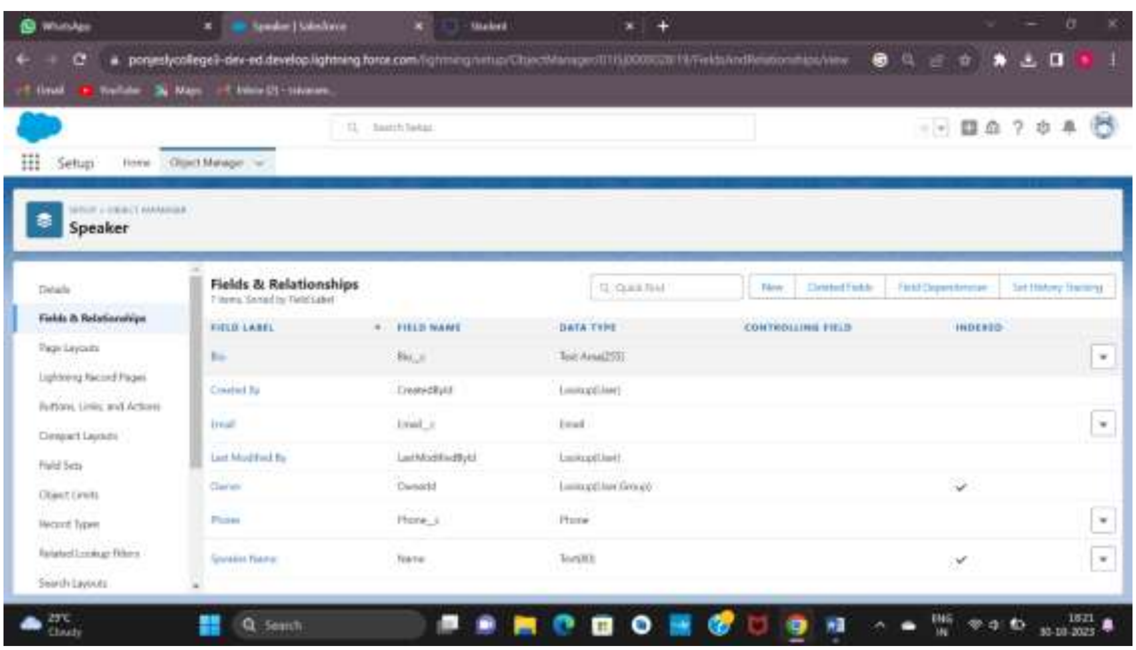
1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select **Attendee**
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the **Auto Number** as the Data Type, click next.
7. For Field Label, enter **Attendee Number**
8. Give a Display Format.

