

# **REPORT FOR BUILD AN EVENT MANAGEMENT**

## **1 INTRODUCTION**

### **1.1 Overview**

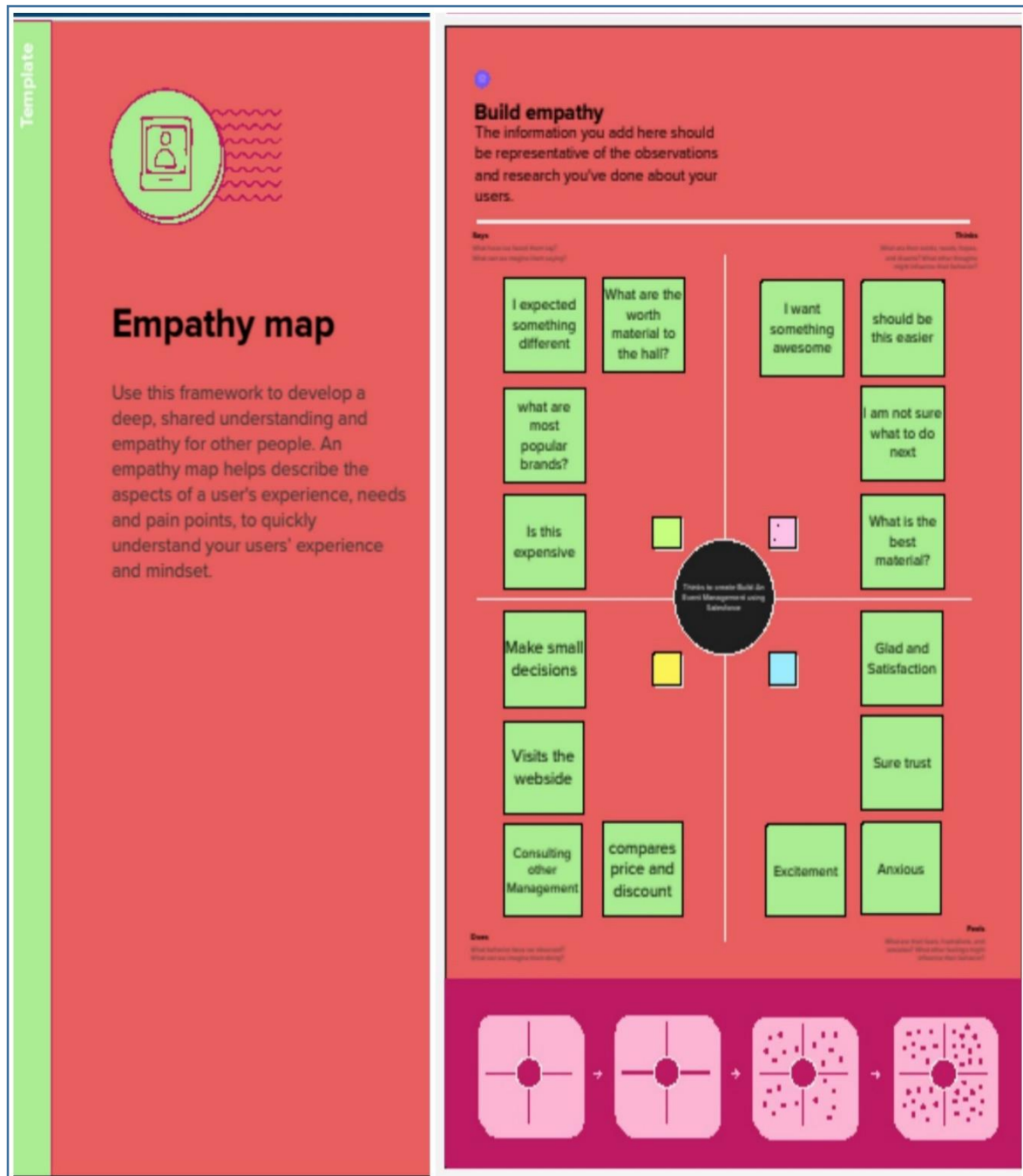
Event management is the process of creating and maintaining an event. This process spans from the very beginning of planning all the way to post-event strategizing. At the start, an event manager makes planning decisions, such as the time, location, and theme of their event.

### **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<https://trailblazer.me/id/yuvks>



## 2.2 Ideation & Brainstorming

### Brainstorm & idea prioritization

Use this template in your next brainstorming session as your team can unleash their imagination and start shaping concepts even if you're not sitting in the same room.

15 minutes in person  
15 minutes online  
2-4 people recommended

#### Before you collaborate

A little bit of preparation goes a long way with this session. Here's what you need to do to get going.

15 minutes

- Team gathering**  
Make sure all team members in this session understand our goals. Share your own ideas about it with the team.
- Write your**  
Write down the problem you're facing and what you want to achieve.
- Share your**  
Share your ideas with the team and get feedback.

#### Define your problem statement

What problem are you trying to solve? Frame your problem as a How Might We statement. This will be the focus of your brainstorm.

15 minutes

How might we...

What is the problem statement?

How might we...

What is the problem statement?

#### Brainstorm

Write down any ideas that come to mind that address your problem statement.

15 minutes

##### Person 1

How many guests are invited to this function?

Which place is suitable to conduct this function?

What type of arrangement is must?

##### Person 2

What type of materials are used for decor on the stage?

When this event will be start?

How many dishes are available?

##### Person 3

I don't like this food.

How many sessions are conducted?

How many chairs are available?

##### Person 4

How many hosts are compare this function?

Who will organised this function?

Time schedule is must.

#### Group idea

Brainstorming your ideas with others is a great way to get ideas. It's also a great way to get feedback on your ideas. It's also a great way to get feedback on your ideas.

15 minutes

#### Prioritize

Now that you have a list of ideas, it's time to prioritize them. Use the following criteria to help you decide which ideas to pursue.

15 minutes

**Prioritize**

**Feasibility**

#### After you collaborate

Now that you have a list of ideas, it's time to prioritize them. Use the following criteria to help you decide which ideas to pursue.

15 minutes

- Brainstorming**  
Write down all the ideas that come to mind. Don't worry about whether they are good or bad. Just write them down.
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Write down all the ideas that come to mind. Don't worry about whether they are good or bad. Just write them down.

### 3 RESULT

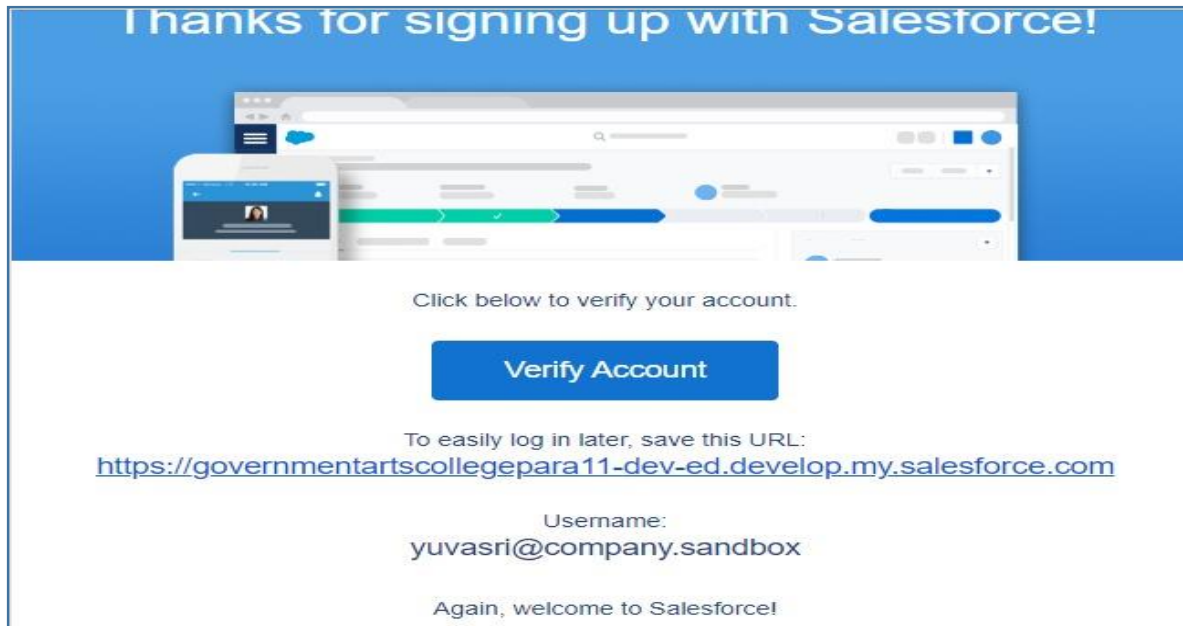
#### 3.1 Data Model:

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

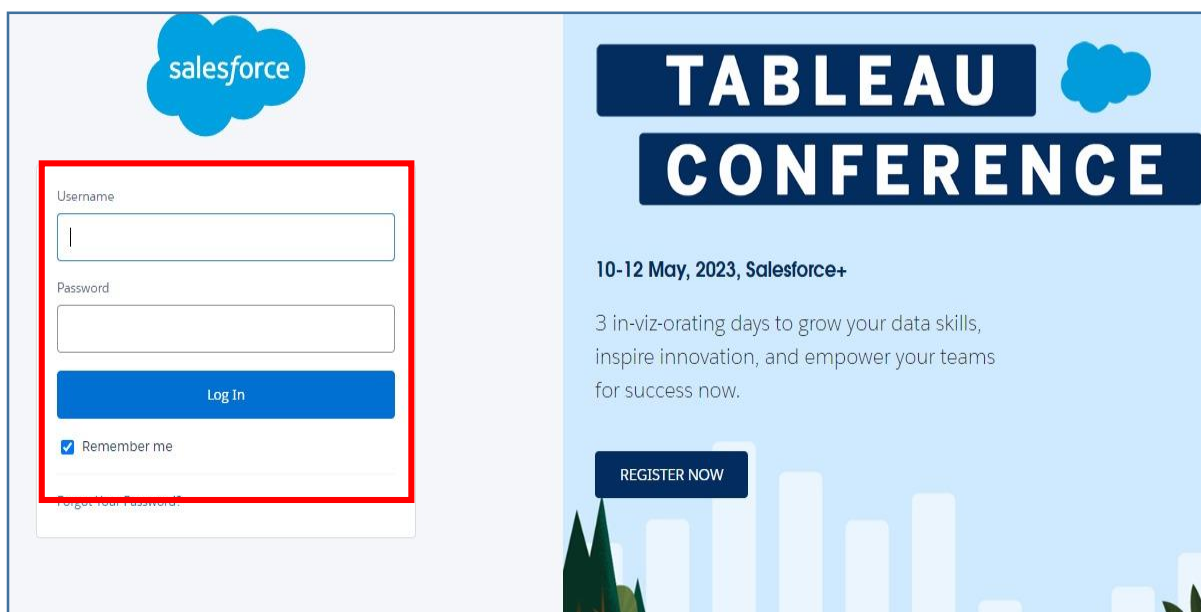
## 3.2 Activity & Screenshot

### Milestone: 1

### Activity: Creating Developer Account

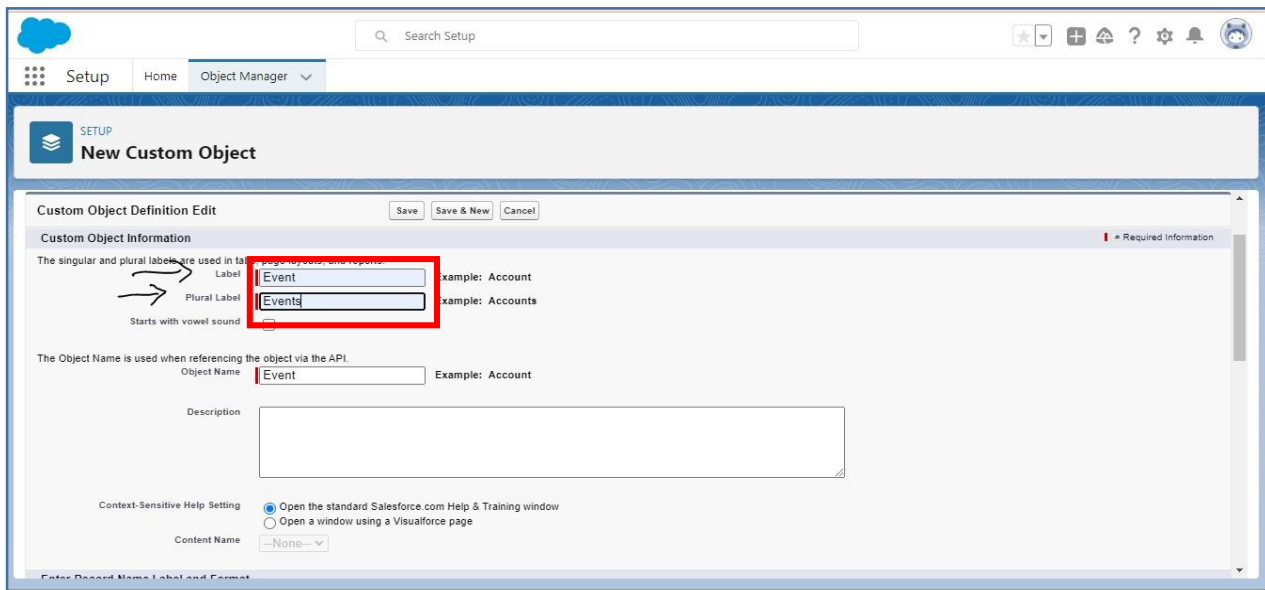


## Login to your salesforce account



## Milestone-2: Object

### Activity-1: Creation of Event Object

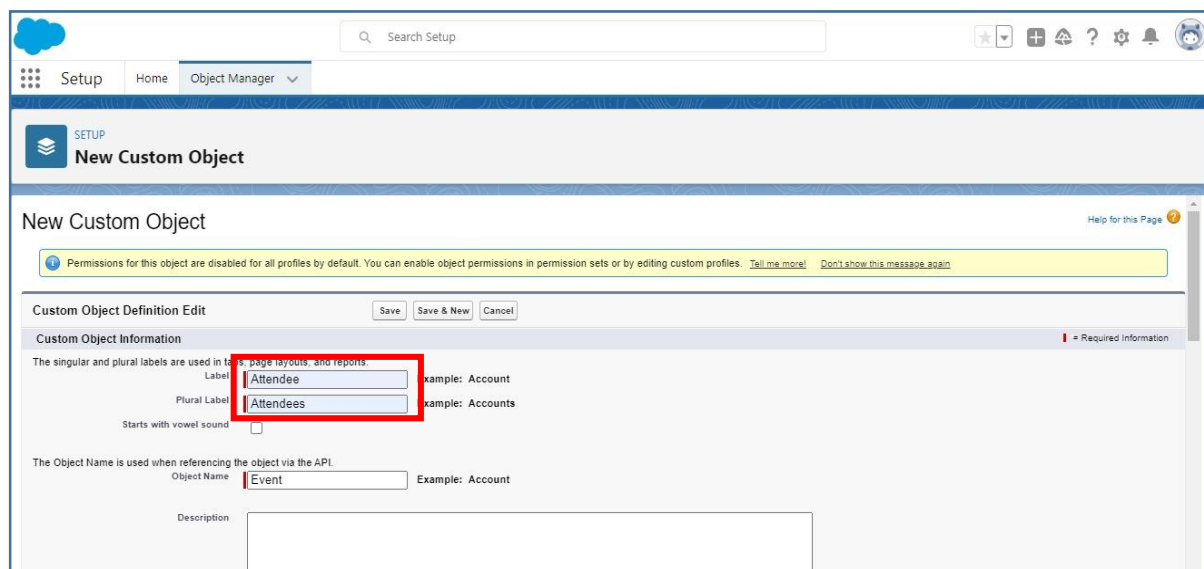


The screenshot shows the 'New Custom Object' page in Salesforce Setup. The 'Custom Object Definition Edit' section is active. The 'Custom Object Information' section contains the following fields:

- Label:** Event (Example: Account)
- Plural Label:** Events (Example: Accounts)
- Object Name:** Event (Example: Account)
- Description:** (Empty text area)
- Context Sensitive Help Setting:** Open the standard Salesforce.com Help & Training window (Selected)
- Content Name:** --None--

The 'Label' and 'Plural Label' fields are highlighted with a red box. A red arrow points to the 'Label' field, and a red arrow points to the 'Plural Label' field. A red box also highlights the 'Object Name' field.

### Activity 2: Creation of Attendee Object



The screenshot shows the 'New Custom Object' page in Salesforce Setup. The 'Custom Object Definition Edit' section is active. The 'Custom Object Information' section contains the following fields:

- Label:** Attendee (Example: Account)
- Plural Label:** Attendees (Example: Accounts)
- Object Name:** Event (Example: Account)
- Description:** (Empty text area)
- Context Sensitive Help Setting:** Open the standard Salesforce.com Help & Training window (Selected)
- Content Name:** --None--

The 'Label' and 'Plural Label' fields are highlighted with a red box. A red arrow points to the 'Label' field, and a red arrow points to the 'Plural Label' field. A red box also highlights the 'Object Name' field.

