

REPORT FOR BUILD AN EVENT MANAGEMENT

1 INTRODUCTION

1.1 Overview

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.

1.2 Purpose

In all areas of business, there are some terms you're never truly sure you know the definition of. However, when it comes to event management, the definition is easy. At its core, event management is the process of planning an event. This is any type of event, whether it be in-person, virtual, or hybrid. It's synonymous with event planning and meeting planning. Just like those other terms, the scope of each project and the nitty-gritty details vary depending on the industry, company size, and more.

2 Problem Definition & Design Thinking

2.1 Empathy Map



2.2 Ideation & Brainstorming



3 RESULT

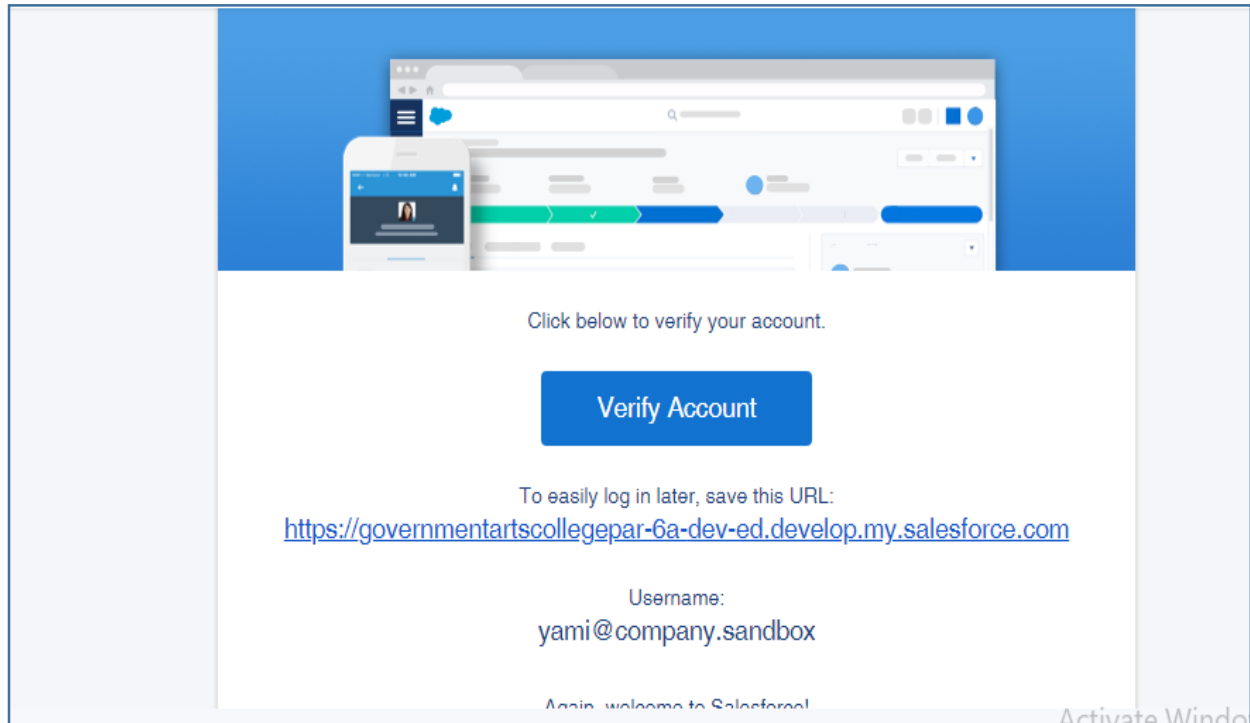
3.1 Data Model:

| Object Name | Fields in the Object | |
|------------------|----------------------|-------------|
| Event Object | Field label | Data type |
| | City | Text |
| | | |
| Attendees Object | Field label | Data type |
| | Id | Auto Number |
| | Phone | Phone |
| | e-mail | Email |
| | | |
| Speakers Object | Field label | Data type |
| | Bio | Text Area |
| | e-mail | Email |
| | | |
| Vendors Object | Field label | Data type |
| | e-mail | Email |
| | Phone | Phone |
| | Service Provider | Text |

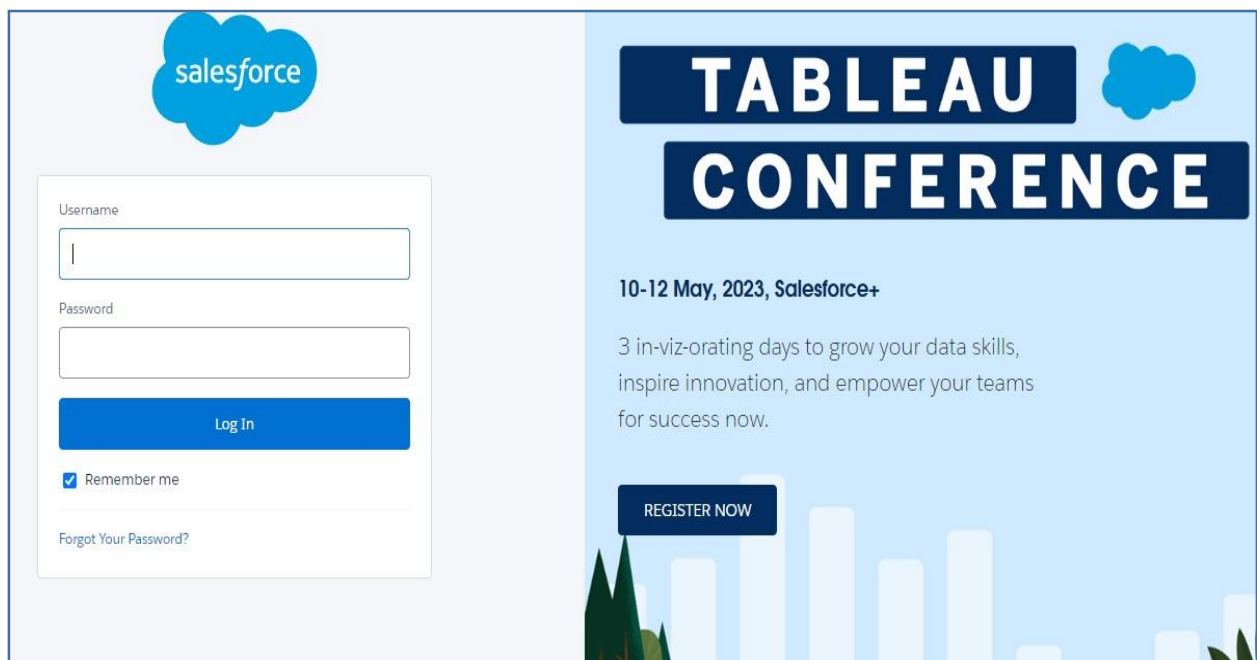
3.2 Activity & Screenshot

Milestone: 1

Activity: Creating Developer Account



Login to your salesforce account



Milestone-2: Object

Activity-1: Creation of Event Object

The screenshot shows the 'New Custom Object' page in Salesforce Setup. The 'Custom Object Information' section is highlighted. The 'Label' field is 'Event' and the 'Plural Label' field is 'Events', both highlighted with a red box. The 'Object Name' field is 'Event'. The 'Description' field is empty. The 'Context-Sensitive Help Setting' is set to 'Open the standard Salesforce.com Help & Training window'. The 'Content Name' is set to 'None--'. A red box highlights the 'Event' and 'Events' labels. A red box also highlights the 'Event' and 'Events' labels. A red box also highlights the 'Event' and 'Events' labels.

