

**SMART INTERNZ**

**BUILD AN EVENT MANAGEMENT  
SYSTEM USING SALESFORCE**

**Project Based Experimental Learning Program**

# Build an Event Management System using Salesforce

This Project helps in managing the on-going and upcoming events in an organization.

## 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.

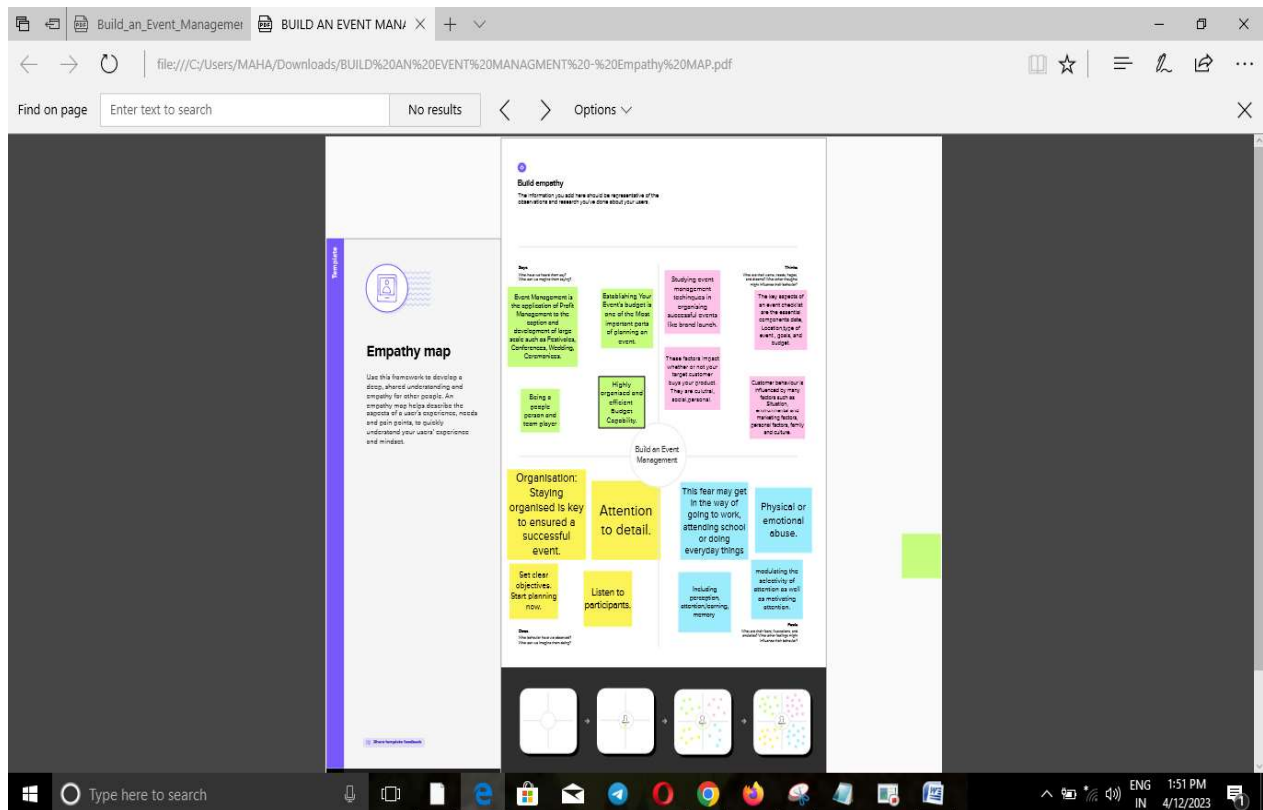
At the start, an event manager makes planning decisions, such as the time, location, and theme of their event. During an event, event managers oversee the event live and make sure things run smoothly. After an event, event managers are tasked with reviewing event data, submitting KPI and ROI findings, and 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.

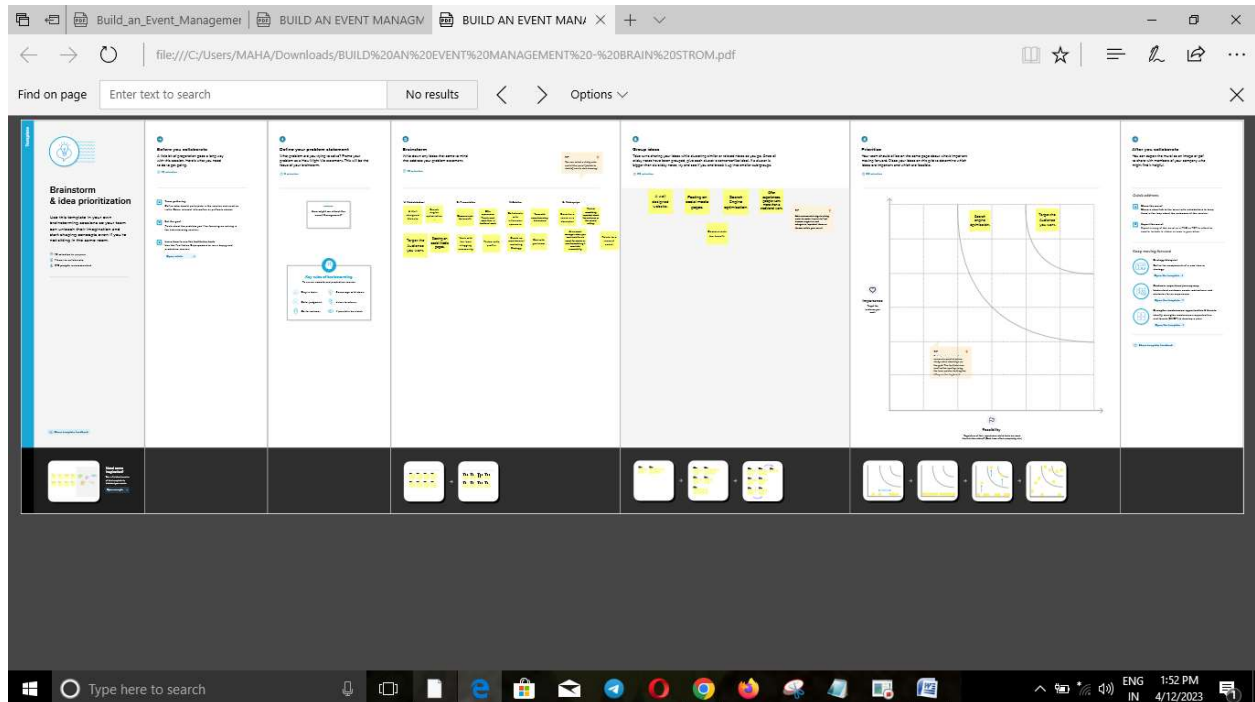
## Milestone 1 - Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

