

# **GUIDED PROJECT**

## **EVENT MANAGEMENT APP USING SALESFORCE**

**Link to document:**

<https://drive.google.com/file/d/13ecE8hxxv-RSs2AjD2fNYx9mejr3M8zk/view?usp=sharing>



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## **1. INTRODUCTION**

The Salesforce Event Management project is a comprehensive solution designed to streamline and optimize the planning, execution, and analysis of events within an organization. It leverages the power of Salesforce, a leading customer relationship management (CRM) platform, to provide a centralized hub for managing all aspects of event management.

### **1.1 OVERVIEW**

The Salesforce Event Management project encompasses a suite of tools and functionalities that enable organizations to efficiently plan, coordinate, and execute various types of events, such as conferences, trade shows, seminars, webinars, and more. It encompasses the entire event lifecycle, from initial planning and registration to post-event analysis and reporting.

### **1.2 PURPOSE**

The purpose of the Salesforce Event Management project is to streamline and automate the event management process, ensuring a seamless experience for both event organizers and attendees.

## **2. LITERATURE SURVEY**

Event management is a crucial aspect of any organization, involving the planning, execution, and evaluation of events such as conferences, trade shows, seminars, and corporate meetings. Salesforce, a leading customer relationship management (CRM) platform, offers robust event management capabilities to help businesses streamline their event processes and enhance attendee experiences. This literature survey provides an overview of the key features, benefits, and challenges associated with the Salesforce event management process.

Salesforce Event Management Features:

2.1 Event Planning and Registration: Salesforce provides comprehensive tools for event planning and registration, allowing businesses to create event websites, design registration forms, and manage attendee data.

2.2 Attendee Management: Salesforce event management facilitates attendee management by capturing and storing attendee information, tracking registrations, and managing attendee communications.

2.3 Mobile Event Apps: Salesforce event management can integrate with mobile event apps, allowing attendees to access event information, agendas, speaker details, and networking opportunities through their mobile devices.

When it comes to event management using Salesforce, there are several approaches and methods you can employ to solve the problem effectively. Here are a few existing approaches commonly used:

**Customization with Salesforce Event Management:** Salesforce provides a robust platform with various customization options to tailor event management processes to your specific needs. You can create custom objects, fields, and workflows to track and manage events. Additionally, you can leverage Salesforce's automation tools like Process Builder, Flow, or Apex to automate event-related tasks and streamline processes.

**Salesforce AppExchange:** The Salesforce AppExchange offers a wide range of pre-built applications and integrations specifically designed for event management. These apps provide functionalities such as event registration, ticketing, attendee management, event marketing, and more. You can explore the AppExchange marketplace to find a suitable app that aligns with your requirements and integrates seamlessly with Salesforce.

**Third-Party Integrations:** Apart from the AppExchange, you can integrate Salesforce with third-party event management tools or platforms. This allows you to leverage specialized event management software while still utilizing Salesforce for other business processes. Common integrations include syncing attendee data, registration information, and event analytics between Salesforce and external systems.

