

BUILD AN EVENT MANAGEMENT USING SALESFORCE

INTRODUCTION

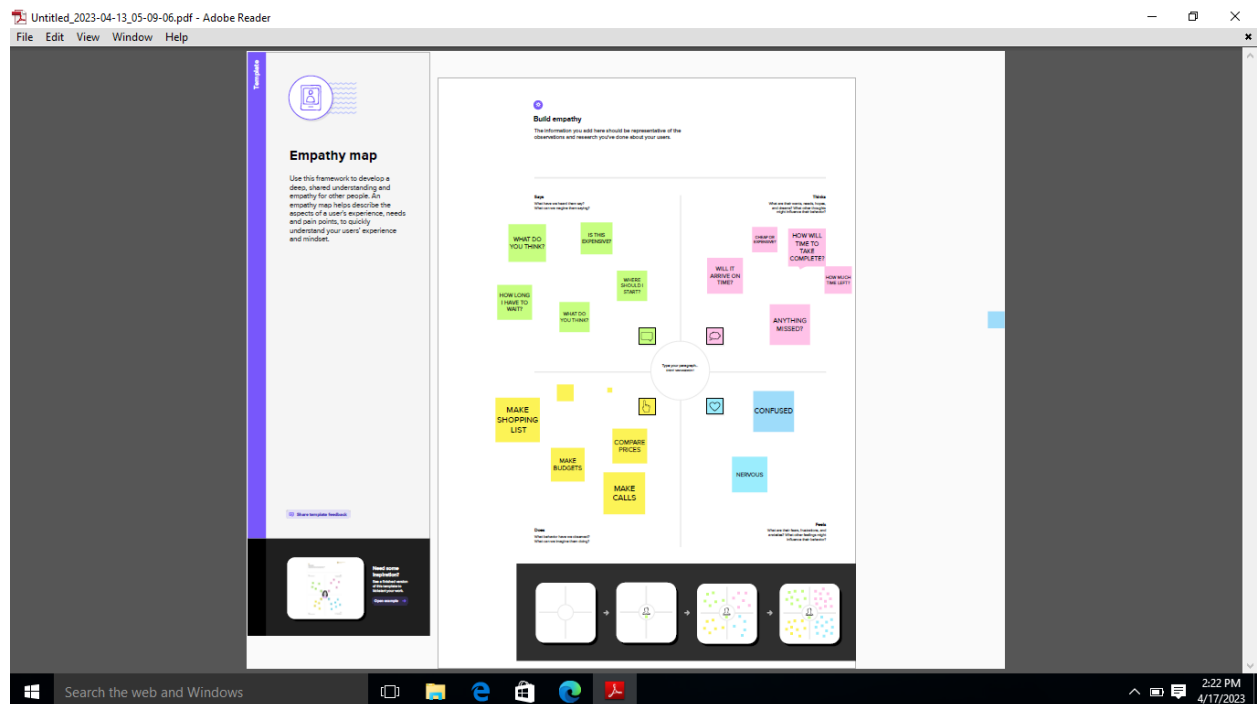
Event Management is the process of creating and maintaining an event. This process spans from the very beginning of planning all the way to post-event strategizing.

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, staying on the ball for any post-event offerings.

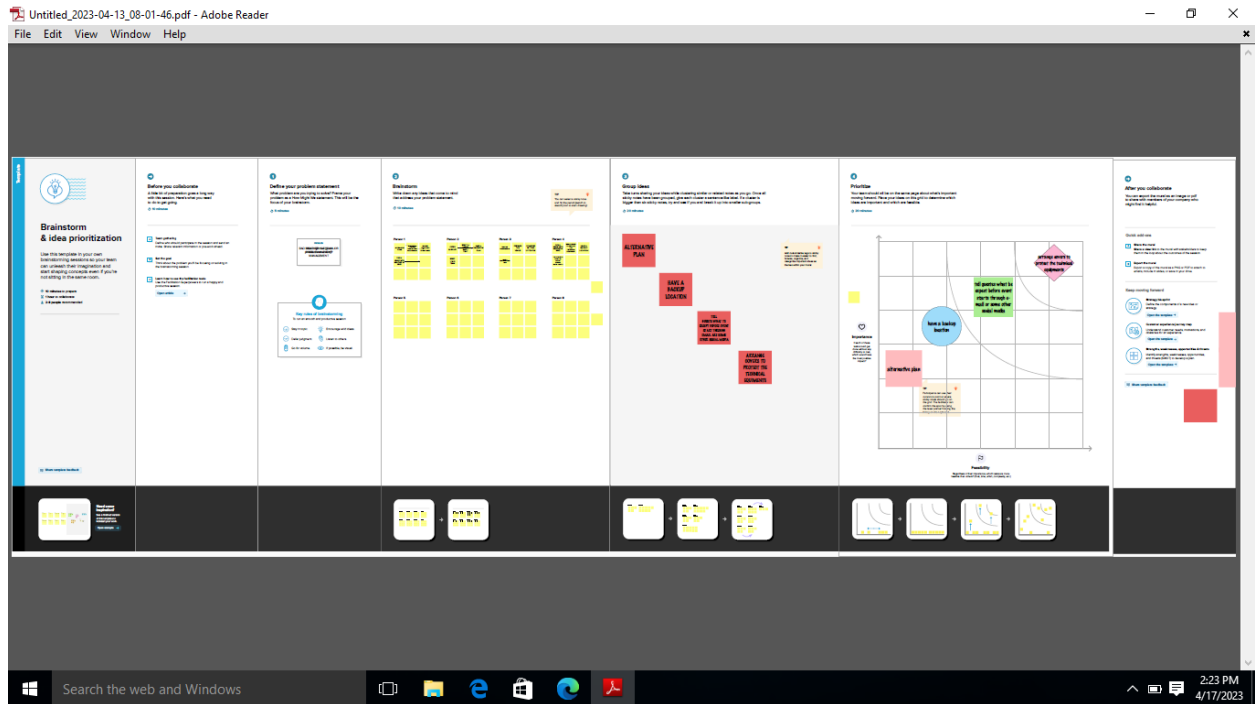
All different branches of planning go into event management, including various types of sourcing, designing, regulation checks, and on-site management. In event management, you could be in the process of creating a conference, a product launch, an internal sales kick-off, or even a wedding. Really, any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

