

# **REPORT FOR BUILD AN EVENT MANAGEMENT**

## **1 INTRODUCTION**

### **1.1 Overview**

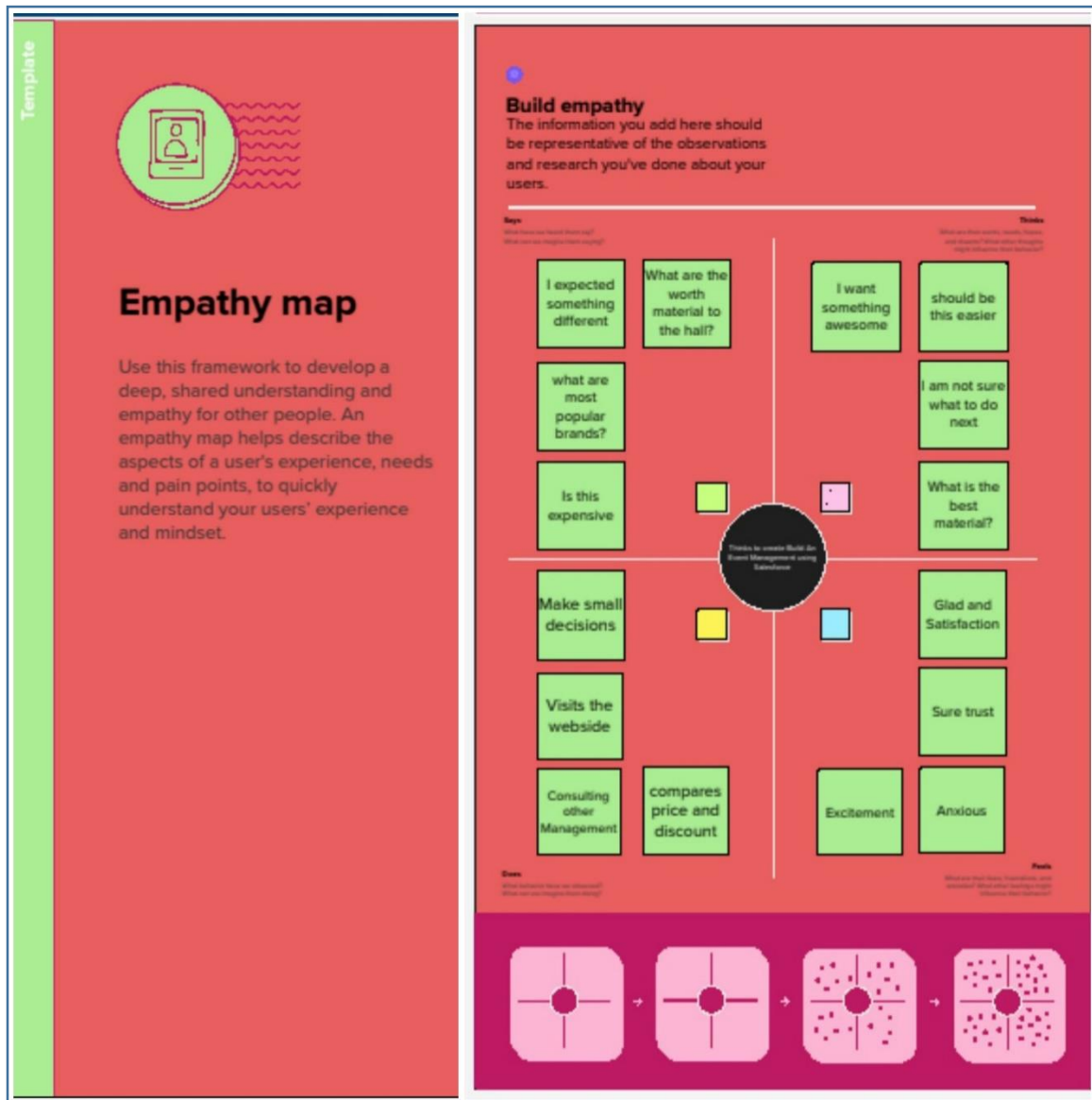
Event management is the process of creating and maintaining an event. This process spans from the very beginning of planning all the way to post-event strategizing. At the start, an event manager makes planning decisions, such as the time, location, and theme of their event.

### **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

### Brainstorm & idea prioritization

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

- 15 minutes to prepare
- 1 hour to collaborate
- 3-8 people recommended

#### Before you collaborate

1. Make list of participants agree a time and place with this session. There's what you need to do to get going.

2. 15 minutes

- Team briefing: Make sure all participants are in the same room and on time. Share a rough idea of what you're about to do.
- Set the goal: Focus on the problem you're looking at solving at the brainstorming session.
- Learn how to use the facilitation tools: Use the 'Facilitation' tab to get a list of tips and facilitation points.

Start session

#### 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.

2. 15 minutes

How might we create a better customer experience?

How to create a better customer experience

What to do

How to do it

When to do it

Where to do it

Who to do it

How to do it

#### Brainstorm

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

3. 15 minutes

Person 1

How many guests are invited to this function

Which place is suitable to conduct this function

What type of materials are used for decor on the stage

When this event will be start

How many dish are available

Person 2

I don't like this food

How many sessions are conducted

How many chairs are available

How many hosts are present at this function

Who will organised this function

Time schedule is must

#### Facilitation tools

These are the tools you'll use to facilitate your session. They're designed to help you get the most out of your session.

1. 15 minutes

#### Brainstorming session

This is the main part of your session. It's where you'll generate ideas and start shaping concepts.

2. 1 hour

#### Group ideas

Take your ideas and group them into categories. This will help you see the big picture and start shaping concepts.

3. 15 minutes

#### Facilitation

These are the tools you'll use to facilitate your session. They're designed to help you get the most out of your session.

4. 15 minutes

#### After you collaborate

1. Make list of participants agree a time and place with this session. There's what you need to do to get going.

2. 15 minutes

- Team briefing: Make sure all participants are in the same room and on time. Share a rough idea of what you're about to do.
- Set the goal: Focus on the problem you're looking at solving at the brainstorming session.
- Learn how to use the facilitation tools: Use the 'Facilitation' tab to get a list of tips and facilitation points.