## 2.1 Empathy Map



## 2.2 Ideation & Brainstromingmap Screenshot



## Milestone 2 – Object:

### What is an object?

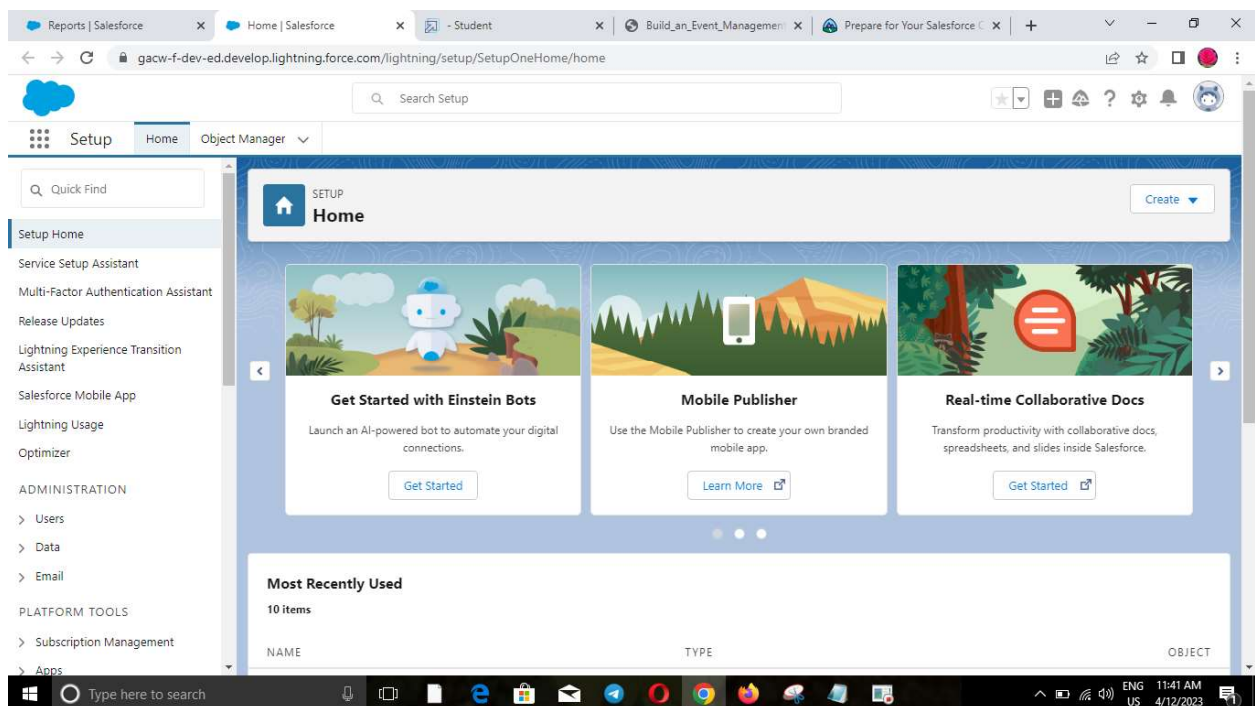
Salesforce objects are database tables that permit you to store data that is specific to an organization. It consists of fields (columns) and records (rows).

### Activity 1:

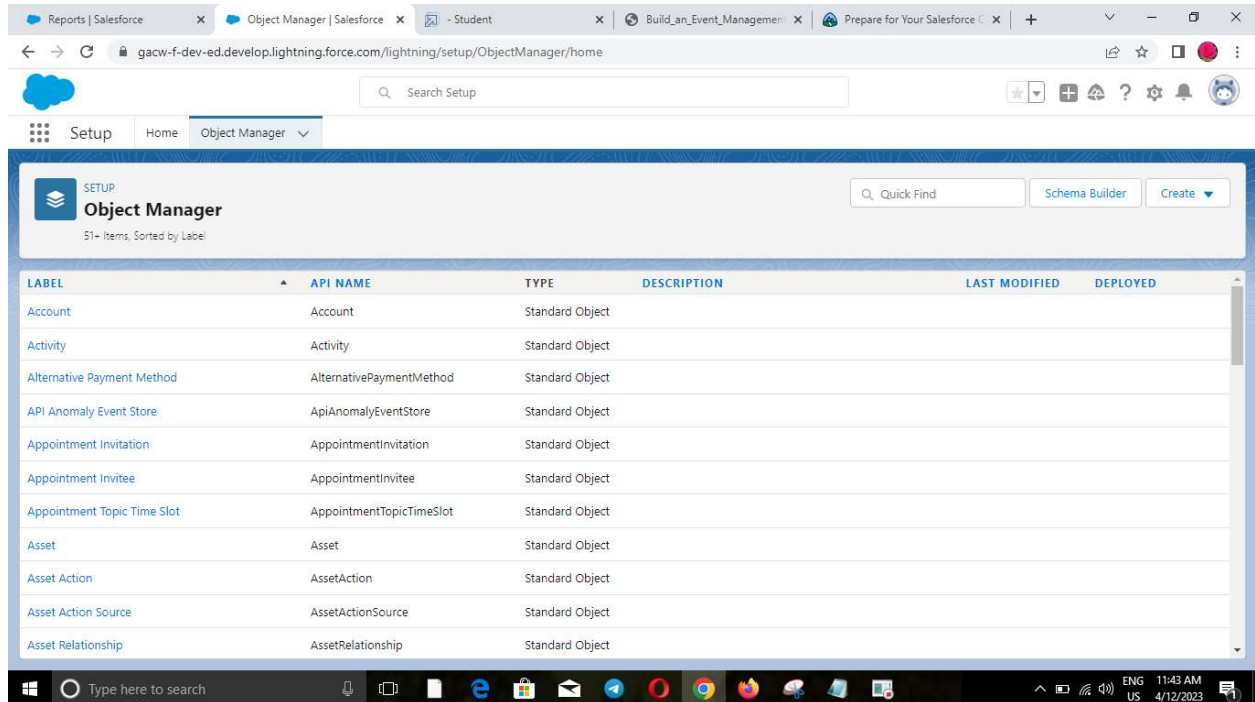
### Creation of Objects for Event Management:

