

Build an Event Management System using Salesforce

1. INTRODUCTION

1.1 Overview

Events create opportunities for people to connect with an area, spend time together, celebrate and experience the diversity of cultures and foster creativity and innovation. They allow a community to come alive and provide an opportunity for a destination to showcase its tourism experience and increase economic activity. Events contribute significantly to community building, lifestyle and leisure enhancement, cultural development, tourism promotion and increased visitation, volunteer participation, fundraising and economic development. Most importantly, events create a sense of fun and vibrancy, resulting in a strong sense of community connectivity, pride and a sense of place.

Events Management Strategy Events are widely acknowledged as presenting opportunities as a strong economic and tourism generator as well as bringing a range of community and social benefits to their host destination. The major drivers of this strategy are the cultural, social and environmental benefits of community events. A clear vision is needed to provide direction to activity in the future, hence the development of an Events Management Strategy for Irwin. In developing this Strategy our objectives are to:

- Gain a sound understanding of existing events and venues;
- Achieve clarity regarding the role and responsibilities of event management company to support and host events
- Develop a sustainable, outcome focused events programme which maximises the potential of our involvement in events;
- Incorporate the cultural, lifestyle and environmental factors unique to the destination into the events programme;
- Pursue campaign which support events and which contribute to overall destination marketing;

1.2 Purpose

Event Management System provides campus event planners a flexible, fully integrated solution to simplify the event management process and keep your customers, faculty and

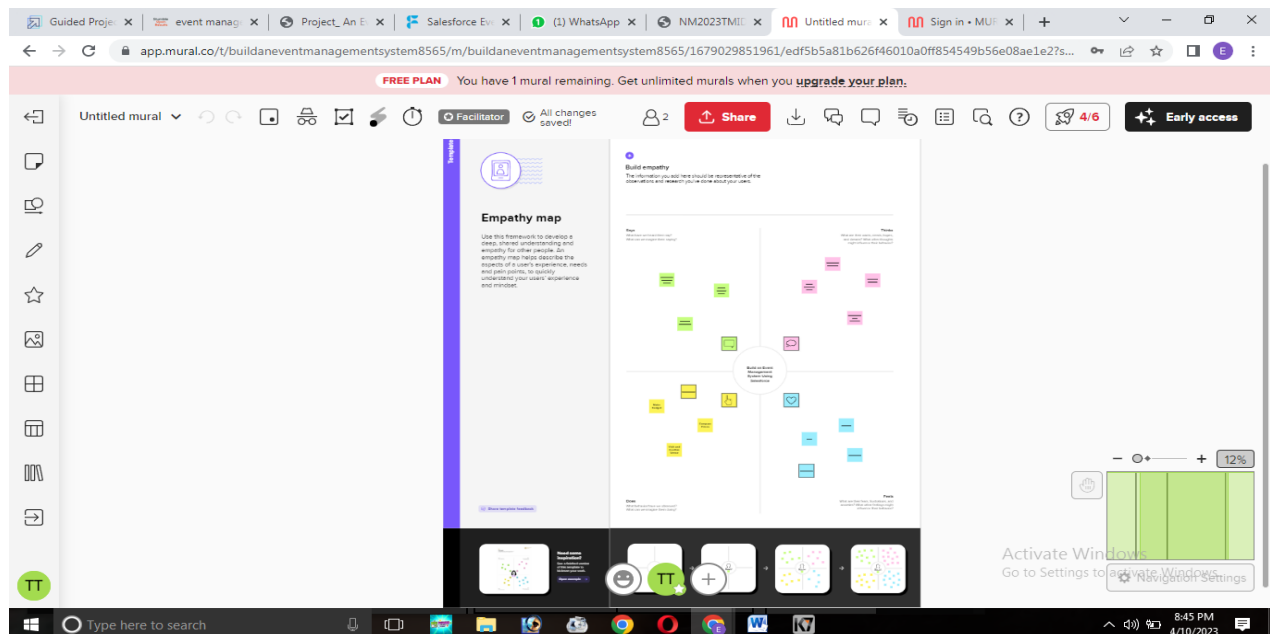
students happy, while maintaining important reports and data for making real estate and future planning decisions.

An event management system allows you to:

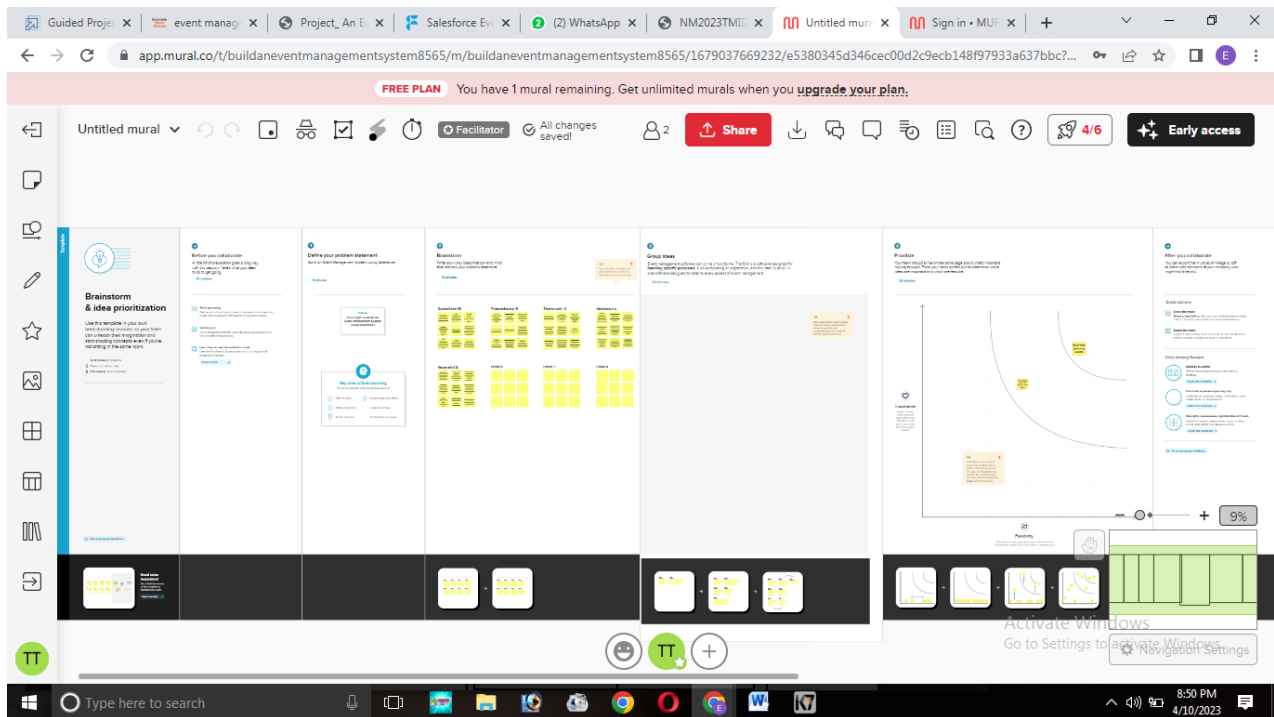
- Minimize administration efforts
- Eliminate missed communications
- Digitize how your events are run
- Comply with COVID-19 safety guidelines
- Maximize your campus flexibility
- Save time planning future events
- Access detailed reports & analytics

2.Problem Definition & Design Thinking

2.1 Empathy Map



2.2 Ideation& Brainstorming Map



3.RESULT

3.1 Data Model

Object name	Field in the Object		
Event	Field Label	Data type	
	City	Text Area(255)	
	Created By	Lookup(User)	
	End Date	Date/Time	
	Event Name	Text(80)	
	Last Modified By	Lookup(User)	
	Owner	Lookup(User,Group)	
	Start Date	Date/Time	
Attendee	Field Label	Data Type	
	Attendee Name	Text(80)	