9. Click Next, Next, then Save & New.



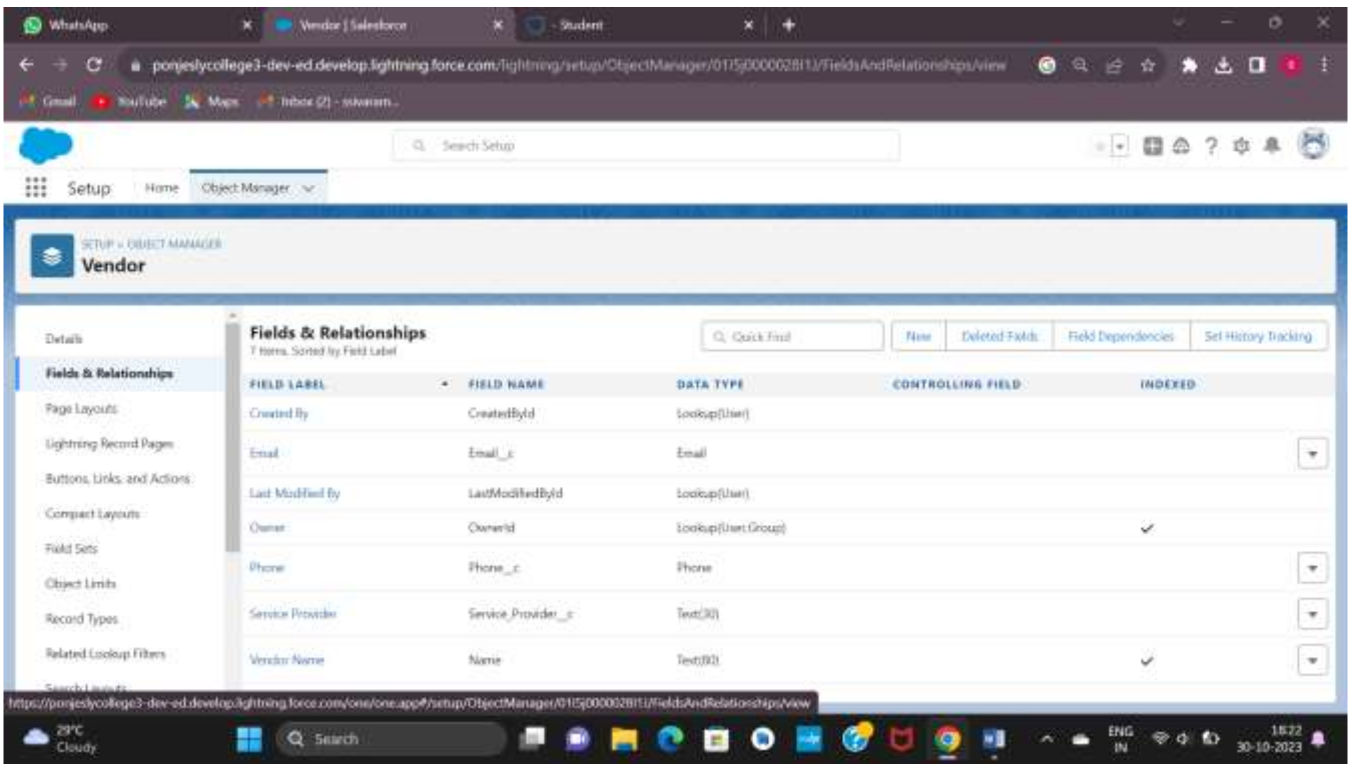
Creation of Formula for the “Speaker” Object

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 **Speaker**.
4. Select Fields & Relationships from the left navigation.
5. Click New
6. Select the Formula as the Data Type, then click Next.
7. Give field label **Speaker**
8. Select formula return type text, Click Next
9. Click Insert Field.
10. Click Next, Next, then Save.



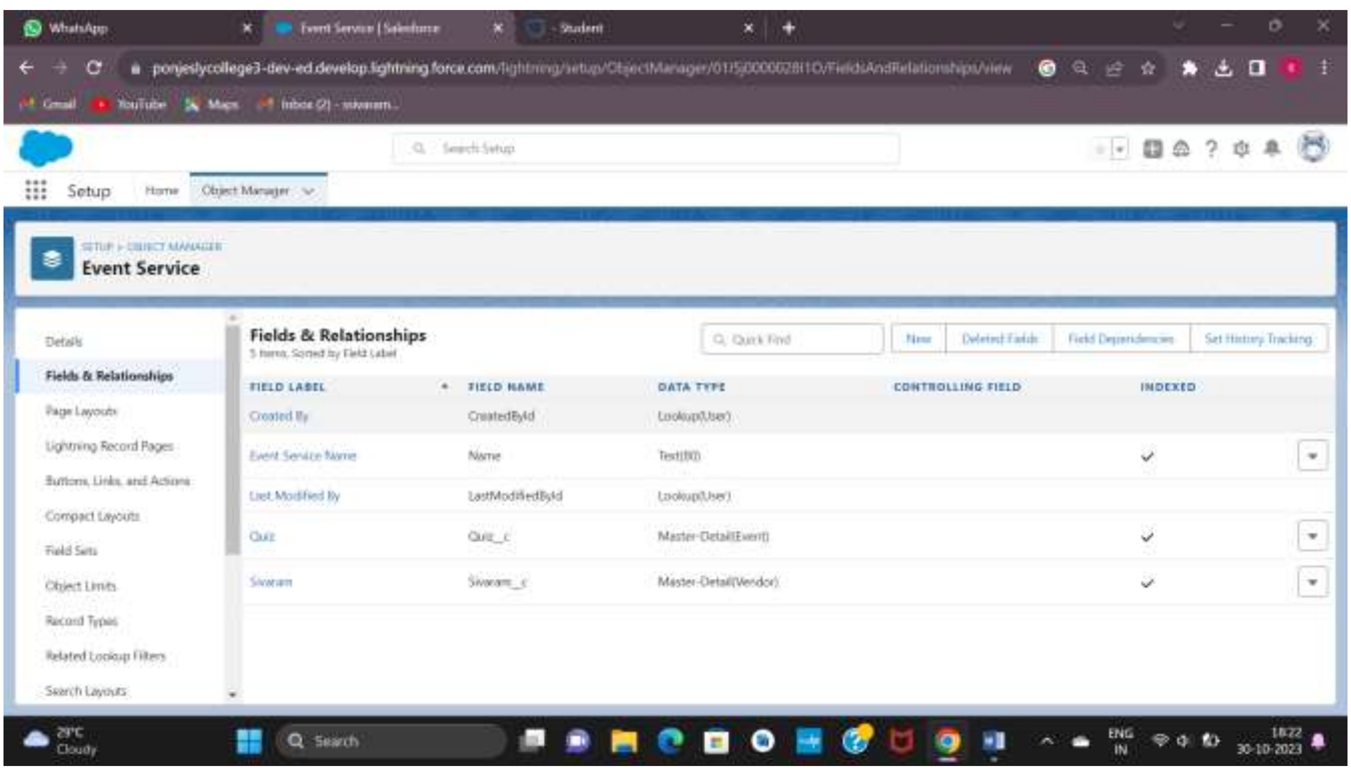
Creation of Number for the “Vendor” Object