For this Event management we need to create 4 objects i.e Events, Attendees, Speakers, Vendors

1. Click on the gear icon and then select Setup.

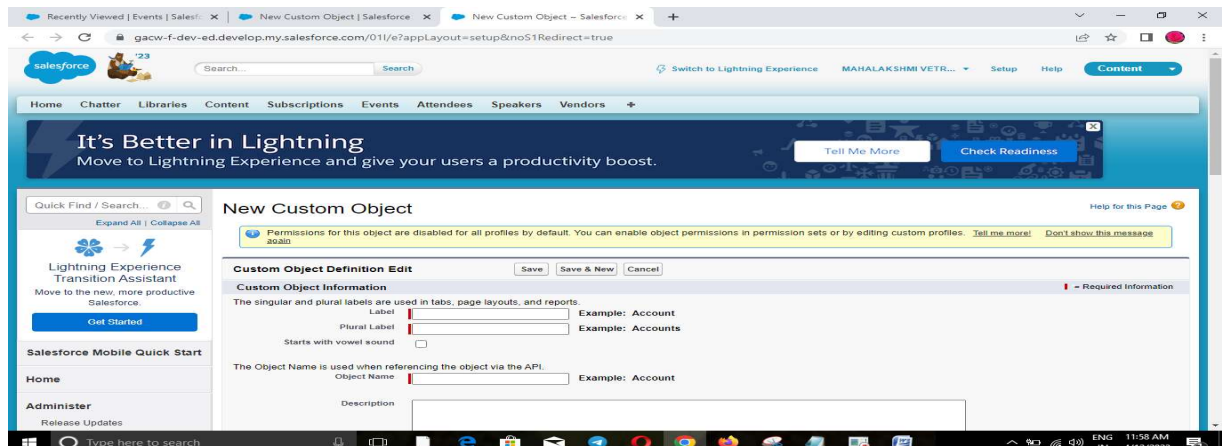


## 2. Click on the object manager tab just beside the home tab.



## 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.

- On the Custom Object Definition page, create the object as follows:
- Label: Event
- Plural Label: Events
- Record Name: Event Name
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save.



## Activity 2:

### Creation of Attendees 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.
  - a. On the Custom Object Definition page, create the object as follows:
  - b. Label: Attendee
  - c. Plural Label: Attendees
  - d. Record Name: Attendee Name
  - e. Check the Allow Reports checkbox f. Check the Allow Search checkbox g. 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 right you will find a Create 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
  - e. Check the Allow Reports checkbox
  - f. Check the Allow Search checkbox
  - g. Click Save.

## Activity 4:

### Creation of Vendors 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.
  - a. On the Custom Object Definition page, create the object as follows:
  - b. Label: Vendor
  - c. Plural Label: Vendors
  - d. Record Name: Vendor Name
  - e. Check the Allow Reports checkbox
  - f. Check the Allow Search checkbox g. Click Save.

## Milestone 3 – Tab:

### Tab

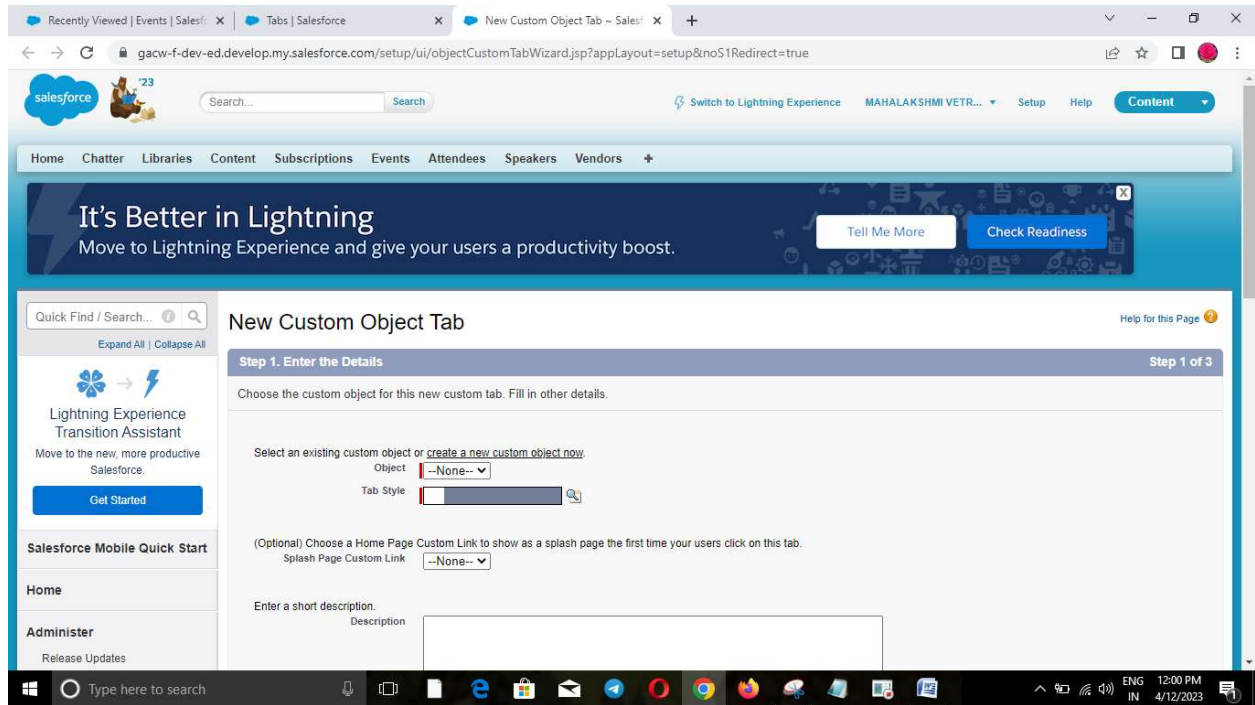
Tabs in Salesforce help users view the information at a glance. It displays the data of objects and other web content in the application.