## Activity 3: Creation of Speaker Object

The screenshot shows the 'New Custom Object' setup page in Salesforce. 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' (Speaker). The 'Label' and 'Plural Label' fields are highlighted with a red box. There are also checkboxes for 'Starts with vowel sound' and a 'Description' field.

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 Speaker Example: Account

Description

## Activity 4: Creation of Vendor Object

The screenshot shows the 'New Custom Object' setup page in Salesforce. 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. There are also checkboxes for 'Starts with vowel sound' and a 'Description' field.

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

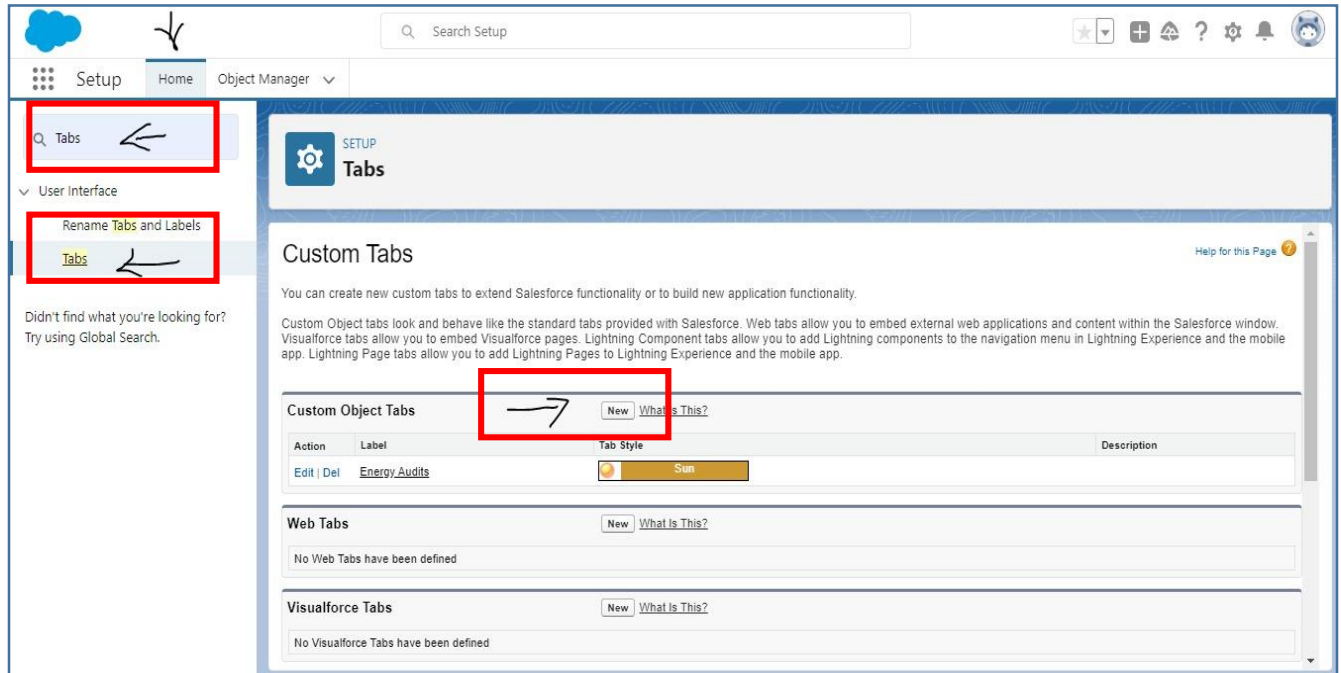
Starts with vowel sound ☐

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

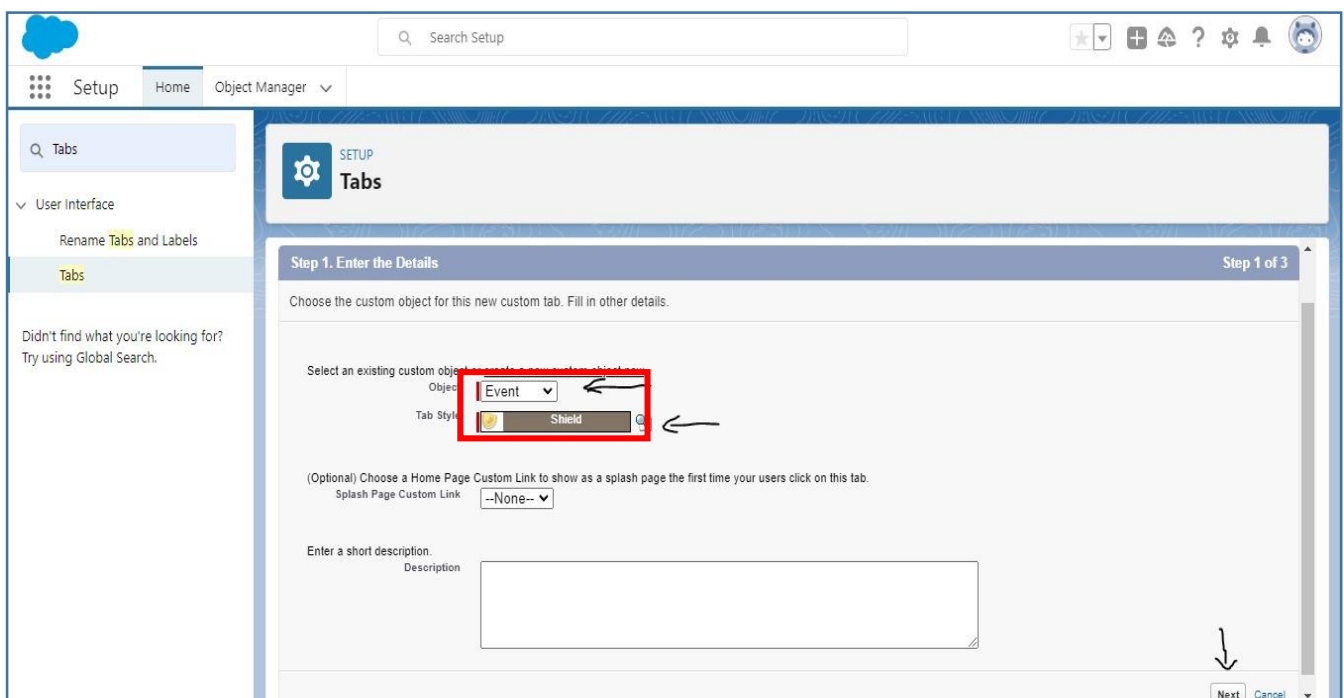
Object Name Vendor Example: Account

Description

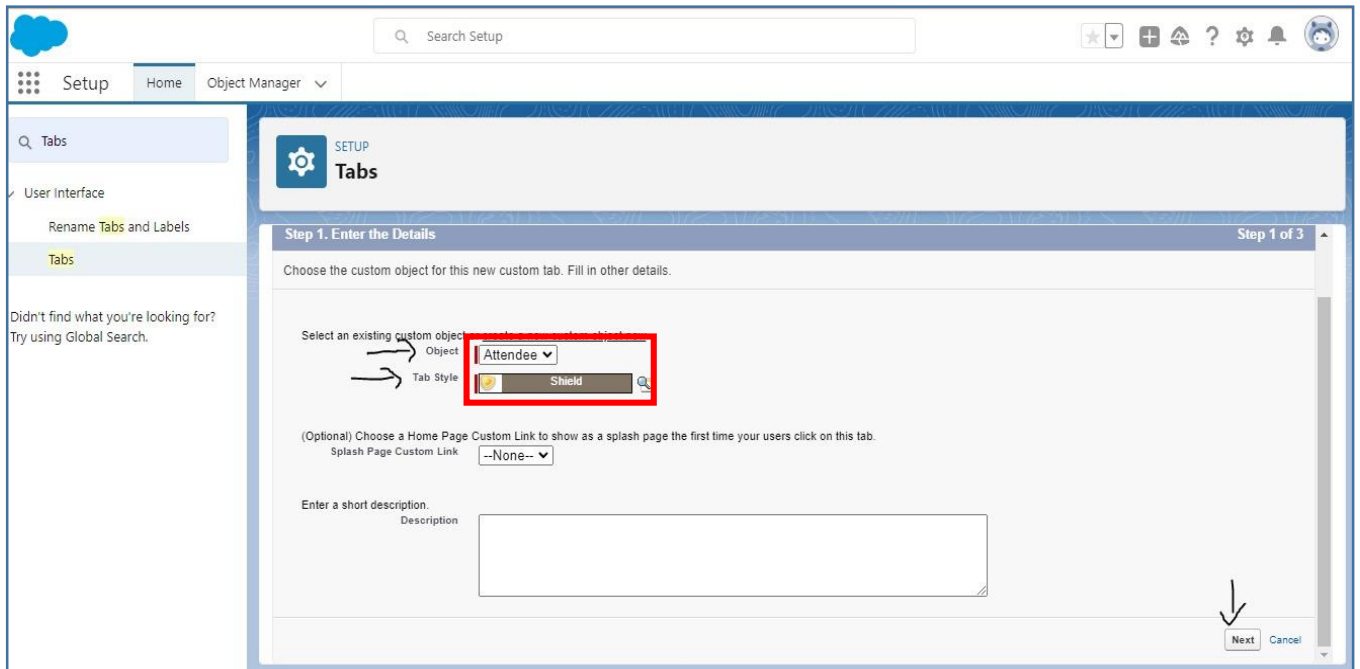
## Milestone-2: Tab



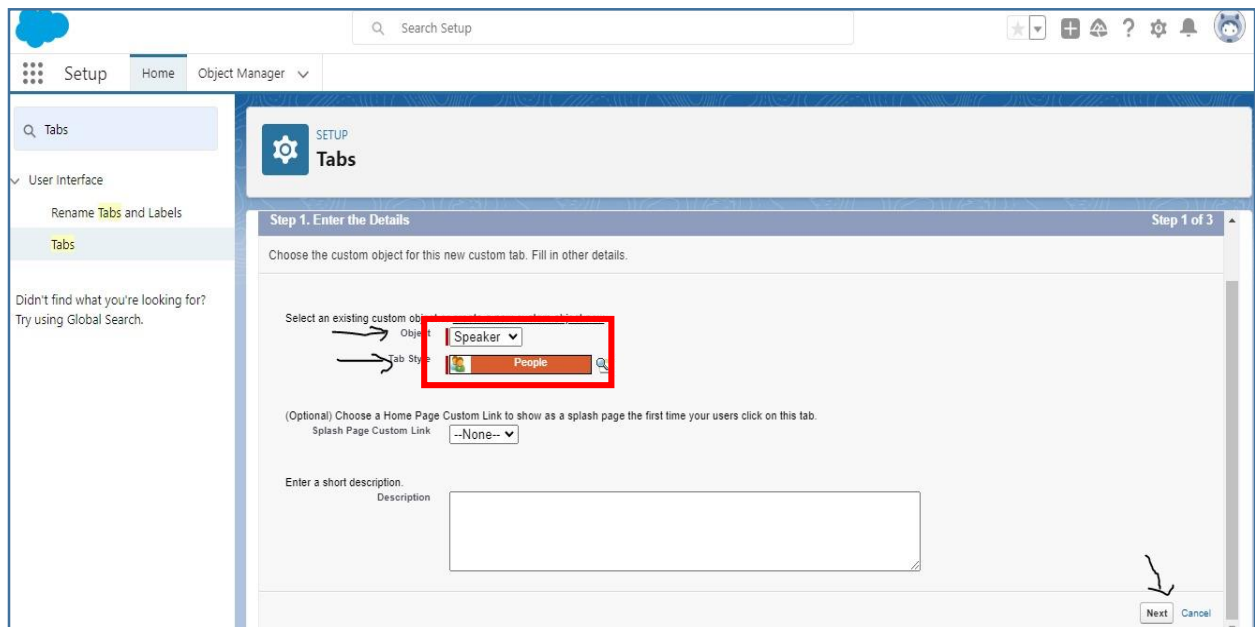
## Activity 1: Creation of Event Tab







## Activity3: Creation of Speaker Tab



## 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 of 3: Enter the Details'. The instructions state: 