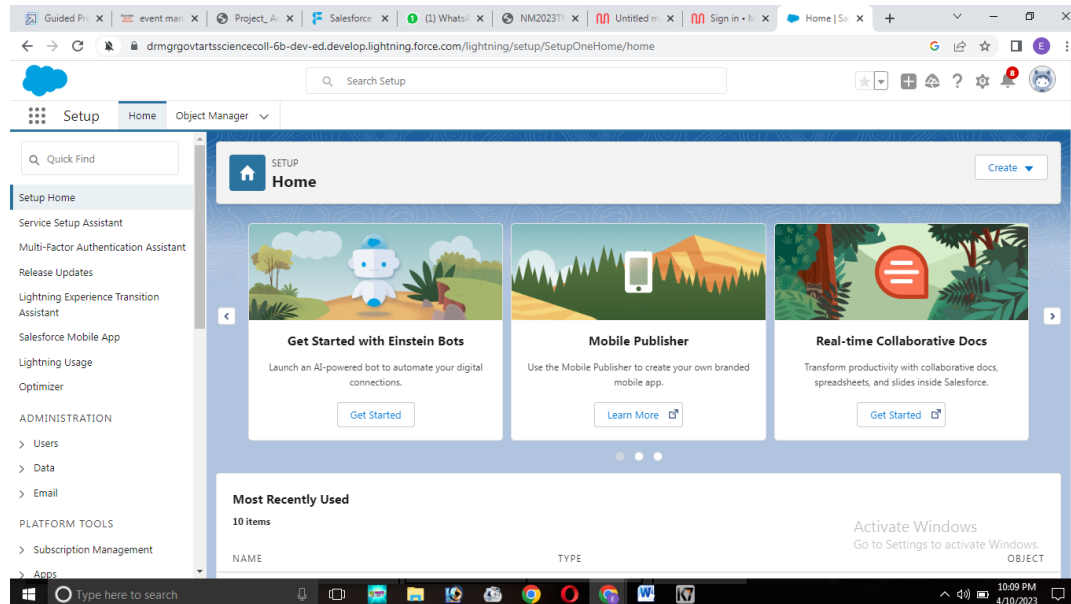
	Created By	Lookup(User)	
	Email	Email	
	Event Name	Master-Detail(Event)	
	Id	Auto Number	
	Last Modified By	Lookup(User)	
	Phone	Phone	
	Tickets	Picklist	
Speaker	Field Label	Data Type	
	Bio	Text Area(255)	
	Created By	Lookup(User)	
	Email	Email	
	Event Name	Lookup(Event)	
	Last Modified By	Lookup(User)	
	Owner	Lookup(User,Group)	
	Speaker Name	Text(80)	
Vendor	Field Label	Data Type	
	Created By	Lookup(User)	
	Email	Email	
	Event Name	Lookup(Event)	
	Last Modified By	Lookup(User)	
	Owner	Lookup(User,Group)	
	Phone	Phone	
	Service Provider	Text(200)	
	Vendor Name	Text(80)	

3.2 Activity & Screenshot

Milestone 1 - Salesforce?

Activity:

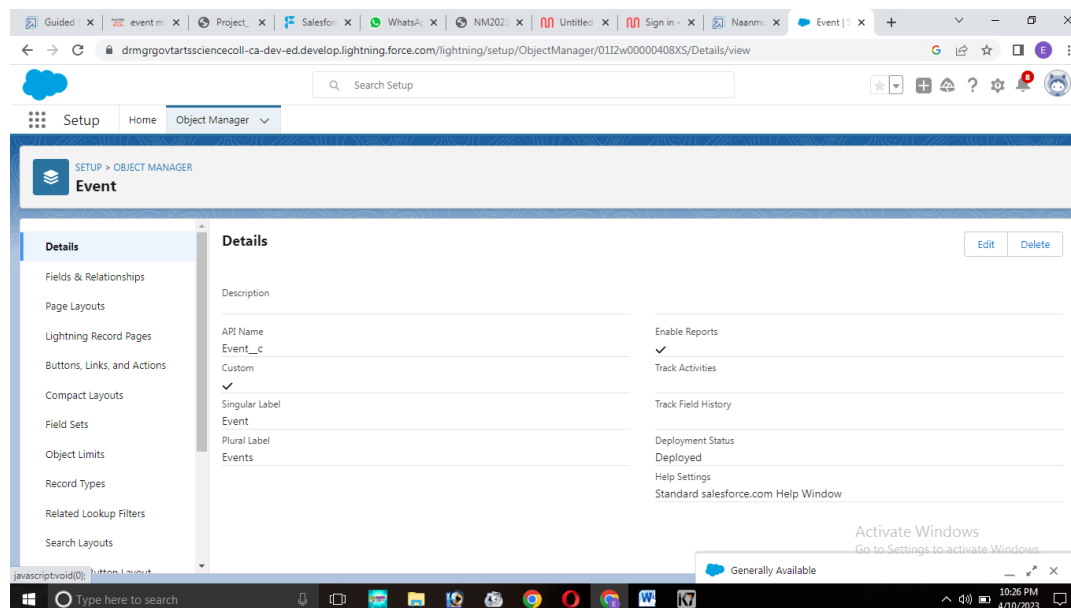
Creating a Salesforce Developer Org:



Milestone 2-Object :

Activity 1:

Creation of Objects for Event Management



Activity 2:

Creation Of Attendees Object:

The screenshot shows the Salesforce Setup interface for the 'Attendee' object. The browser address bar displays the URL: `dmgrgovartartsciencecoll-ca-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w00000408Y1/Details/view`. The page title is 'Attendee' under the 'Object Manager' section. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Details' and includes fields for Description, API Name (Attendee__c), Custom (checked), Singular Label (Attendee), Plural Label (Attendees), Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). There are 'Edit' and 'Delete' buttons in the top right corner. A Windows taskbar is visible at the bottom with the system clock showing 10:31 PM on 4/10/2023.

Activity 3:

Creation of Speaker object:

The screenshot shows the Salesforce Setup interface for the 'Speaker' object. The browser address bar displays the URL: `dmgrgovartartsciencecoll-ca-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w00000408Yf/Details/view`. The page title is 'Speaker' under the 'Object Manager' section. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Details' and includes fields for Description, API Name (Speaker__c), Custom (checked), Singular Label (Speaker), Plural Label (Speakers), Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). There are 'Edit' and 'Delete' buttons in the top right corner. A Windows taskbar is visible at the bottom with the system clock showing 10:35 PM on 4/10/2023.

Activity 4:

Creation of vendors object:

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Vendor' and shows the 'Details' tab. The 'Details' section includes fields for Description, API Name (Vendor__c), Custom, Singular Label (Vendor), Plural Label (Vendors), and a list of settings: Enable Reports (checked), Track Activities (checked), Track Field History, Deployment Status (Deployed), Help Settings (Standard salesforce.com Help Window), and a 'Generally Available' status. The bottom of the screen shows a Windows taskbar with various application icons and a system clock indicating 10:38 PM on 4/10/2023.

Milestone 3-Tab:

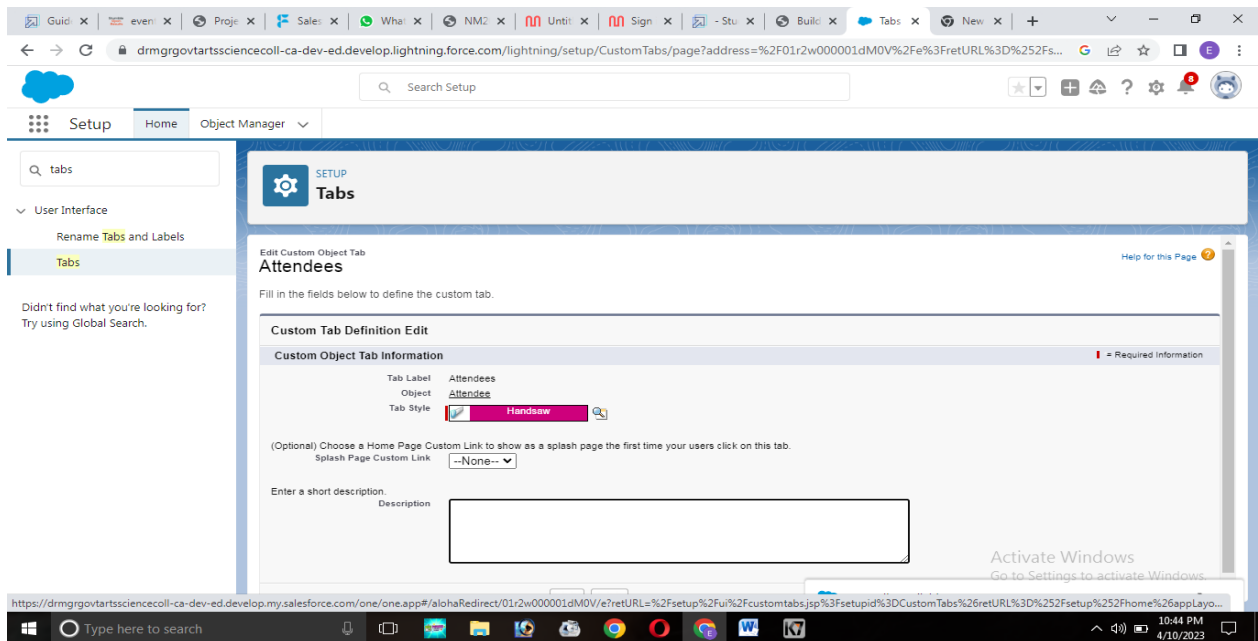
Activity 1:

Creation of Event Tab:

The screenshot shows the Salesforce Setup interface for creating a custom tab. The left sidebar contains a navigation menu with options like User Interface, Rename Tabs and Labels, and Tabs. The main content area is titled 'Events' and shows the 'Custom Tab Definition Edit' section. The 'Custom Object Tab Information' section includes fields for Tab Label (Events), Object (Event), and Tab Style (Big top). Below this, there is a section for 'Splash Page Custom Link' with a dropdown menu set to 'None'. The bottom of the screen shows a Windows taskbar with various application icons and a system clock indicating 10:41 PM on 4/10/2023.