## 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:

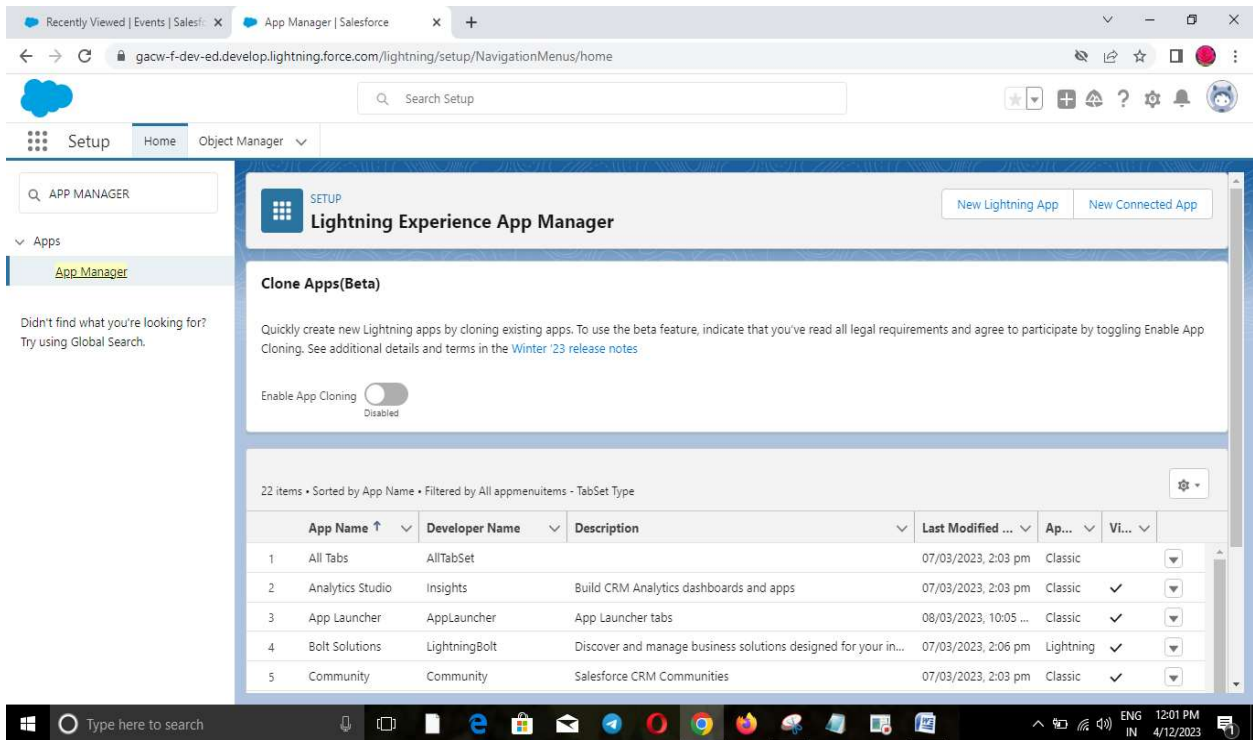
### What is an App?

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.