Start session

### 3 RESULT

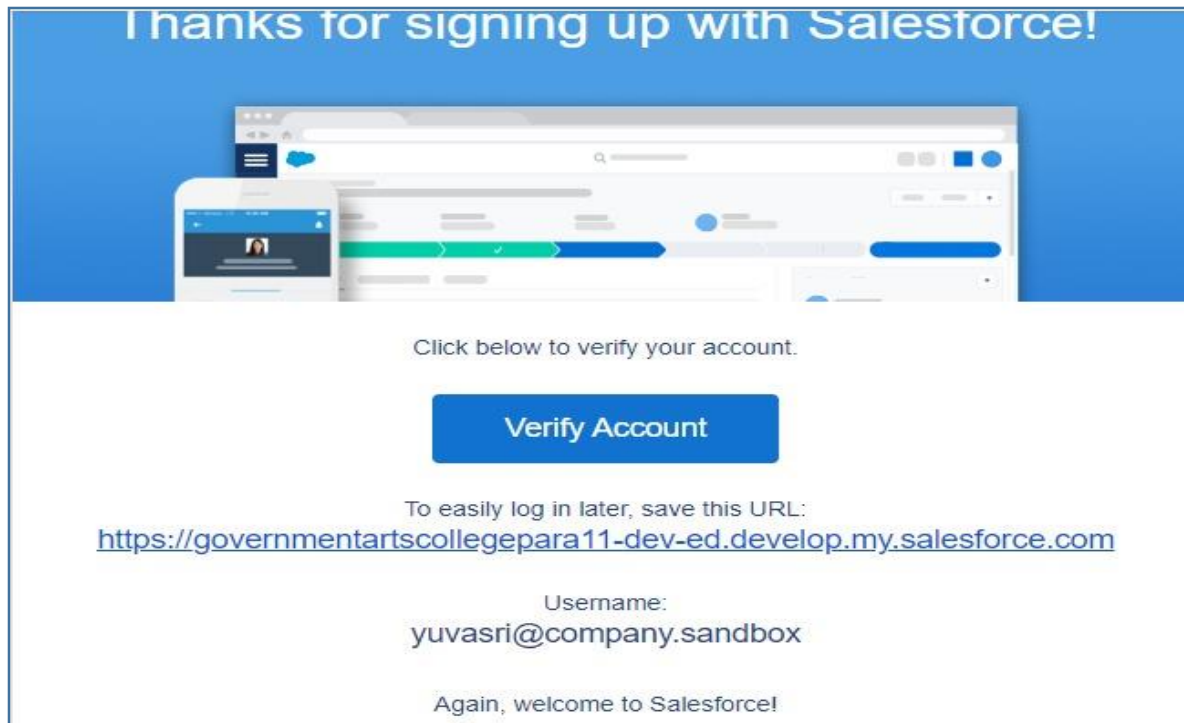
#### 3.1 Data Model:

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' object name. A red box also highlights the 'Event' object name. A red box also highlights the 'Event' object name.

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. 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 'Attendee' and 'Attendees' labels. A red box also highlights the 'Event' object name. A red box also highlights the 'Event' object name. A red box also highlights the 'Event' object name.

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' page in the Salesforce Setup interface. 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', which includes a 'Custom Object Information' tab. This tab contains the following fields:

- Label:** 'Speaker' (Example: Account). This field is highlighted with a red box.
- Plural Label:** 'speakers' (Example: Accounts). This field is also highlighted with a red box.
- Starts with vowel sound:** A checkbox that is currently unchecked.
- Object Name:** 'Spokea' (Example: Account). This field is highlighted with a red box.
- Description:** An empty text area.

Arrows point from the text 'The singular and plural labels are used in tabs, page layouts, and reports.' to the 'Label' and 'Plural Label' fields. Another arrow points from the text 'The Object Name is used when referencing the object via the API.' to the 'Object Name' field.

## Activity 4: Creation of Vendor Object

The screenshot shows the 'New Custom Object' page in the Salesforce Setup interface. 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', which includes a 'Custom Object Information' tab. This tab contains the following fields:

- Label:** 'Vendor' (Example: Account). This field is highlighted with a red box.
- Plural Label:** 'Vendors' (Example: Accounts). This field is also highlighted with a red box.
- Starts with vowel sound:** A checkbox that is currently unchecked.
- Object Name:** 'Vendor' (Example: Account). This field is highlighted with a red box.
- Description:** An empty text area.

Arrows point from the text 'The singular and plural labels are used in tabs, page layouts, and reports.' to the 'Label' and 'Plural Label' fields. Another arrow points from the text 'The Object Name is used when referencing the object via the API.' to the 'Object Name' field.

## 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 background 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 row: '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 for creating a custom tab. The left sidebar shows the navigation menu with 'Setup', 'Home', and 'Object Manager'. The 'Setup' page is active, and the 'Tabs' section is selected. The 'Attendee' object is chosen, and the 'Shield' tab style is selected. The 'Next' button is highlighted with a red box.

Search Setup

Setup Home Object Manager

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 or create a new custom object now.

Object Attendee

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 3: Creation of Speaker Tab

The screenshot shows the Salesforce Setup interface for creating a custom tab. The left sidebar shows the navigation menu with 'Setup', 'Home', and 'Object Manager'. The 'Setup' page is active, and the 'Tabs' section is selected. The 'Speaker' object is chosen, and the 'People' tab style is selected. The 'Next' button is highlighted with a red box.

Search Setup

Setup Home Object Manager

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 or create a new custom object now.

Object Speaker

Tab Style People

(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 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--'. There is a text area for 'Enter a short description.' with a placeholder 'Description'. At the bottom right, there are 'Next' and 'Cancel' buttons. A hand-drawn arrow points from the 'Next' button to the 'Cancel' button.