'Choose the custom object for this new custom tab. Fill in other details.' Under 'Select an existing custom object', the 'Vendor' dropdown is selected and highlighted with a red box. Below it, the 'Tab Style' dropdown is set to 'Laptop'. The 'Splash Page Custom Link' is set to '--None--'. There is a text area for 'Enter a short description'. At the bottom right, there are 'Next' and 'Cancel' buttons.

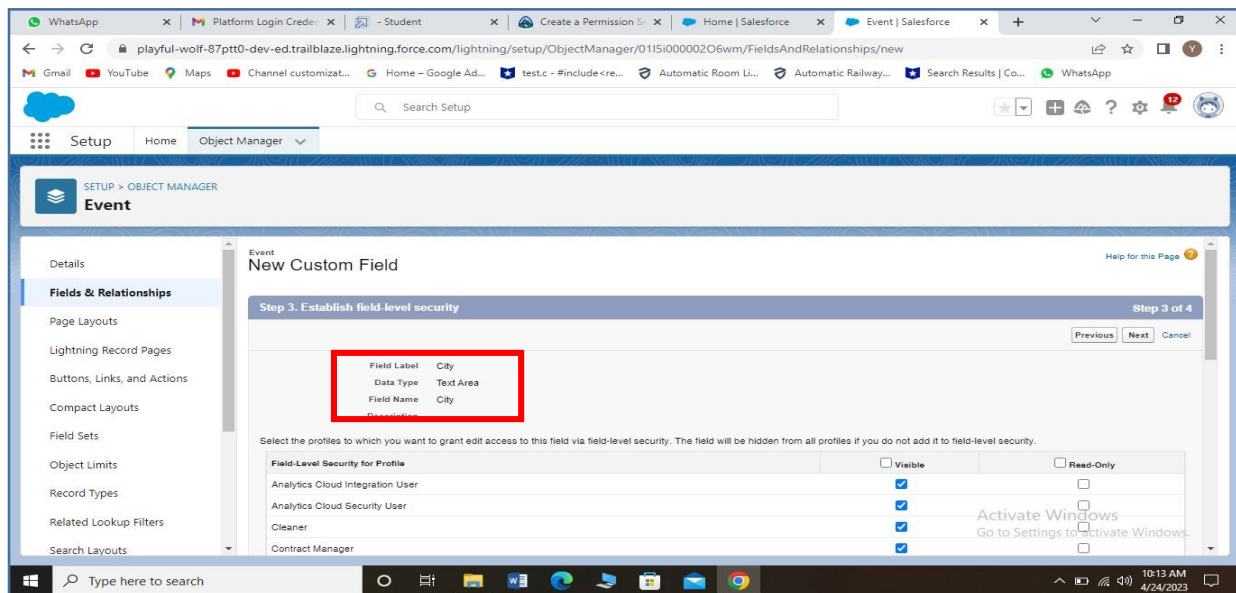
## Milestone -3: Lightning App

### Activity: Creation of Event Management Construction App

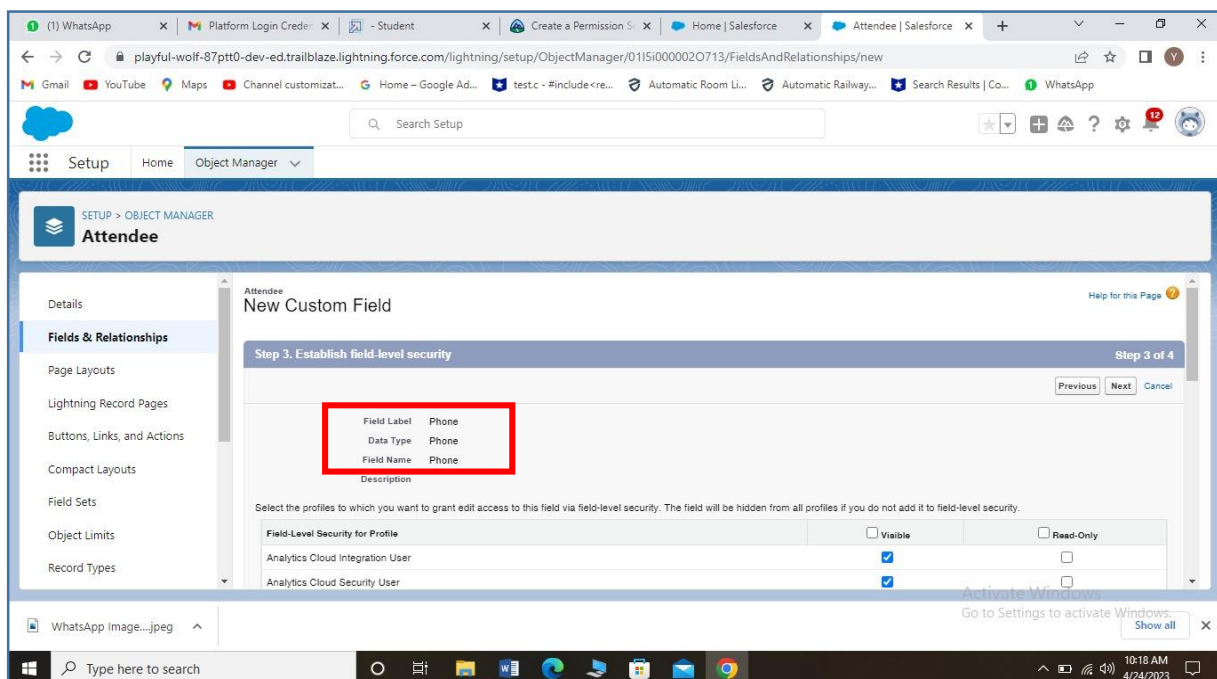
The screenshot shows the 'New Lightning App' creation interface. The title is 'App Details & Branding'. The instructions state: 'Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.' The form is divided into two sections: 'App Details' and 'App Branding'. In the 'App Details' section, the '\*App Name' field is highlighted with a red box and contains the text 'Event Management'. Below it, the '\*Developer Name' field contains 'Event\_Management'. The 'Description' field is empty. In the 'App Branding' section, there is an 'Image' upload area with an 'Upload' button. The 'Primary Color Hex Value' is set to '#0070D2'. At the bottom right, there is a 'Next' button.