PROBLEM DEFINITION AND DESIGNING THINKING

EMPATHY MAP



IDEATION AND BRAINSTORMING MAP



RESULT

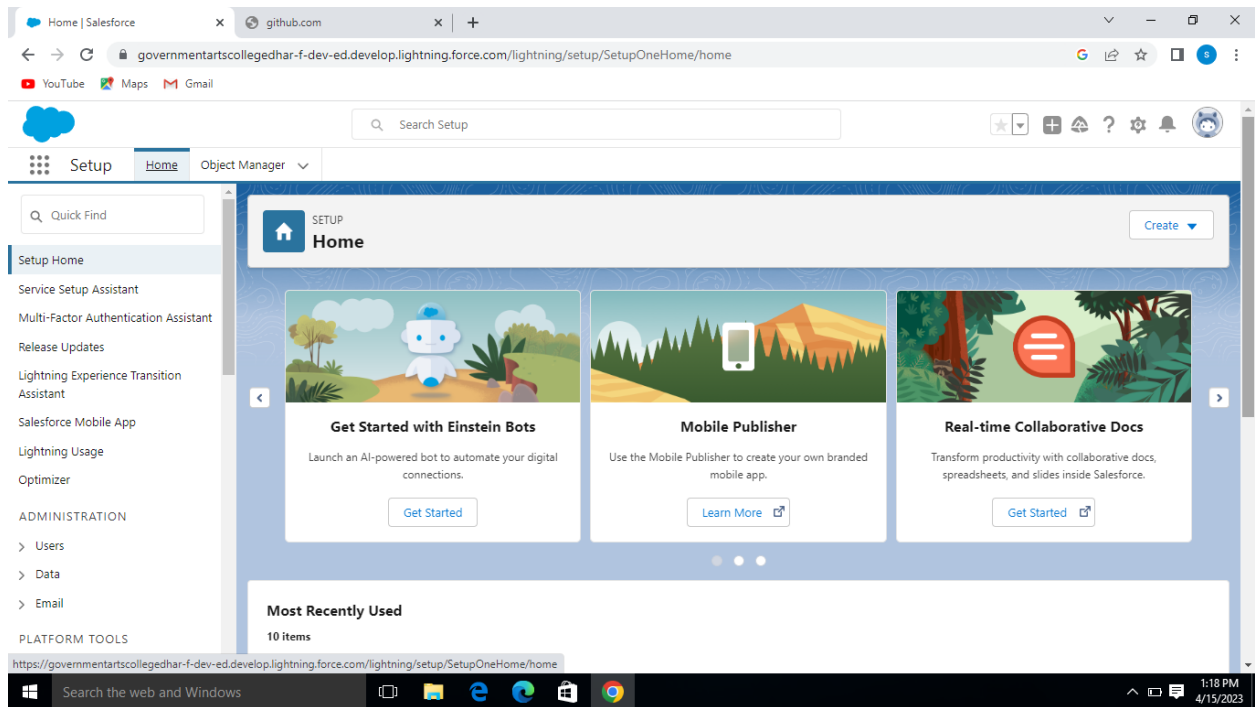
DATA MODEL

Object	Label : Event
	Plural Name: Events
	Record Name: Event Name
Field	Field Label: Event
	Field Name: Event
	Data Type: Text 80

MILESTONE:1 (Sales force)

Activity:

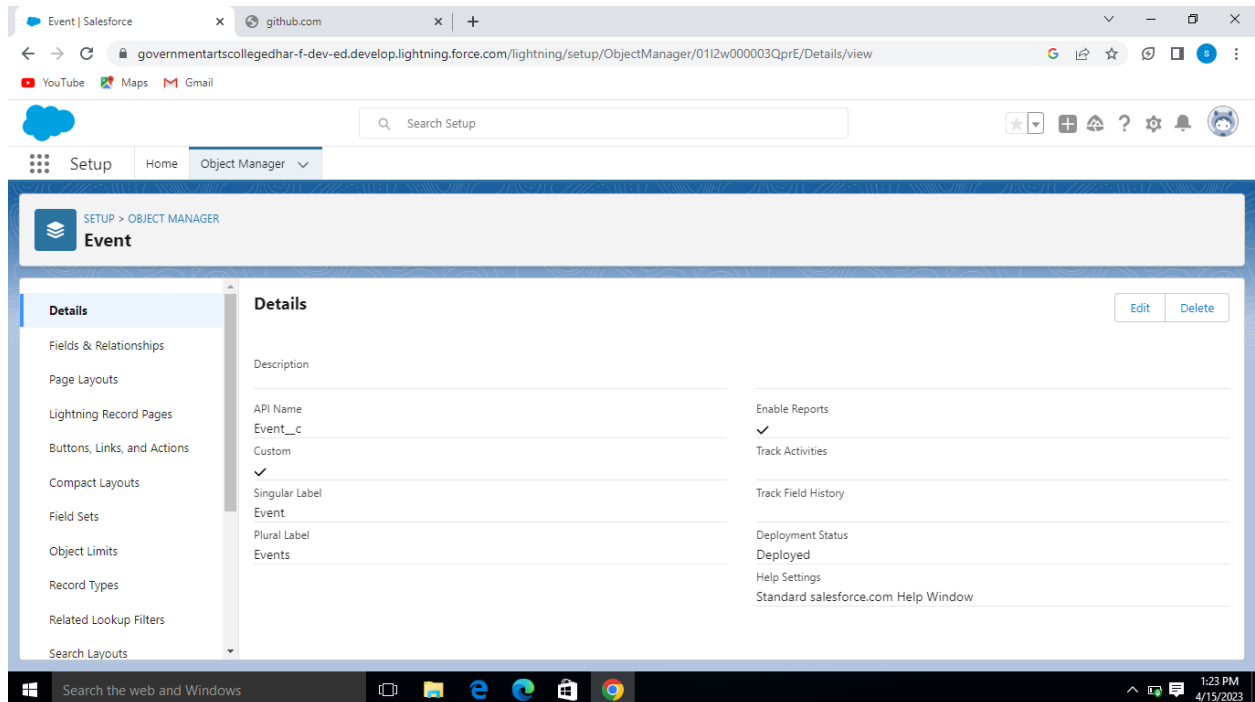
CREATE A SALESFORCE DEVELOPER ORG:



MILESTONE : 2 (Object)

ACTIVITY:1

CREATION OF OBJECTS FOR EVENT MANAGEMENT:



ACTIVITY: 2

CREATION OF ATTENDEES OBJECT:

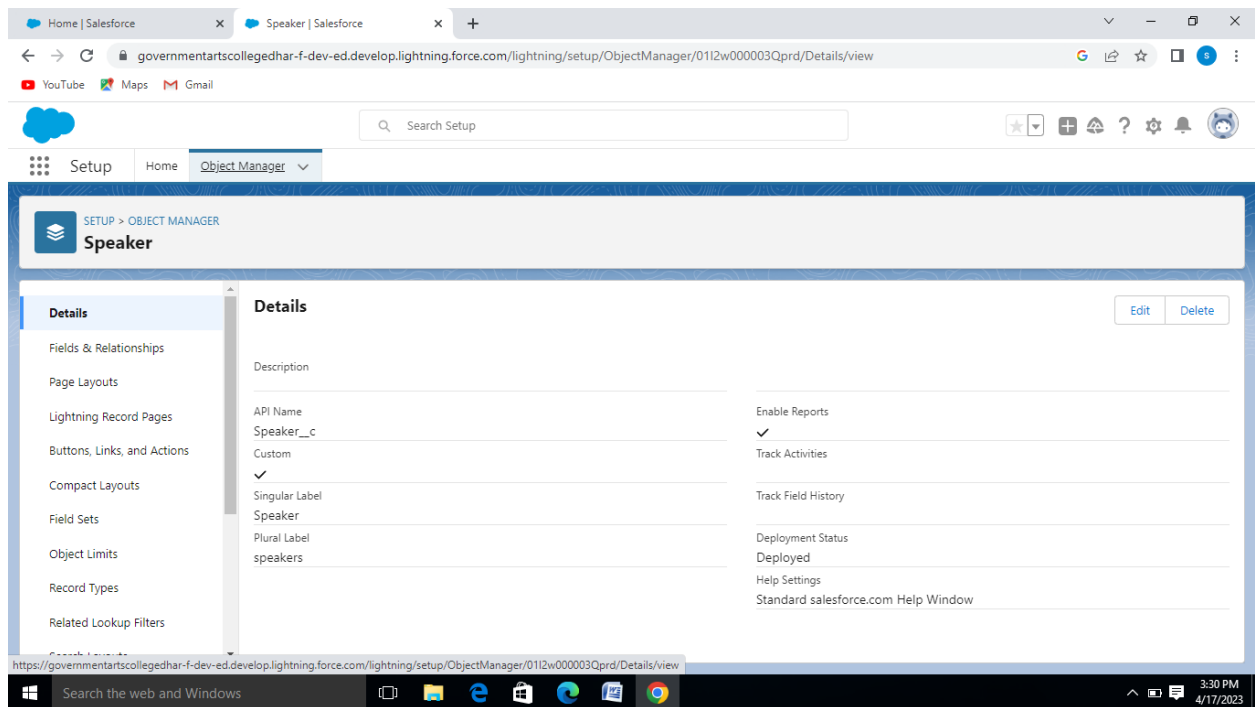
The screenshot shows the Salesforce Object Manager setup page for the 'Attendee' object. The browser address bar displays the URL: `governmentartscollegedhar-f-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003QprY/Details/view`. The Salesforce interface includes a top navigation bar with 'Setup' and 'Home' tabs, and a 'Search Setup' field. The left sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area, titled 'Details', contains the following configuration details:

Field	Value
Description	
API Name	Attendee__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

At the bottom right of the details section, there are 'Edit' and 'Delete' buttons. The Windows taskbar at the bottom shows the time as 1:24 PM on 4/15/2023.

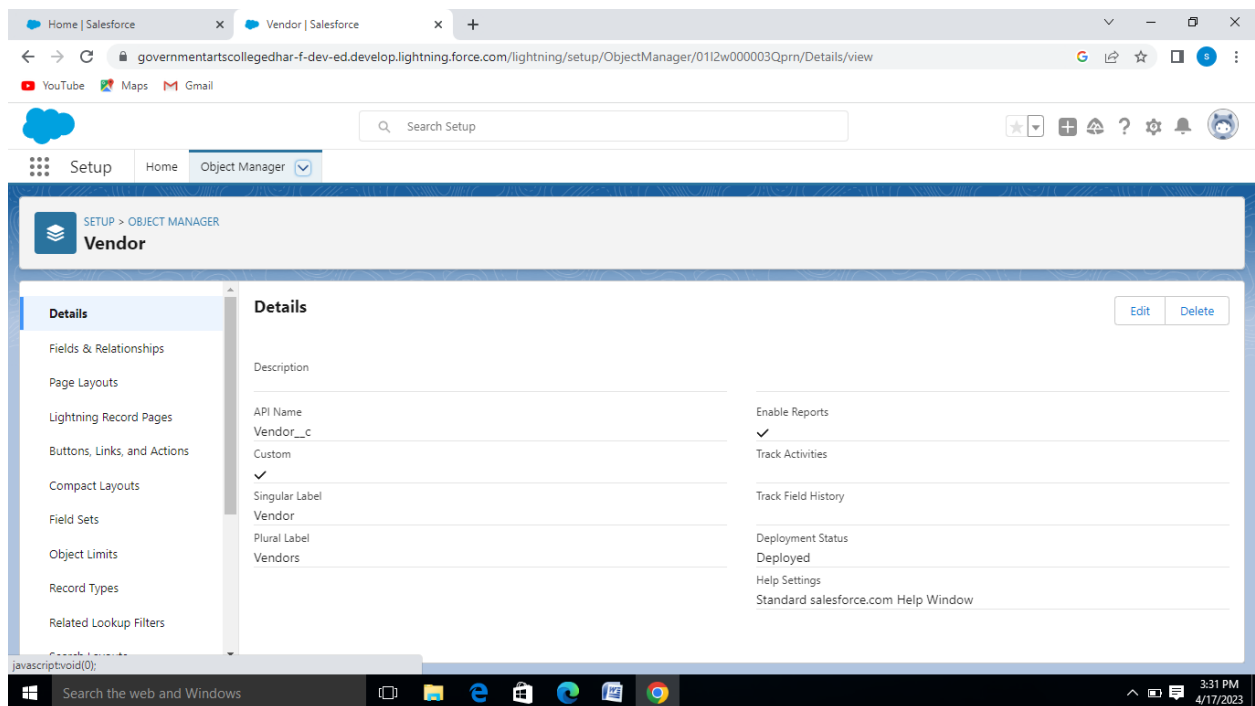
ACTIVITY:3

CREATION OF SPEAKER OBJECT:



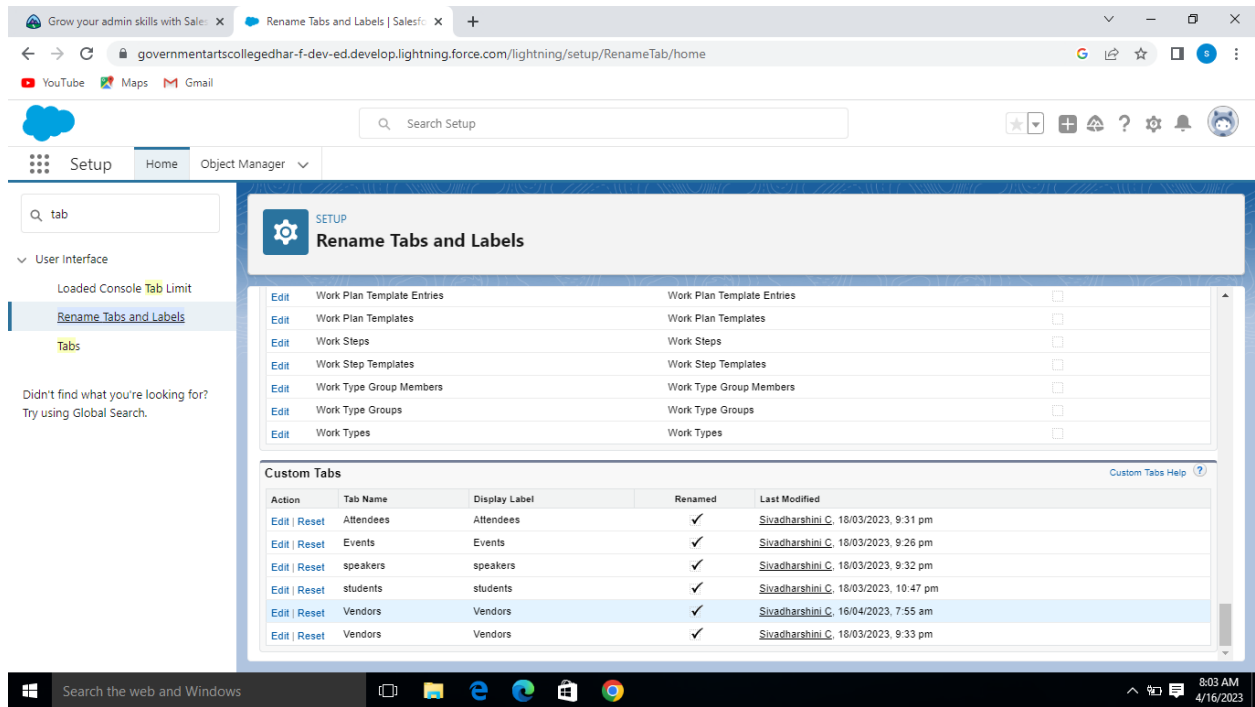
ACTIVITY:4

CREATION OF VENDOR OBJECTS:



MILESTONE:3 (Tab)

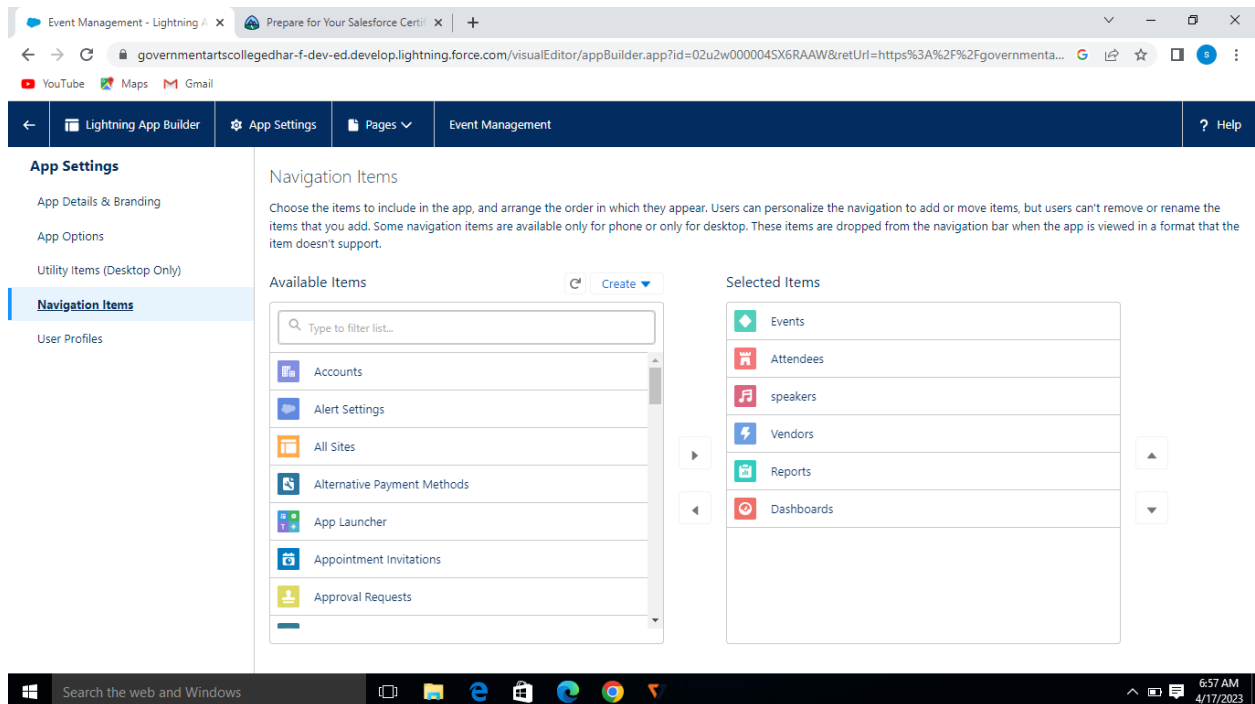
ACTIVITY



MILESTONE : 3 (application)