Setup | Home | Object Manager

SETUP New Custom Object

Custom Object Definition Edit [Save] [Save & New] [Cancel]

Custom Object Information ⓘ Required 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:

Context-Sensitive Help Setting: ☒ Open the standard Salesforce.com Help & Training window
☐ Open a window using a Visualforce page

Content Name:

Enter Record Name Label and Format

Activity 2: Creation of Attendee Object

The screenshot shows the 'New Custom Object' page in Salesforce Setup. The 'Custom Object Information' section is highlighted. The 'Label' field is 'Attendee' and the 'Plural Label' field is 'Attendees', both highlighted with a red box. The 'Object Name' field is 'Event'. The 'Description' field is empty. A yellow banner at the top states: '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 this message again.' A red box highlights the 'Attendee' and 'Attendees' labels. A red box also highlights the 'Attendee' and 'Attendees' labels. A red box also highlights the 'Attendee' and 'Attendees' labels.

Setup | Home | Object Manager

SETUP New Custom Object

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 this message again](#)

Custom Object Definition Edit [Save] [Save & New] [Cancel]

Custom Object Information ⓘ Required 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:

Activity 3: Creation of Speaker Object

The screenshot shows the 'New Custom Object' setup page in a web application. The page title is 'New Custom Object'. Below the title, there is a message: '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 this message again](#)'. The main section is 'Custom Object Definition Edit' with buttons 'Save', 'Save & New', and 'Cancel'. Under 'Custom Object Information', there are fields for 'Label' (Speaker), 'Plural Label' (speakers), and 'Object Name' (Spokee). The 'Label' and 'Plural Label' fields are highlighted with a red box. The 'Object Name' field is also highlighted. The 'Description' field is empty. The page also includes a 'Help for this Page' link and a 'Required Information' indicator.

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 this message again](#)

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label Speaker Example: Account

Plural Label speakers Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name Spokee Example: Account

Description

Activity 4: Creation of Vendor Object

The screenshot shows the 'New Custom Object' setup page in a web application. The page title is 'New Custom Object'. Below the title, there is a message: '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 this message again](#)'. The main section is 'Custom Object Definition Edit' with buttons 'Save', 'Save & New', and 'Cancel'. Under 'Custom Object Information', there are fields for 'Label' (Vendor), 'Plural Label' (Vendors), and 'Object Name' (Vendor). The 'Label' and 'Plural Label' fields are highlighted with a red box. The 'Object Name' field is also highlighted. The 'Description' field is empty. The page also includes a 'Help for this Page' link and a 'Required Information' indicator.

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 this message again](#)

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label Vendor Example: Account

Plural Label Vendors Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name Vendor Example: Account

Description

Milestone-3: Tabs

The screenshot shows the Salesforce Setup interface. In the left sidebar, under 'User Interface', the 'Tabs' link is highlighted with a yellow box and a black arrow pointing to it. The main content area is titled 'Custom Tabs' and includes a 'New' button with a 'What Is This?' link. Below this, there are three sections: 'Custom Object Tabs', 'Web Tabs', and 'Visualforce Tabs'. The 'Custom Object Tabs' section contains a table with one entry: 'Energy Audits' with a 'Sun' tab style. A red arrow points to the 'New' button in this section. The 'Web Tabs' and 'Visualforce Tabs' sections both show 'No [type] Tabs have been defined'.

Setup
Home
Object Manager

Search Setup

Q Tabs

User Interface

Rename Tabs and Labels

Tabs

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

SETUP
Tabs

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

New What Is This?

| Action | Label | Tab Style | Description |
|------------|---------------|-----------|-------------|
| Edit Del | Energy Audits | Sun | |

Web Tabs

New What Is This?

No Web Tabs have been defined

Visualforce Tabs

New What Is This?

No Visualforce Tabs have been defined

Activity 1: Creation of Event Tab

The screenshot shows the 'Step 1. Enter the Details' page for creating a new custom tab. The 'Object' dropdown menu is set to 'Event' and is highlighted with a red box. The 'Tab Style' dropdown menu is set to 'Shield' and is also highlighted with a red box. A red arrow points to the 'Next' button at the bottom right of the page. The 'Splash Page Custom Link' is set to '--None--'.

Setup
Home
Object Manager

Search Setup

Q Tabs

User Interface

Rename Tabs and Labels

Tabs

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

SETUP
Tabs

Step 1. Enter the Details

Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object

Object

Event

Tab Style

Shield

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link

--None--

Enter a short description.

Description

Next Cancel

Activity 2: Creation of Attendee object

The screenshot shows the Salesforce Setup interface. On the left sidebar, under 'User Interface', the 'Tabs' section is selected. The main content area is titled 'SETUP Tabs' and shows 'Step 1 of 3: Enter the Details'. The instruction is 'Choose the custom object for this new custom tab. Fill in other details.' Below this, there are two fields: 'Object' and 'Tab Style'. The 'Object' dropdown is set to 'Attendee' and the 'Tab Style' dropdown is set to 'Shield'. Both dropdowns are highlighted with a red rectangle. Below these, there is an optional section for 'Home Page Custom Link' with a dropdown set to '--None--'. At the bottom, there is a text area for 'Enter a short description.' and a 'Next' button with a downward arrow pointing to it.

Activity 3: Creation of Speaker Tab

The screenshot shows the Salesforce Setup interface. On the left sidebar, under 'User Interface', the 'Tabs' section is selected. The main content area is titled 'SETUP Tabs' and shows 'Step 1 of 3: Enter the Details'. The instruction is 'Choose the custom object for this new custom tab. Fill in other details.' Below this, there are two fields: 'Object' and 'Tab Style'. The 'Object' dropdown is set to 'Speaker' and the 'Tab Style' dropdown is set to 'People'. Both dropdowns are highlighted with a red rectangle. Below these, there is an optional section for 'Home Page Custom Link' with a dropdown set to '--None--'. At the bottom, there is a text area for 'Enter a short description.' and a 'Next' button with a downward arrow pointing to it.

Activity 4: Creation of Vendor Tab

The screenshot shows the Salesforce Setup interface. On the left, the navigation menu is open, showing 'Setup' > 'User Interface' > 'Tabs'. The main content area is titled 'SETUP Tabs' and shows 'Step 1. Enter the Details'. The instructions say: 'Choose the custom object for this new custom tab. Fill in other details.' There are two main sections: 'Select an existing custom object or create a new custom object now.' and '(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.' In the first section, the 'Object' dropdown is set to 'Vendor' and the 'Tab Style' is set to 'Laptop'. A red box highlights these two dropdowns. In the second section, the 'Splash Page Custom Link' is set to '--None--'. Below this, there is a text area for 'Enter a short description.' with the label 'Description'. At the bottom right, there are 'Next' and 'Cancel' buttons. A hand-drawn arrow points down towards the 'Next' button.