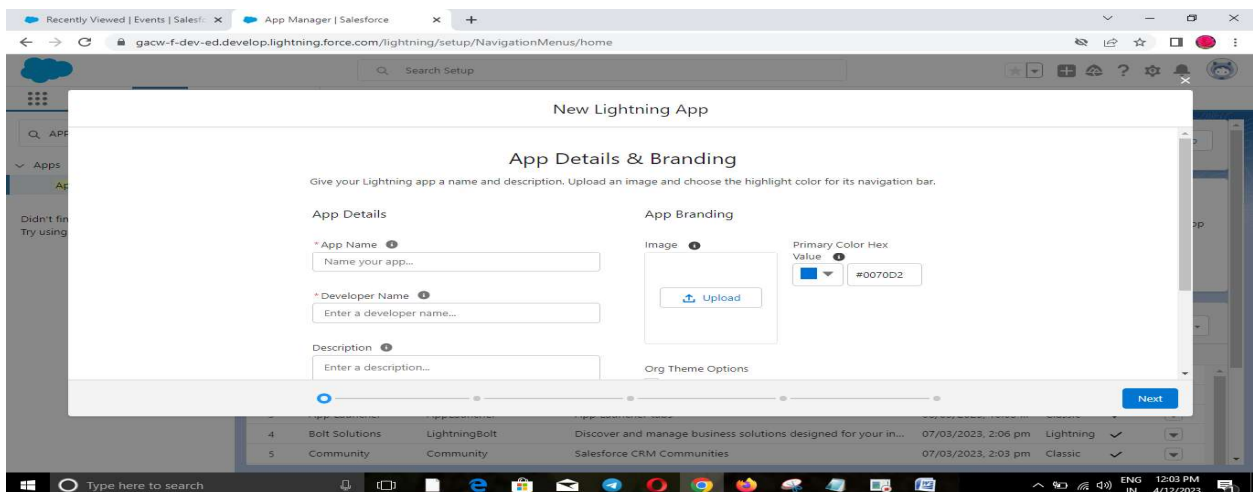
## Activity

# Create the Event Management Construction app

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

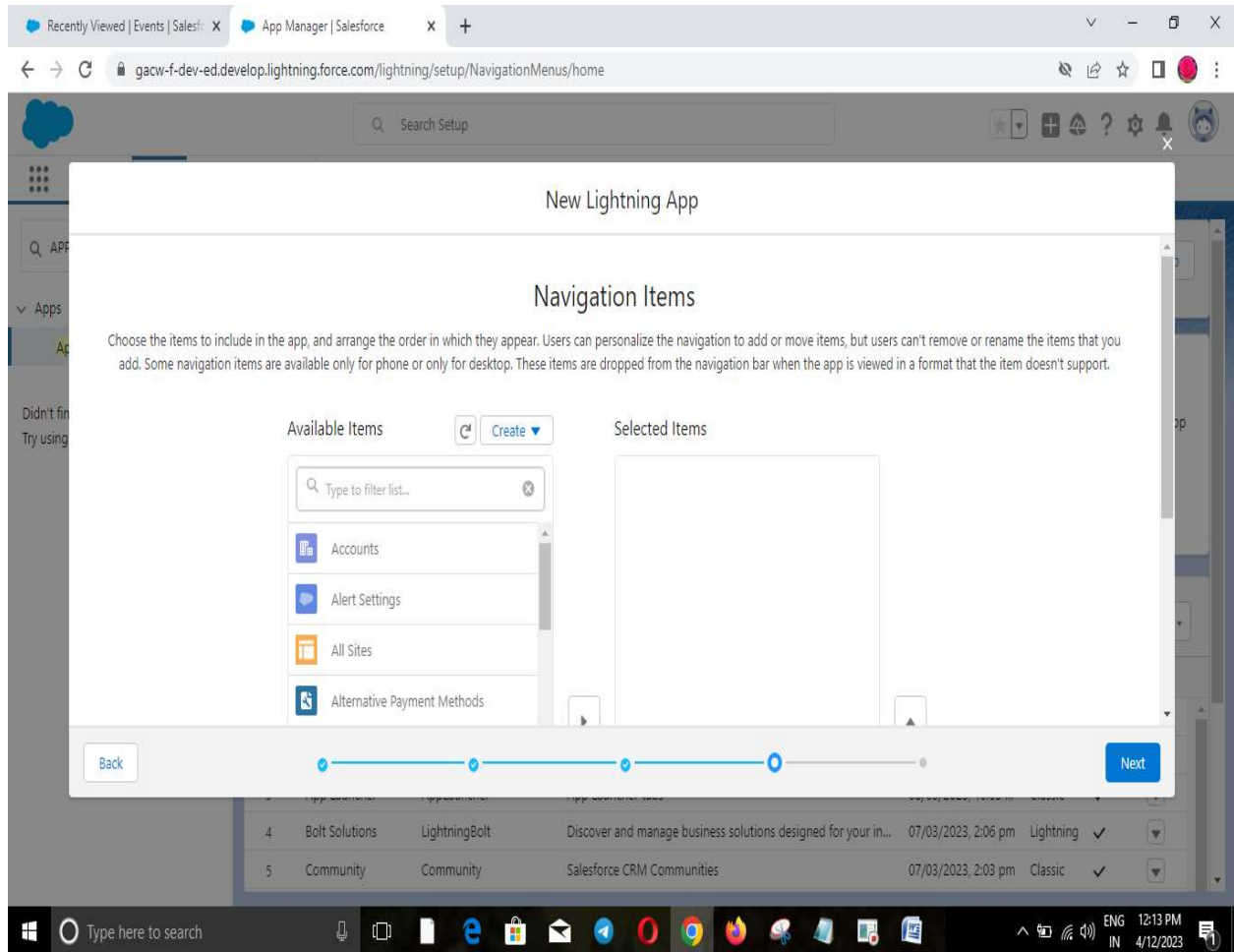


- Click New Lightning App. Enter Event Management as the App Name, then click Next

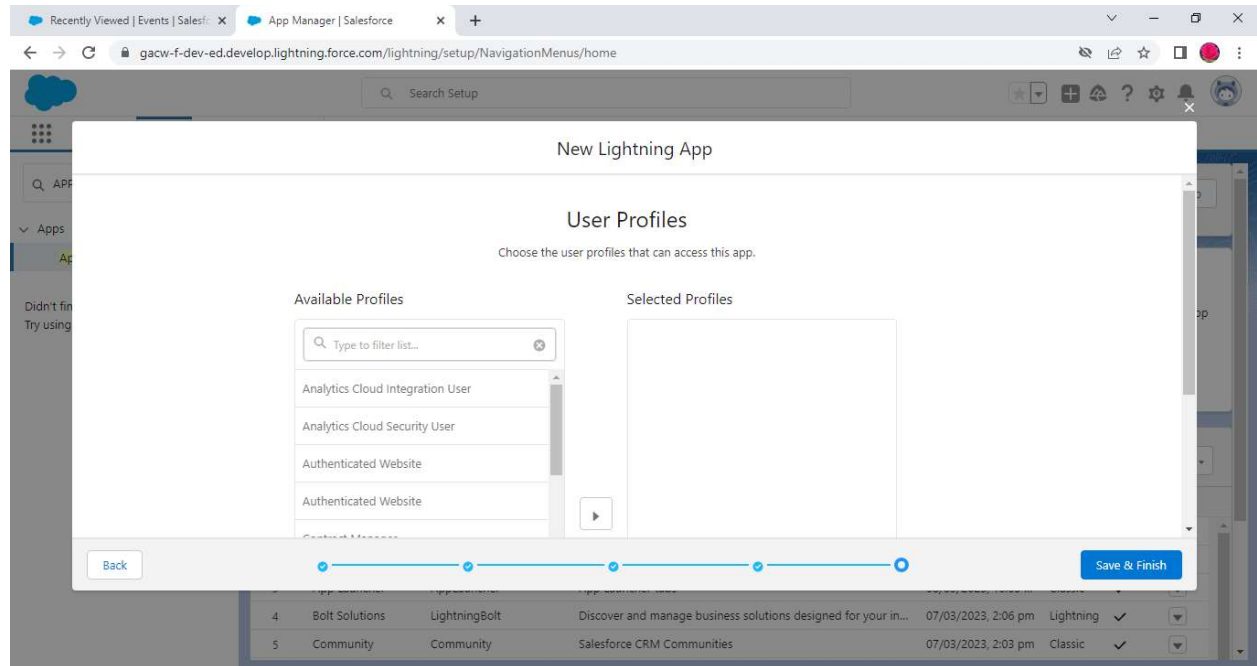


- Under App Options, leave the default selections and click Next.
- Under Utility Items, leave as is and click Next.

- **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:

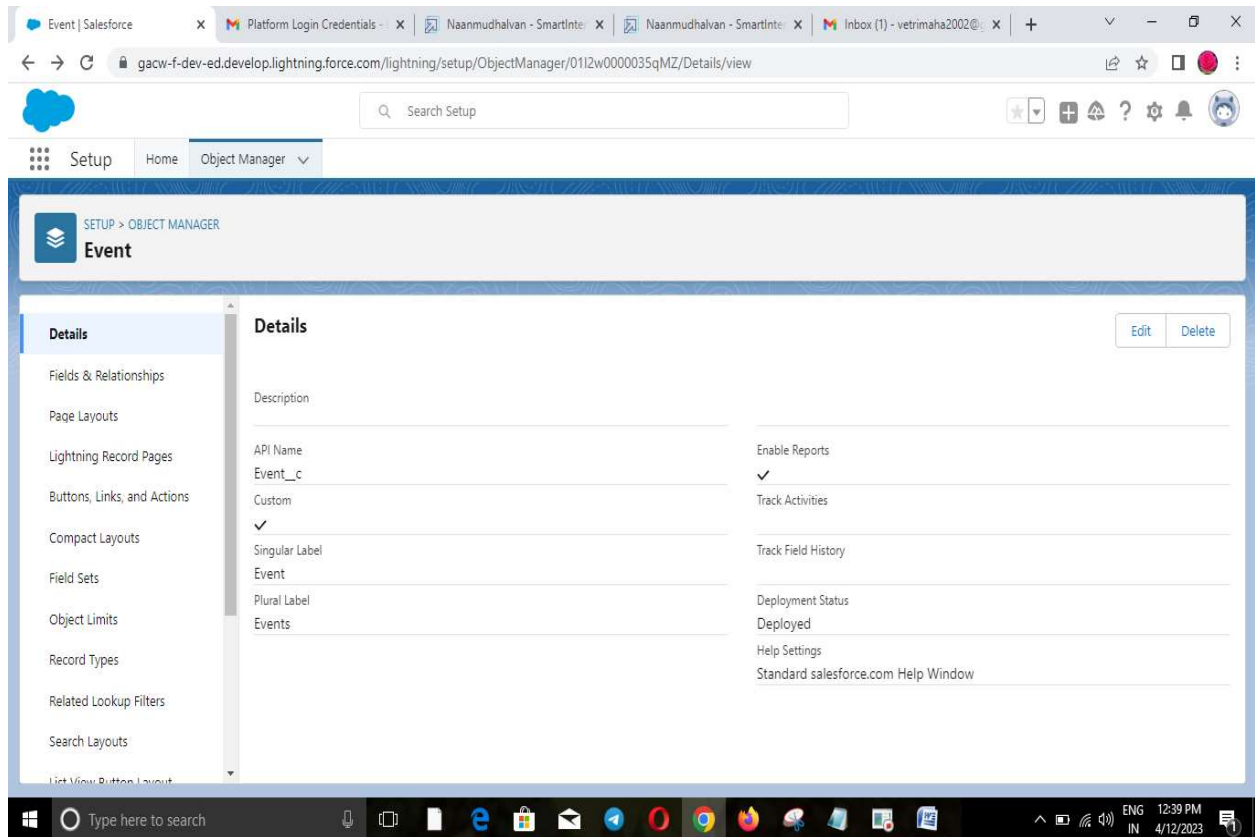
### What are fields?

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.

## 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



The screenshot shows the Salesforce Setup interface for the 'Event' object. The 'Fields & Relationships' section is active, displaying a table of existing fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are:

| FIELD LABEL      | FIELD NAME       | DATA TYPE           | CONTROLLING FIELD | INDEXED |
|------------------|------------------|---------------------|-------------------|---------|
| 09.03.2023       | X09_03_2023__c   | Date/Time           |                   |         |
| 11.03.2023       | X11_03_2023__c   | Date/Time           |                   |         |
| Attendee         | Attendee__c      | Master-Detail(Zone) |                   | ✓       |
| Created By       | CreatedById      | Lookup(User)        |                   |         |
| Last Modified By | LastModifiedById | Lookup(User)        |                   |         |
| Salem            | Salem__c         | Text(5)             |                   |         |
| Women's Day      | Name             | Text(80)            |                   | ✓       |

5. Select the Text as the Data Type, then click Next.

6. For Field Label, enter City.

The screenshot shows the 'New Custom Field' wizard in Salesforce Setup, specifically 'Step 2: Enter the details'. The form fields are as follows:

- Field Label:** A text input field.
- Length:** A text input field with a hint: 'Please enter the maximum length for a text field below.'
- Field Name:** A text input field.
- Description:** A large text area.
- Help Text:** A large text area.

Navigation buttons at the bottom right include 'Previous', 'Next', and 'Cancel'. The 'Next' button is highlighted.

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

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 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.

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Home, Chatter, Libraries, Content, Subscriptions, Events, Attendees, Speakers, and Vendors. The main content area is titled 'Profiles' and displays a table of existing profiles. The table has columns for Action, Profile Name, User License, and Custom. The profiles listed are: Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, Chatter External User, Chatter Free User, Chatter Moderator User, Contract Manager, and Cross Org Data Proxy User. The bottom of the page shows a pagination bar indicating 1-25 of 41 profiles, with 0 selected. The system status bar at the bottom indicates the user is logged in as MAHALAKSHMI VETRI...

| Action                                | Profile Name                                     | User License                     | Custom                   |
|---------------------------------------|--|----------------------------------|--------------------------|
| <input type="checkbox"/> Edit   Clone | <a href="#">Analytics Cloud Integration User</a> | Analytics Cloud Integration User | <input type="checkbox"/> |
| <input type="checkbox"/> Edit   Clone | <a href="#">Analytics Cloud Security User</a>    | Analytics Cloud Integration User | <input type="checkbox"/> |
| <input type="checkbox"/> Edit   Clone | <a href="#">Authenticated Website</a>            | Authenticated Website            | <input type="checkbox"/> |
| <input type="checkbox"/> Edit   Clone | <a href="#">Authenticated Website</a>            | Authenticated Website            | <input type="checkbox"/> |
| <input type="checkbox"/> Edit   Clone | <a href="#">Chatter External User</a>            | Chatter External                 | <input type="checkbox"/> |
| <input type="checkbox"/> Edit   Clone | <a href="#">Chatter Free User</a>                | Chatter Free                     | <input type="checkbox"/> |
| <input type="checkbox"/> Edit   Clone | <a href="#">Chatter Moderator User</a>           | Chatter Free                     | <input type="checkbox"/> |
| <input type="checkbox"/> Edit   Clone | <a href="#">Contract Manager</a>                 | Salesforce                       | <input type="checkbox"/> |
| <input type="checkbox"/> Edit   Clone | <a href="#">Cross Org Data Proxy User</a>        | XOrg Proxy User                  | <input type="checkbox"/> |

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

Platform Login Credentials - x - Student x Build\_an\_Event\_Management x Profiles | Salesforce x Profiles - Salesforce - Devel x

gacw-f-dev-ed.develop.my.salesforce.com/00e?setupid=EnhancedProfiles&appLayout=setup&noS1Redirect=true

Home Chatter Libraries Content Subscriptions Events Attendees Speakers Vendors +

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Move to Lightning Experience and give your users a productivity boost.