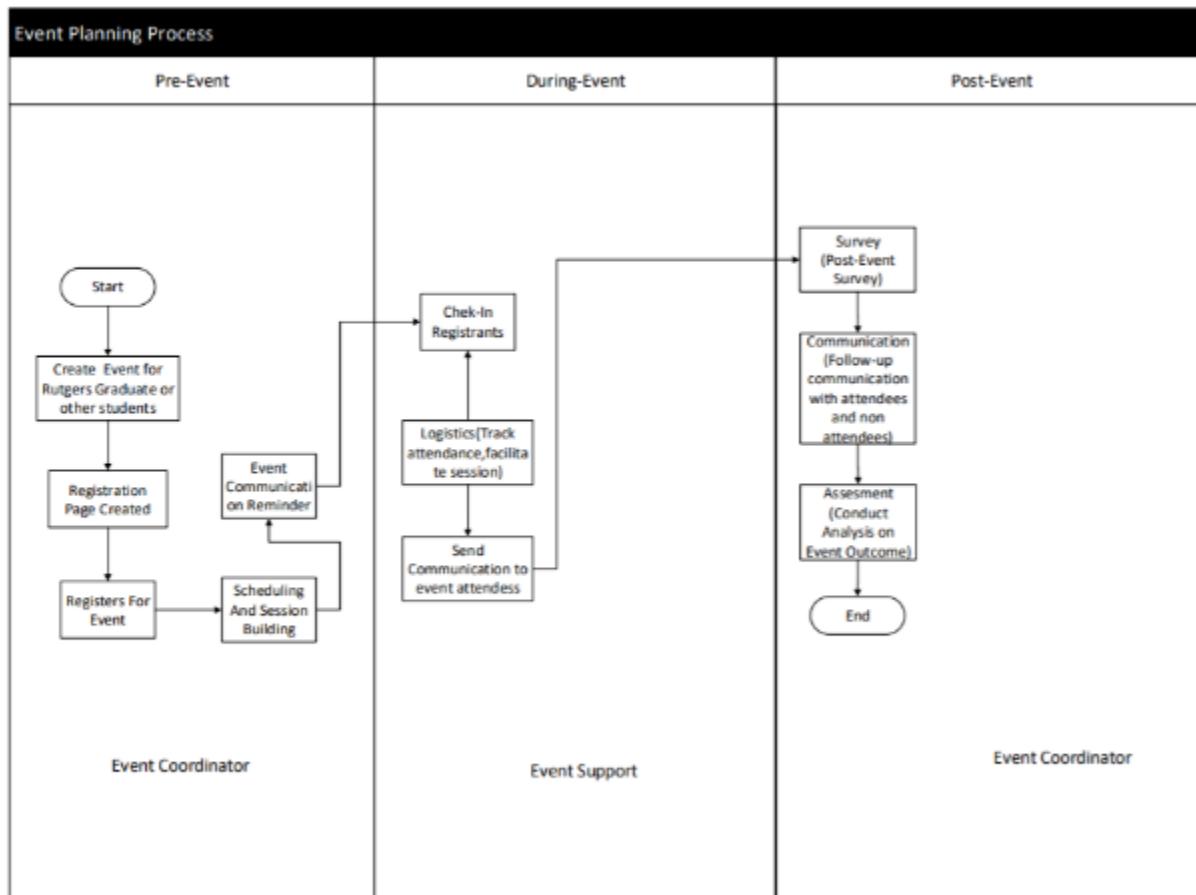
**Community and Customer Portals:** Salesforce provides community and customer portals that allow you to create self-service platforms for event registration, ticketing, and attendee management. These portals enable individuals or organizations to register for events, view event details, make payments, and interact with event organizers directly. By providing a seamless user experience, you can enhance engagement and simplify event management tasks.

**Reporting and Analytics:** Salesforce offers robust reporting and analytics capabilities that can be leveraged to gain insights into event performance. You can create custom reports and dashboards to track attendee registrations, revenue, event success metrics, and more. Analyzing this data helps you make informed decisions, identify areas for improvement, and optimize your event management strategies.

**Salesforce Mobile App:** The Salesforce mobile app allows you to manage events on the go. You can access event-related data, update attendee information, communicate with stakeholders, and perform essential tasks using your mobile device. This ensures that you have real-time visibility and control over your events, even when you are not at your desk.

### 3. THEORETICAL ANALYSIS

#### 3.1 BLOCK DIAGRAM



#### 3.2 SOFTWARE REQUIREMENTS

Server Infrastructure: Determine the server infrastructure based on factors such as expected user load, data storage requirements, and integration needs. This could include servers, networking equipment, and storage devices.

Client Machines: Ensure that the client machines meet the minimum system requirements to access and use Salesforce. This includes having compatible operating systems, web browsers, and sufficient processing power and memory.

Salesforce Licenses: Acquire the necessary Salesforce licenses for the event management project, based on the number of users and required functionalities. Salesforce offers various editions with different features, such as Sales Cloud, Service Cloud, or Marketing Cloud.

Salesforce AppExchange: Explore and select relevant applications from the Salesforce AppExchange marketplace that can enhance event management capabilities, such as event planning, ticketing, attendee management, or reporting tools. Integration Tools: Identify any third-party systems or applications that need to be integrated with Salesforce for event management. This could include email marketing tools, payment gateways, customer relationship management (CRM) systems, or event registration platforms.

Development Tools: If customization or development is required for the project, ensure access to development tools such as Salesforce Developer Console, Salesforce Extensions for Visual Studio Code, or other compatible Integrated Development Environments (IDEs).

Mobile Devices: Consider mobile device compatibility if the event management project requires access to Salesforce functionality on smartphones or tablets. Ensure that the Salesforce mobile app is compatible with the targeted devices' operating systems.

## **4. EXECUTION AND RESULTS**

### **Build An Event Management System:**

The Event Management System using Salesforce is a project that involves developing a customized solution for managing events using the Salesforce platform. It includes features such as event registration, attendee management, scheduling, and reporting, all integrated within the Salesforce CRM. This system can be used by event organizers to streamline their event management processes and improve their efficiency in organizing events.

There are five different types of Salesforce editions available:

Essentials: Designed for small businesses that are starting to use CRM to enhance their sales or service productivity. It offers a setup assistant and administration tools that can be customized as your business grows.