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 **Vendor Detail**.
4. Select Fields & Relationships from the left navigation
5. Click New & select number field, click Next.
6. For Field Label **Email.**
7. Click Next, Next, then Save & New.



Creation of Number for the “Event Service” Object

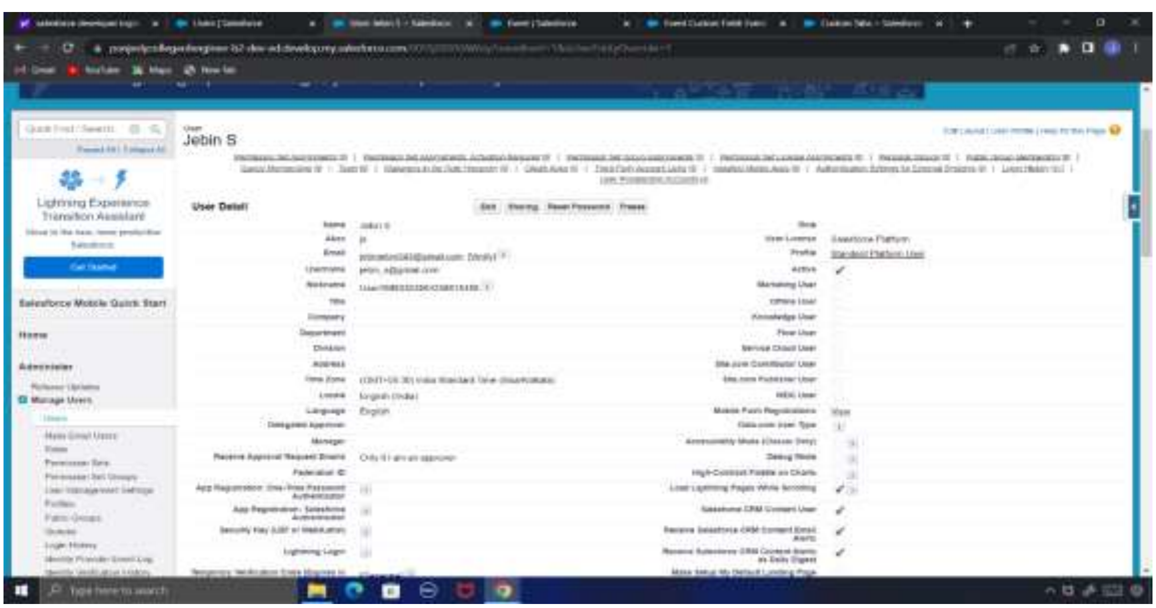
1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select **Event Service Detail**.
4. Select Fields & Relationships from the left navigation
5. Click New & select number field, click Next.
6. For Field Label **Event Service Name.**
7. Click Next, Next, then Save & New.
8. Click Next, Next, then Save & New.