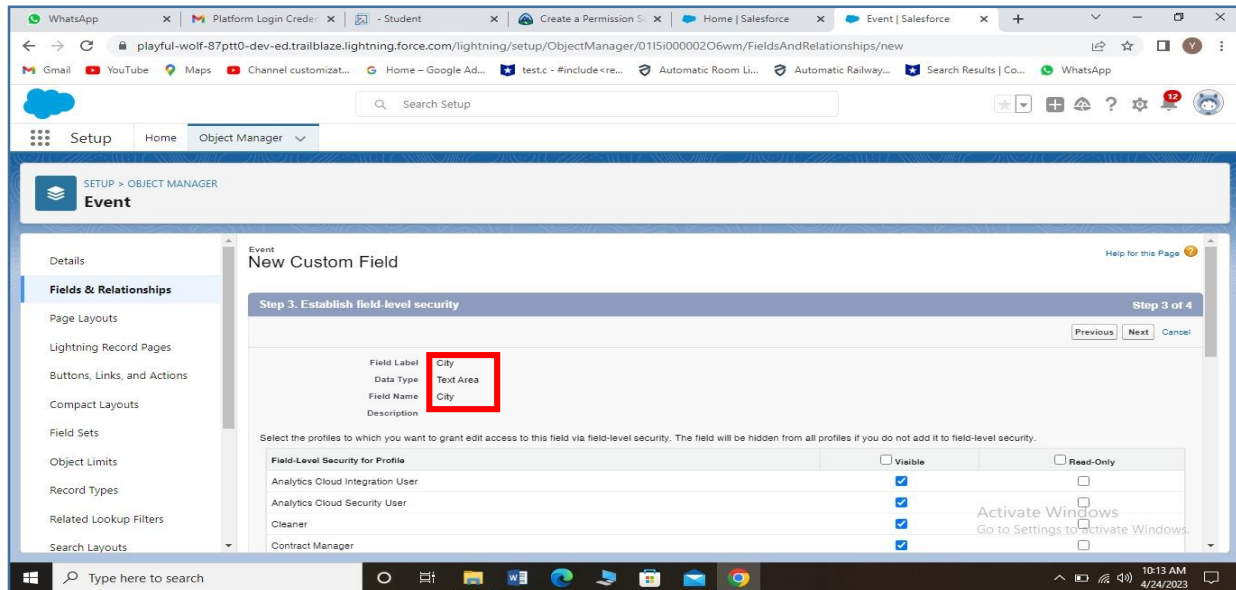
Milestone -3: Lightning App

Activity: Creation of Event Management Construction App

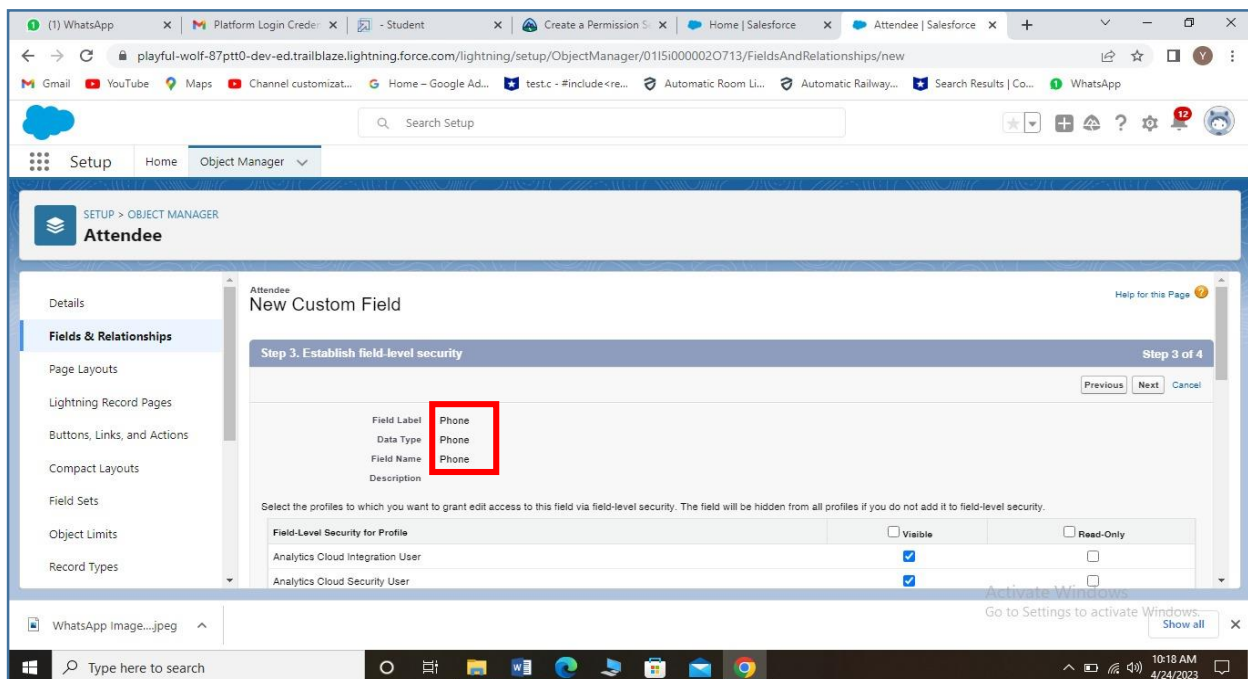
The screenshot shows the 'New Lightning App' creation interface. The title is 'App Details & Branding'. Below the title, it says: 'Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.' There are two main sections: 'App Details' and 'App Branding'. In the 'App Details' section, there are three fields: '*App Name', '*Developer Name', and 'Description'. The '*App Name' field contains the text 'Event Management' and is highlighted with a red box. A hand-drawn arrow points to this field. The '*Developer Name' field contains the text 'Event_Management'. The 'Description' field is empty. In the 'App Branding' section, there is an 'Image' field with an 'Upload' button and a 'Primary Color Hex' field with a value of '#0070D2'. At the bottom right, there is a 'Next' button. A hand-drawn arrow points down towards the 'Next' button.