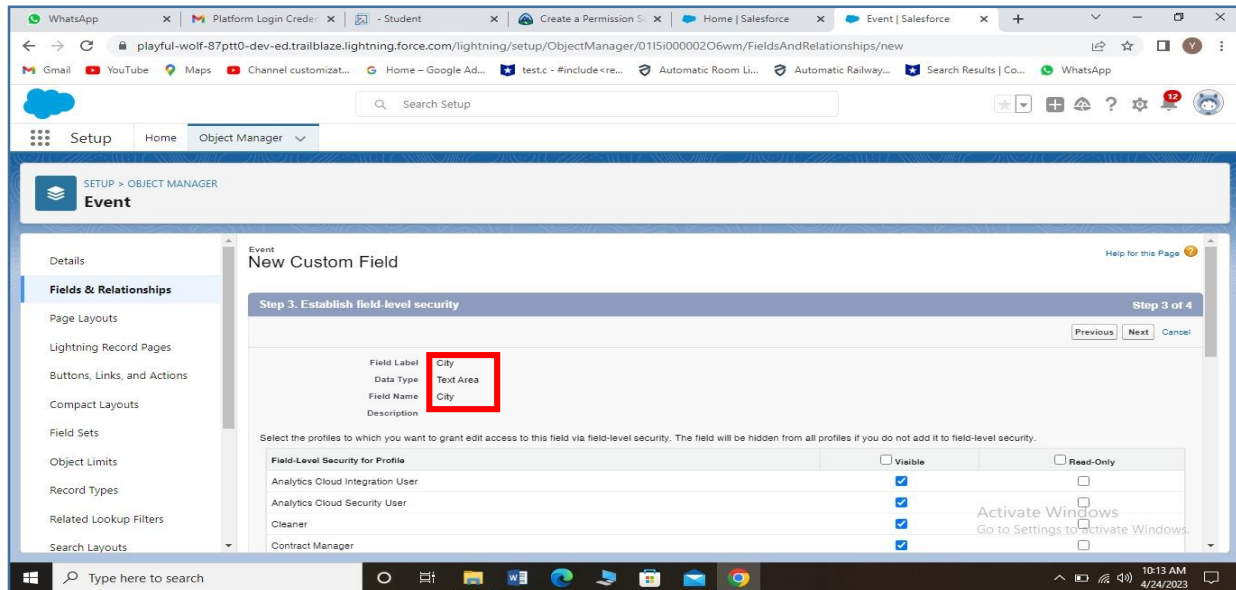
## Milestone -3: Lightning App

### Activity: Creation of Event Management Construction App

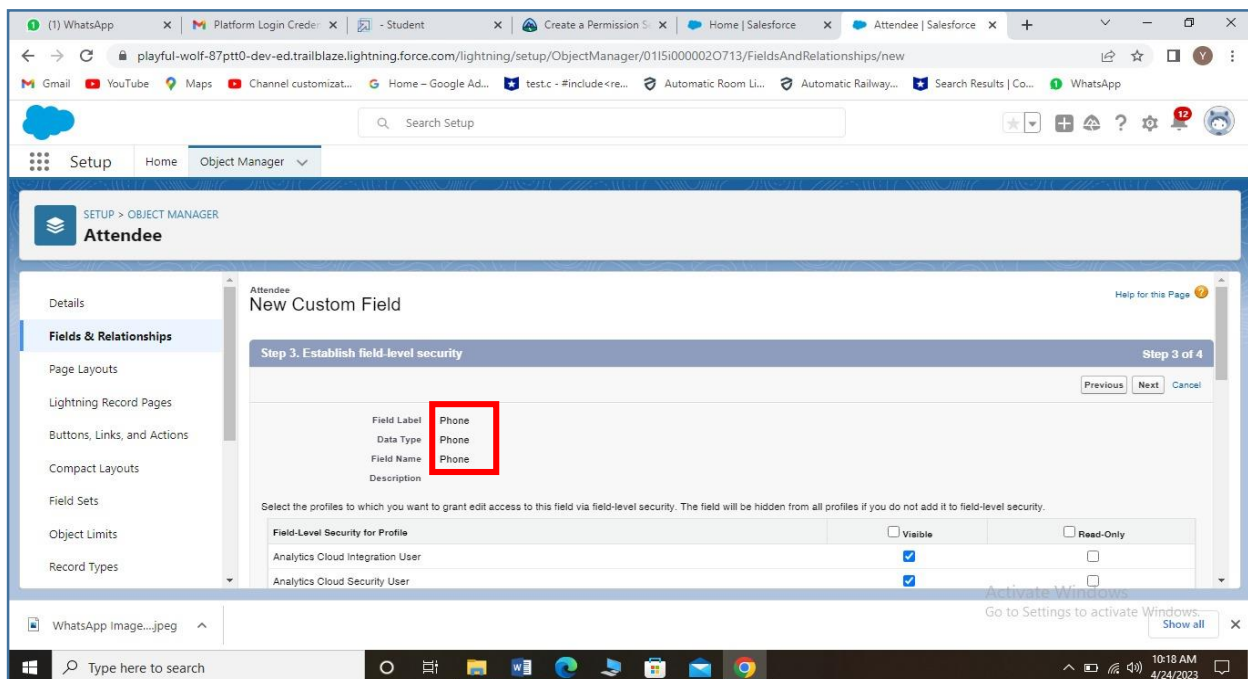
The screenshot shows the 'New Lightning App' creation interface. The title is 'App Details & Branding'. The instructions say: 'Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.' There are two main sections: 'App Details' and 'App Branding'. In the 'App Details' section, the '\*App Name' field is set to 'Event Management' and is highlighted with a red box. Below it, the '\*Developer Name' field is set to 'Event\_Management'. The 'Description' field has a placeholder 'Enter a description.'. In the 'App Branding' section, there is an 'Image' field with an 'Upload' button. The 'Primary Color Hex' field is set to '#0070D2'. At the bottom right, there is a 'Next' button. A hand-drawn arrow points from the 'Next' button to the 'Cancel' button.