Milestone- 06[User]

Creating A User:

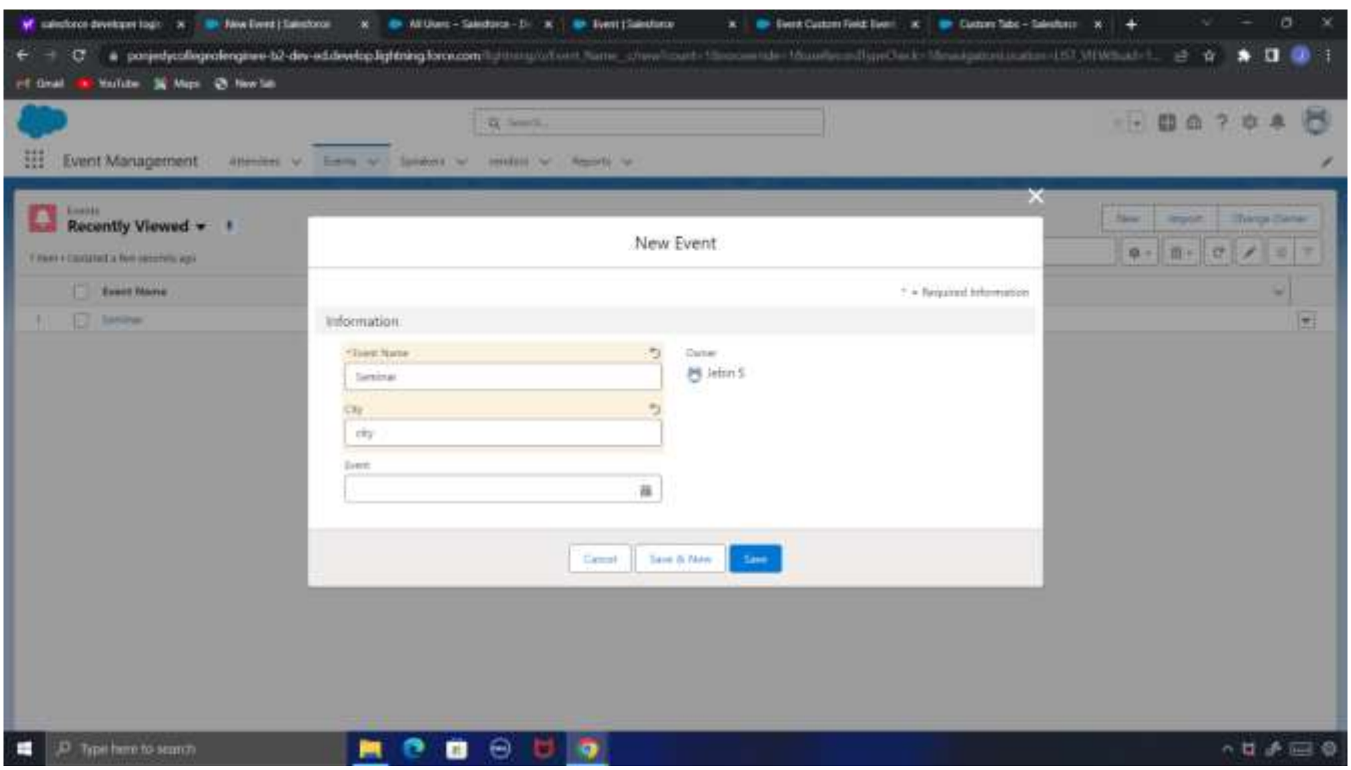
1. From Setup, in the Quick Find box, enter Users.
2. Select Users.
3. Click New User.
4. Enter the First Name, **email ,** Last Name, **Teacher** and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
5. Select a User License as salesforce
6. Select a profile as Standard user.
7. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.