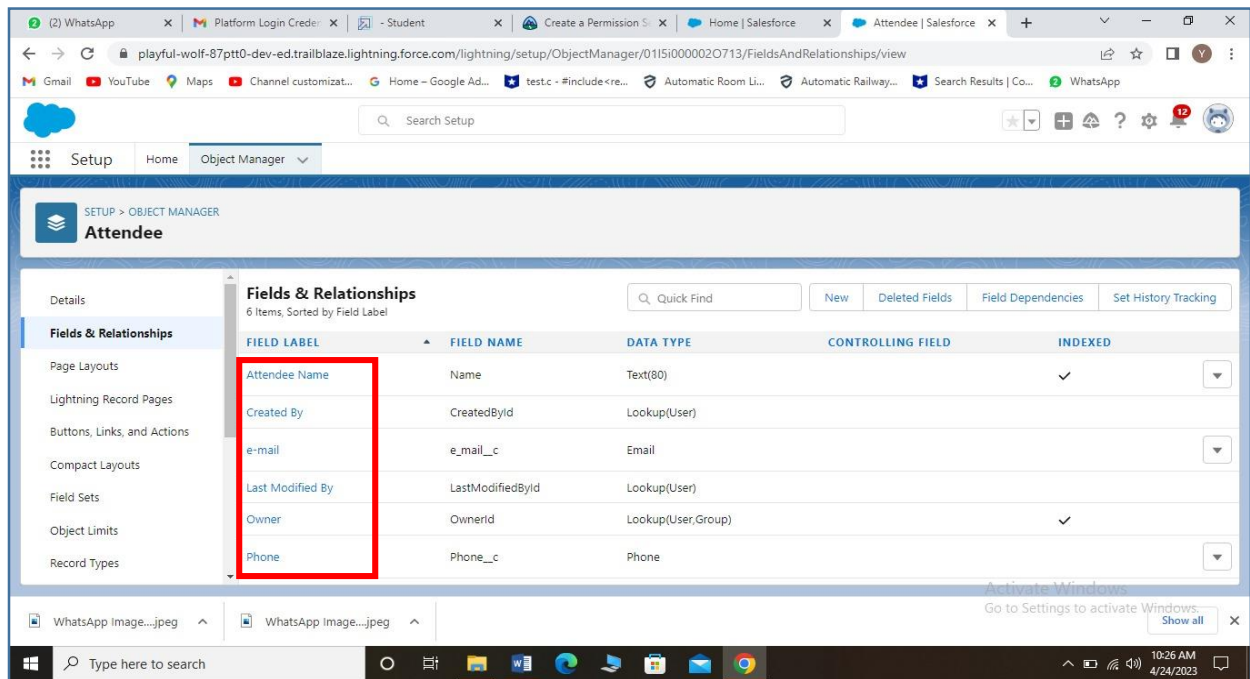
Milestone-4: Fields and Relationship

Activity 1: Creation of fields for the Event object

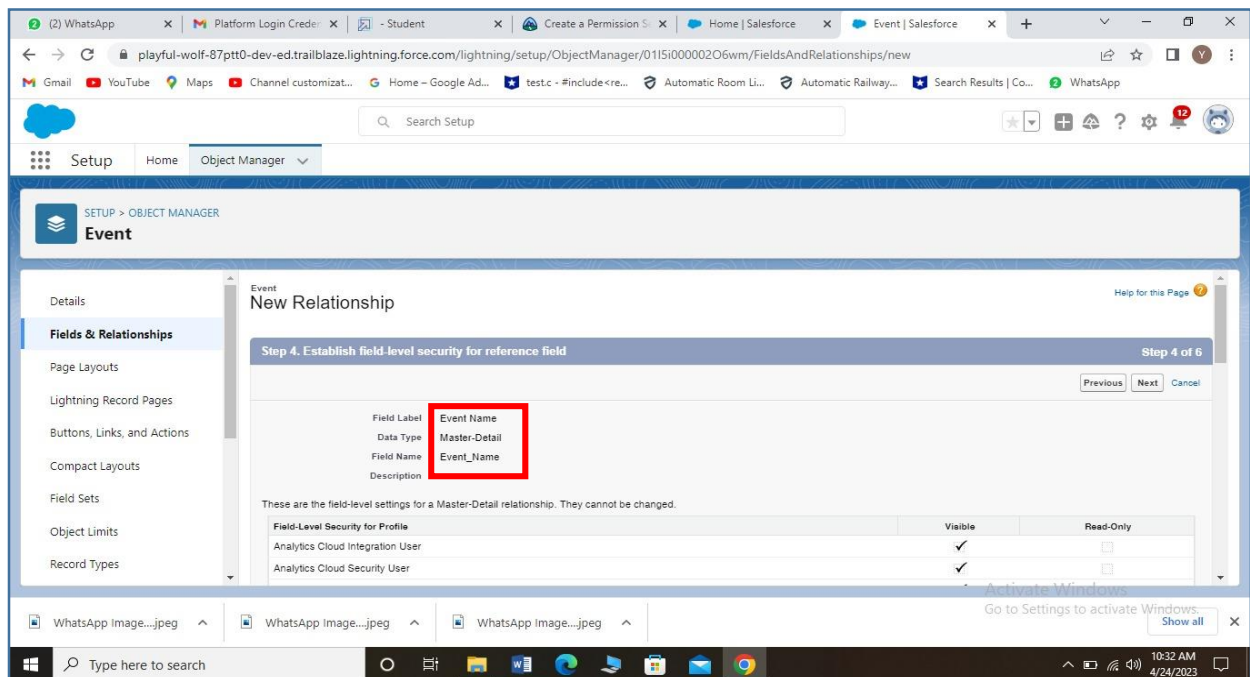


Activity 2: Creation of fields for the Attendee objects

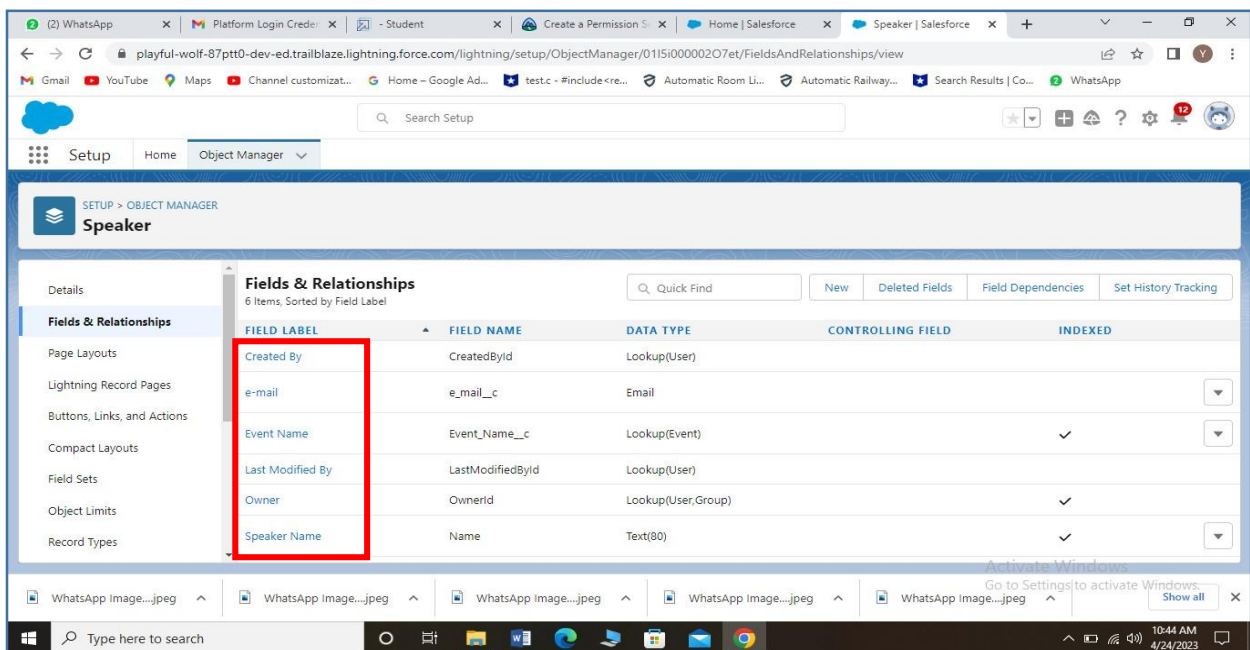
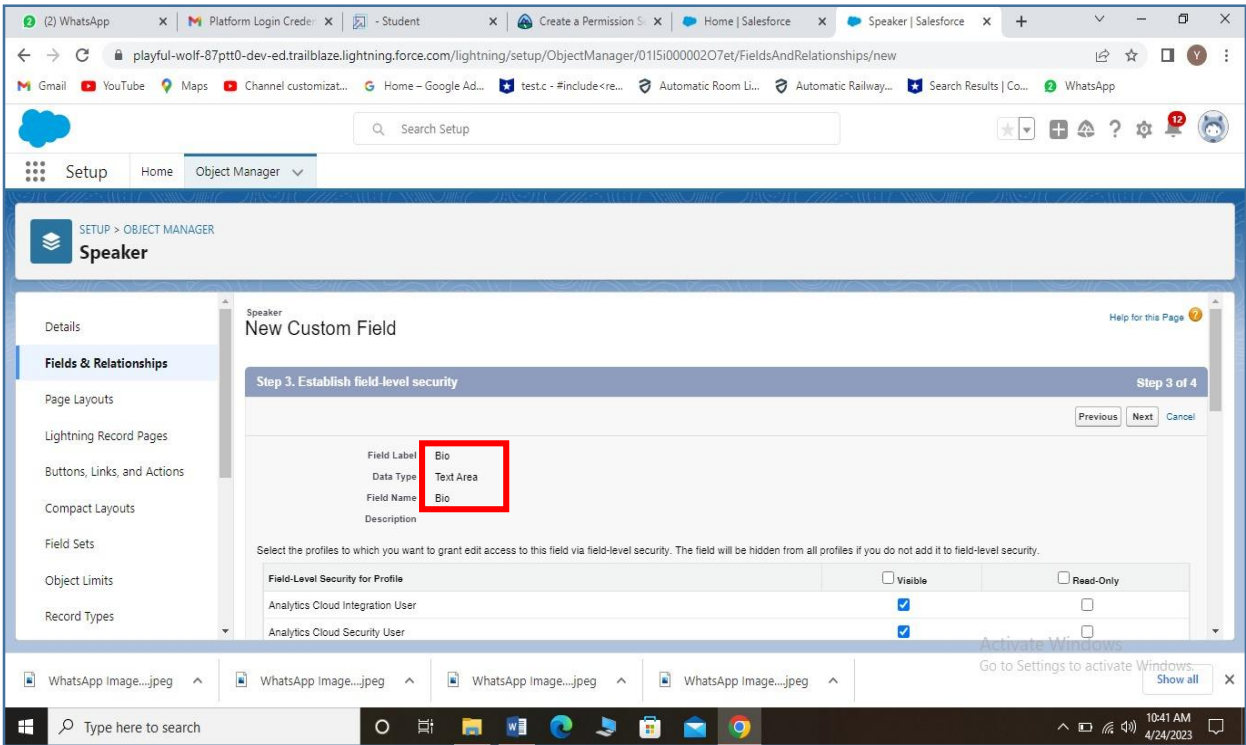