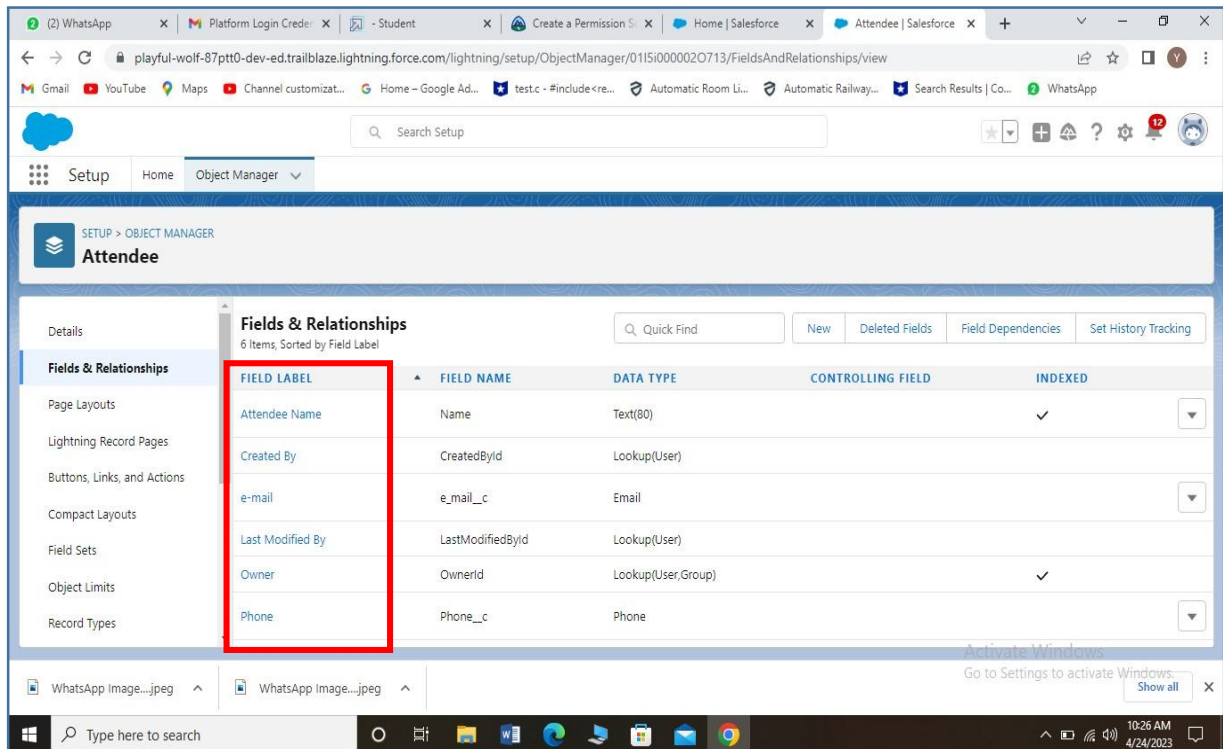
## Milestone-4: Fields and Relationship

### Activity 1: Creation of fields for the Event object

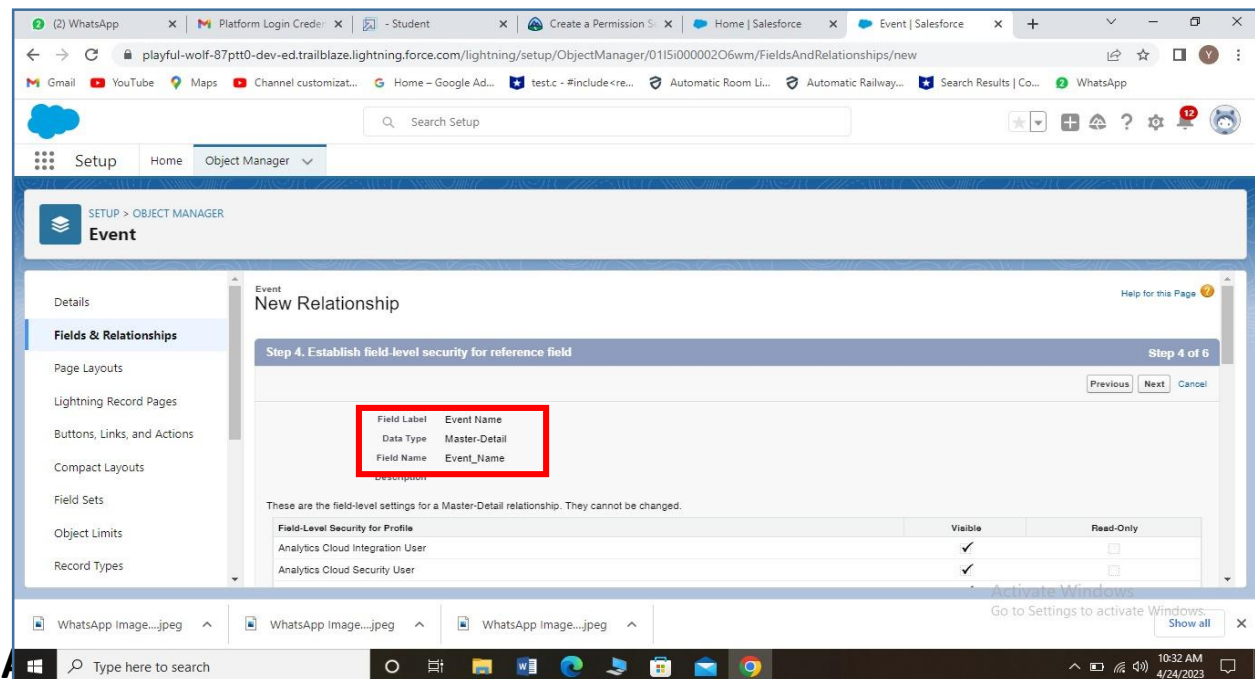


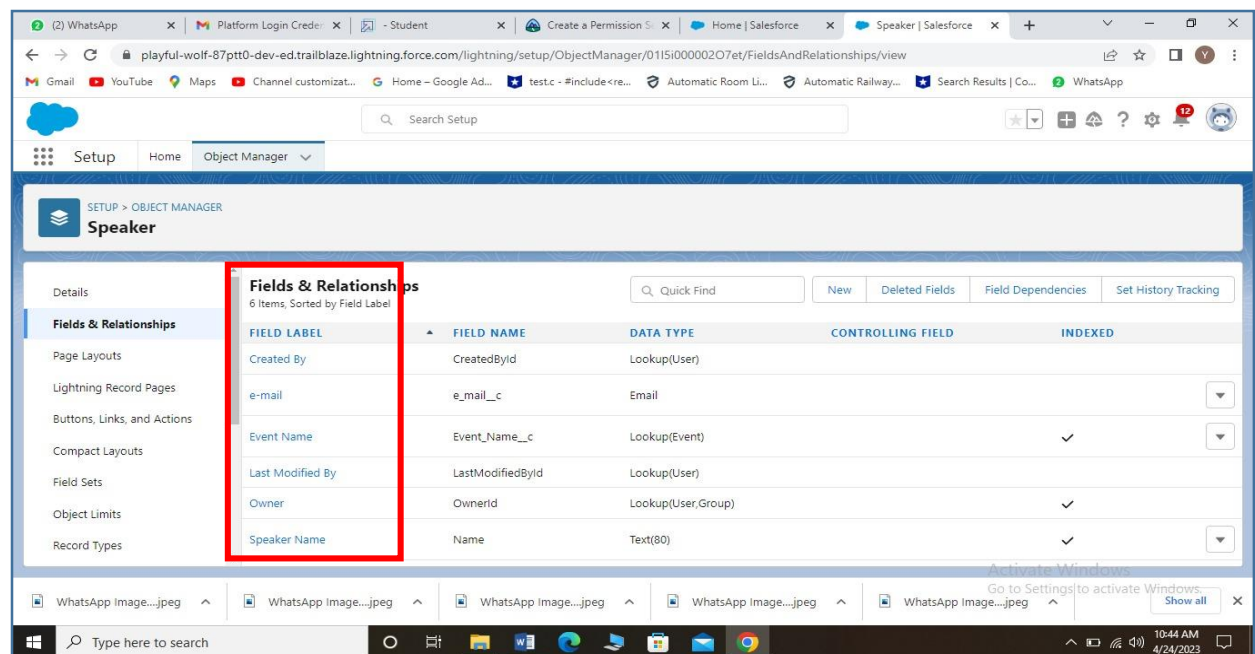