Milestone- 07[User Adoption]

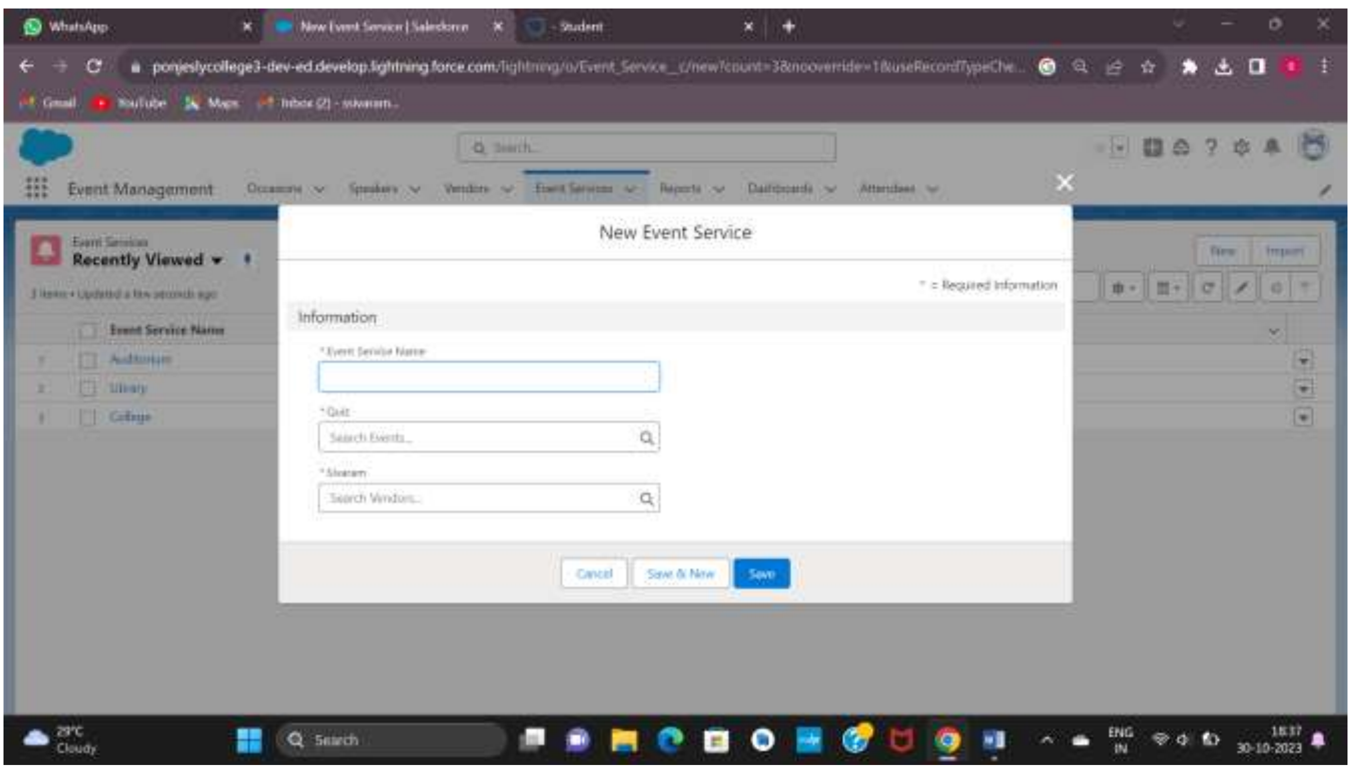
Create Record

1. Click on App Launcher on left side of screen.
2. Search **Event Management** App & click on.
3. Click on **Event** tab.
4. Click new button
5. Fill all **Event** record details.
6. Click on Save Button.