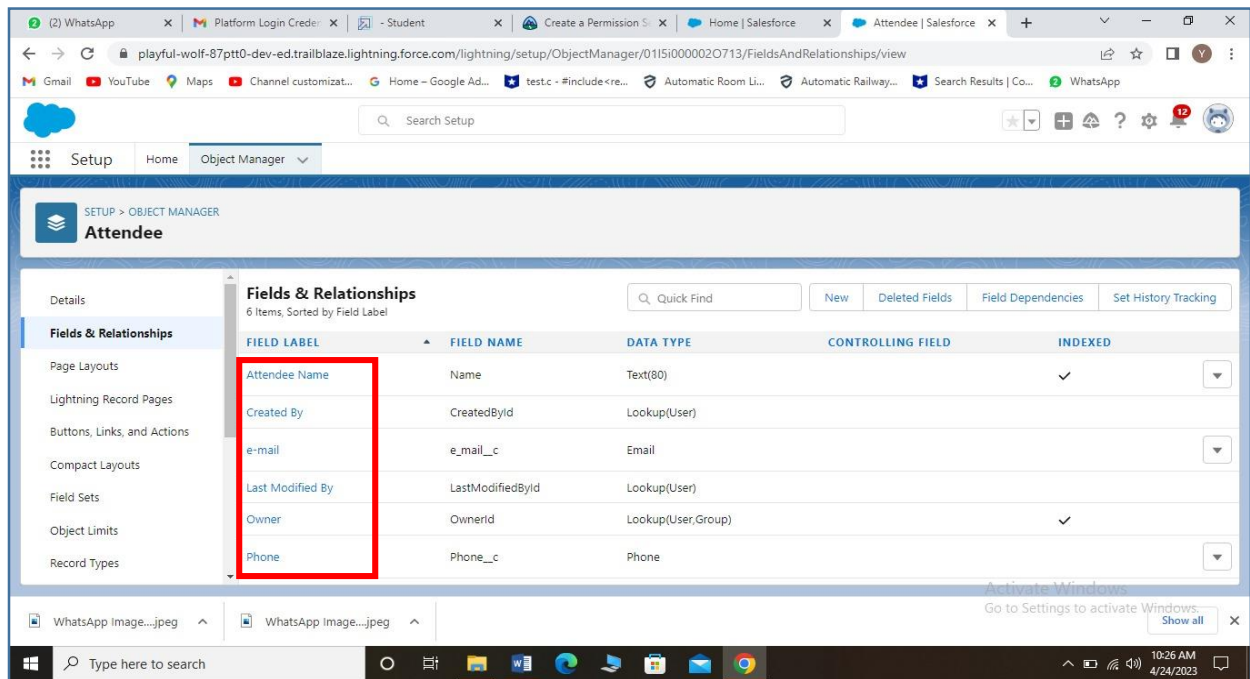
## Milestone-4: Fields and Relationship

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

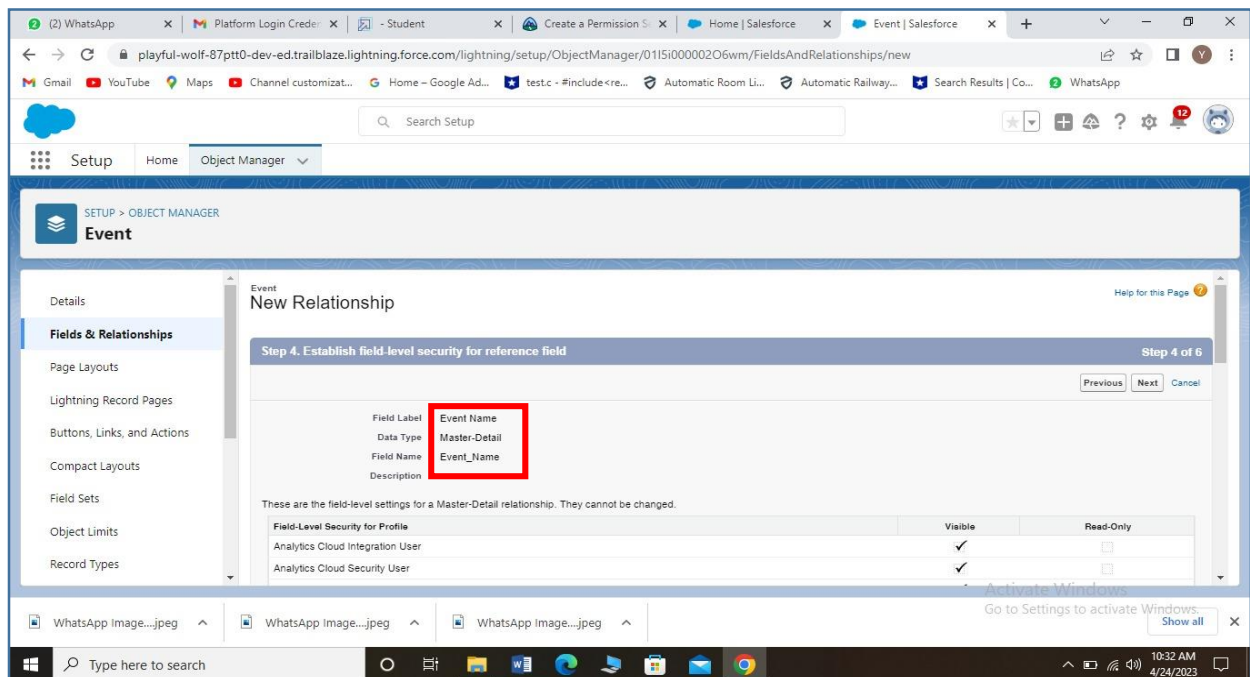


### Activity 2: Creation of fields for the Attendee objects

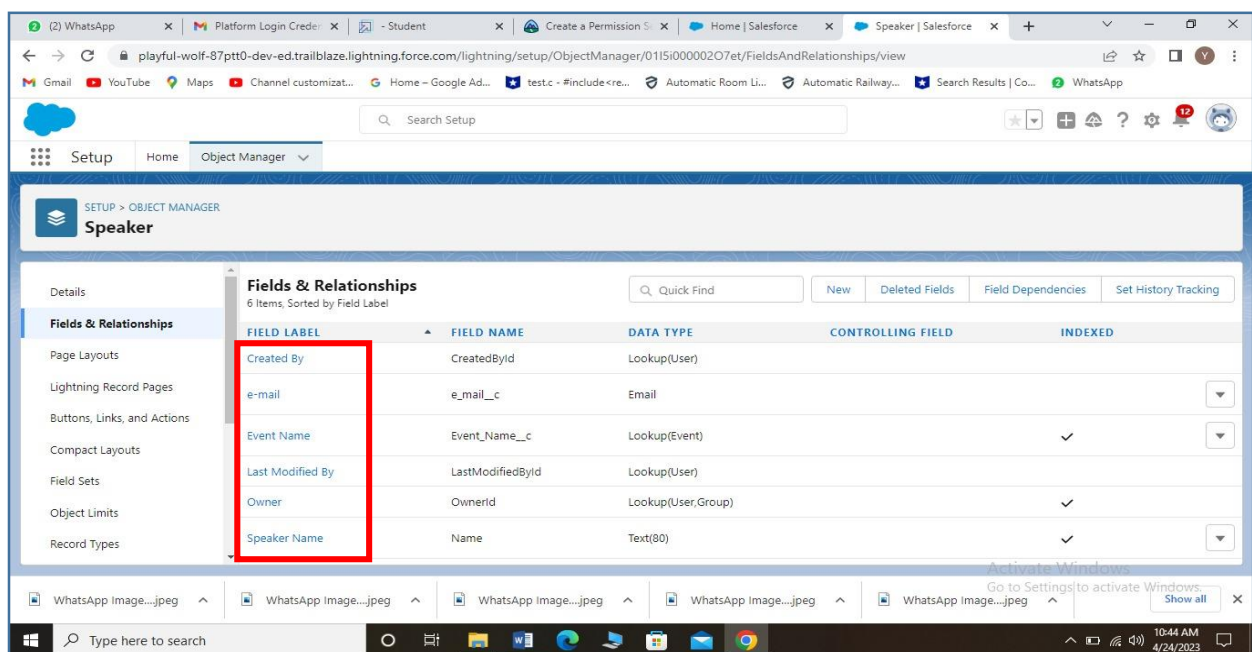
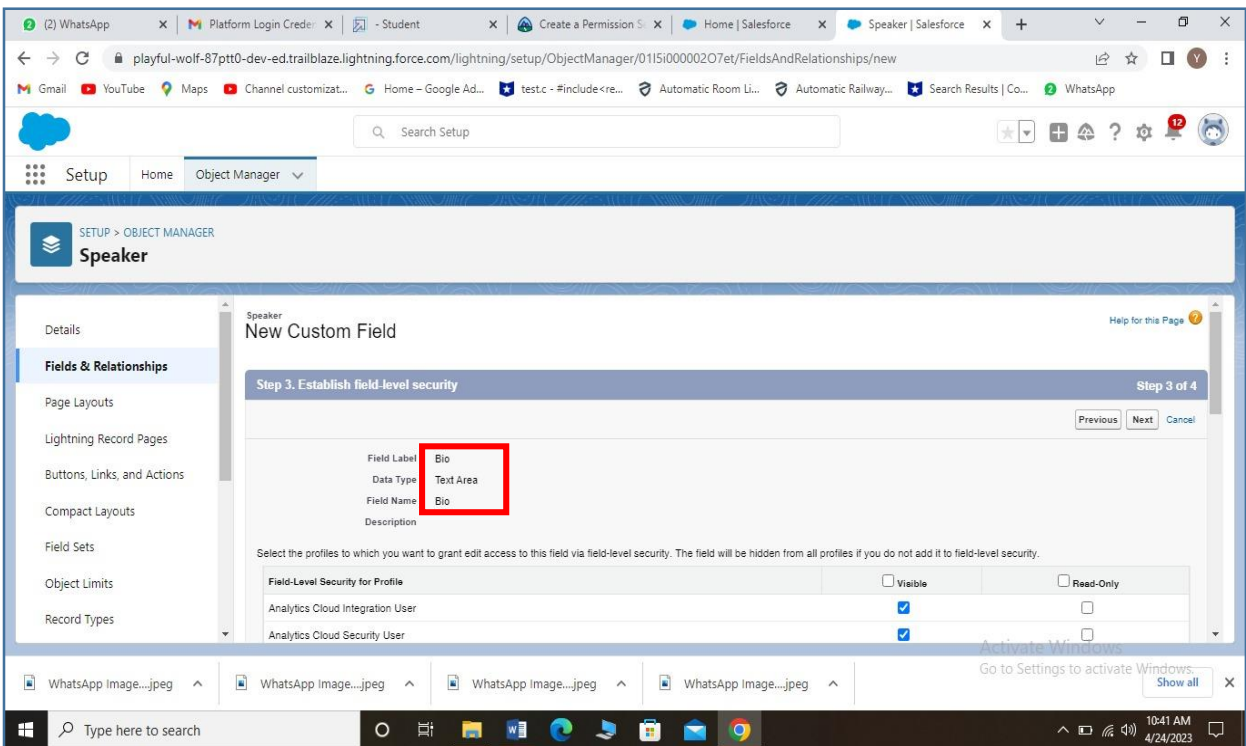