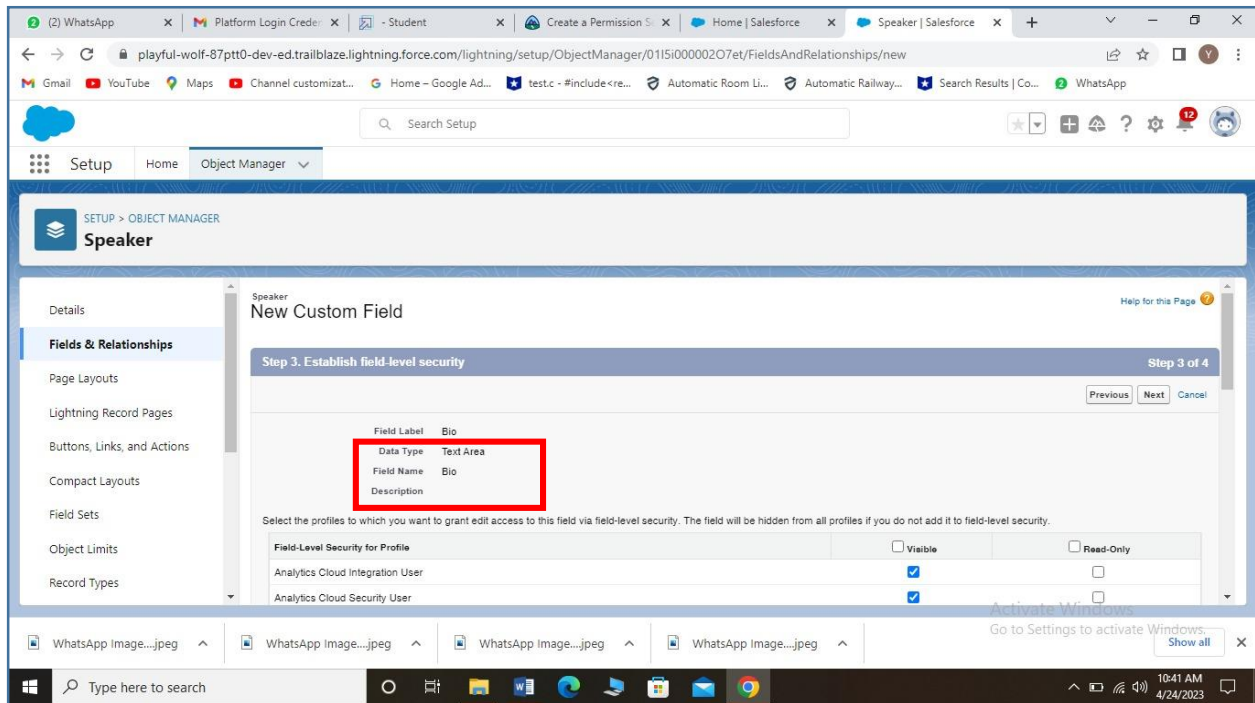
### Activity 2: Creation of fields for the Attendee objects





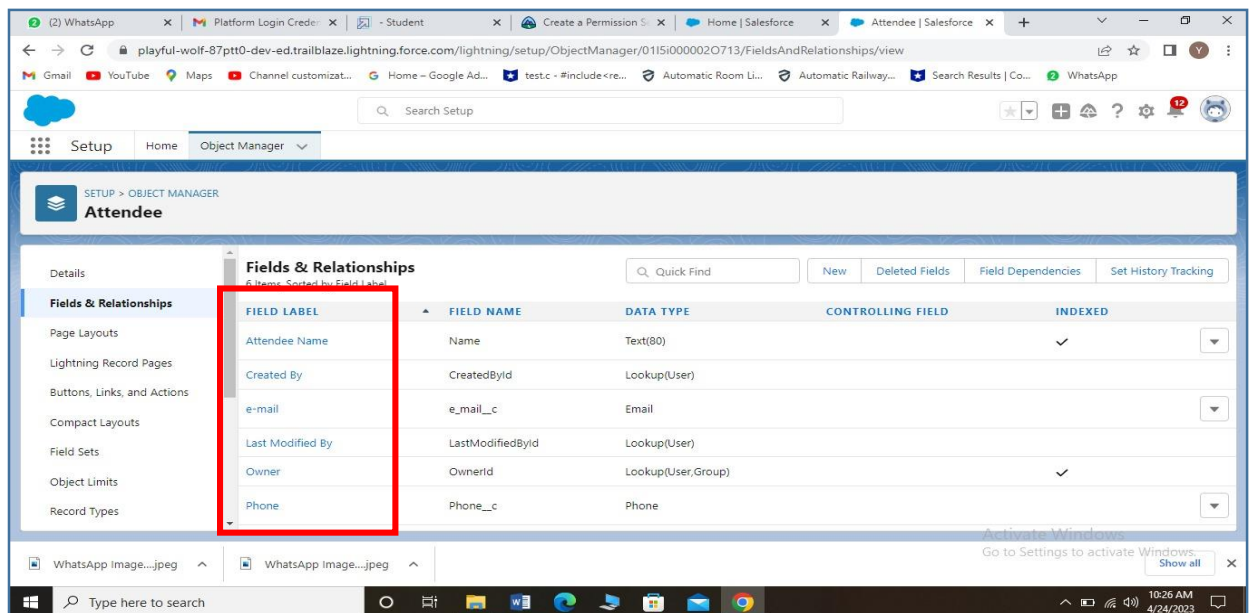
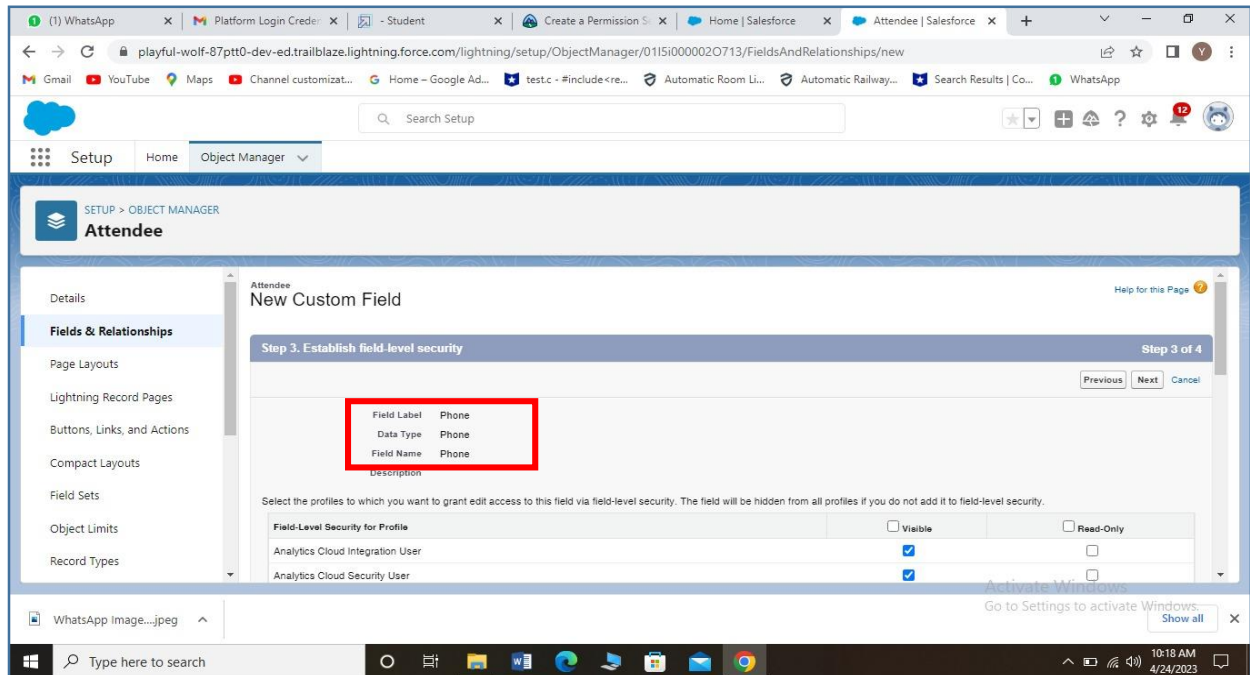
## Let's Create a Master-detail Relationship with Event Object