Professional: Tailored for businesses that require comprehensive CRM functionality. It provides user-friendly customization, integration, and administration tools to support small to midsize deployments.

Enterprise: Geared towards large and complex businesses, meeting their specific needs. It offers advanced customization and administration tools, along with all the features available in the Professional Edition. It is suitable for large-scale deployments and includes access to Salesforce APIs for seamless integration with back-office systems.

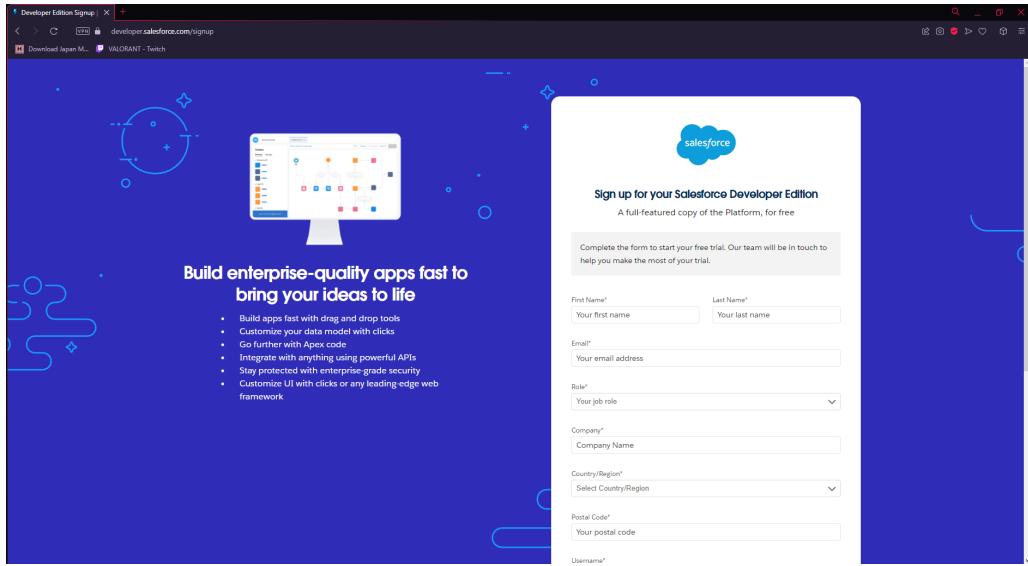
Unlimited: Designed to maximize success across the entire enterprise using the Lightning Platform. It provides enhanced platform flexibility for managing and sharing information on demand. The Unlimited Edition includes all the functionality of the Enterprise Edition, along with Premier Support, full mobile access, unlimited custom apps, increased storage limits, and other features.

Developer: Specifically designed for developers, granting them access to the Lightning Platform and APIs. It allows developers to extend Salesforce, integrate with other applications, and create new tools and applications. The Developer Edition also offers access to many features available in the Enterprise Edition.

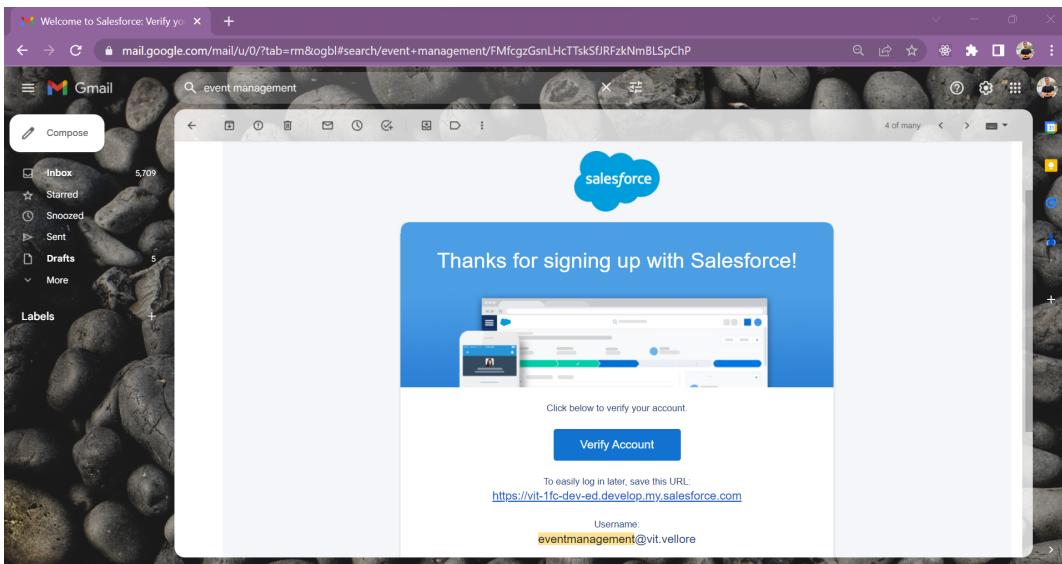
#### **4.1 Creating A Salesforce Developer Org:**

A Developer org has all the features and licenses you need to get started with Salesforce.