Tell Me More Check Readiness

Quick Find / Search... Expand All | Collapse All

**Profiles** Help for this Page

All Profiles Edit | Delete | Create New View

New Profile

| Action       | Profile Name                            | User License           | Custom                   |
|--------------|---|------------------------|--------------------------|
| Edit   Clone | Salesforce API Only System Integrations | Salesforce Integration | <input type="checkbox"/> |
| Edit   Clone | Silver Partner User                     | Silver Partner         | <input type="checkbox"/> |
| Edit   Clone | Solution Manager                        | Salesforce             | <input type="checkbox"/> |
| Edit   Clone | Standard Platform User                  | Salesforce Platform    | <input type="checkbox"/> |
| Edit   Clone | Standard User                           | Salesforce             | <input type="checkbox"/> |
| Edit   Clone | System Administrator                    | Salesforce             | <input type="checkbox"/> |

1-6 of 6 0 Selected Page 1 of 1

Type here to search

6. While still on the Event profile page, then click Edit.

Platform Login Credentials - x - Student x Build\_an\_Event\_Management x Profiles | Salesforce x Profiles - Salesforce - Devel x

gacw-f-dev-ed.develop.my.salesforce.com/00e?setupid=EnhancedProfiles&appLayout=setup&noS1Redirect=true

Home Chatter Libraries Content Subscriptions Events Attendees Speakers Vendors +

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Quick Find / Search... Expand All | Collapse All

**Profiles** Help for this Page

All Profiles Edit | Delete | Create New View

New Profile

| Action       | Profile Name                            | User License           | Custom                   |
|--------------|---|------------------------|--------------------------|
| Edit   Clone | Salesforce API Only System Integrations | Salesforce Integration | <input type="checkbox"/> |
| Edit   Clone | Silver Partner User                     | Silver Partner         | <input type="checkbox"/> |
| Edit   Clone | Solution Manager                        | Salesforce             | <input type="checkbox"/> |
| Edit   Clone | Standard Platform User                  | Salesforce Platform    | <input type="checkbox"/> |
| Edit   Clone | Standard User                           | Salesforce             | <input type="checkbox"/> |
| Edit   Clone | System Administrator                    | Salesforce             | <input type="checkbox"/> |

1-6 of 6 0 Selected Page 1 of 1

Type here to search

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

permission

## 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

**Platform Login Credentials** | **Student** | **Build\_an\_Event\_Management** | **Users | Salesforce** | **All Users ~ Salesforce - Dev**

gacw-f-dev-ed.develop.my.salesforce.com/005?isUserEntityOverride=1&appLayout=setup&no\$1Redirect=true

salesforce Search... Switch to Lightning Experience MAHALAKSHMI VETR... Setup Help Content

Home Chatter Libraries Content Subscriptions Events Attendees Speakers Vendors +

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Quick Find / Search... Expand All | Collapse All

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Move to the new, more productive Salesforce. [Get Started](#)

**Salesforce Mobile Quick Start**

Home

**Administer**  
Release Updates

## All Users

On this page you can create, view, and manage users.  
In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

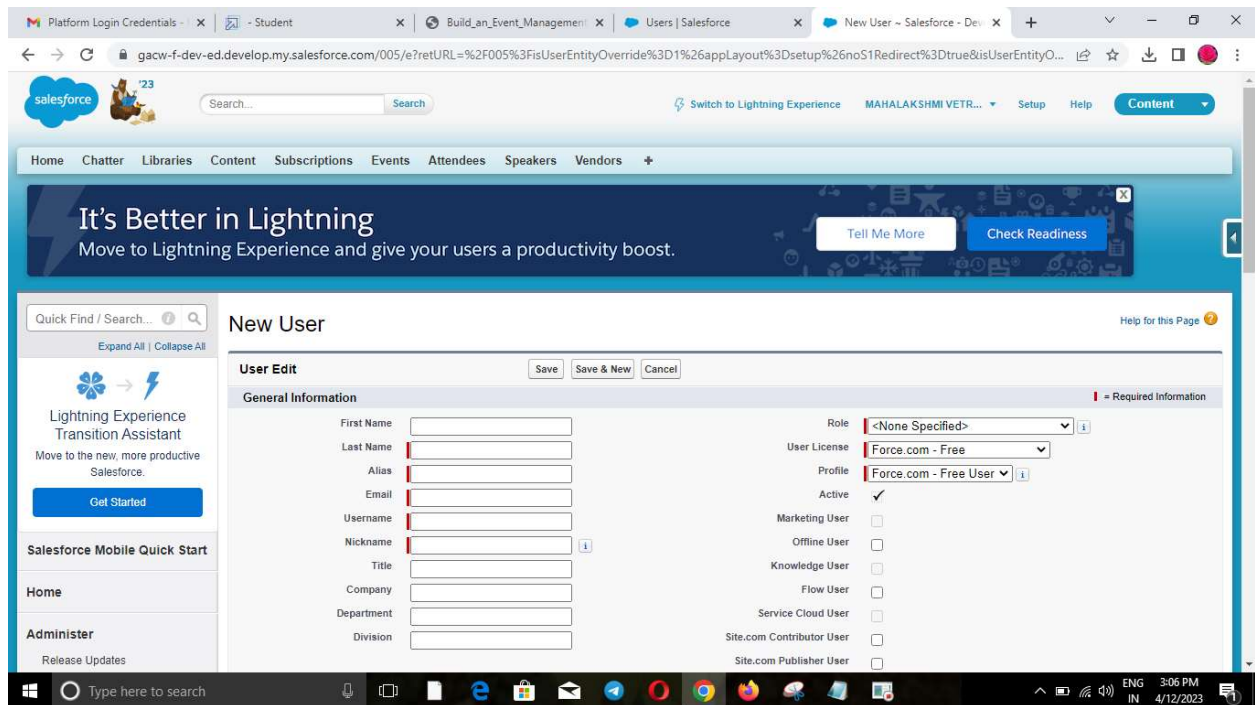
View: **All Users** Edit | [Create New View](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other **All**

| Action               | Full Name            | Alias   | Username   | Role | Active | Profile                          |
|----------------------|----------------------|---------|--|------|--------|----------------------------------|
| <a href="#">Edit</a> | Chatter Expert       | Chatter | chattv.0042w00000rn9aax:ivluz3npgt9@chatter.salesforce.com |      | ✓      | Chatter Free User                |
| <a href="#">Edit</a> | Gupta Sanjay         | Sanj    | mahaamm967@gmail.com                                       |      | ✓      | Event Vendors Profile            |
| <a href="#">Edit</a> | User Integration     | integ   | integration@0042w00000rn9aax.com                           |      | ✓      | Analytics Cloud Integration User |
| <a href="#">Edit</a> | User Security        | sec     | insightssecurity@0042w00000rn9aax.com                      |      | ✓      | Analytics Cloud Security User    |
| <a href="#">Edit</a> | VETRIVEL MAHALAKSHMI | MVETR   | maha@physics.com   |      | ✓      | System Administrator             |

[New User](#) [Reset Password\(s\)](#) [Add Multiple Users](#)

- **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](mailto: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.