ACTIVITY

CREATE THE EVENT MANAGEMENT CONSTRUCTION APP



MILESTONE : 4 (Fields)

ACTIVITY : 1

CREATION OF FIELDS FOR EVENT OBJECT:

The screenshot displays the Salesforce Object Manager interface for the 'Event' object. The left sidebar shows the navigation menu with 'Fields & Relationships' selected. The main content area shows a table of fields with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table lists 7 items, sorted by Field Label. The fields are: City (Text(100)), Created By (Lookup(User)), End_date (Date/Time), Event Name (Text(80)), Last Modified By (Lookup(User)), Owner (Lookup(User,Group)), and start_date (Date/Time). The 'Event Name' and 'Owner' fields are marked as indexed.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Text(100)		
Created By	CreatedById	Lookup(User)		
End_date	End_date__c	Date/Time		
Event Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
start_date	start_date__c	Date/Time		

ACTIVITY:2

CREATION OF FIELDS FOR ATTENDEES OBJECT:

The screenshot shows the Salesforce Setup interface for the 'Attendee' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Fields & Relationships' and shows 6 items, sorted by Field Label. The table below lists the fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Attendee Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
ID	ID__c	Auto Number		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
phone	phone__c	Phone		

ACTIVITY:3

CREATION OF FIELDS FOR THE SPEAKERS OBJECT:

The screenshot shows the Salesforce Setup interface for the 'Speaker' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Fields & Relationships' and shows 7 items, sorted by Field Label. The table below lists the fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
BIO	BIO__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Event	Event__c	Lookup(Event)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Speaker Name	Name	Text(80)		✓

ACTIVITY:4

CREATION OF FIELDS FOR THE VENDOR OBJECTS:

The screenshot shows the Salesforce Setup interface for the 'Vendor' object. The 'Fields & Relationships' tab is selected, displaying a list of 8 fields. The left sidebar contains navigation options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area shows the following fields:

Field Label	Field Name	Field Type	Required
Created By	CreatedById	Lookup(User)	
Email	Email__c	Email	
Event	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(50)	
Vendor Name	Name	Text(80)	✓

The bottom of the screen shows the Windows taskbar with the search bar and various application icons. The system clock indicates 3:52 PM on 4/17/2023.

MILESTONE:5 (PROFILE)

ACTIVITY: 1

CREATION ON PROFILE:

The screenshot shows the Salesforce Setup interface for the 'Event Vendors' profile. The left sidebar contains a search bar with 'profil' and a list of navigation items: Users, Profiles, and a search result for 'Event Vendors'. The main content area is titled 'SETUP Profiles' and includes a 'Profile' section for 'Event Vendors'. Below this, there is a list of permissions and a 'Page Layouts' section. The 'Page Layouts' section shows a table with columns for 'Standard Object Layouts' and 'Page Layouts'. The table includes rows for 'Global', 'Email Application', and 'Object Milestone'. The 'Global' row shows 'Global Layout' as the assigned layout. The 'Email Application' row shows 'Not Assigned'. The 'Object Milestone' row shows 'Object Milestone Layout' as the assigned layout. The 'Operating Hours' row shows 'Operating Hours Layout' as the assigned layout. The 'Page Layouts' section also includes a 'Page Layouts' column with links to 'View Assignment' for each layout.

ACTIVITY: 2

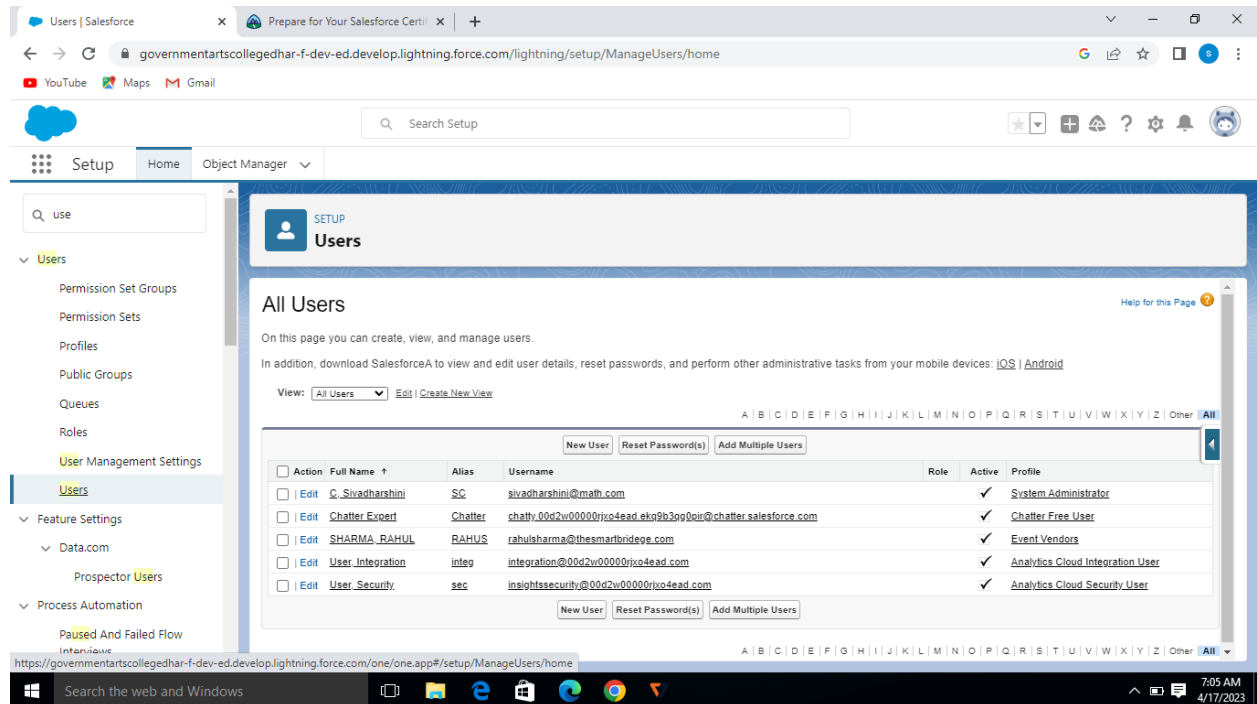
CREATION ON EVENT VENDOR PROFILE:

The screenshot shows the Salesforce Setup interface for the 'EVENT VENDOR PROFILE'. The left sidebar contains a search bar with 'PROF' and a list of navigation items: Users, Profiles, and a search result for 'EVENT VENDOR PROFILE'. The main content area is titled 'SETUP Profiles' and includes a 'Profile' section for 'EVENT VENDOR PROFILE'. Below this, there is a list of permissions and a 'Page Layouts' section. The 'Page Layouts' section shows a table with columns for 'Standard Object Layouts' and 'Page Layouts'. The table includes rows for 'Global', 'Email Application', and 'Object Milestone'. The 'Global' row shows 'Global Layout' as the assigned layout. The 'Email Application' row shows 'Not Assigned'. The 'Object Milestone' row shows 'Object Milestone Layout' as the assigned layout. The 'Operating Hours' row shows 'Operating Hours Layout' as the assigned layout. The 'Page Layouts' section also includes a 'Page Layouts' column with links to 'View Assignment' for each layout.

MILESTONE: 6(USER)

ACTIVITY: 1

CREATE A USER:



The screenshot shows the Salesforce 'Users' management page. The left sidebar contains a navigation menu with options like 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', 'Feature Settings', 'Data.com', 'Prospector Users', and 'Paused And Failed Flow'. The main content area is titled 'All Users' and includes a search bar, a 'View: All Users' dropdown, and a table of users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The users listed are: C. Sivadharshini (System Administrator), Chatter Expert (Chatter Free User), SHARMA, RAHUL (Event Vendors), User Integration (Analytics Cloud Integration User), and User Security (Analytics Cloud Security User). The bottom of the page shows a Windows taskbar with the date 4/17/2023 and time 7:05 AM.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	C. Sivadharshini	SC	sivadharshini@math.com		✓	System Administrator
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter.00d2u00000rjx04ead.ek98b3gg00ir@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	SHARMA, RAHUL	RAHUL	rahulsharma@thesmartbridego.com		✓	Event Vendors
<input type="checkbox"/> Edit	User Integration	integ	integration@00d2u00000rjx04ead.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightsecurity@00d2u00000rjx04ead.com		✓	Analytics Cloud Security User

MILESTONE: 7 (PERMISSION SETS)

ACTIVITY: 1

CREATING A PERMISSION SETS:

Permission Sets | Salesforce

governmentartscollegedhar-f-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2F0PS2w000009MFZ9

Search Setup

Setup Home Object Manager

permi

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

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

SETUP Permission Sets

Permission Set: **Event Permits** [Video Tutorial](#) [Help for this Page](#)

Find Settings... Clone Edit Properties Manage Assignments

Permission Set Overview

Description	API Name	Event_Permits
License	Namespace Prefix	
Session Activation Required	Created By	Sivadharshini C. 19/03/2023, 8:19 am
Last Modified By	Sivadharshini C. 19/03/2023, 8:19 am	

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"

Search the web and Windows

7:07 AM 4/17/2023

ACTIVITY: 2

CREATION ON VENDOR PERMITS

History

Profiles | Salesforce

developer.salesforce.com sign up

governmentartscollegedhar-f-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00e2w000000xet9%3Fsetupid%3DEnhance...