## Let's Create a Master-detail Relationship with Event Object

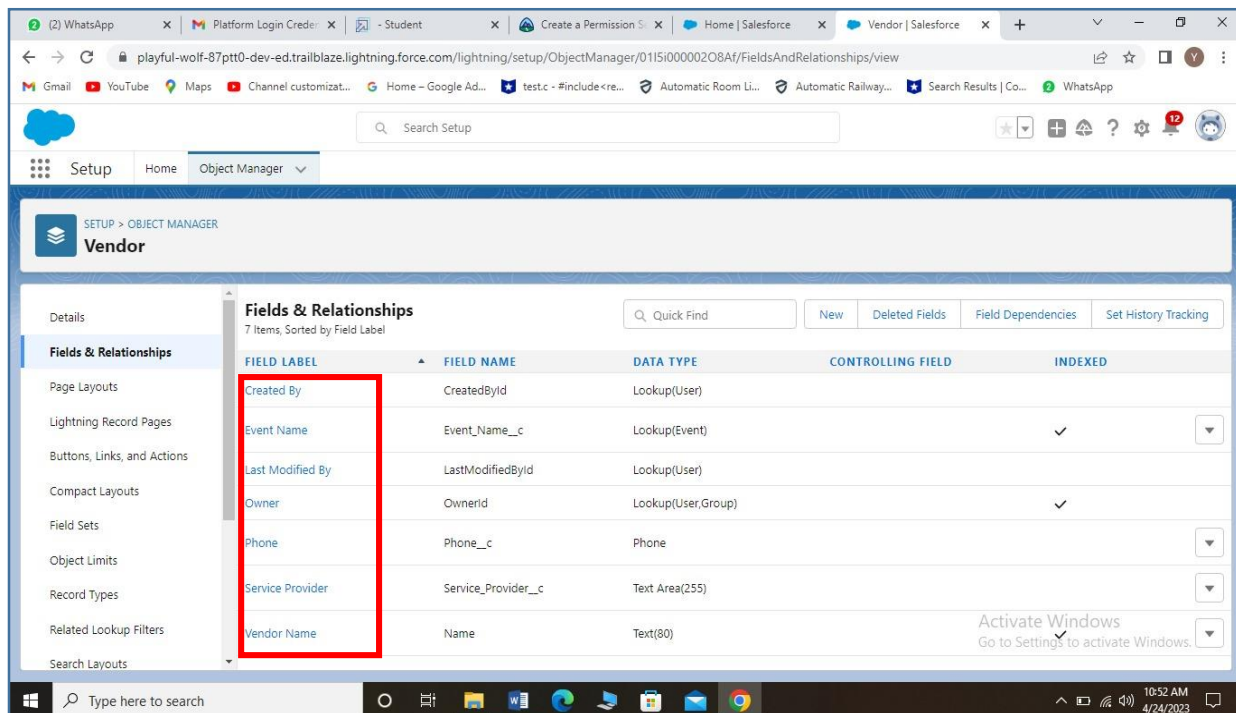
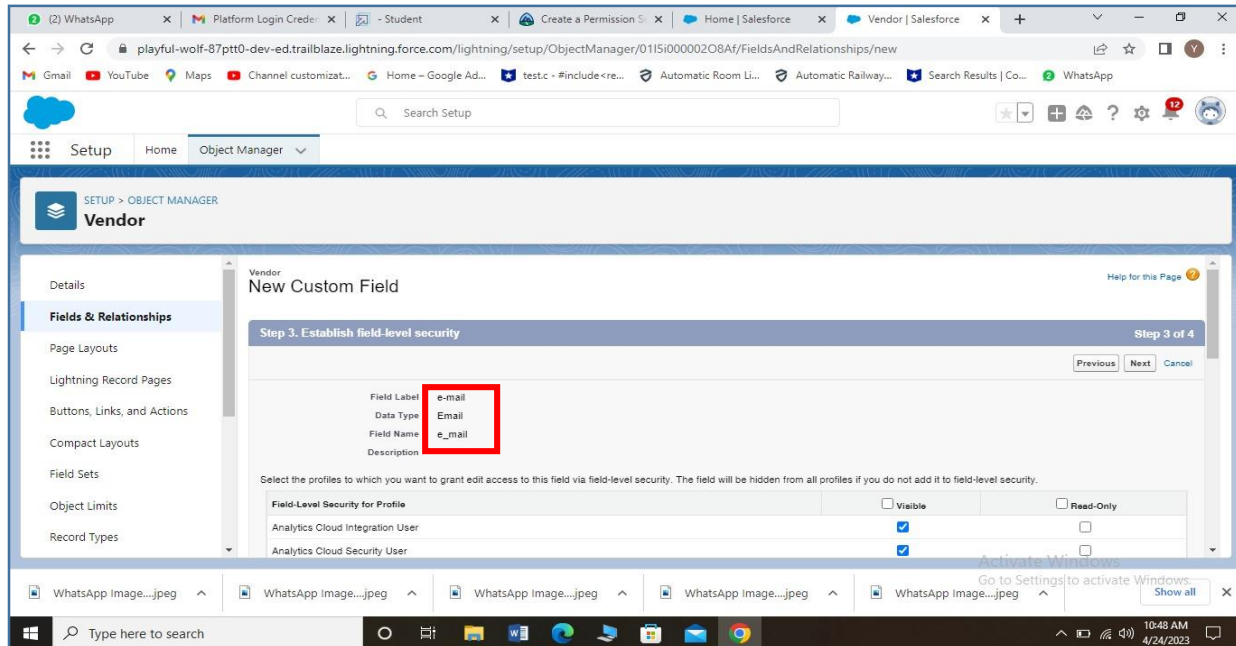