## Activity 1:

### Creating a Permission Set:

- From setup search “permission sets” in quick find and select permission set then click

The screenshot shows the Salesforce 'Create New View' page for Permission Sets. The page is divided into three main sections: Step 1. Enter View Name, Step 2. Specify Filter Criteria, and Step 3. Select Columns to Display. Step 1 has a 'View Name' field. Step 2 has a table with columns 'Setting', 'Operator', and 'Value'. The 'Setting' column has a dropdown menu, and the 'Operator' column has a dropdown menu with 'equals' selected. The 'Value' column has a text input field. There are 'Add Row' and 'Clear All Rows' links. Below the table, there are examples: 'Modify All Data equals False' and 'Contact: Modify All equals True'. Step 3 is partially visible at the bottom. The left sidebar shows the 'Quick Find' search bar and the 'Lightning Experience Transition Assistant' button. The top navigation bar includes 'Home', 'Chatter', 'Libraries', 'Content', 'Subscriptions', 'Events', 'Attendees', 'Speakers', and 'Vendors'.

- Enter label as: Event Permits and Save.
- After saving the permission click on the Manage assignment
- After saving the permission click on the Manage 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

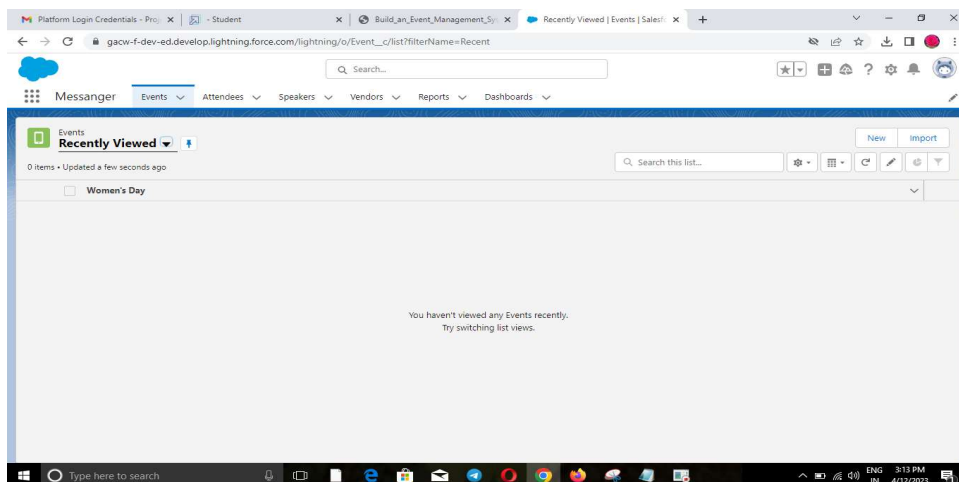
### What are Reports?

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.

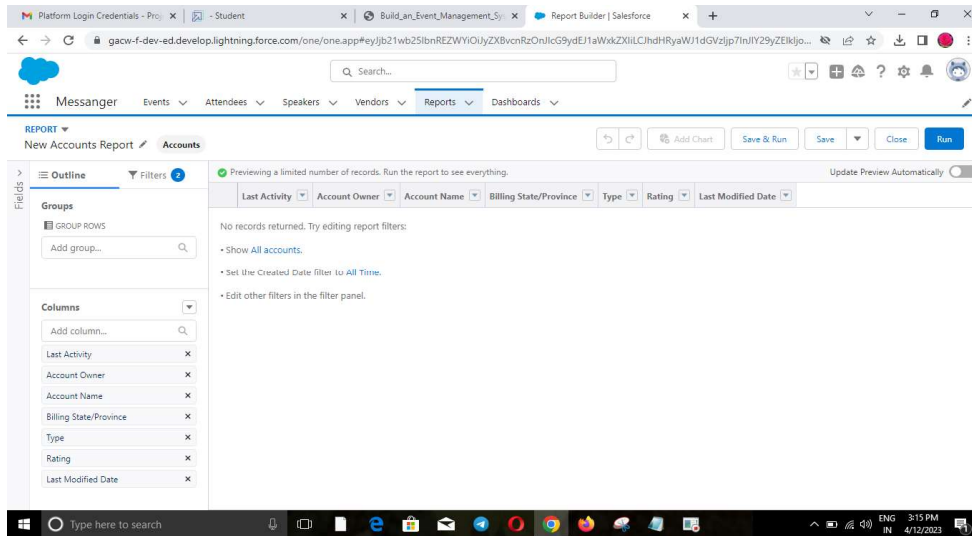
### Activity

#### 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.







## Trailhead Profile Public URL

Team Lead - <https://trailblazer.me/id/mahavetri2002>  
Team Member- <https://trailblazer.me/id/mpriya197>  
Team Member- <https://trailblazer.me/id/smurugan104>  
Team Member- <https://trailblazer.me/id/prems75>

## Project Report Template

## 5. ADVANTAGE

1. Better Time Management
2. Ultimate Assessability
3. Increased Revenue
4. Greater Customer Satisfaction
5. Simple Account Planning

## DISADVANTAGE

1. Expensive
2. You have to pay for add-ons to get the most out of the software

3. The learning curve never seems to end.
4. Customer support has a poor reputation.

## **APPLICATIONS**

Salesforce helps businesses keep track of customer interactions and sales data. It can manage leads, contacts, opportunities, and cases.

## **CONCLUSION**

Salesforce has been growing tremendously its employees, customers, offices throughout the world by providing innovative and best ideas/solutions

## **FUTURE SCOPE**

Salesforce jobs are plenty, and the scope for Salesforce careers is vast. According to a study by Gartner, businesses of all sizes are switching from on-premise to cloud deployments. It's predicted that in 2019, investments on SaaS will reach approximately \$42 billion.

**PROJECT WAS CREATED BY**

**V . MAHALAKSHMI**  
**( III B. SC PHYSICS EM)**