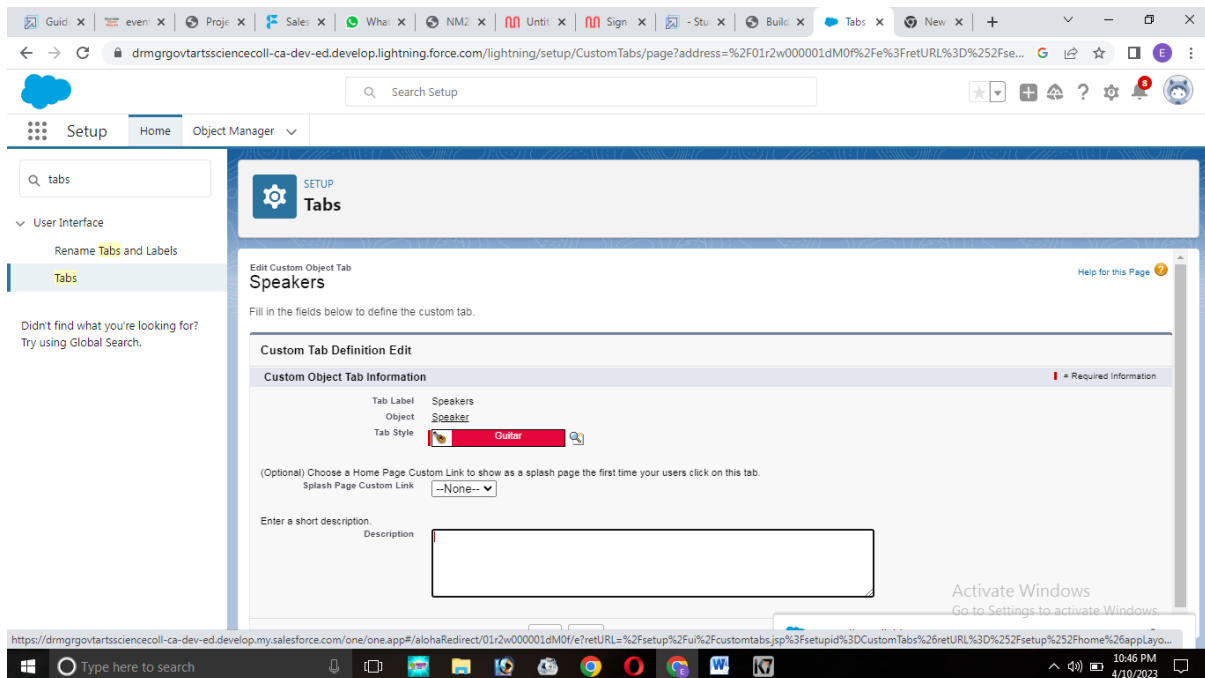
Activity 2:

Creation of Attendee tab :



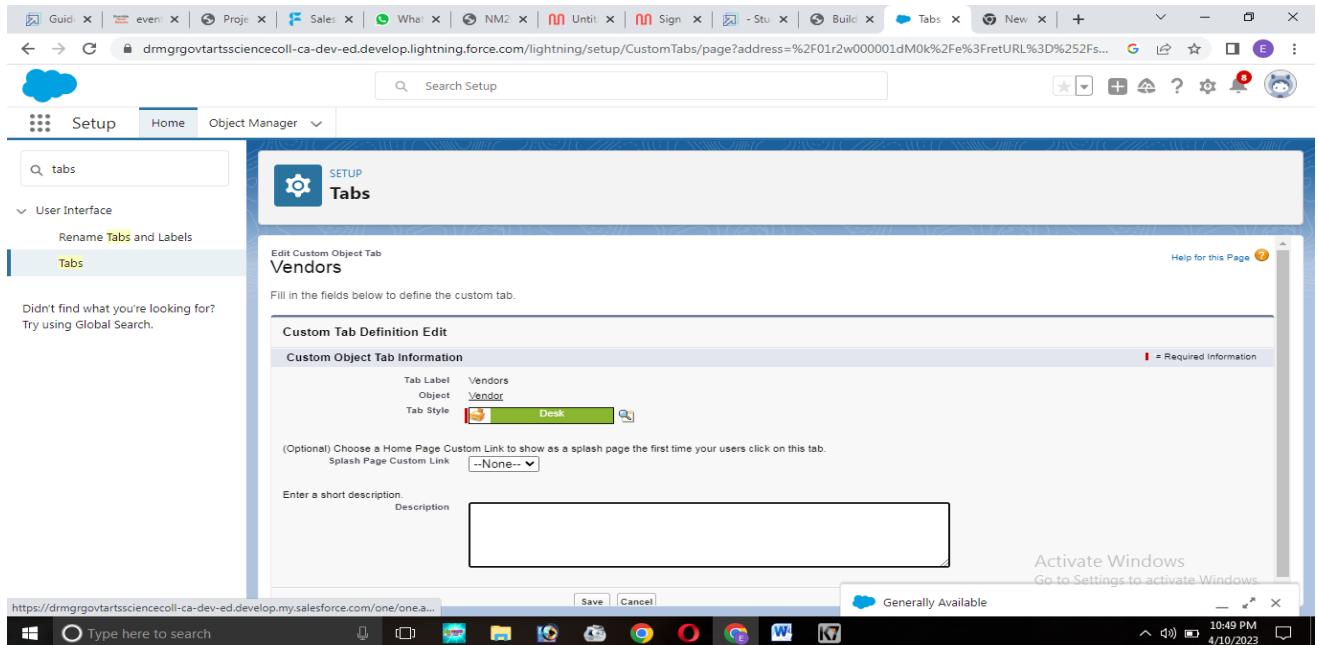
Activity 3:

Creation of Speakers tab:



Activity 4:

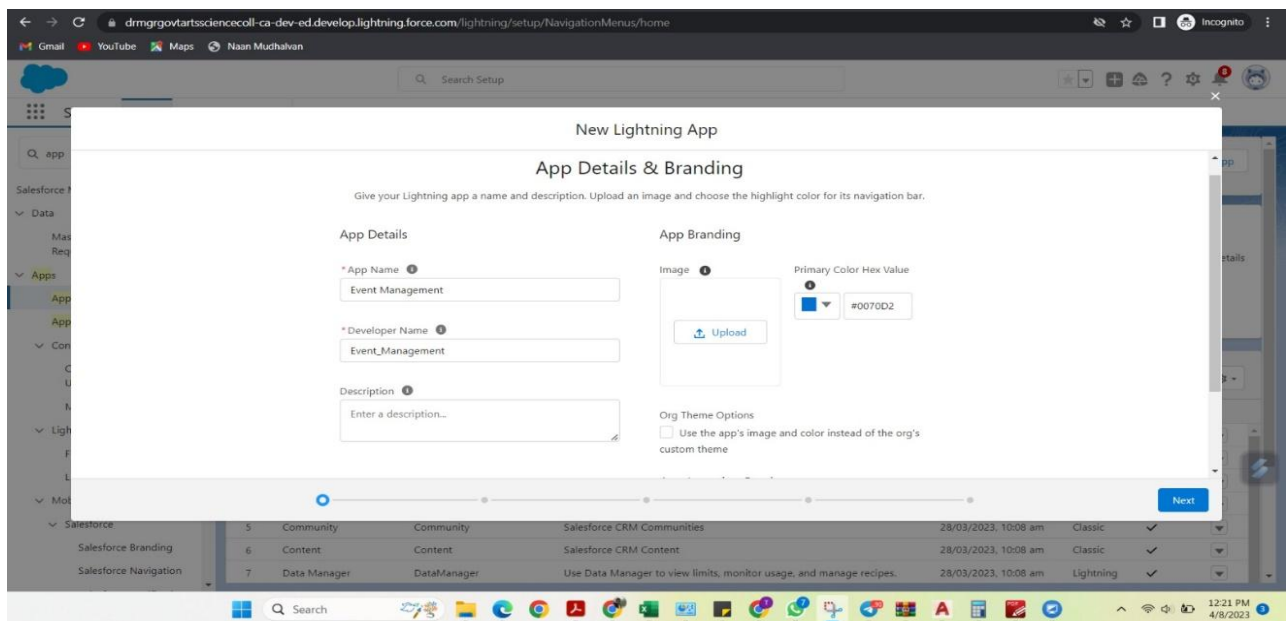
Creation of Vendor tab:

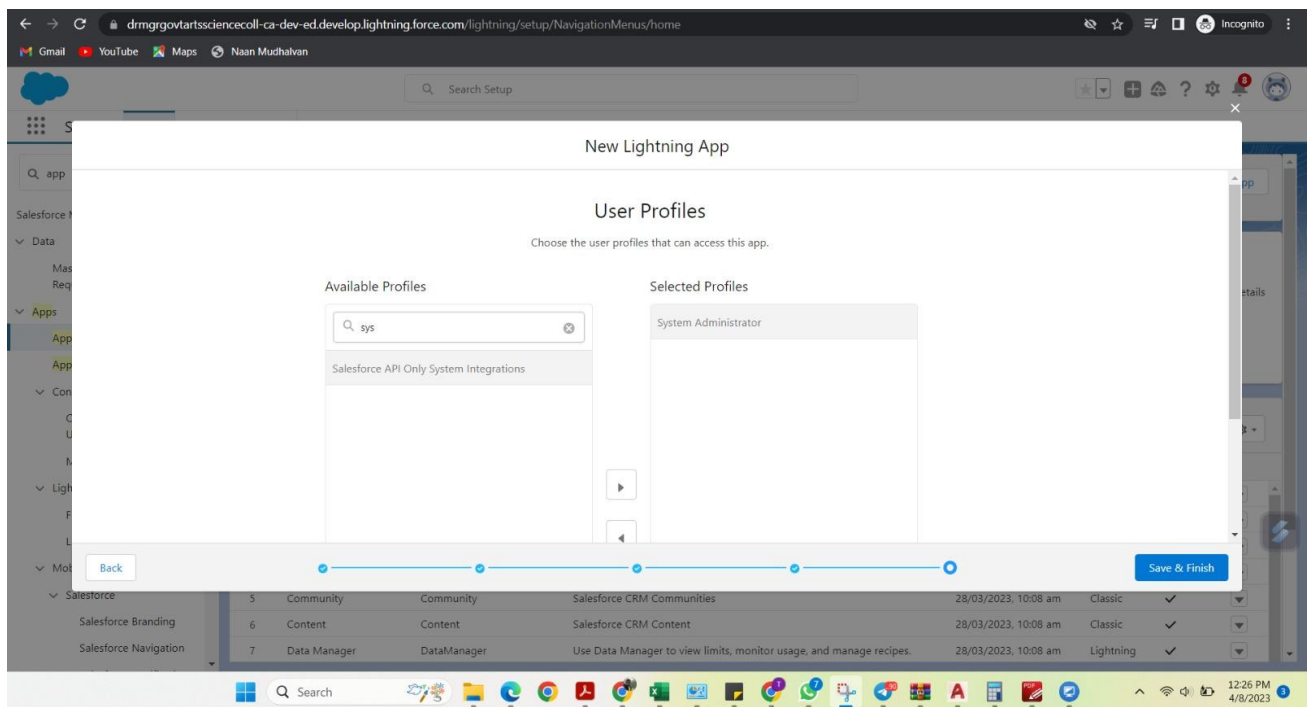
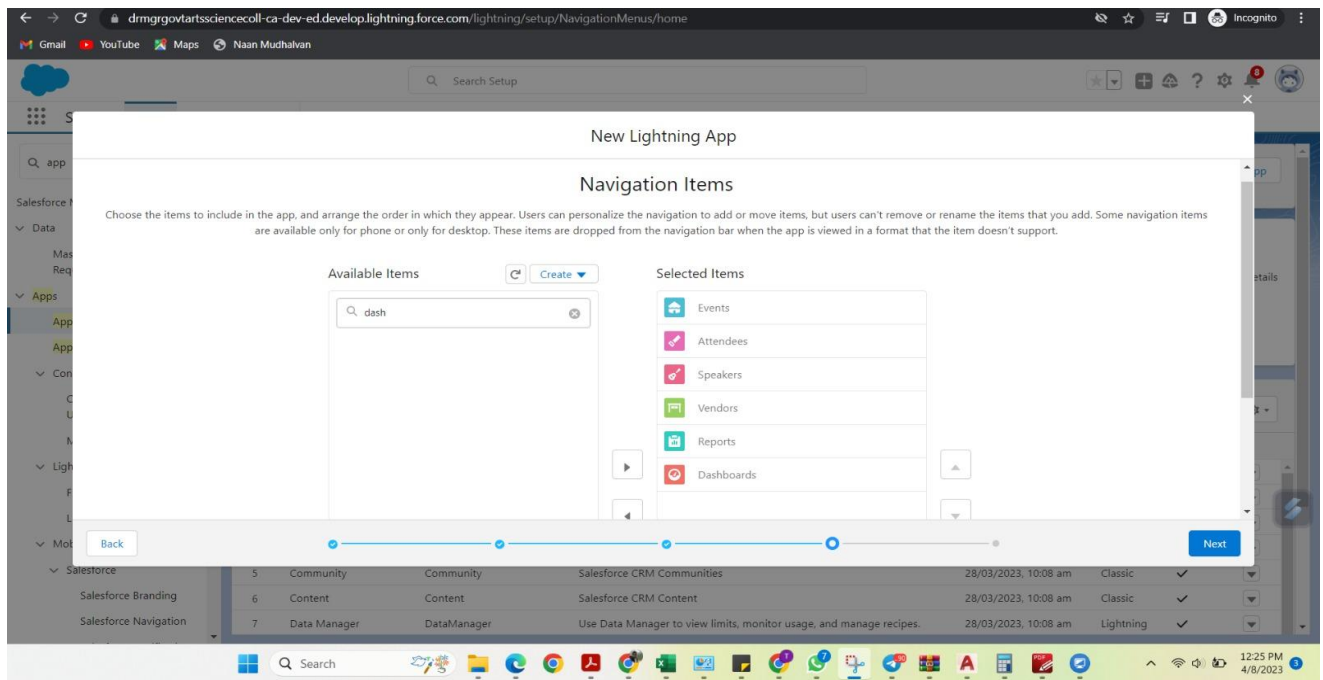


Milestone 3-Application:

Activity

Create the Event Management Construction app

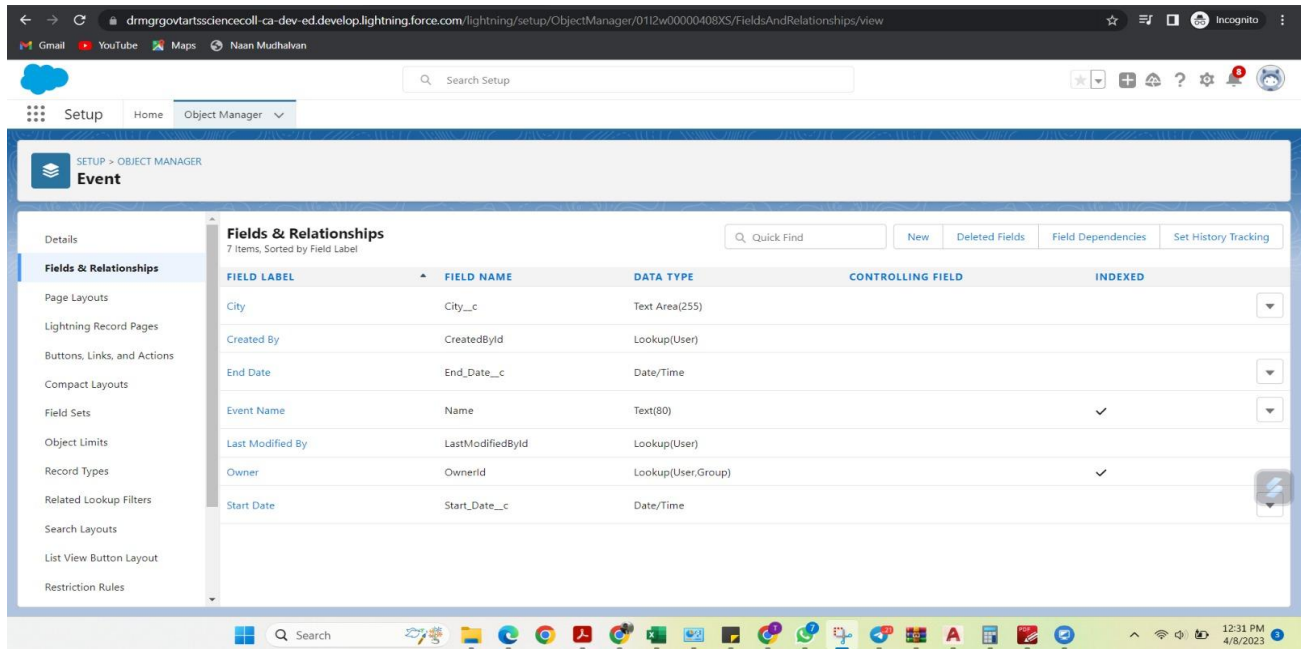




Milestone 4: Fields

Activity 1:

Creation of fields for the Event Objects:

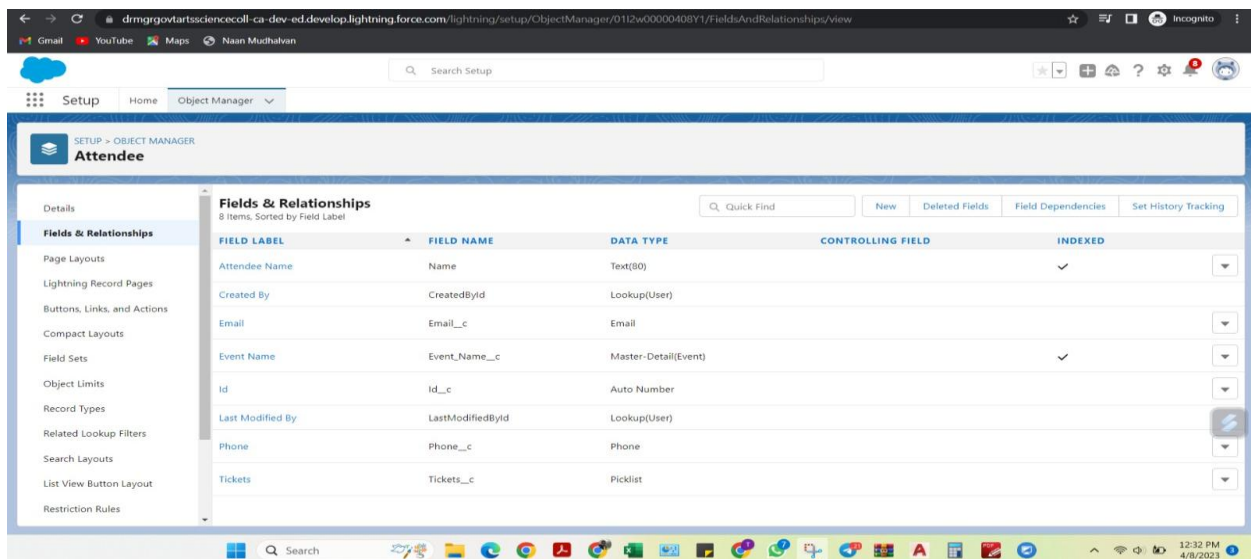


The screenshot shows the Salesforce Setup interface for the 'Event' object. The 'Fields & Relationships' section is active, displaying a table of 7 fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: City (Text Area(255)), Created By (Lookup(User)), End Date (Date/Time), Event Name (Text(80)), Last Modified By (Lookup(User)), Owner (Lookup(User.Group)), and Start Date (Date/Time). The 'Indexed' column shows checkmarks for Event Name and Owner.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
End Date	End_Date__c	Date/Time		
Event Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User.Group)		✓
Start Date	Start_Date__c	Date/Time		

Activity 2:

Creation of fields for the attendees objects:

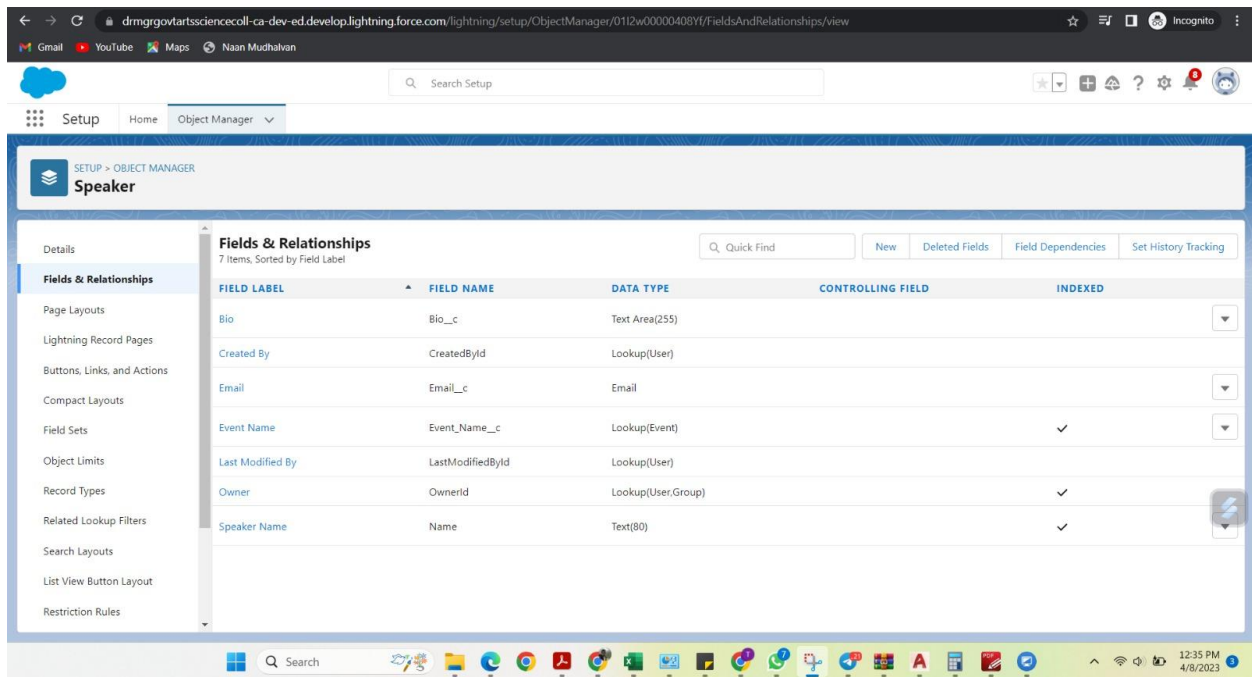


The screenshot shows the Salesforce Setup interface for the 'Attendee' object. The 'Fields & Relationships' section is active, displaying a table of 8 fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: Attendee Name (Text(80)), Created By (Lookup(User)), Email (Email), Event Name (Master-Detail(Event)), Id (Auto Number), Last Modified By (Lookup(User)), Phone (Phone), and Tickets (Picklist). The 'Indexed' column shows checkmarks for Attendee Name and Event Name.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Attendee Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Event Name	Event_Name__c	Master-Detail(Event)		✓
Id	Id__c	Auto Number		
Last Modified By	LastModifiedById	Lookup(User)		
Phone	Phone__c	Phone		
Tickets	Tickets__c	Picklist		

Activity 3

Creation of fields for the Speakers Object:

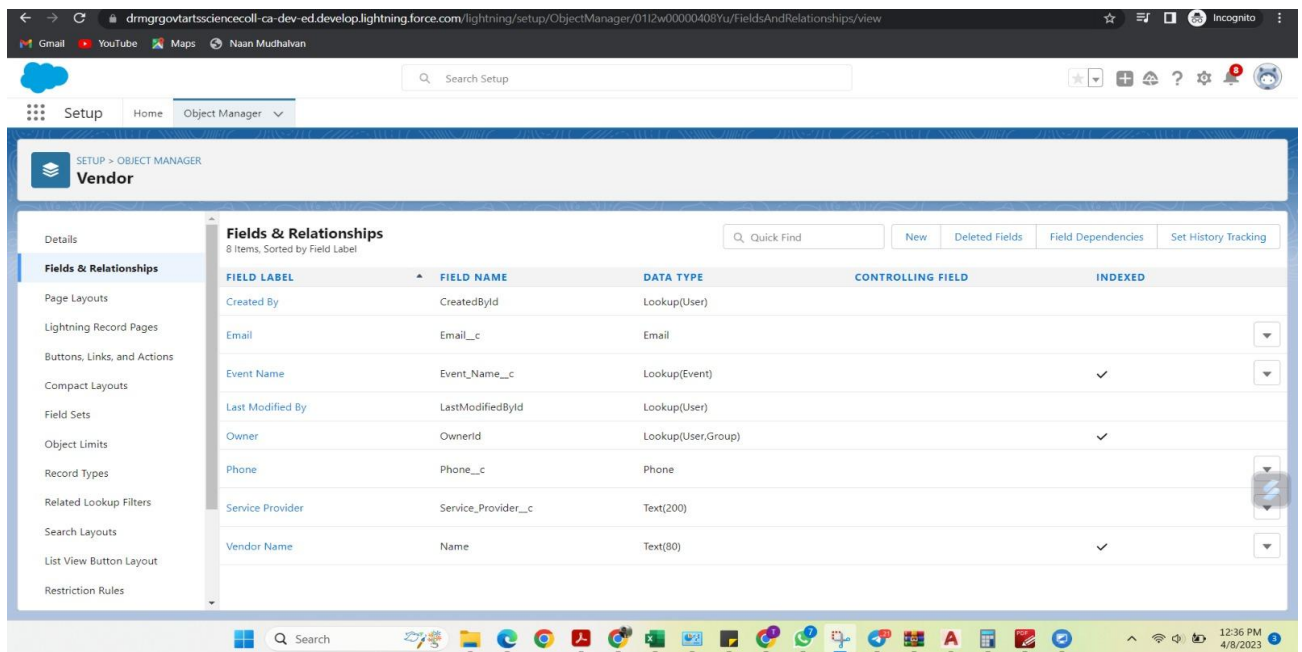


The screenshot shows the Salesforce Setup interface for the 'Speaker' object. The 'Fields & Relationships' section is active, displaying a table of 7 fields. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are Bio, Created By, Email, Event Name, Last Modified By, Owner, and Speaker Name. The 'Speaker Name' field is highlighted with a blue bar.