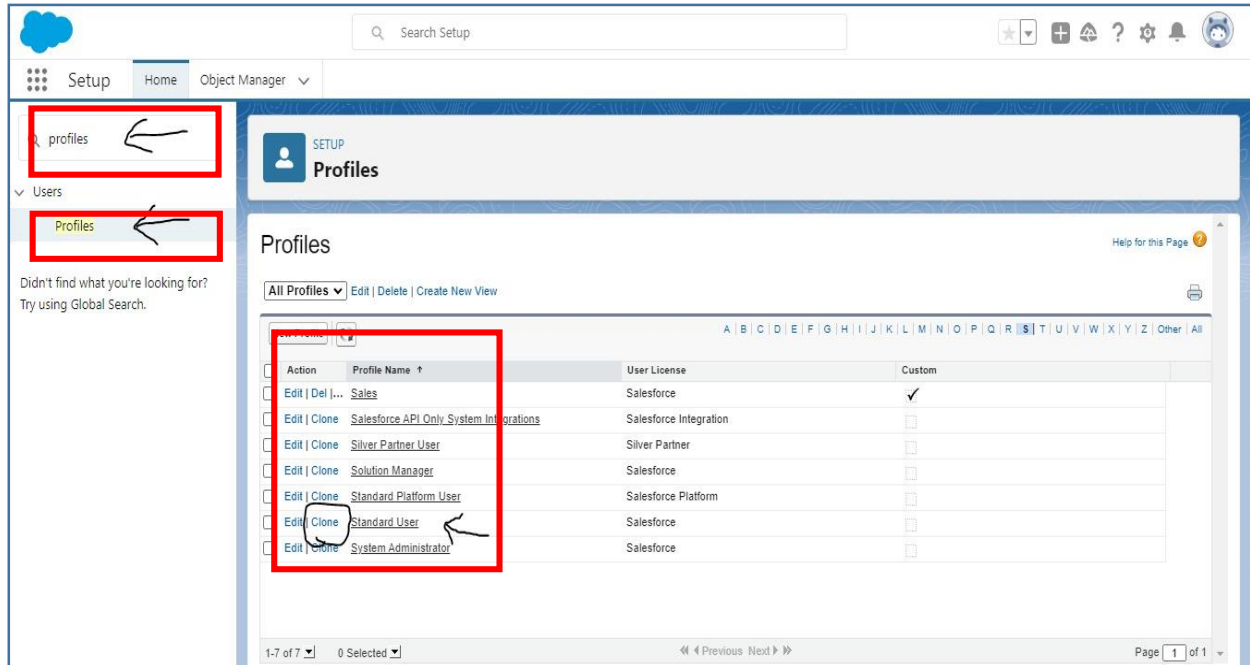




## Activity 5: Creation of fields for the Vendors Object



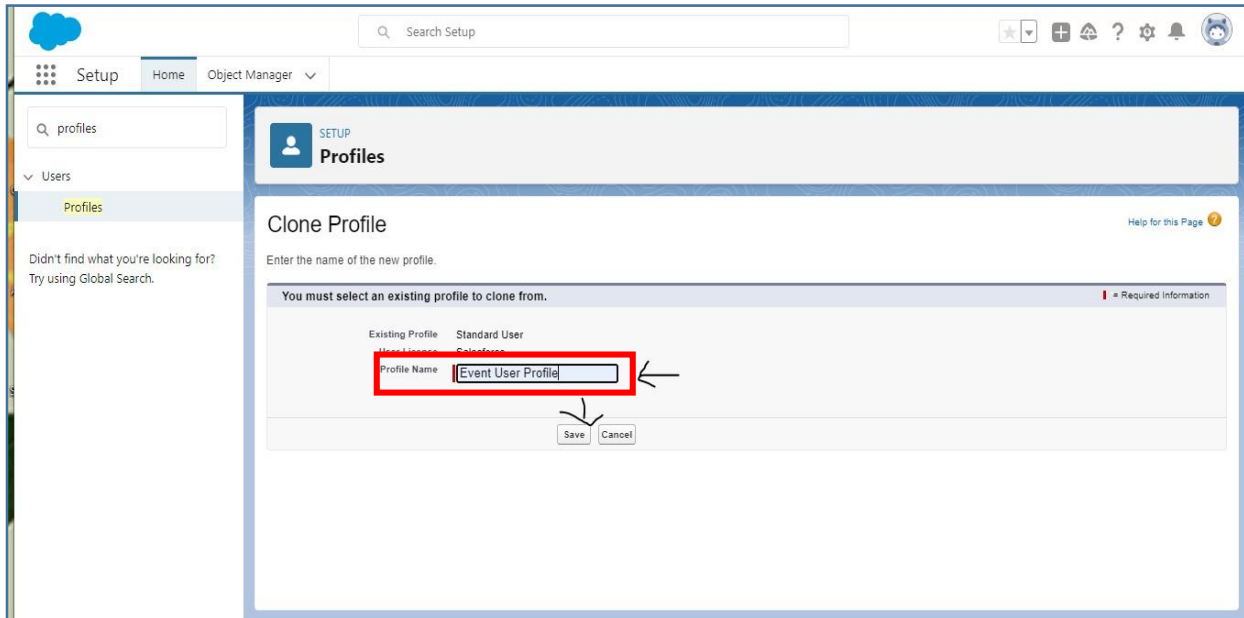
## Milestone-5: Profile



This screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains a search bar with 'profiles' entered and a 'Profiles' link under the 'Users' category. The main content area displays a table of profiles. A red box highlights the 'Edit | Clone' link for the 'Standard User' profile, with an arrow pointing to it. Another red box highlights the 'profiles' search bar in the sidebar, also with an arrow pointing to it.

Action	Profile Name	User License	Custom
<a href="#">Edit   Del  ...</a>	<a href="#">Sales</a>	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit   Clone</a>	<a href="#">Salesforce API Only System Integrations</a>	Salesforce Integration	<input type="checkbox"/>
<a href="#">Edit   Clone</a>	<a href="#">Silver Partner User</a>	Silver Partner	<input type="checkbox"/>
<a href="#">Edit   Clone</a>	<a href="#">Solution Manager</a>	Salesforce	<input type="checkbox"/>
<a href="#">Edit   Clone</a>	<a href="#">Standard Platform User</a>	Salesforce Platform	<input type="checkbox"/>
<a href="#">Edit   Clone</a>	<a href="#">Standard User</a>	Salesforce	<input type="checkbox"/>
<a href="#">Edit   Clone</a>	<a href="#">System Administrator</a>	Salesforce	<input type="checkbox"/>