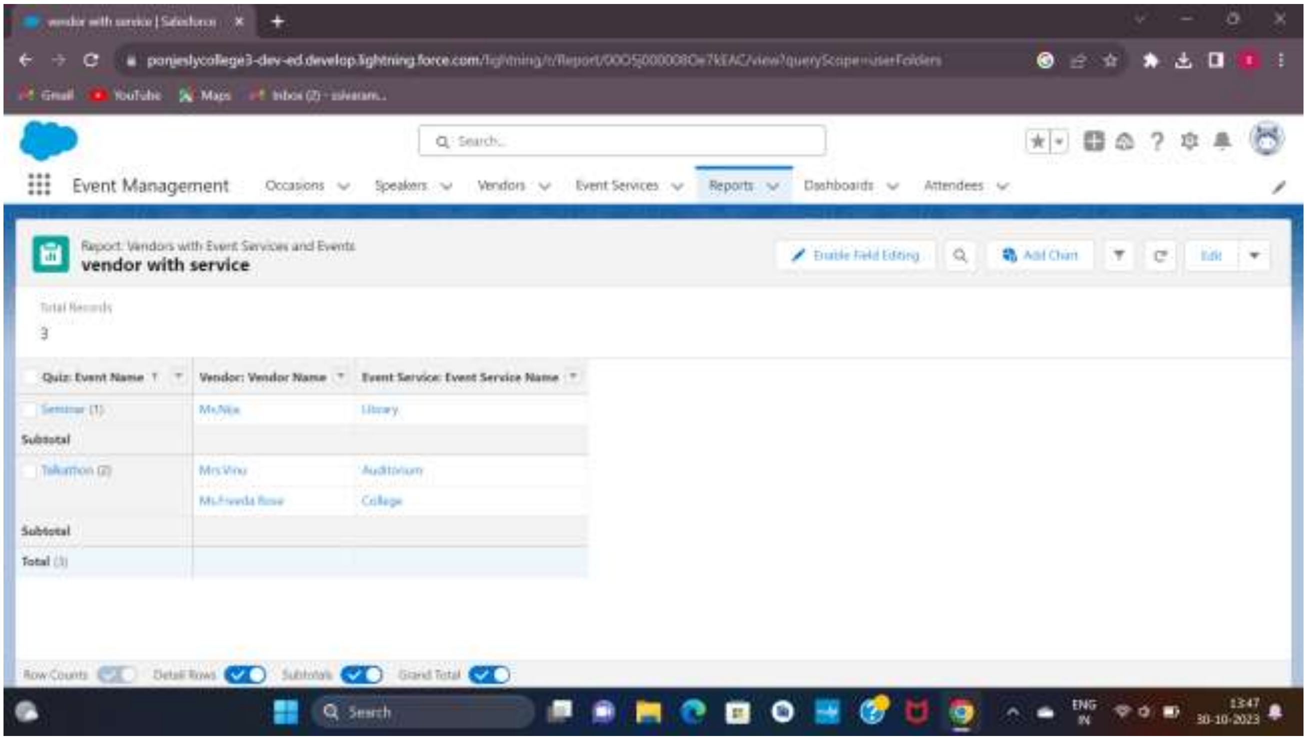
Create Record (Event Service)

1. Click on App Launcher on left side of screen.
2. Search **Event Management** App & click on.
3. Click on **Event Service** tab.
4. Click new button
5. Fill all record details.
6. Click on Save Button.