Search Setup

Setup Home Object Manager

PROF

Users

Profiles

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

SETUP Profiles

Profile: **VENDOR PERMITS** [Help for this Page](#)

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges](#) | [Enabled Apex Class Access](#) | [Enabled External Data Source Access](#) | [Enabled Named Credential Access](#) | [Enabled Custom Metadata Type Access](#) | [Enabled Custom Setting Definitions Access](#) | [Enabled Flow Access](#) | [Enabled Service Presence Status Access](#) | [Enabled Custom Permissions](#)

Profile Detail Edit Clone Delete View Users

Name	VENDOR PERMITS
User License	Analytics Cloud Integration User
Description	Custom Profile
Created By	Sivadharshini C. 17/04/2023, 6:54 pm
Modified By	Sivadharshini C. 17/04/2023, 6:54 pm

Page Layouts

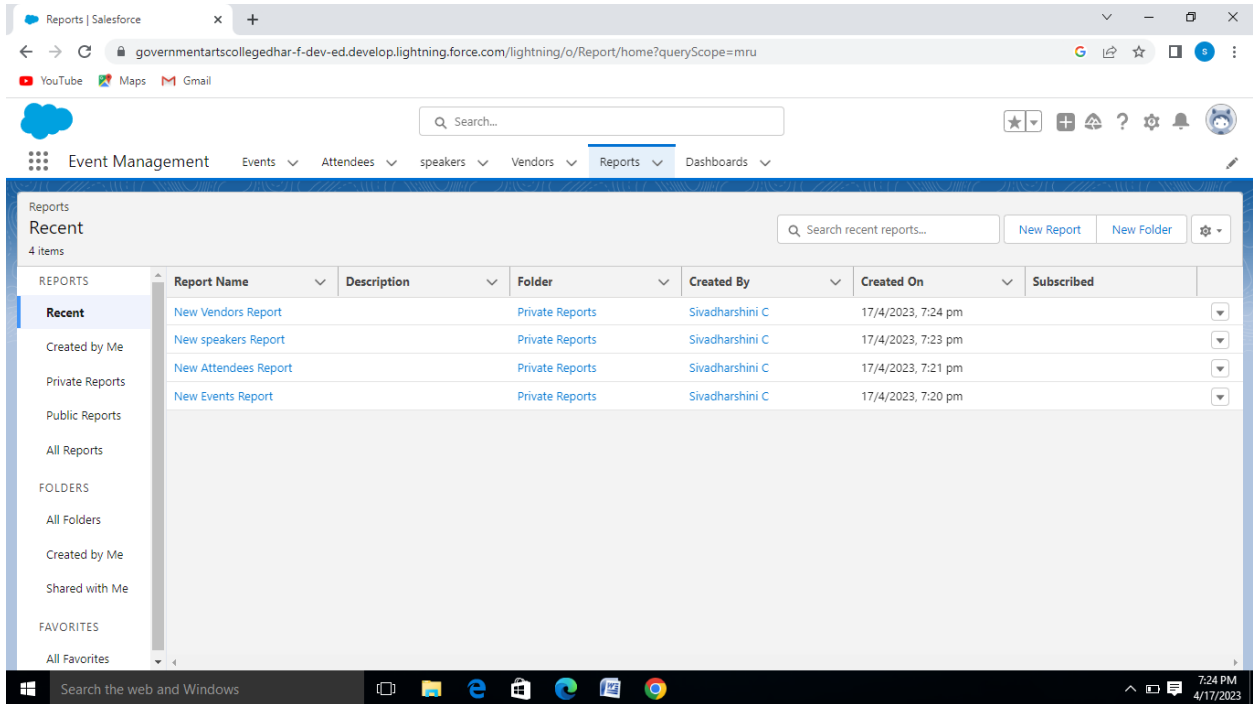
Standard Object Layouts	Global	Object Milestone	Operating Hours
	Global Layout View Assignment	Object Milestone Layout View Assignment	Operating Hours Layout View Assignment
	Email Application View Assignment	Operating Hours Layout View Assignment	Operating Hours Layout View Assignment

Search the web and Windows

6:54 PM 4/17/2023

MILESTONE: 8(REPORTS)

ACTIVITY:



The screenshot shows the Salesforce Reports page. The top navigation bar includes 'Event Management', 'Events', 'Attendees', 'speakers', 'Vendors', 'Reports', and 'Dashboards'. The 'Reports' section is active, displaying a list of recent reports. The table has columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. The reports listed are 'New Vendors Report', 'New speakers Report', 'New Attendees Report', and 'New Events Report', all created by 'Sivadharshini C' on 17/4/2023.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Vendors Report		Private Reports	Sivadharshini C	17/4/2023, 7:24 pm	
Created by Me	New speakers Report		Private Reports	Sivadharshini C	17/4/2023, 7:23 pm	
Private Reports	New Attendees Report		Private Reports	Sivadharshini C	17/4/2023, 7:21 pm	
Public Reports	New Events Report		Private Reports	Sivadharshini C	17/4/2023, 7:20 pm	

TRAILHEAD PROFILE PUBLIC URL:

TEAM LEAD: <https://trailblazer.me/id/sivac49>

TEAM MEMBER 1: <https://trailblazer.me/id/sujis29>

TEAM MEMBER 2: <https://trailblazer.me/id/sivaa52>

TEAM MEMBER 3: <https://trailblazer.me/id/swetc6>

ADVANTAGES:

- They make it less stressful. It goes without saying that organising an event, no matter the type of size, it is going to be stressful. ...
- They ensure it runs smoothly. ...
- They take care of the legalities. ...
- They have the right contacts. ...
- Come and Talk to Us.

DISADVANTAGES:

- Unconventional work hours.
- Time away from family and friend.
- Experience requirements
- Job instability
- Multiple events at the same time.
- High level of responsibility.

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.