## Activity 3: Creation of fields for the Speakers object

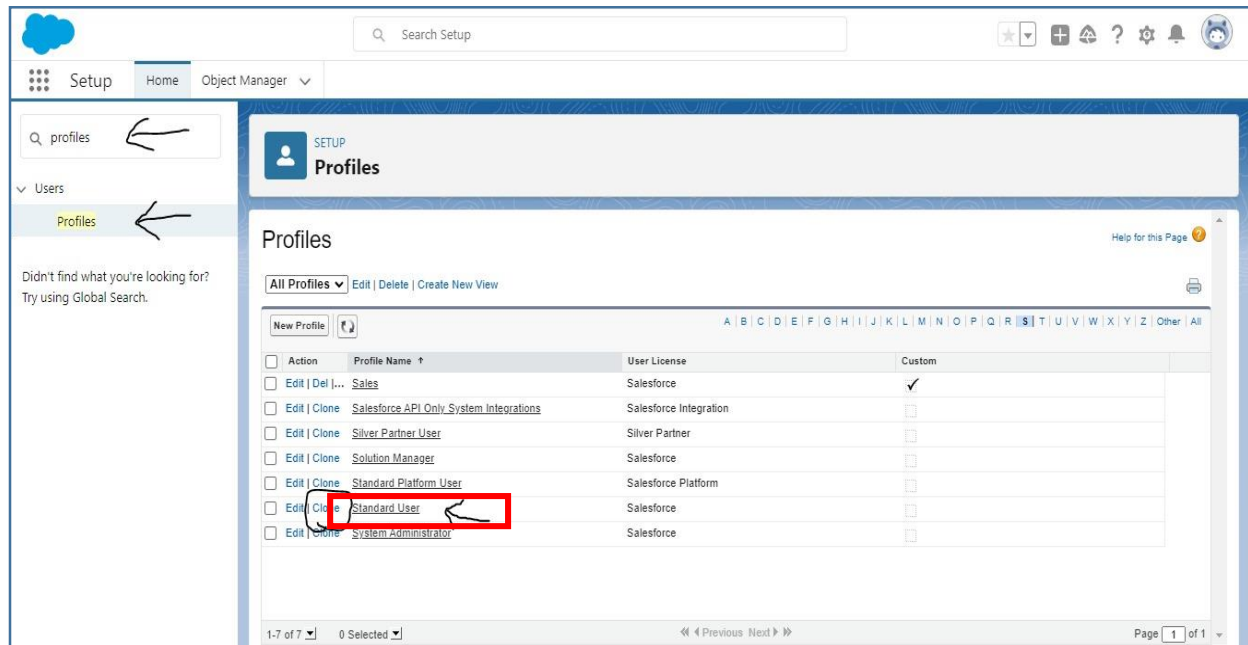




## Activity 5: Creation of fields for the Vendors Object



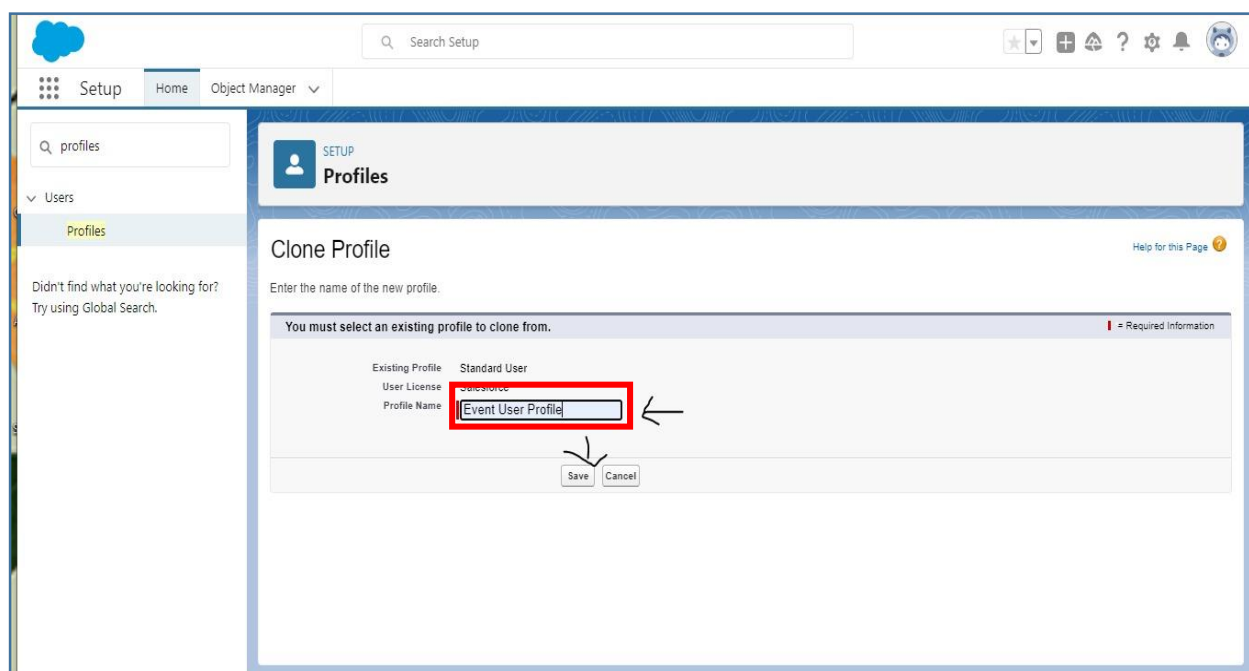
## Milestone-5: Profile



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
<a href="#">Edit</a>   <a href="#">Delete</a>	Sales	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Silver Partner User	Silver Partner	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Solution Manager	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Standard User	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	System Administrator	Salesforce	<input type="checkbox"/>

## Activity 1: Creation on Event Profile



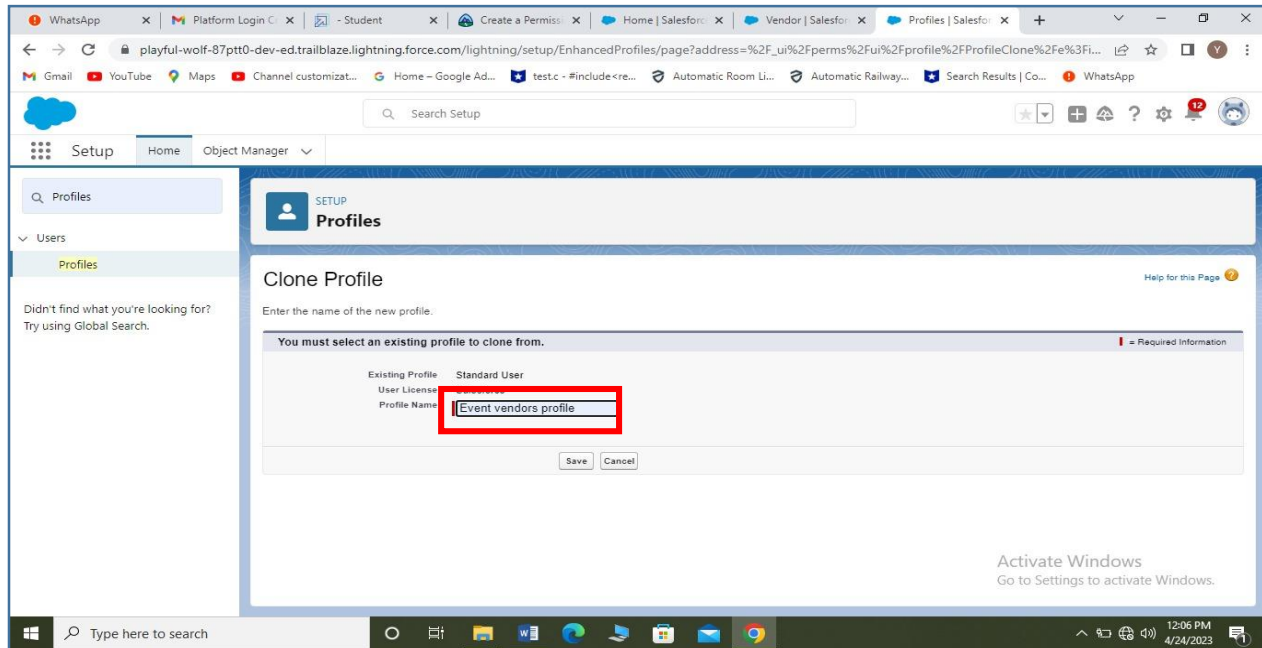
The screenshot shows the 'Clone Profile' page in Salesforce Setup. The 'Profile Name' field is highlighted with a red box and an arrow, containing the text 'Event User Profile'. The page prompts the user to enter the name of the new profile and provides 'Save' and 'Cancel' buttons.

You must select an existing profile to clone from.