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

Activity 4:

Creation of fields for the Vendors object:



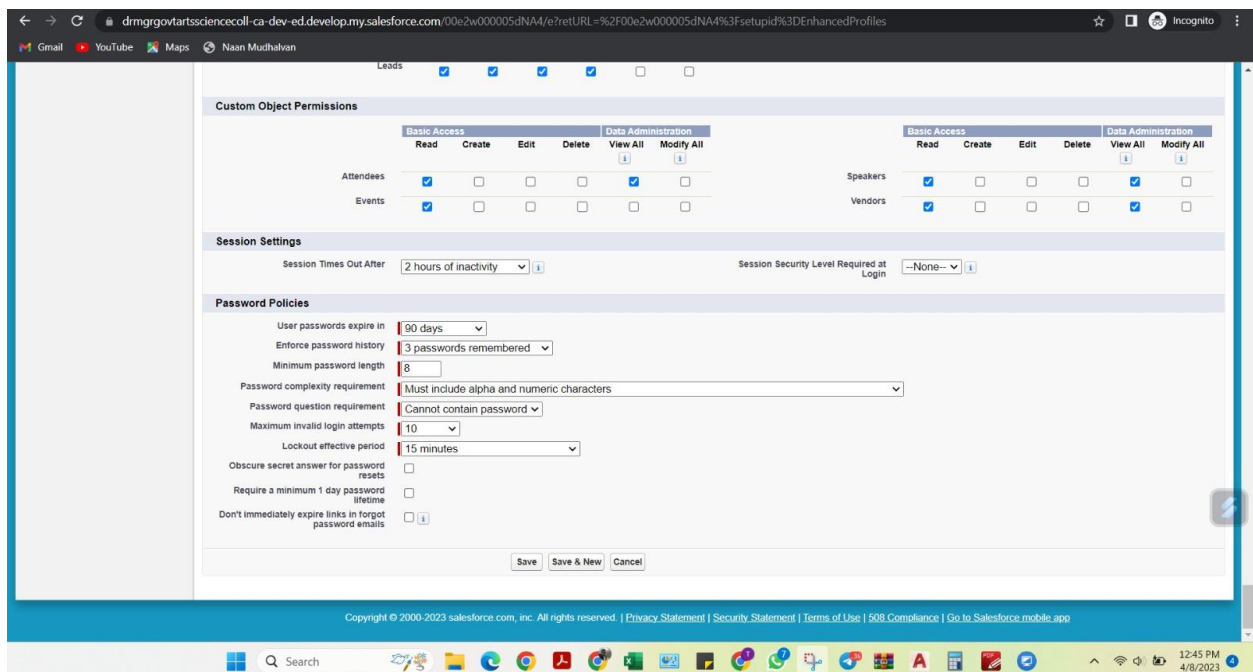
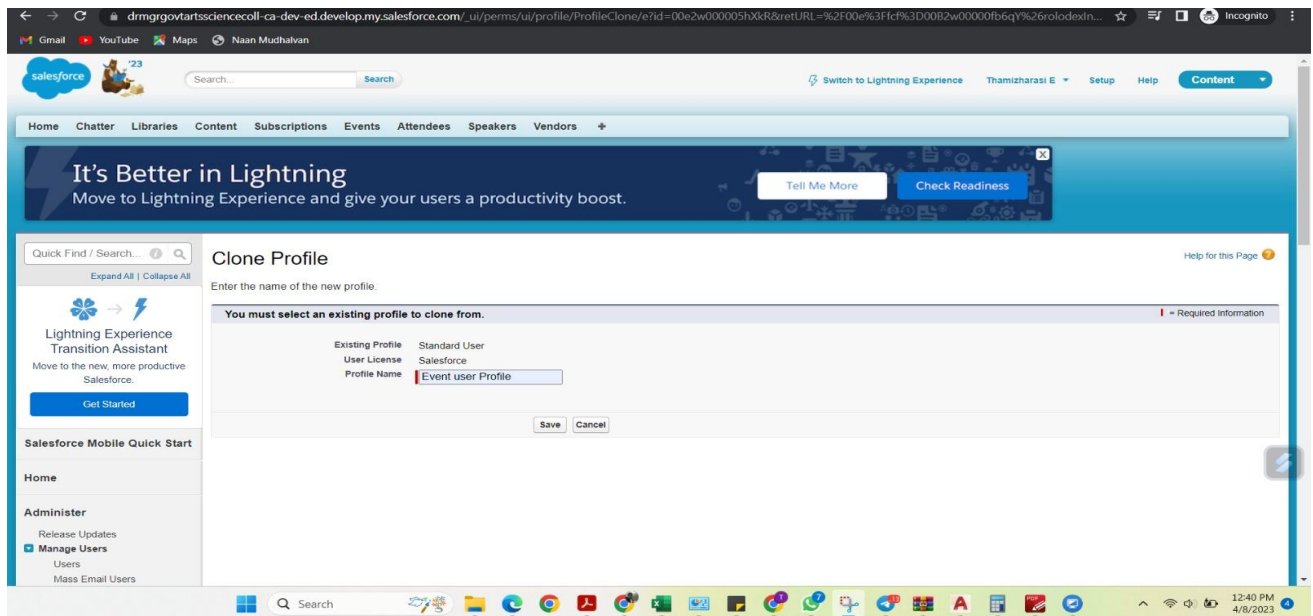
The screenshot shows the Salesforce Setup interface for the 'Vendor' object. The 'Fields & Relationships' section is active, displaying a table of 8 fields. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are Created By, Email, Event Name, Last Modified By, Owner, Phone, Service Provider, and Vendor Name. The 'Vendor Name' field is highlighted with a blue bar.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Event Name	Event_Name__c	Lookup(Event)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		
Service Provider	Service_Provider__c	Text(200)		
Vendor Name	Name	Text(80)		✓

Milestone 5-Profile:

Activity 1:

Creation of profile:



Activity 2:

Create a profile with the profile name as “Event vendors profile”.

The screenshot displays the Salesforce Lightning Experience interface. The top navigation bar includes links for Home, Chatter, Libraries, Content, Subscriptions, Events, Attendees, Speakers, and Vendors. A banner at the top promotes the Lightning Experience with the text "It's Better in Lightning" and "Move to Lightning Experience and give your users a productivity boost." Below the banner, the "Clone Profile" section is active, showing a form to create a new profile by cloning an existing one. The "Existing Profile" is set to "Standard User", the "User License" is "Salesforce", and the "Profile Name" is "Event vendors profile". The "Session Settings" and "Password Policies" sections are also visible, showing various configuration options for user sessions and password requirements.

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: --None--

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password resets: ☐

Require a minimum 1 day password lifetime: ☐

Don't immediately expire links in forgot password emails: ☐

Custom Object Permissions

	Basic Access				Data Administration			Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	Modify All
Attendees	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Speakers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Events	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Vendors	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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Milestone 6-User:

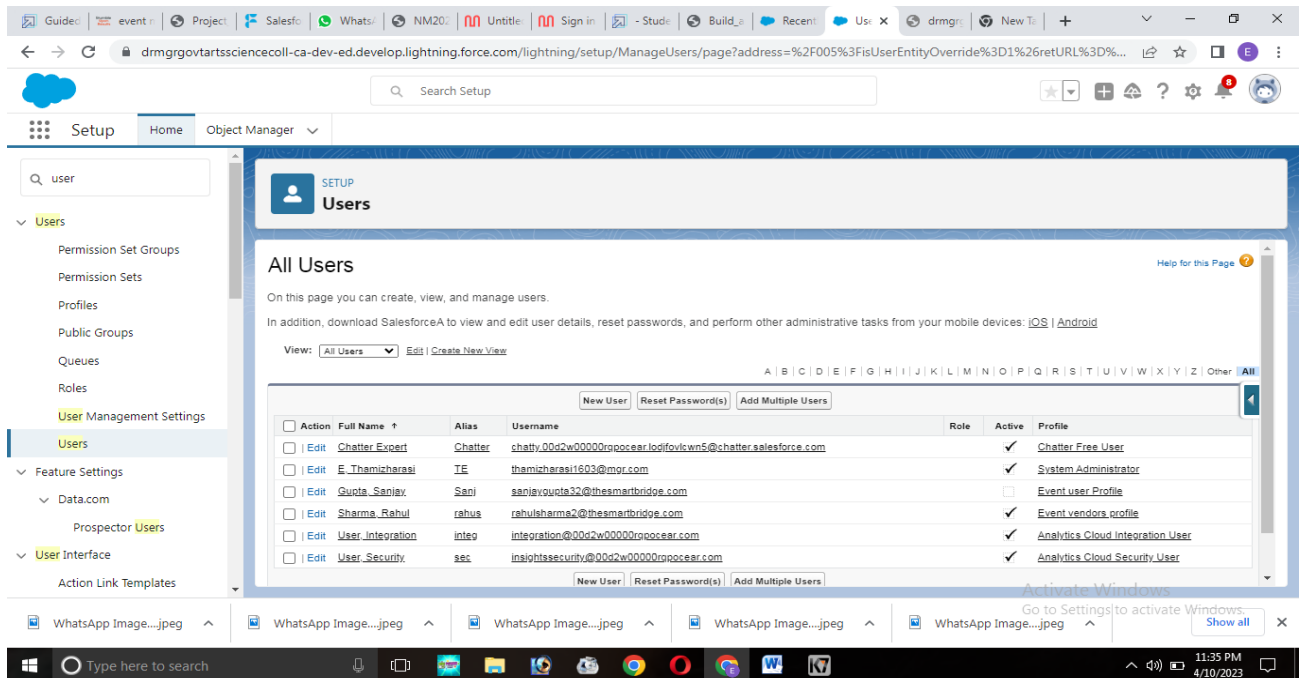
Activity 1:

Creating a User:

The screenshot shows the Salesforce Lightning Setup interface. The left sidebar contains a navigation menu with options like Setup, Home, and Object Manager. The main content area is titled 'Users' and displays the 'User Edit' form for 'Sanjay Gupta'. The form includes fields for General Information (First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, Division) and Role (Role, User License, Profile, Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User). The 'Role' dropdown is set to '<None Specified>', 'User License' is 'Salesforce', and 'Profile' is 'Event user Profile'. The 'Active' checkbox is checked. The 'Save' button is visible at the bottom of the form. The bottom of the screen shows the Windows taskbar with the time 11:34 PM and date 4/10/2023.