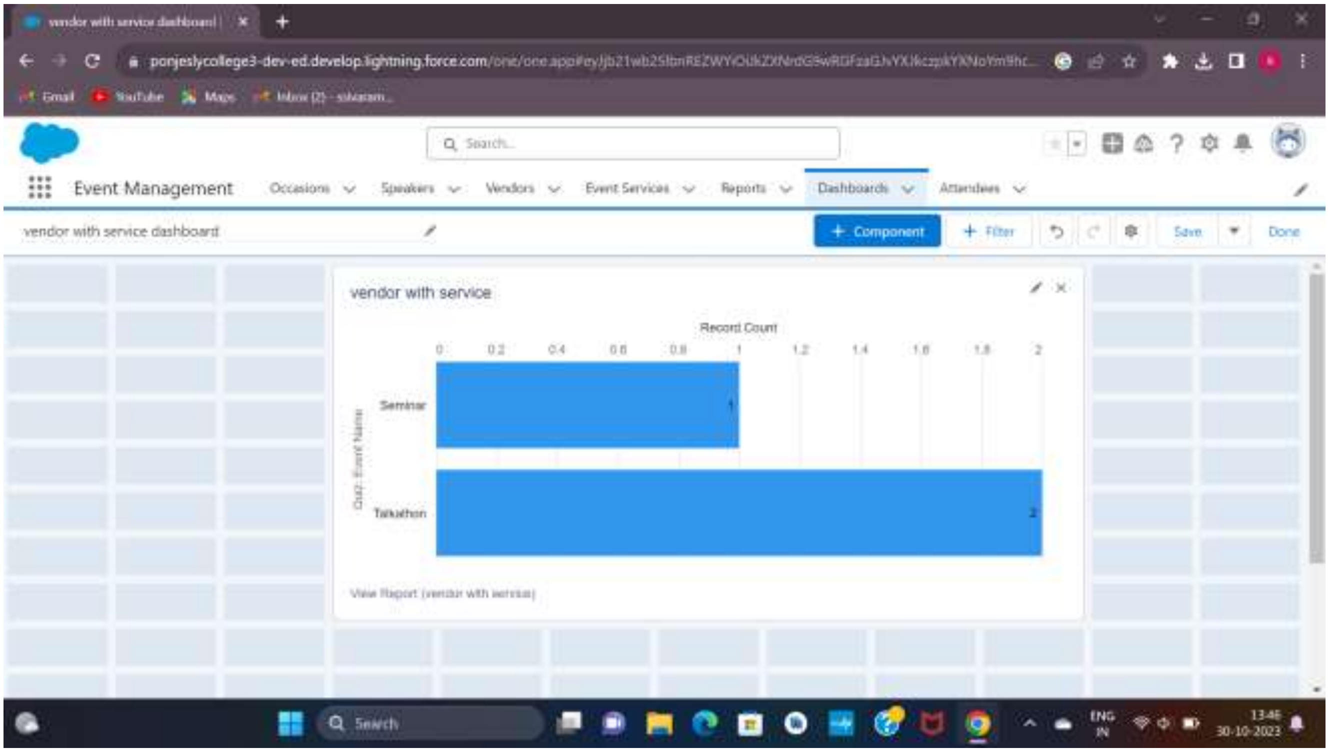
Milestone- 08[Reports]

1. Click App Launcher
2. Select **Event Management** App
3. Click reports tab and click new.
4. Click the report type as Vendor with Event Service Click **Start report.**
5. Customize your report, in group rows select –**Event Name**, in group column Select **Vendor Name, Event Service Name.**
6. Click save and run
7. Give report name –**Event Report** and Click Save.



Milestone- 09[Dashboards]

1. Click on Dashboards tab from the Candidate Internal Result Card App.
2. Click on new dashboard.
3. Give name- **Event Management** and create.
4. Give your dashboard a name and click on +component
5. Select the **Event with Service Report** you created.
6. For the data visualization select any of the chart, table etc.
7. Click add and save.



Milestone- 11[Approval Process]

Click Setup and select Setup.

1. Select Process Automation | Approval Processes (or use the Quick Find and search for Approval Processes) 2. In the Manage Approval Processes For list, select Travel Approval.
3. Click Create New Approval Process and select Use Jump Start Wizard.
4. Enter the following parameters
5. For manage approval process select the attendee from the drop down

6. For the process name **: Attendee approval process**

Unique name:**Attendee_approval_process**

Click on next.

7. From the field drop down select cancel and make operator equal and in value keep as true.

8. Leave as default

Now from fields to display column make sure that the Attendee Name is present

From the submitter type select owner and make sure that the record creator must be present in the allowed submitter section and click on save.

12. Then there will be dialogue box appear and select the no i will do it later

13. Now under Initial Submission action

Click on new and select the field update and give the following details:

Name:Cancel Status

Unique Name:Cancel_Status

Field to update:Cancel Status

And keep value and pending.

15. Now we will see to keep the approval steps.

Name:Attendee records with cancel
checkbox true
Unique Name:(auto -populated),click on next

Select enter this is following Criteria
is met
From field drop down Select cancel and from operator drop down select equals and on value make it true Now select the automatically assign to the approver and select user and keep the user as created user.