## Activity 1: Creation on Event Profile



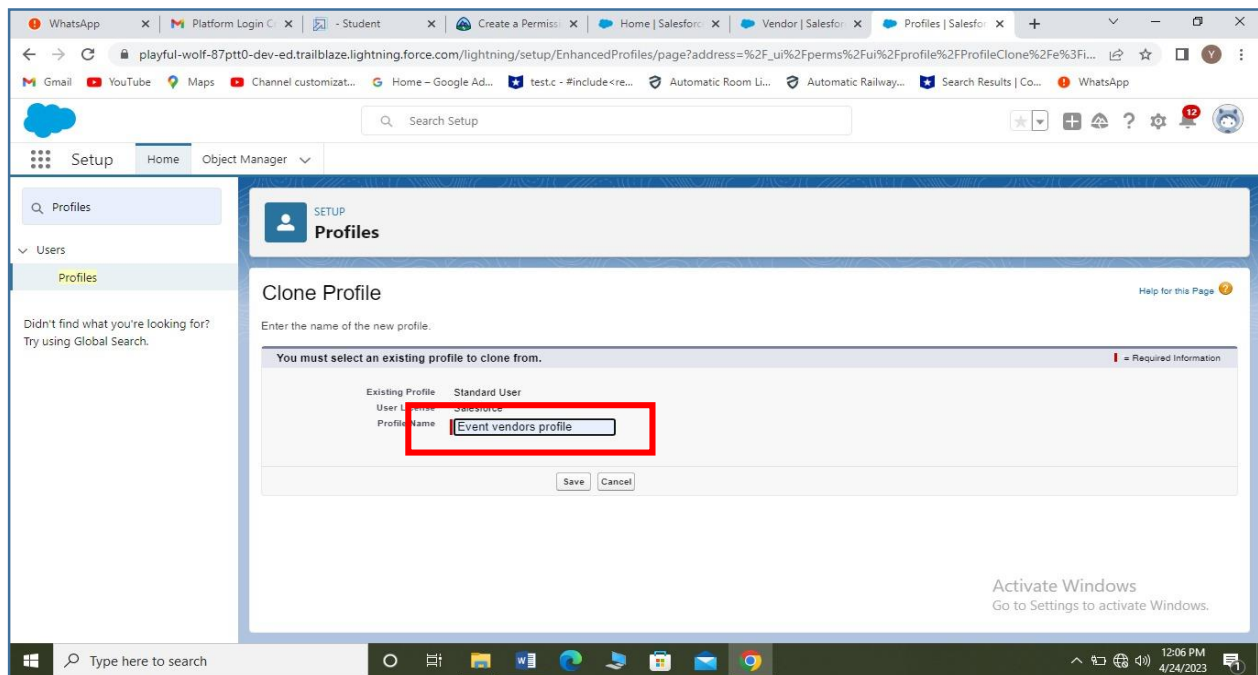
This screenshot shows the 'Clone Profile' dialog in Salesforce Setup. The dialog prompts the user to 'Enter the name of the new profile.' and states 'You must select an existing profile to clone from.' The 'Existing Profile' dropdown is set to 'Standard User'. The 'Profile Name' input field contains 'Event User Profile' and is highlighted with a red box and an arrow. The 'Save' and 'Cancel' buttons are at the bottom.

Existing Profile: Standard User

Profile Name:

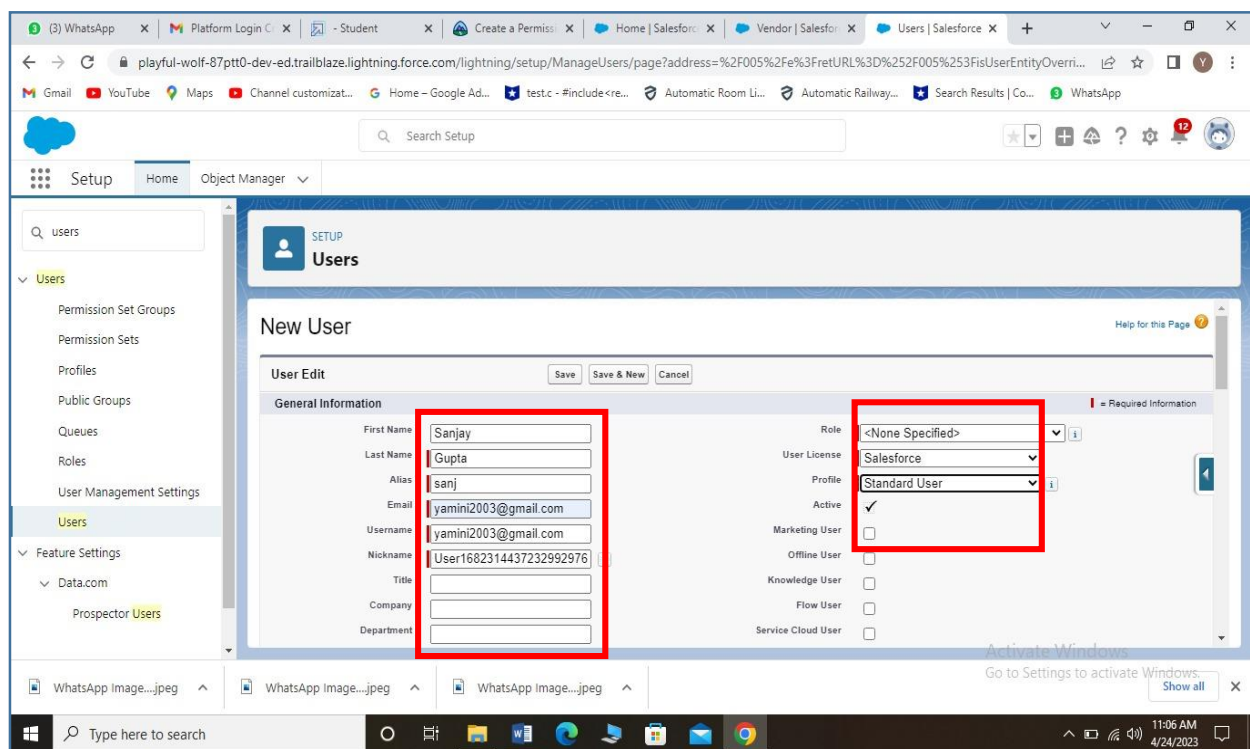
Save Cancel

## Activity 2: Creation on Event Vendor Profile



## Milestone-6 User

## Activity 1: Creation of Sanjay Gupta User





## Activity 2: Creating of Rahul Sharma User

Setup Home Object Manager

Search Setup

Users

Permission Set Groups  
Permission Sets  
Profiles  
Public Groups  
Queues  
Roles  
User Management Settings  
Users  
Feature Settings  
Data.com  
Prospector Users

WhatsApp Image...jpeg

Setup Users

New User

User Edit Save Save & New Cancel

General Information

First Name: Rahul  
Last Name: Sharma  
Alias: rahus  
Email: yamin2003@gmail.com  
Username: yamin2003@gmail.com  
Nickname: User1682314437232992976  
Title:  
Department:

Role: <None Specified>  
User License: Salesforce  
Profile: Standard User  
Active: ☒  
Marketing User: ☐  
Offline User: ☐  
Knowledge User: ☐  
Flow User: ☐  
Service Cloud User: ☐

Activate Windows  
Go to Settings to activate Windows  
Show all

11:09 AM  
4/24/2023

## Milestone-7 : Permission Sets

### Activity 1: Creating a Permission Set

Setup Home Object Manager

Search Setup

Permission Sets

Permission Sets

On this page you can create, view, and manage permission sets.  
In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All Edit Delete Create New View

New

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Buyer	Allows access to the store. Lets users see products and ...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer Manager	Includes all Buyer capabilities, and allows access to man...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	CRM User	Denotes that the user is a Sales Cloud or Service Cloud ...	CRM User
<input type="checkbox"/>	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Event Permits		
<input type="checkbox"/>	FieldServiceMobileStandardPermSet	Give your mobile workforce access to the Field Service ...	Field Service Mobile
<input type="checkbox"/>	Merchandiser	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License S...
<input type="checkbox"/>	Ration		Salesforce

1-19 of 19 0 Selected Previous Next Page 1 of 1

## Activity 2: Permission Sets 2

The screenshot shows the Salesforce Setup interface for creating a new permission set. The left sidebar has a search bar containing "permission sets" and a list of navigation items including "Users" and "Permission Sets". The main content area is titled "Permission Sets" and contains a form for "Enter permission set information". Red annotations highlight the search bar, the "Label" field (containing "Event Permits"), the "API Name" field (containing "Event\_Permits"), and the "Save" button at the top right of the form. Below the form, there is a section for "Select the type of users who will use this permission set" with a "License" dropdown menu set to "--None--".

Search Setup

Setup Home Object Manager

Q permission sets

Users

Permission Sets

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

SETUP

Permission Sets

Save Cancel

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--

Save Cancel

## Milestone -8: Reports

The screenshot shows the "Create Report" dialog in Salesforce. The left sidebar lists categories, with "All" selected. The main area is titled "Select a Report Type" and contains a search bar with "ev" and a table of report types. Red annotations highlight the search bar, the "All" category, and the "Start Report" button in the "Details" panel. The "Details" panel shows the "Events" report type selected, with a "Start Report" button and a "Details" link.

Create Report

Category

Recently Used

All

Accounts & Contacts

Opportunities

Customer Support Reports

Leads

Campaigns

Select a Report Type

Q ev

Report Type Name Category

Tasks and Events Standard

Events with Invitees Standard

Events Standard

Details

Events Standard Report Type

Start Report

Details

Fields (11)

Created By You

No Reports Yet

- 4 Trailhead Profile Public URL**  
Team Lead- <https://trailblazer.me/id/yuvks>

## **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.