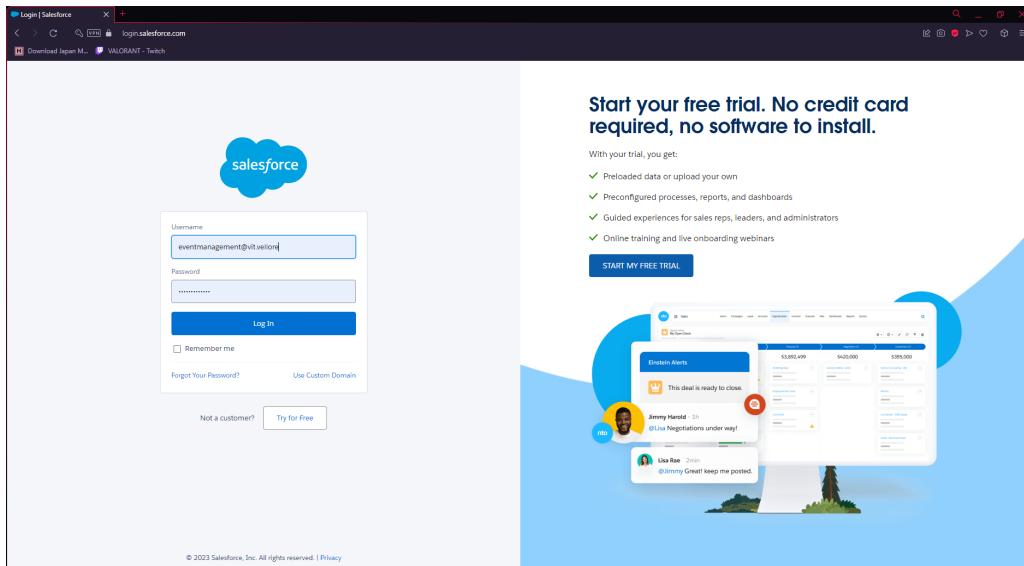
- i. Search [Developer.salesforce.com](https://developer.salesforce.com)



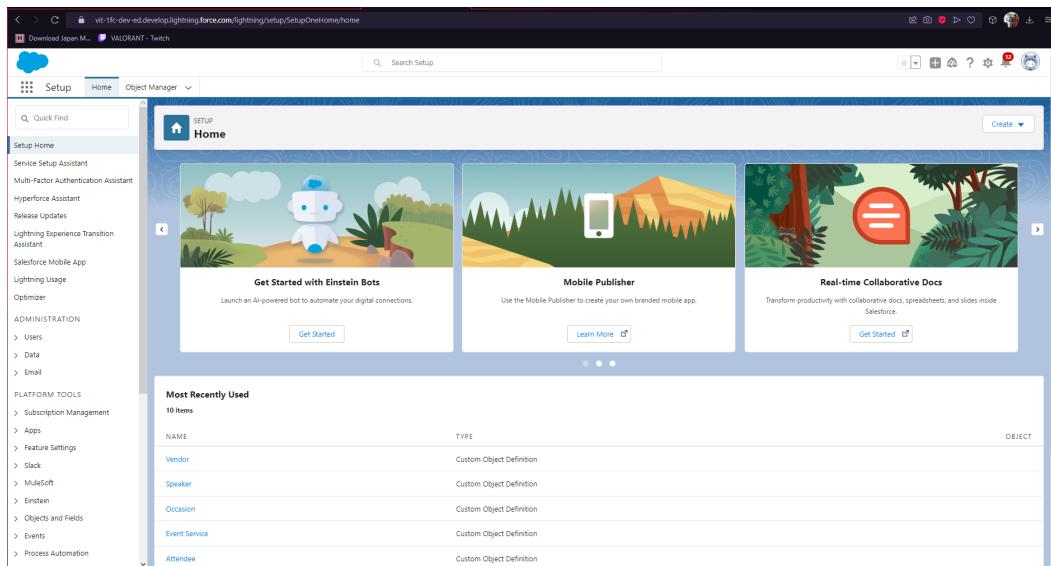
- ii. Enter the following details like First name, last name, Email, Role, Company, Country/Region, Postal code, and Username must be unique.
- iii. Click sign me up, after a few min you will reserve a mail salesforce org and by using the verify account link you can create your new password.