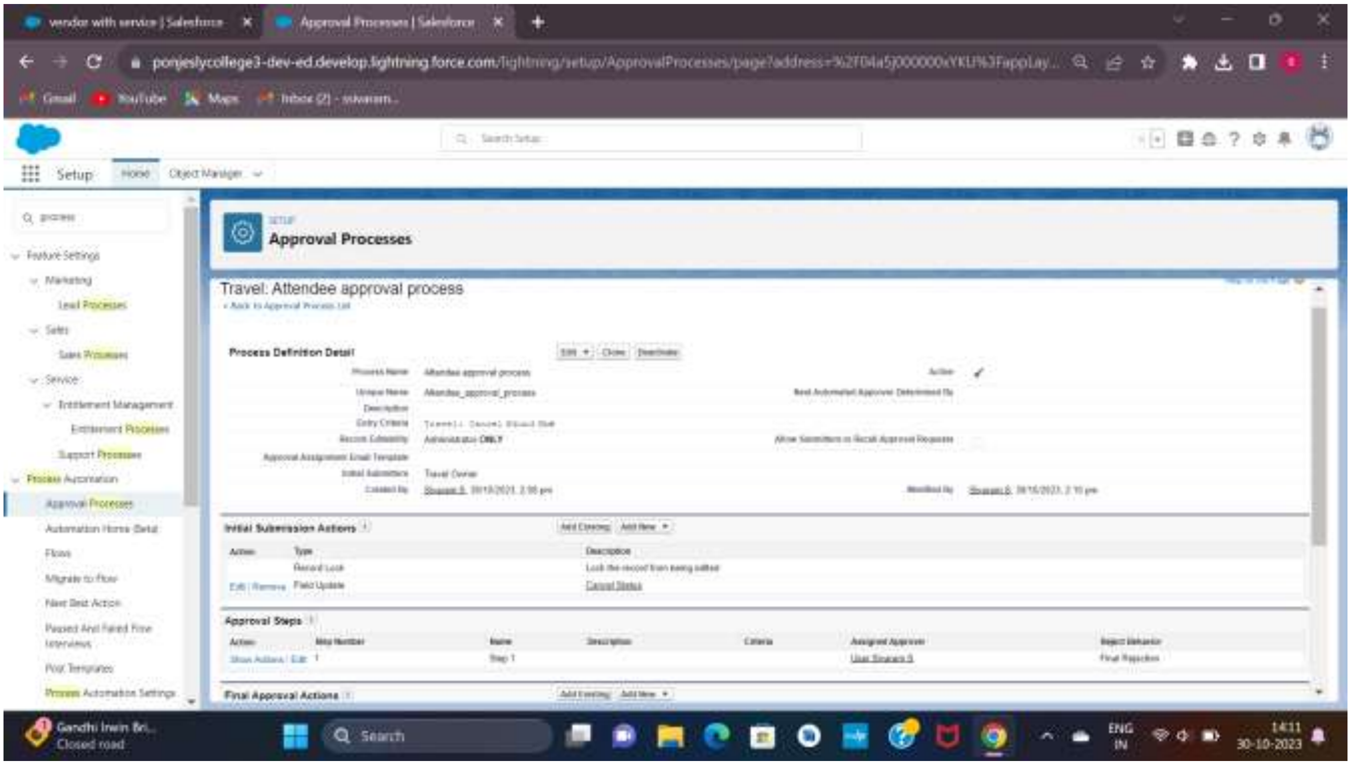
Now let's check the final approval action

Select the new and select the field update and give the following details.

Name:Confirm Cancel Status
Select field to update :Status
And keep the new value as:Confirm

Now let's check the Final rejection action. click on new and select the field update and enter the following details.

18. Name:Not confirmed cancel Status
    Field to update: Cancel Status
    keep value as : Not confirmed
19. And make the approval Process active.



Demo Video Link:

https://youtu.be/vTN9Crmnwk0?si=1UIMyMvQmrIK6Eby

Trailhead Url:

Team Leader: Sivaram S

https://www.salesforce.com/trailblazer/sivarams

Team Member1: Jebin S

https://www.salesforce.com/trailblazer/jebins

Team Member2: Abin Rj

https://www.salesforce.com/trailblazer/abinrj

Team Member3: Rahul Krishna

https://www.salesforce.com/trailblazer/rahulkrishnas