Activity 2:

The screenshot shows the Salesforce Lightning Setup interface. The left sidebar contains a navigation menu with options like Setup, Home, and Object Manager. The main content area is titled 'Users' and displays the 'User Edit' form for 'Rahul Sharma'. The form includes fields for General Information (First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, Division) and Role (Role, User License, Profile, Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User). The 'Role' dropdown is set to '<None Specified>', 'User License' is 'Salesforce', and 'Profile' is 'Event vendors profile'. The 'Active' checkbox is checked. The 'Save' button is visible at the bottom of the form. The bottom of the screen shows the Windows taskbar with the time 11:34 PM and date 4/10/2023.



The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains a navigation menu with options like 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', 'Feature Settings', 'Data.com', 'Prospector Users', 'User Interface', and 'Action Link Templates'. The main content area is titled 'All Users' and includes a search bar, a 'View' dropdown set to 'All Users', and a table of users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The users listed are Chatter Expert, E. Thamizharasi, Gupta Sanjay, Sharma Rahul, User Integration, and User Security. The bottom of the screen shows a Windows taskbar with various application icons and a system clock indicating 11:35 PM on 4/10/2023.

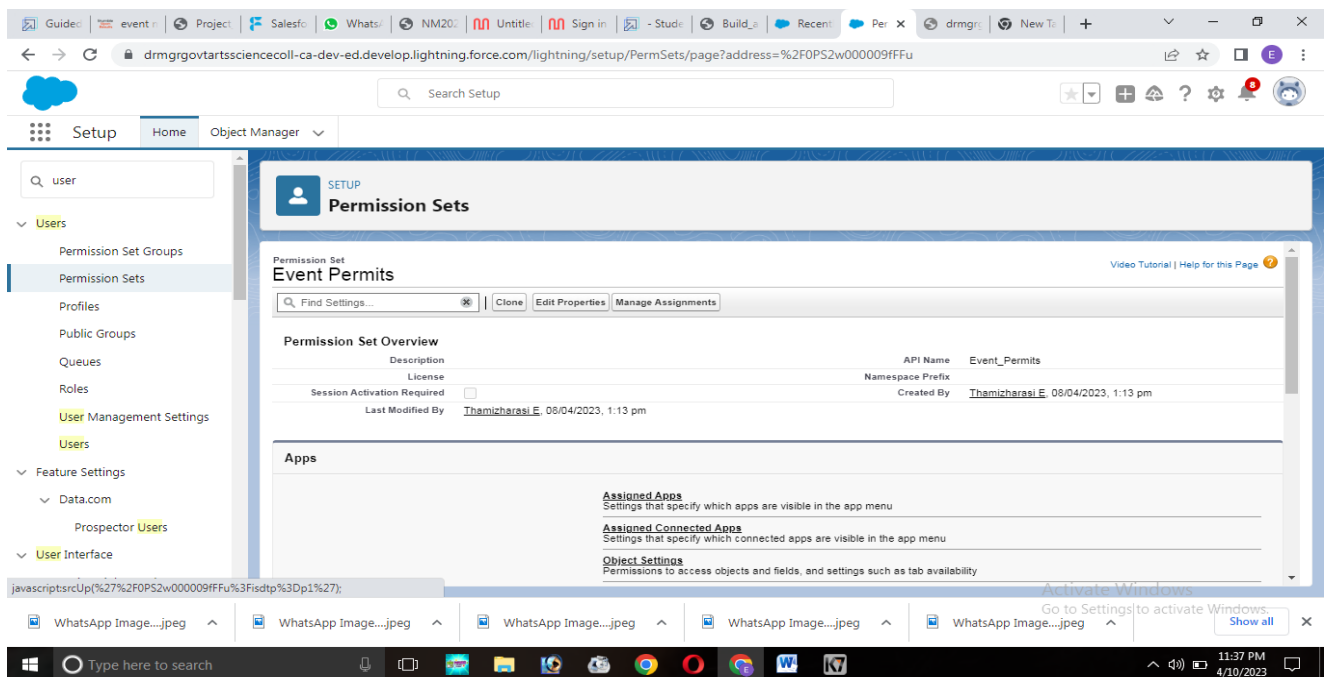
Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d2w00000roopear.lofioviswn5@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	E. Thamizharasi	TE	thamizharasi1603@mpr.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Gupta Sanjay	Sani	sanjaygupta32@thesmartbridge.com		<input type="checkbox"/>	Event user Profile
<input type="checkbox"/> Edit	Sharma Rahul	rahus	rahulsharma2@thesmartbridge.com		<input checked="" type="checkbox"/>	Event vendors profile
<input type="checkbox"/> Edit	User Integration	integ	integration@00d2w00000roopear.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00d2w00000roopear.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Milestone 7-Permission sets:

Activity 1:

Creating a Permission set:

Event Permit:



The screenshot shows the Salesforce Setup interface for the 'Permission Sets' section. The left sidebar is similar to the previous screenshot, with 'Permission Sets' highlighted. The main content area is titled 'Permission Sets' and shows the 'Event Permits' permission set. It includes a search bar, a 'Find Settings...' button, and a 'Permission Set Overview' section. The overview shows the API Name as 'Event_Permits', the Namespace Prefix as 'Event_Permits', and the Created By as 'Thamizharasi E.' on 08/04/2023 at 1:13 pm. Below the overview, there are sections for 'Apps' and 'Object Settings'. The bottom of the screen shows a Windows taskbar with various application icons and a system clock indicating 11:37 PM on 4/10/2023.

Permission Set Overview	API Name	Event_Permits
Description	Namespace Prefix	
License	Created By	Thamizharasi E.
Session Activation Required	Created	08/04/2023, 1:13 pm
Last Modified By		

The screenshot shows the Salesforce Setup interface for the 'Event Permits' permission set. The left sidebar contains navigation options like Users, Permission Set Groups, Profiles, and Roles. The main content area is titled 'Event Permits' and displays a table of 'Current Assignments'.

<input type="checkbox"/>	Full Name ↑	Active	Role	Profile	User License	Expires On
<input type="checkbox"/>	Rahul Sharma	✓		Event vendors profile	Salesforce	
<input type="checkbox"/>	Thamizharasi E	✓		System Administrator	Salesforce	

Buttons for 'Add Assignment' and 'Show all' are visible. The bottom of the screen shows the Windows taskbar with the date 4/10/2023 and time 11:38 PM.

Activity 2:

Vendor Permits:

The screenshot shows the Salesforce Setup interface for the 'Vendor Permits' permission set. The left sidebar is the same as the previous screenshot. The main content area is titled 'Permission Sets' and shows the 'Vendor Permits' permission set overview.

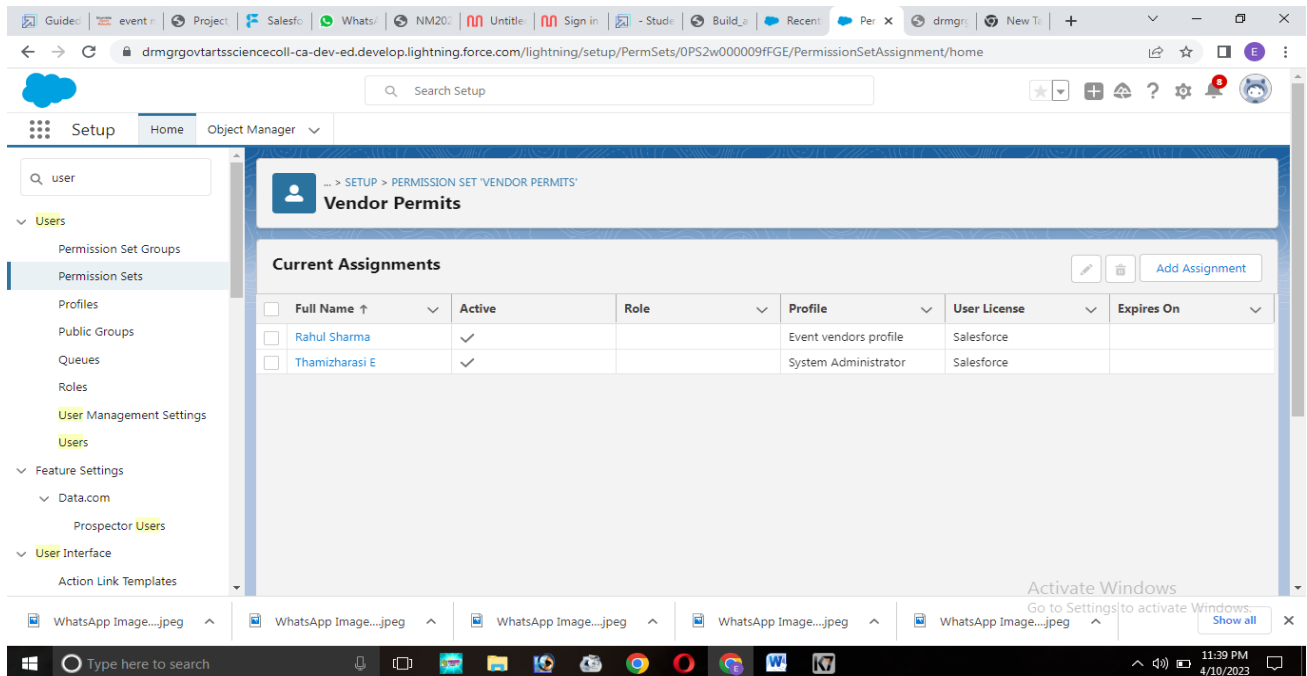
Permission Set Overview

Field	Value
Description	Vendor Permits
License	API Name: Vendor_Permits
Session Activation Required	<input type="checkbox"/>
Created By	Thamizharasi E, 08/04/2023, 1:17 pm
Last Modified By	Thamizharasi E, 08/04/2023, 1:17 pm

Apps

- Assigned Apps**: Settings that specify which apps are visible in the app menu.
- Assigned Connected Apps**: Settings that specify which connected apps are visible in the app menu.
- Object Settings**: Permissions to access objects and fields, and settings such as tab availability.