- iv. Click save.
- v. Search [login.salesforce.com](https://login.salesforce.com)
- vi. By using username and password you can login to the salesforce org.



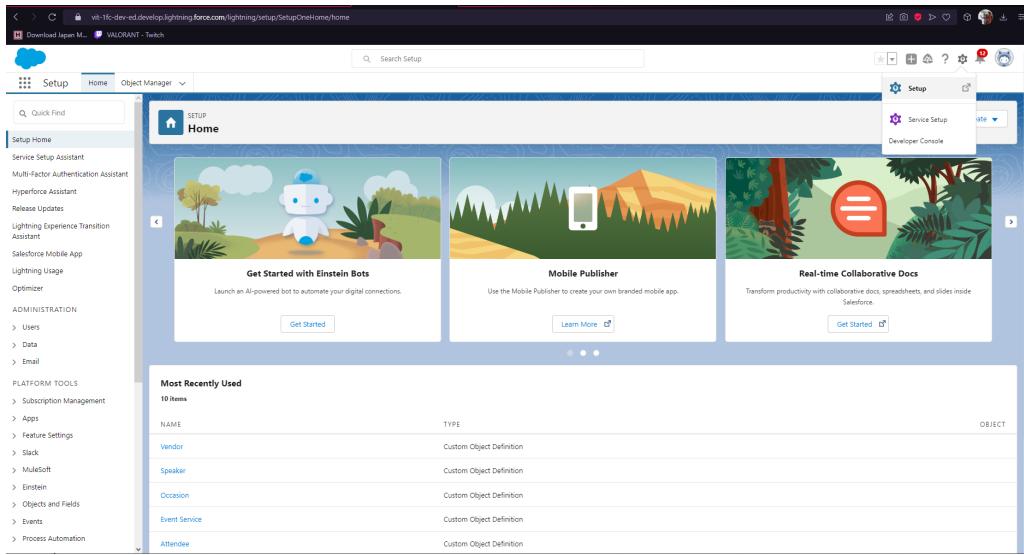
vii. The setup page will appear as below



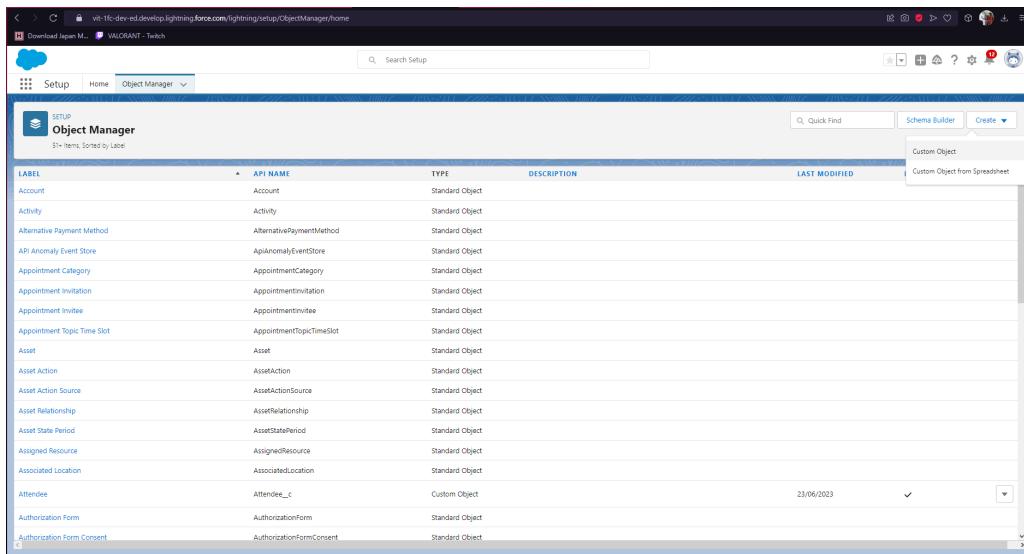
## 4.2 Creating Objects for Event Management:

Salesforce objects are database tables that permit you to store data that is specific to an organization. It consists of fields (columns) and records (rows). Salesforce objects are of two types - Standard Objects and Custom Objects. For this Event management, we need to create 4 objects : Occasion, Attendees, Speakers, and vendors. The below steps are provided to create those objects.

i. Click on the gear icon on the top right corner and then select Setup.



ii. After that, on the extreme right you will find a Create Dropdown button. Click on that and select Custom Object.



iii. On the Custom Object Definition page, create the Occasion object as follows:

Label: Occasion

Plural Label: Occasions

Record Name: Event Name

Check the Allow Reports checkbox

Check the Allow Search checkbox

Click Save.