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

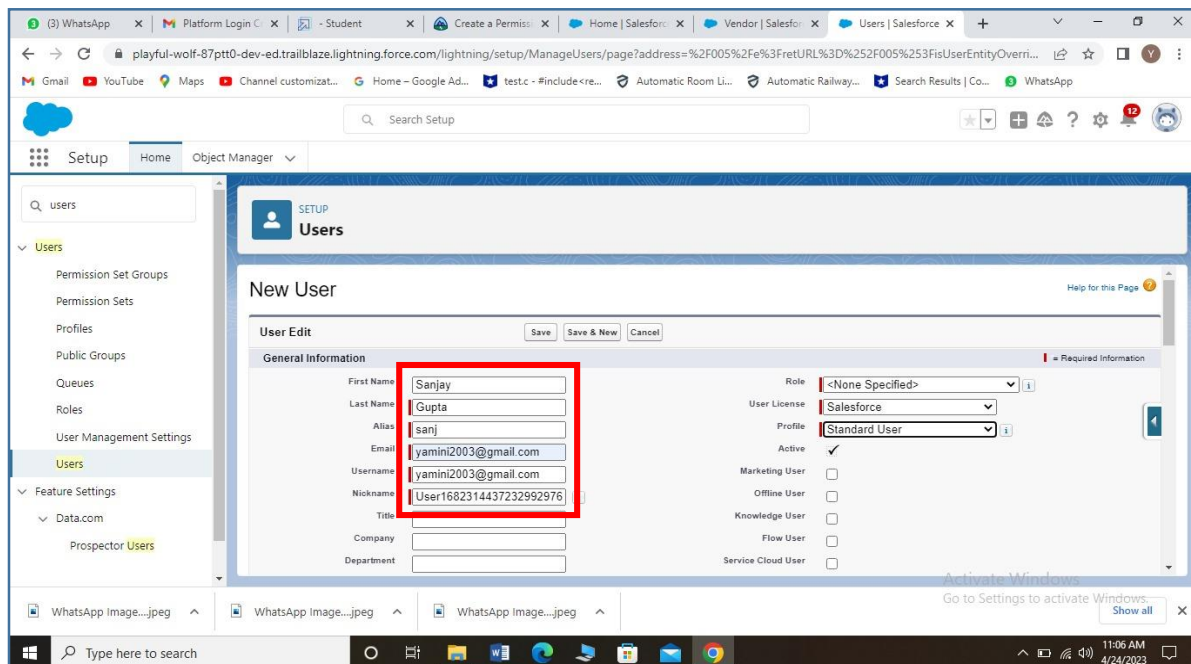
Save Cancel

## Activity 2: Creation on Event Vendor Profile



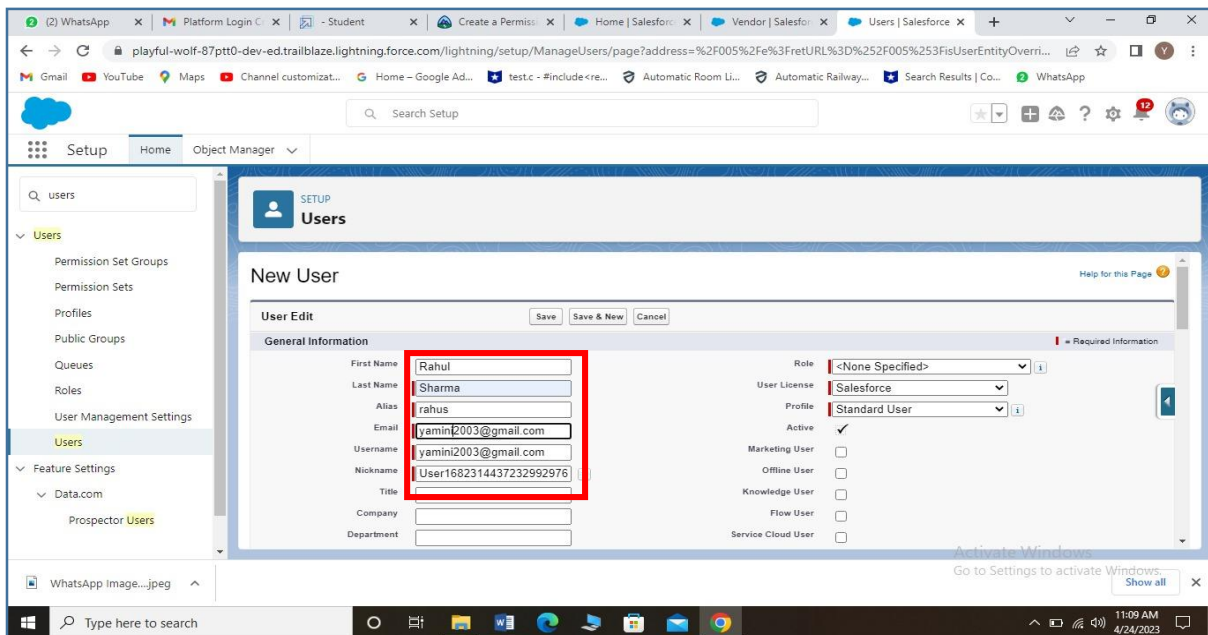
## Milestone-6 User

### 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 navigation links: Setup, Home, Object Manager, Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users, Feature Settings, Data.com, and Prospector Users. The main content area is titled "New User" and contains a "User Edit" form. The form is divided into "General Information" and "Role" sections. The "General Information" section includes fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, and Department. The "Role" section includes fields for Role, User License, Profile, Active, Marketing User, Offline User, Knowledge User, Flow User, and Service Cloud User. The "General Information" section is highlighted with a red box, and the "Role" section is also highlighted with a red box. The "General Information" section contains the following data: First Name: Rahul, Last Name: Sharma, Alias: rahus, Email: yamin2003@gmail.com, Username: yamin2003@gmail.com, Nickname: User1682314437232992976, Title: , Company: , Department: . The "Role" section contains the following data: Role: <None Specified>, User License: Salesforce, Profile: Standard User, Active: checked, Marketing User: unchecked, Offline User: unchecked, Knowledge User: unchecked, Flow User: unchecked, Service Cloud User: unchecked. The bottom of the screen shows a Windows taskbar with the time 11:09 AM and date 4/24/2023.

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

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:

Company:

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.