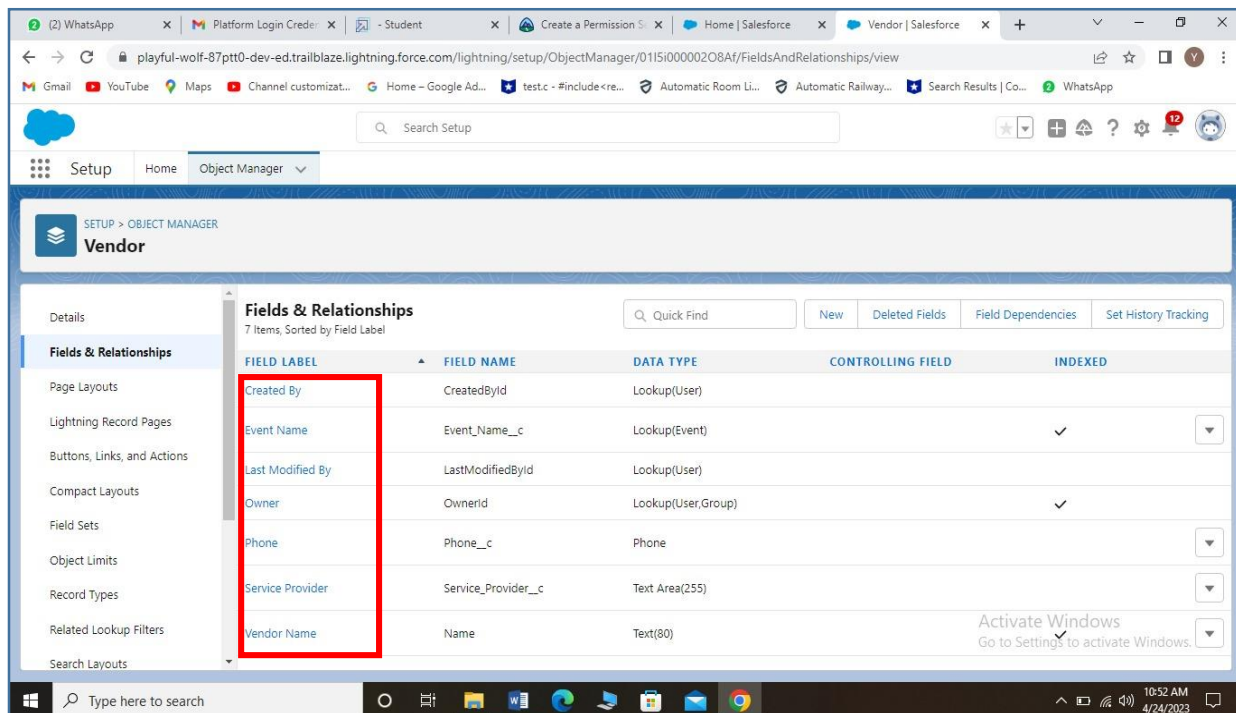
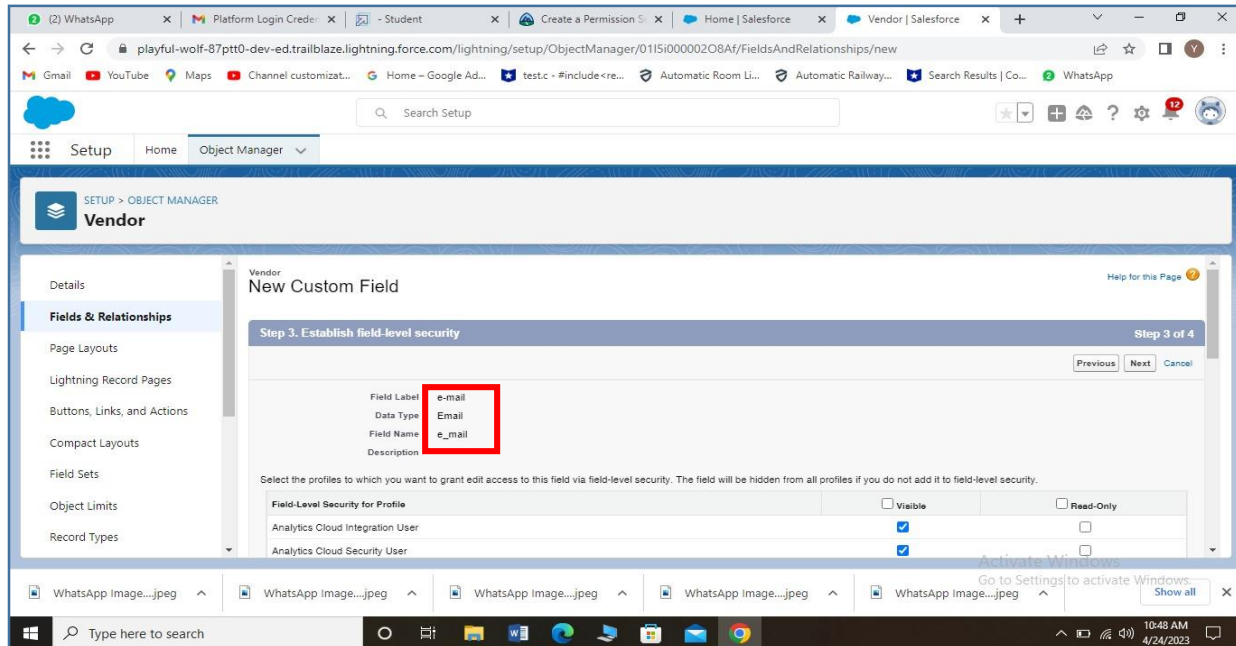
Let's Create a Master-detail Relationship with Event Object



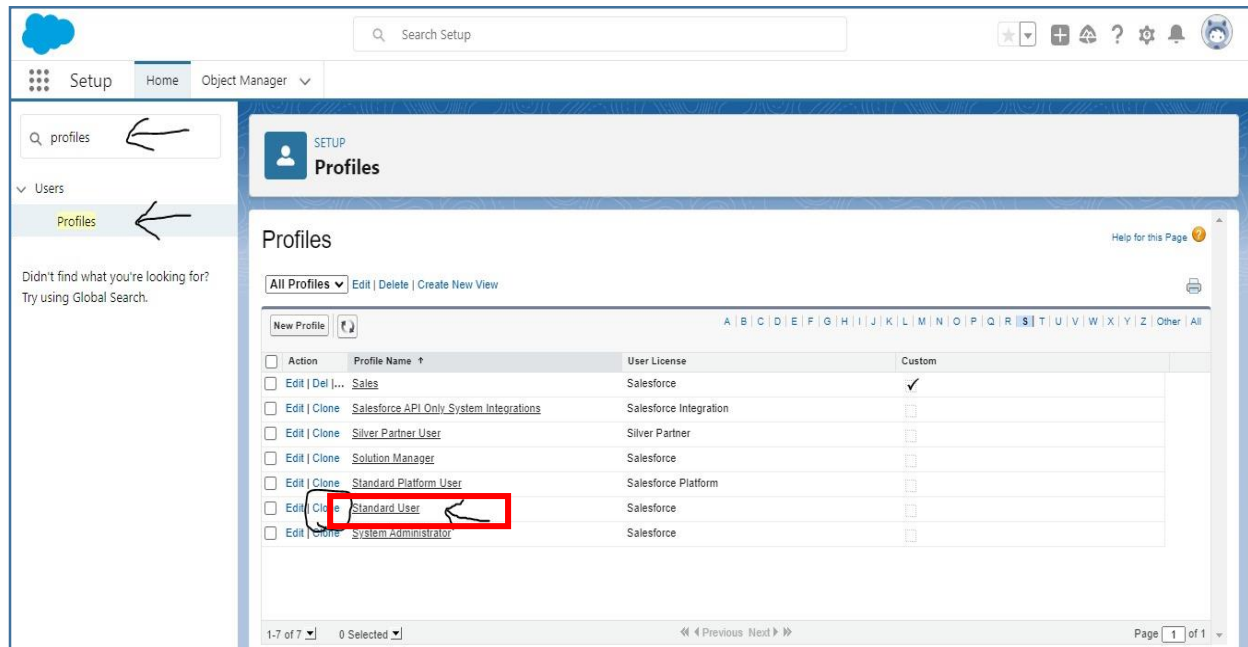
Activity 3: Creation of fields for the Speakers object