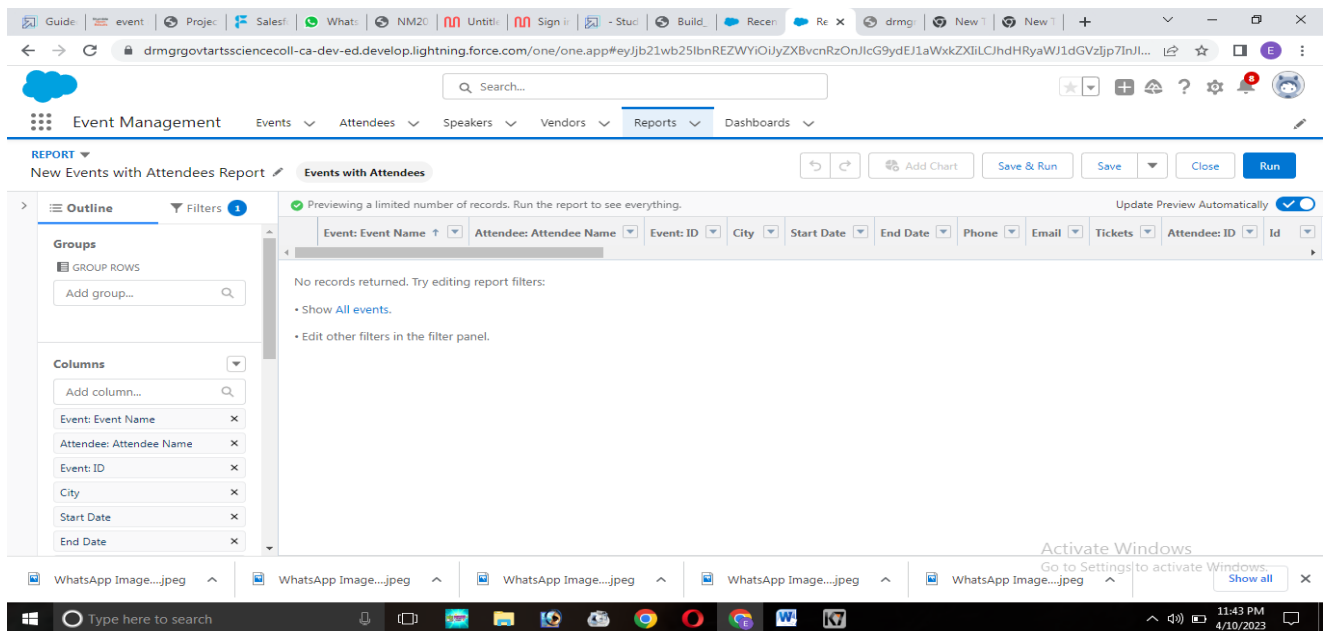
The bottom of the screen shows the Windows taskbar with the date 4/10/2023 and time 11:39 PM.

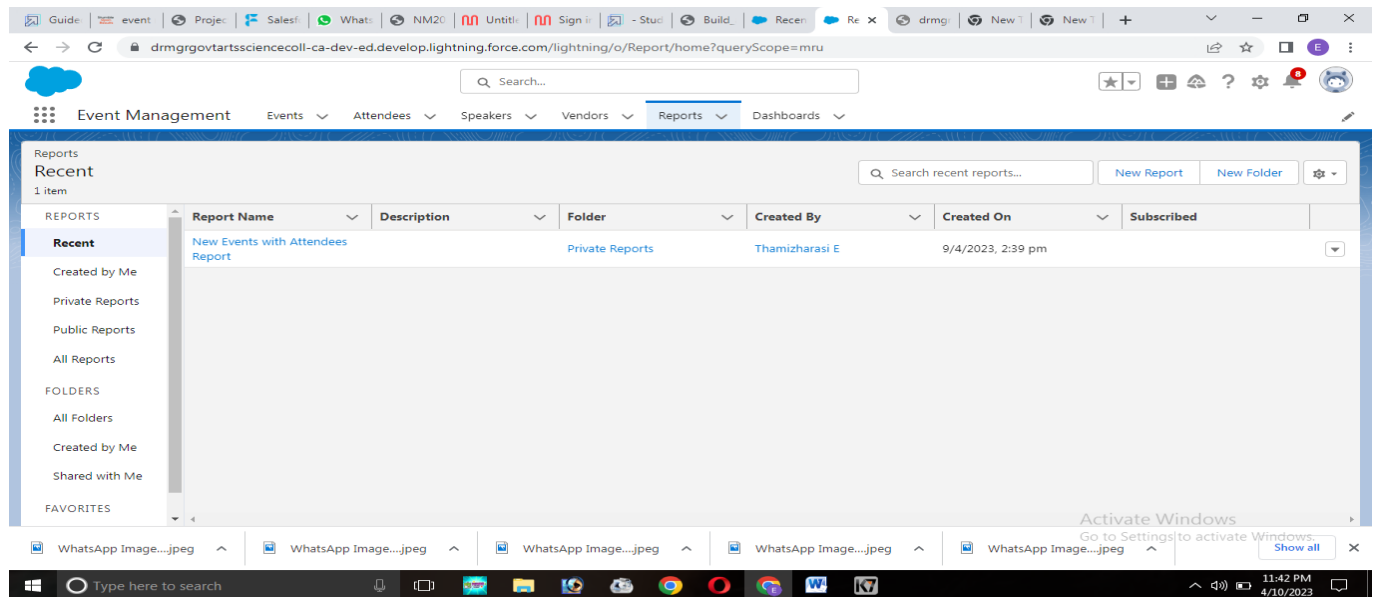


Milestone 8- Reports:

Activity

Creating a Report:





4. Trailhead Profile Public URL

Team Lead - <https://trailblazer.me/id/ethamizharasi>

Team Member 1-<https://trailblazer.me/id/tshanmugam7>

Team Member 2-<https://trailblazer.me/id/vanms>

Team Member 3-<https://trailblazer.me/id/sshree129>

Team Member 4-<https://trailblazer.me/id/vaishu209>

5. ADVANTAGES & DISADVANTAGE

Advantages

1. professionalism. They can take all the drudgery away from you and let you focus on other things (such as content).
2. Risk. They will do a risk analysis, create plans and implement procedures. Then, if something does go wrong, it is usually prepared for and taken care of.
3. Achieve objectives. It is too easy to focus on the details of the event and forget that the intention is to achieve your objectives. An event management company will help with this.
4. Additional options. The company will tell you about other things you may not have thought of which could enhance the experience.
5. Reduce time for finding location.

6. User Friendly GUI.
7. This system is effective and provide best of the cost to user.
8. Save Time In Communication.
9. Efficiently Manage Multiple Events

Disadvantages

1. cost. You need to pay them in addition to other event costs
2. company knowledge. The Event Management come any does not know anything about your company unless you tell them.

6. Application

In order to provide the best assistance to campus event planners, a comprehensive event management system must offer:

- Customized processes & scheduling
- Effortless event updates & tracking
- Resources & documentation
- Mobile on-the-go access
- Hardware & software integrations
- Data security & management
- Custom reporting & dashboards

7. Conclusion

In this project, we made attempt to effectively introduce the concept of event management systems already existing in the society. We then explain the concept of online event management systems which are already present. We describe the proposed system and explain the features implemented by our proposed system .We also give a brief overview of the technologies used during the development of our proposed system. This project can be further refined and extended by introducing new and more innovative features.

8. Future Scope

The future of event management as experts have over the last year and a half thoroughly analyzed all hints towards a more diverse usage of digital technologies to enhance customer experience. While the exact estimates are still uncertain, the many usages and vast opportunities it entails can only mean one thing – event management as we once knew of it has undergone a paradigm shift.

Change is very often received in its initial stages as a challenge, one that needs time to get accustomed and adapt to in the best possible way. The transition from on-ground to digital event management went through a similar process. An industry that thrives off of social interaction and physical networking had to make a drastic change when moved to an online platform. Today, as event professionals are more comfortable with the transition and have gained a clearer understanding of its long term advantages, the future of digital event management looks fantastic to say the least.