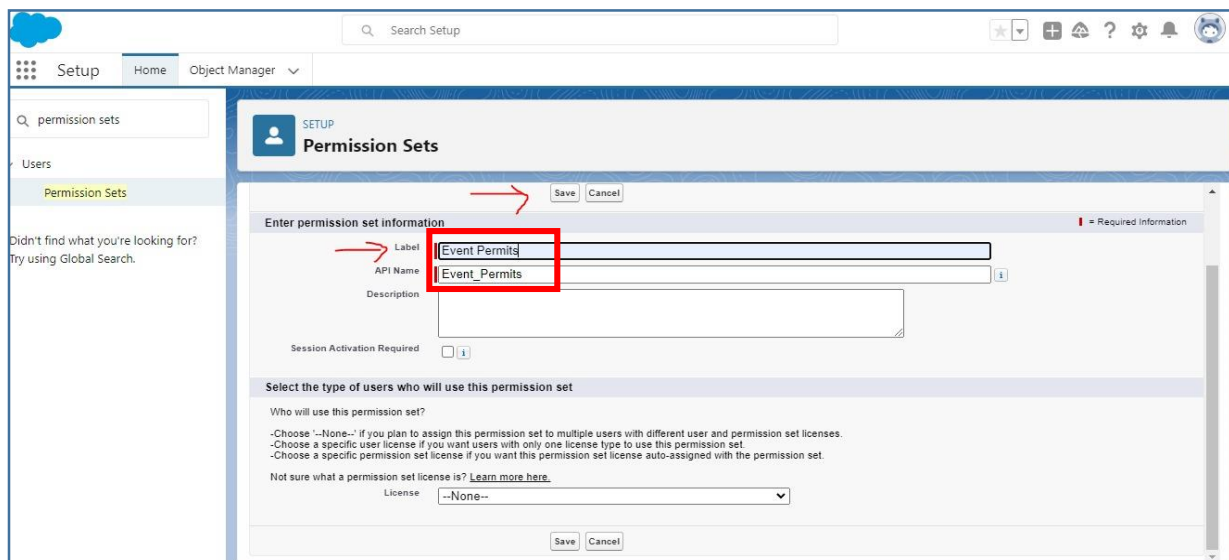
Show all

Type here to search

11:09 AM 4/24/2023

## 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 navigation links: Setup, Home, Object Manager, Users, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users, Feature Settings, Data.com, and Prospector Users. The main content area is titled "Permission Sets" and contains a "Enter permission set information" form. The form is divided into "Enter permission set information" and "Select the type of users who will use this permission set" sections. The "Enter permission set information" section includes fields for Label, API Name, and Description. The "Select the type of users who will use this permission set" section includes a "Who will use this permission set?" section and a "License" dropdown menu. The "Enter permission set information" section is highlighted with a red box, and the "Select the type of users who will use this permission set" section is also highlighted with a red box. The "Enter permission set information" section contains the following data: Label: Event Permits, API Name: Event\_Permits, Description: . The "Select the type of users who will use this permission set" section contains the following data: Who will use this permission set? (empty), License: --None--.

Setup Home Object Manager

Search Setup

Permission Sets

Users

Permission Sets

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

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.

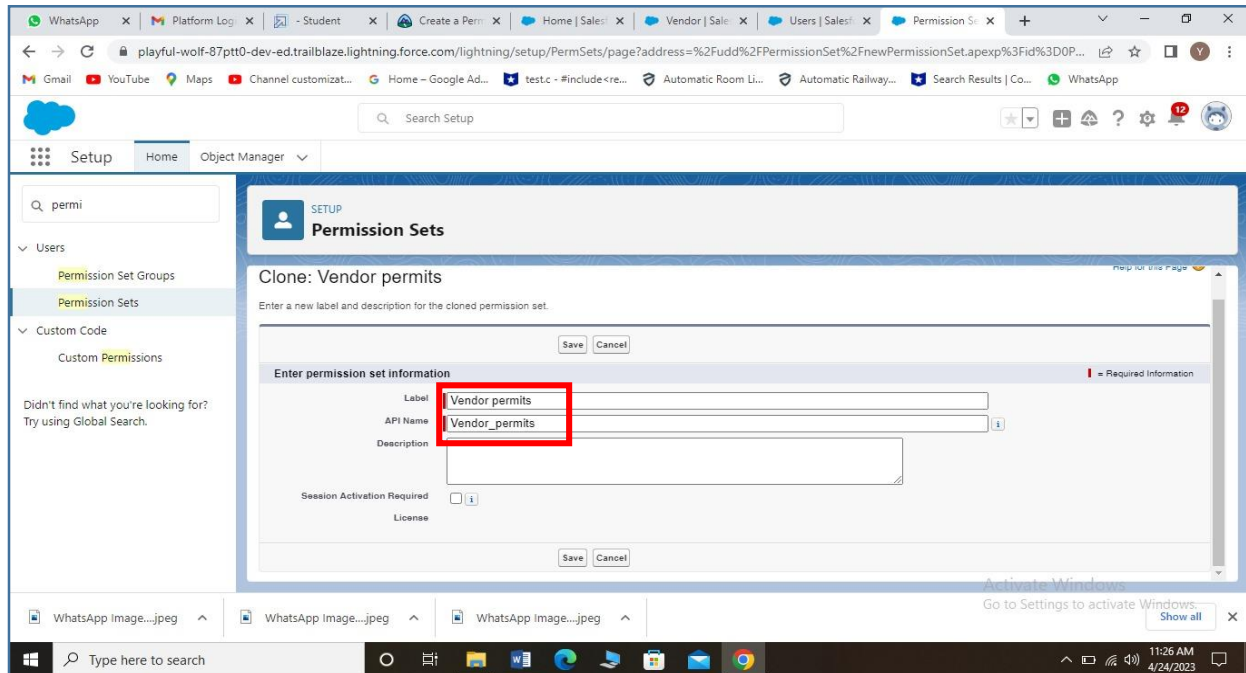
-Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

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

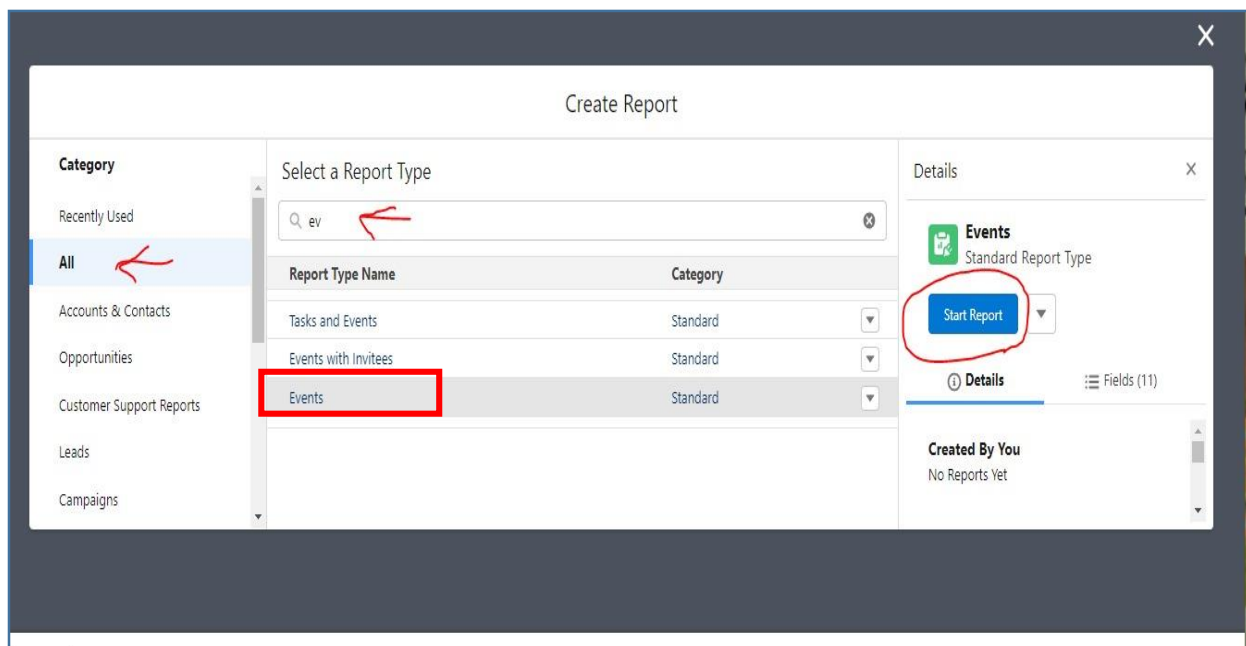
License: --None--

Save Cancel

## Activity 2: Permission Sets 2



## Milestone – 8: Reports



**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.