Activity 5: Creation of fields for the Vendors Object



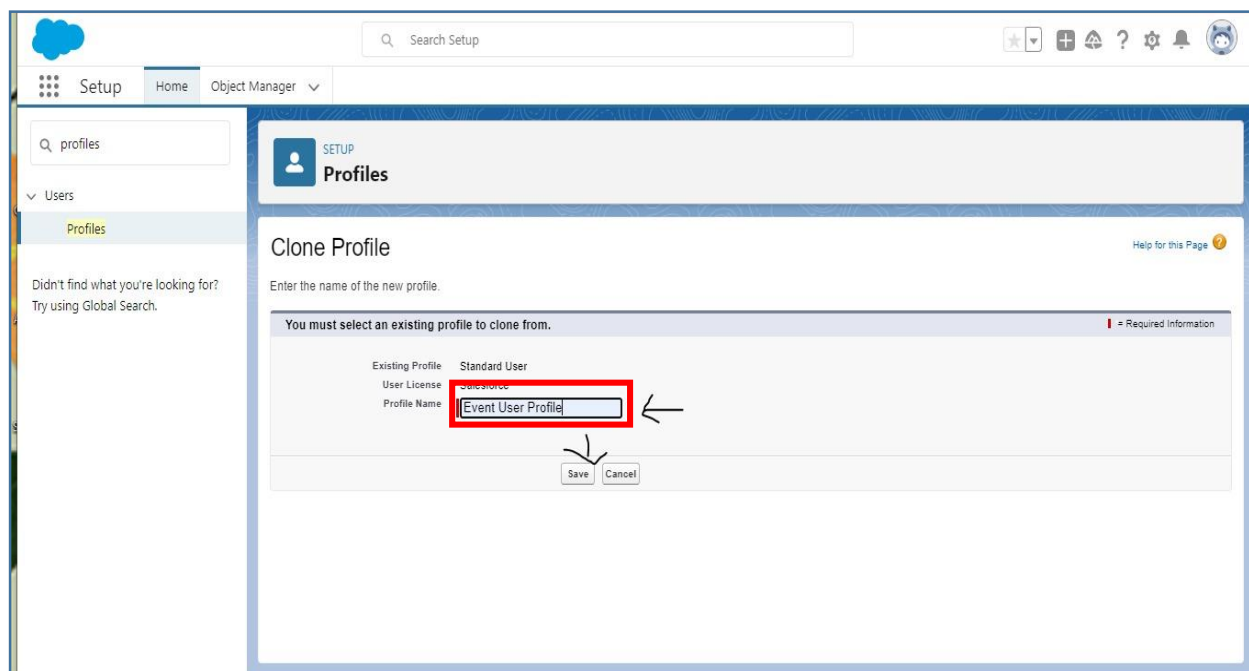
Milestone-5: Profile



The screenshot shows the Salesforce Setup interface. In the left sidebar, the 'Profiles' link is highlighted with a red box and an arrow. The main content area displays the 'Profiles' list. A table lists various profiles, with 'Standard User' highlighted by a red box and an arrow. The table has columns for Action, Profile Name, User License, and Custom.

| Action | Profile Name | User License | Custom |
|---|---|------------------------|-------------------------------------|
| Edit Delete | Sales | Salesforce | <input checked="" type="checkbox"/> |
| 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"/> |

Activity 1: Creation on Event Profile



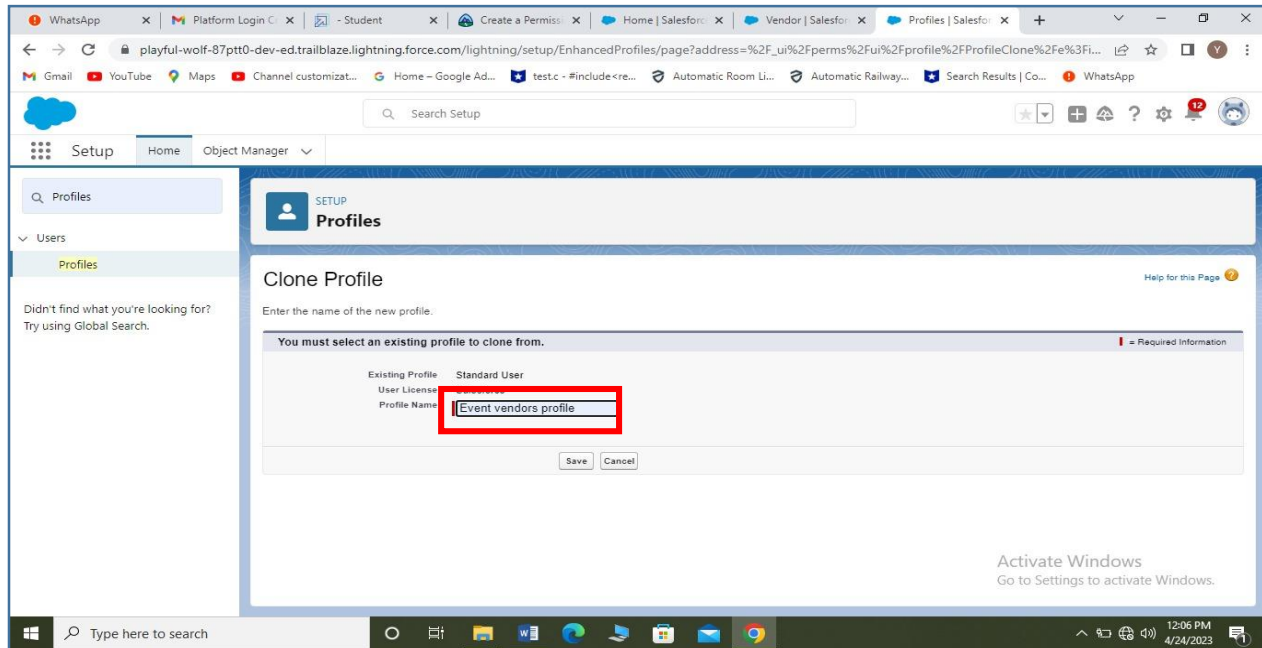
The screenshot shows the 'Clone Profile' page in Salesforce Setup. The 'Profile Name' field is highlighted with a red box and an arrow. The page prompts the user to enter the name of the new profile and provides a dropdown menu to select an existing profile to clone from. The 'Standard User' profile is selected, and the 'Event User Profile' is entered in the 'Profile Name' field.

You must select an existing profile to clone from.

| Existing Profile | User License | Profile Name |
|------------------|--------------|--------------------|
| Standard User | Salesforce | Event User Profile |

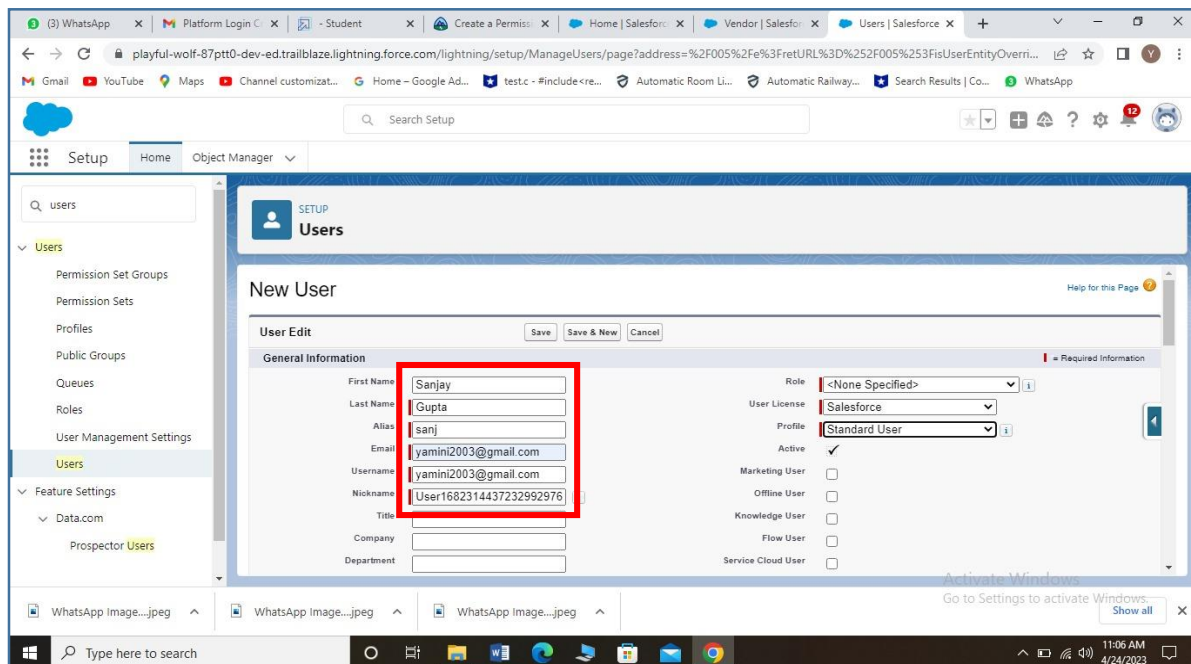
Save Cancel

Activity 2: Creation on Event Vendor Profile

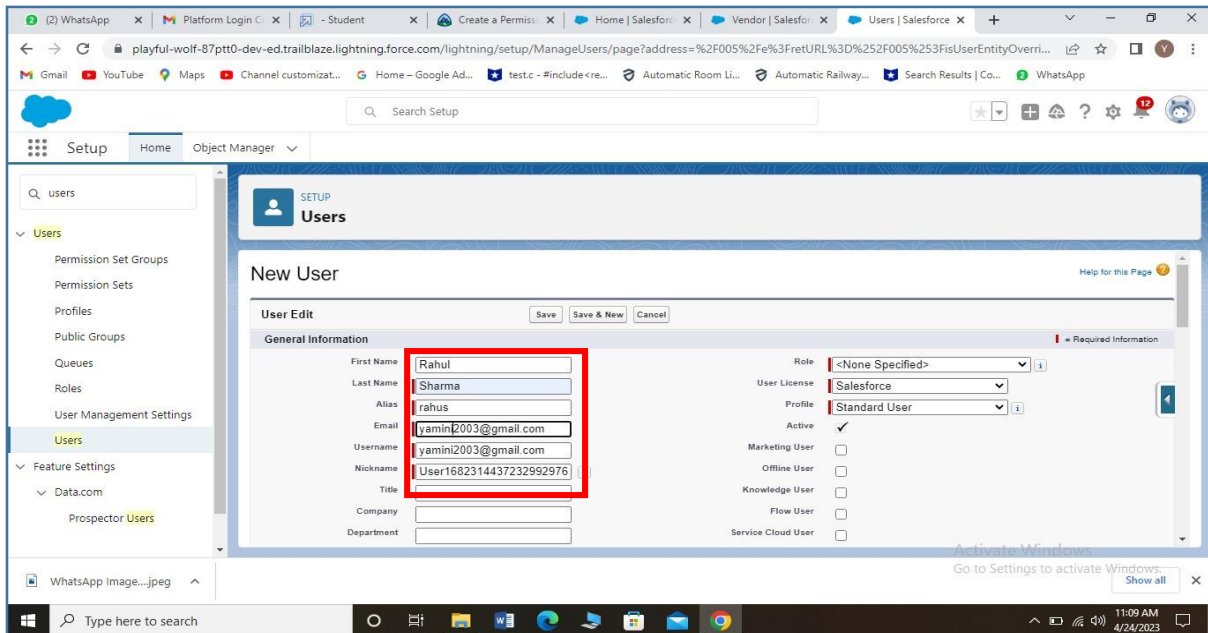


Milestone-6 User

Activity 1: Creating of Sanjay Gupta User



Activity 2: Creating of Rahul Sharma User



The screenshot shows the Salesforce Setup interface for creating a new user. The left sidebar contains a search bar and a navigation menu with categories like Users, Feature Settings, and Data.com. The main content area is titled 'New User' and contains a 'User Edit' form. The 'General Information' section is highlighted with a red box, showing the following fields: First Name (Rahul), Last Name (Sharma), Alias (rahus), Email (yamin2003@gmail.com), Username (yamin2003@gmail.com), Nickname (User1682314437232992976), Title, Company, and Department. The 'Role' dropdown is set to '<None Specified>', 'User License' is 'Salesforce', and 'Profile' is 'Standard User'. The 'Active' checkbox is checked. The bottom of the screen shows a Windows taskbar with the time 11:09 AM on 4/24/2023.

Setup

Users

New User

User Edit

General Information

First Name: Rahul

Last Name: Sharma

Alias: rahus

Email: yamin2003@gmail.com

Username: yamin2003@gmail.com

Nickname: User1682314437232992976

Title:

Company:

Department:

Role: <None Specified>

User License: Salesforce

Profile: Standard User

Active: ☒

Marketing User: ☐

Offline User: ☐

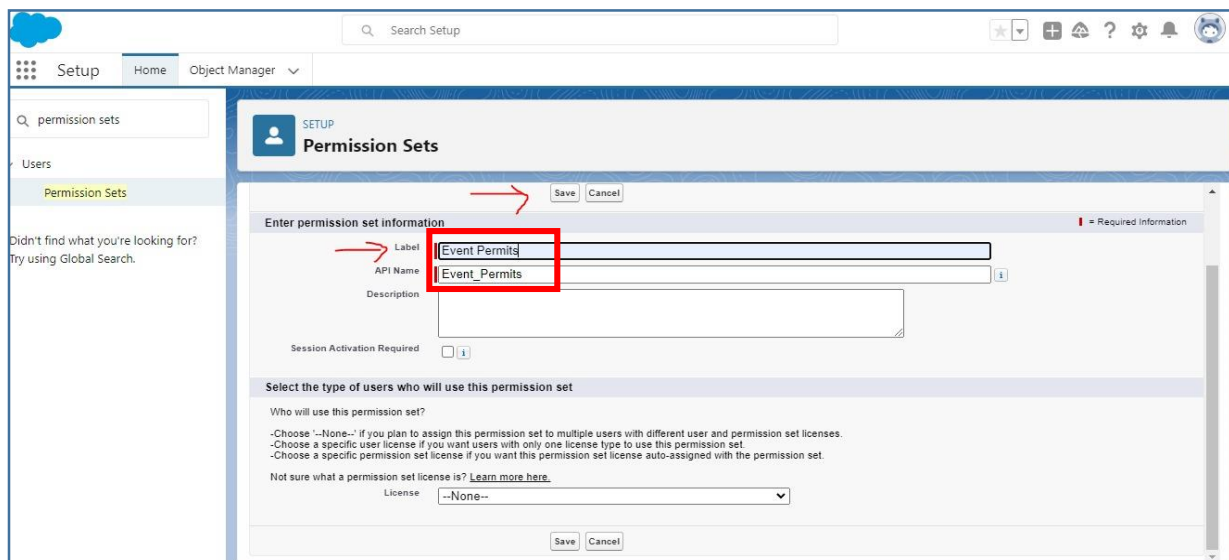
Knowledge User: ☐

Flow User: ☐

Service Cloud User: ☐

Milestone-7: Permissions Sets

Activity 1: Creating a Permission Set



The screenshot shows the Salesforce Setup interface for creating a new permission set. The left sidebar contains a search bar and a navigation menu with categories like Users, Feature Settings, and Data.com. The main content area is titled 'Permission Sets' and contains a form to 'Enter permission set information'. The 'Label' field is set to 'Event Permits' and the 'API Name' field is set to 'Event_Permits', both highlighted with a red box. The 'Description' field is empty. The 'Session Activation Required' checkbox is unchecked. Below the form, there is a section 'Select the type of users who will use this permission set' with a 'License' dropdown set to '--None--'. The bottom of the screen shows a Windows taskbar with the time 11:09 AM on 4/24/2023.

Setup

Permission Sets

Enter permission set information

Label: Event Permits

API Name: Event_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.

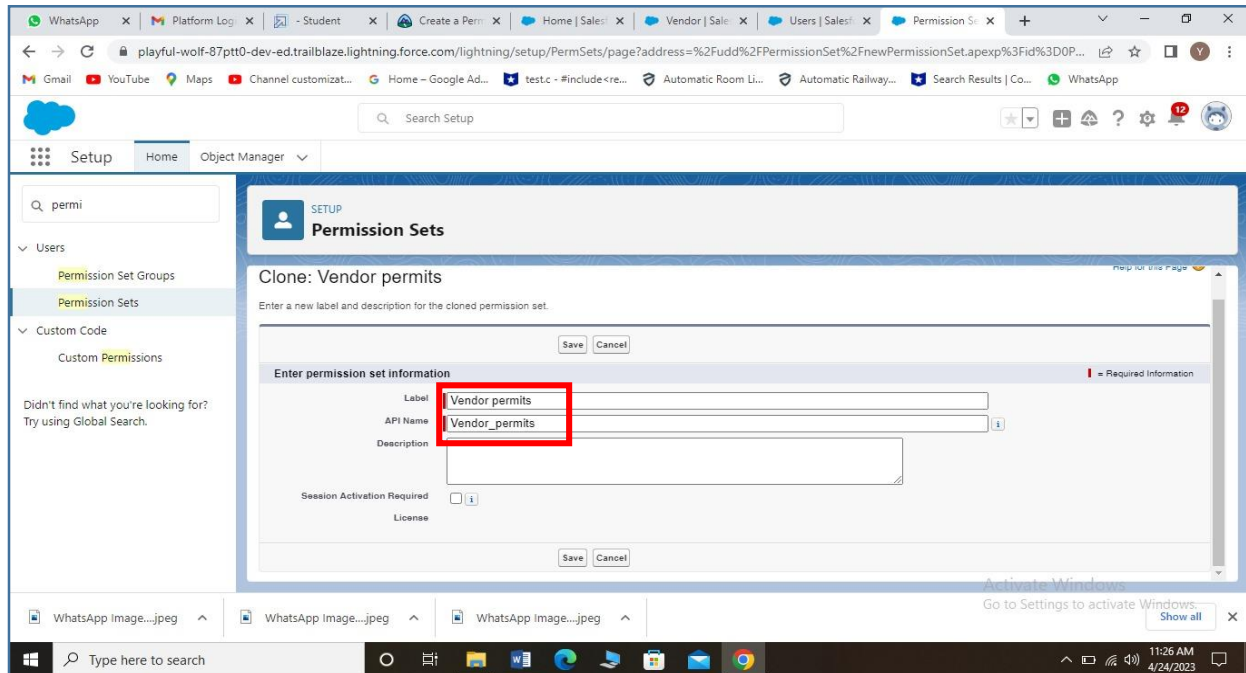
-Choose a specific user license if you want users with only one license type to use this permission set.

-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

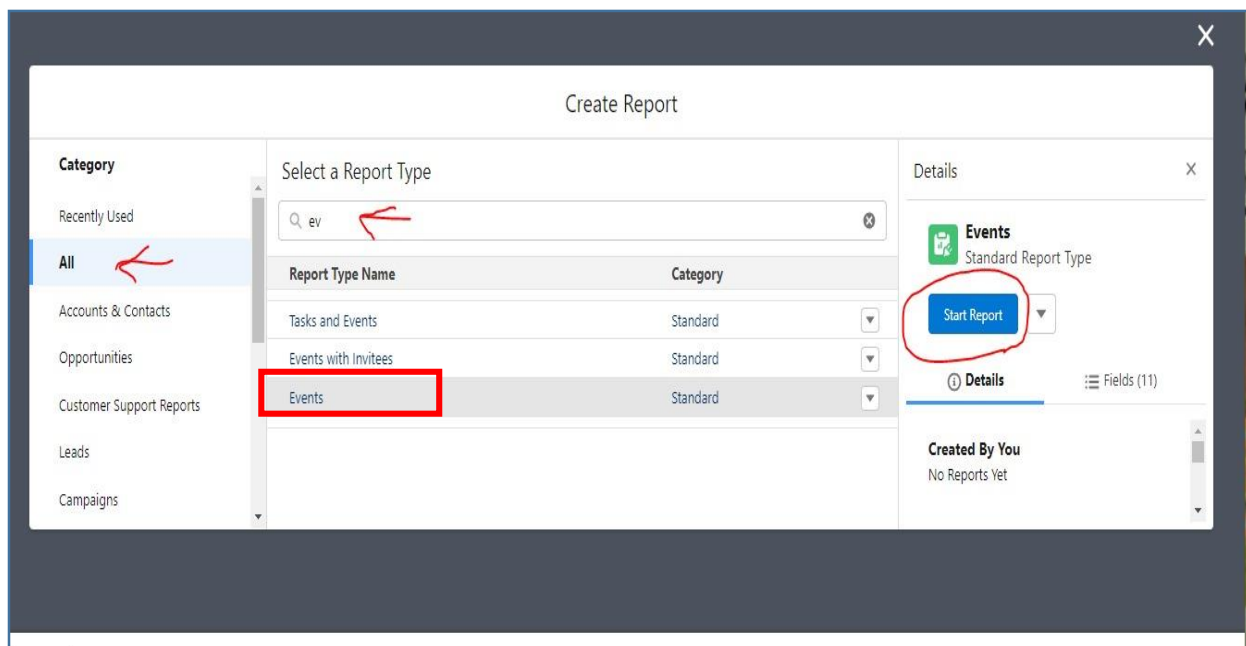
Not sure what a permission set license is? [Learn more here.](#)

License: --None--

Activity 2: Permission Sets 2



Milestone – 8: Reports



4 Trailhead Profile Public URL
Team Member- <https://trailblazer.me/id/ysubramaniyan>

5 ADVANTAGES & DISADVANTAGE

- Opportunities for creativity
- Ability to work on different events
- Chance to work with diverse clients
- Collaborative work environment
- High projections for job growth
- Few educational requirements
- Unconventional work hours
- Time away from family and friends

6 Applications

- Tracking Customers.
- Collecting Data for Marketing.
- Improving Interactions and Communications.
- Streamlining Internal Sales Processes.

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.

SolutionDot always keep your objectives and goals on top priority while developing any plan of work.

8 FUTURE SCOPE

Event managers do not lead a simple life. The stressful schedules and the irregular working hours are some of its prime characteristics. But, those in this field believe that they can endure it all to experience the satisfaction they get from hosting a successful event. So, let's begin by discussing what event management exactly is and what's the scope of event management as a career in India.