New Custom Object

Custom Object Definition Edit

Custom Object Information

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

Label: Occasion Example: Account

Plural Label: Occasions Example: Accounts

Starts with vowel sound:

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

Object Name: Occasion 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:

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: Occasion Name Example: Account Name

Data Type: Text

Optional Features

Allow Reports  Allow Activities  Track Field History

- iv. Using the same steps given above, create the Custom Object Attendees with the following details:

Label: Attendee

Plural Label: Attendees

Record Name: Attendee Name

Check the Allow Reports checkbox

Check the Allow Search checkbox

Click Save.

New Custom Object

Custom Object Definition Edit

Custom Object Information

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

Label: Attendee Example: Account

Plural Label: Attendees Example: Accounts

Starts with vowel sound:

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

Object Name: Attendee 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:

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: Attendee Name Example: Account Name

Data Type: Text

Optional Features

Allow Reports  Allow Activities  Track Field History

- v. Using the same steps given above, create the Custom Object Speaker as follows:

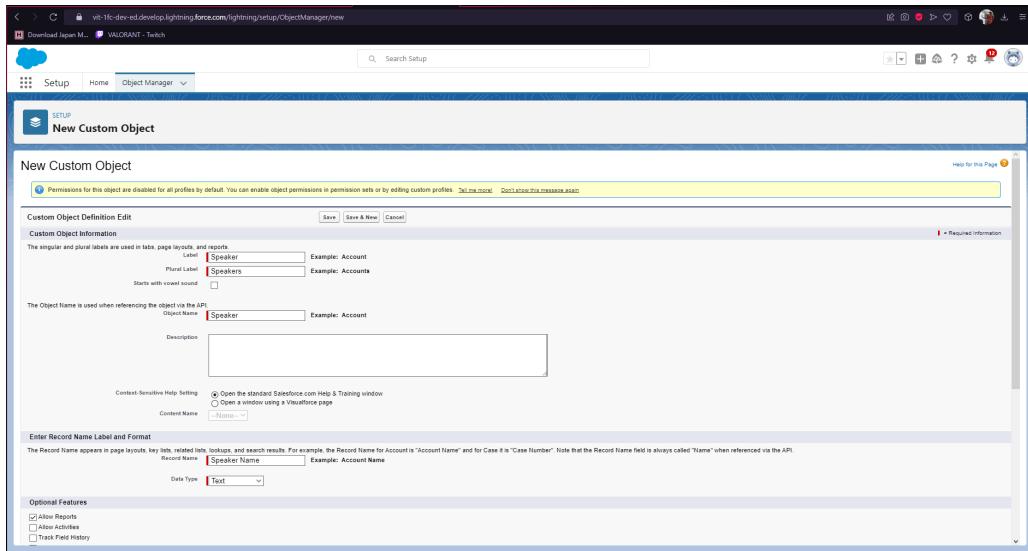
Label: Speaker

Plural Label: Speakers

Record Name: Speaker Name

Check the Allow Reports checkbox

Check the Allow Search checkbox and Click Save.



The screenshot shows the 'New Custom Object' page in the Salesforce Setup. The object name is 'Speaker'. The 'Label' field is set to 'Speaker' and the 'Plural Label' field is set to 'Speakers'. The 'Optional Features' section has the 'Allow Reports' checkbox checked. The 'Save & New' button is visible at the top right.

vi. Using the same steps given above, create the Custom Object Vendor as follows:

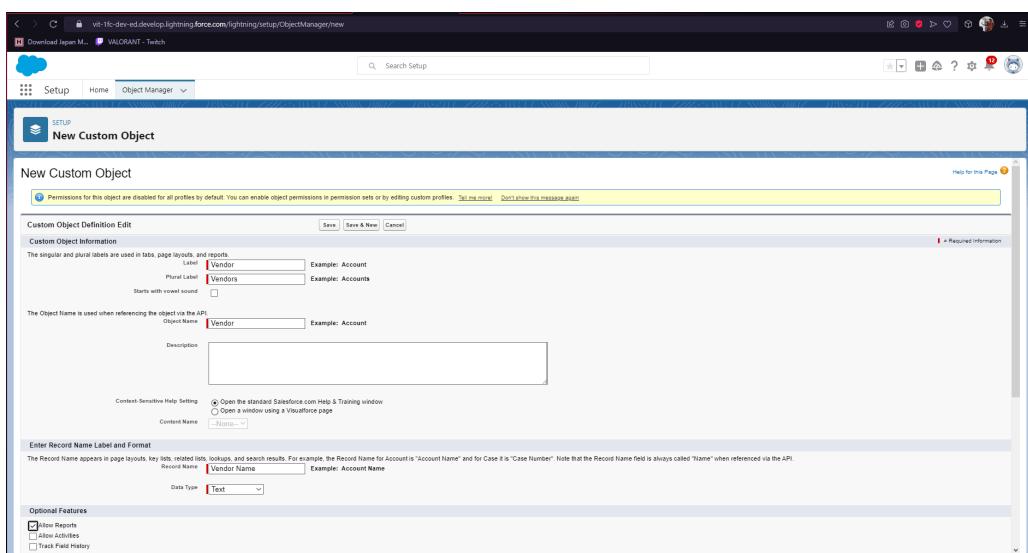
Label: Vendor

Plural Label: Vendors

Record Name: Vendor Name

Check the Allow Reports checkbox and the Allow Search checkbox

Click Save



The screenshot shows the 'New Custom Object' page in the Salesforce Setup. The object name is 'Vendor'. The 'Label' field is set to 'Vendor' and the 'Plural Label' field is set to 'Vendors'. The 'Optional Features' section has both the 'Allow Reports' and 'Allow Search' checkboxes checked. The 'Save & New' button is visible at the top right.

vi. Using the same steps given above, create the Custom Object Event Service as follows:

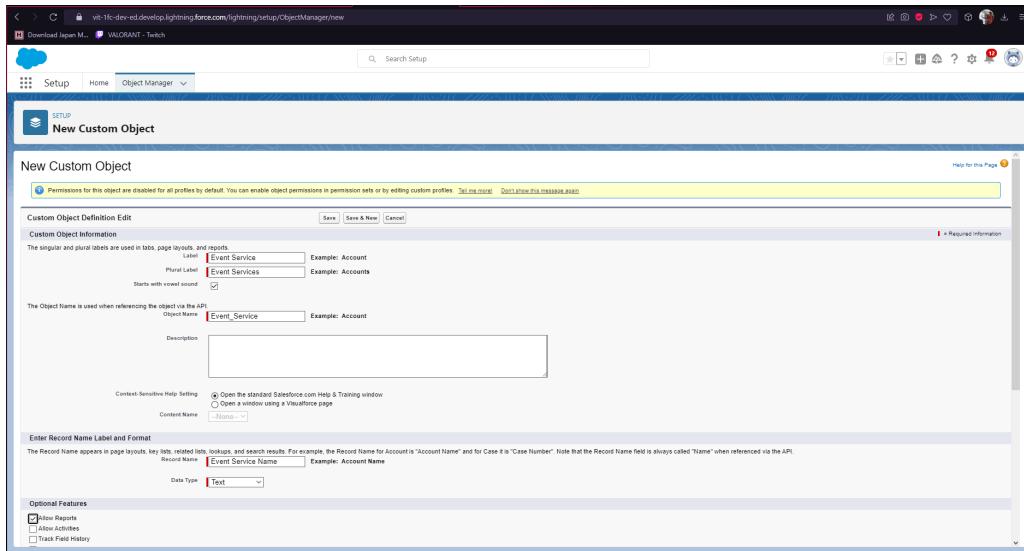
Label: Event Service

Plural Label: Event Services

Record Name: Event Services Name

Check the Allow Reports checkbox the Allow Search checkbox

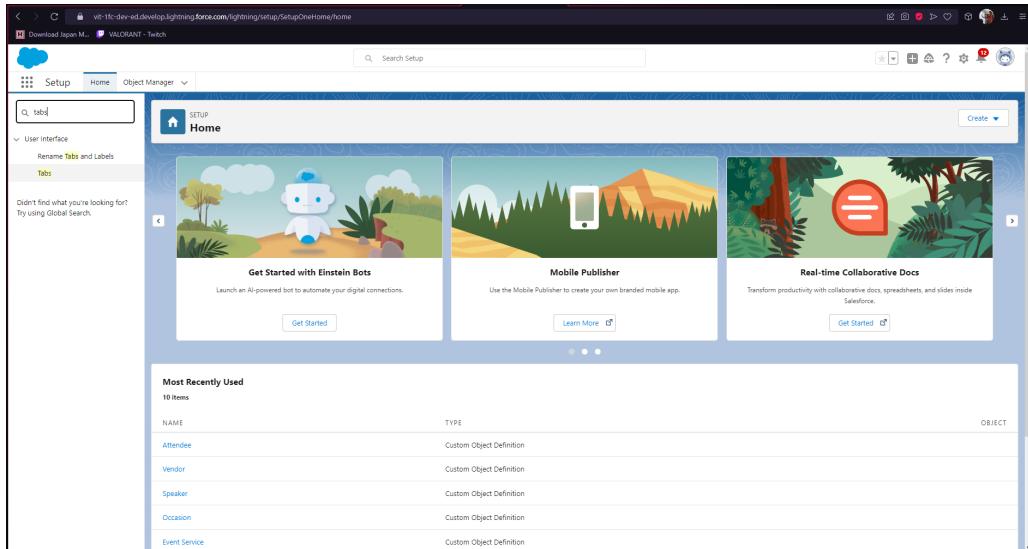
Click Save



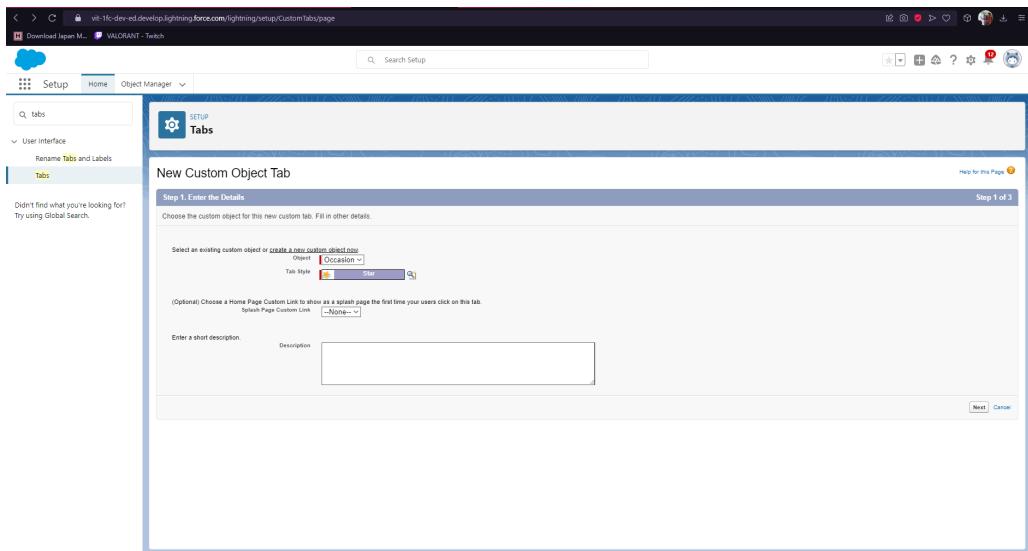
### 4.3 Creating Tabs of the Objects:

Tabs in Salesforce help users view the information at a glance. It displays the data of objects and other web content in the application. There are mainly 4 types of tabs: Standard Object Tabs, Custom Object Tabs, Web Tabs and Visualforce Tabs. We will be creating custom tabs for all the custom objects that we have made.

i. Click on the Home tab, enter Tabs in Quick Find and select Tabs.



ii. Under custom object tabs, click New.

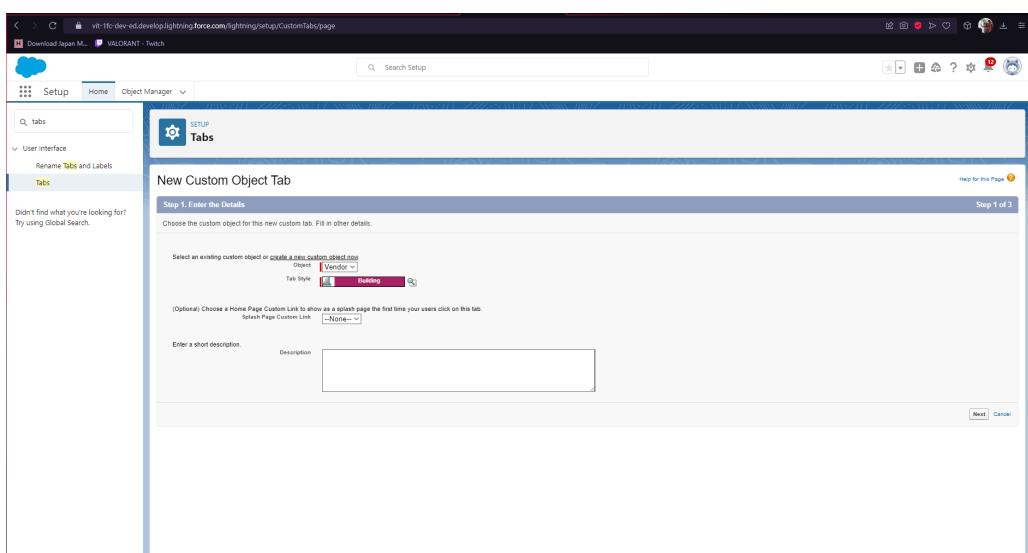
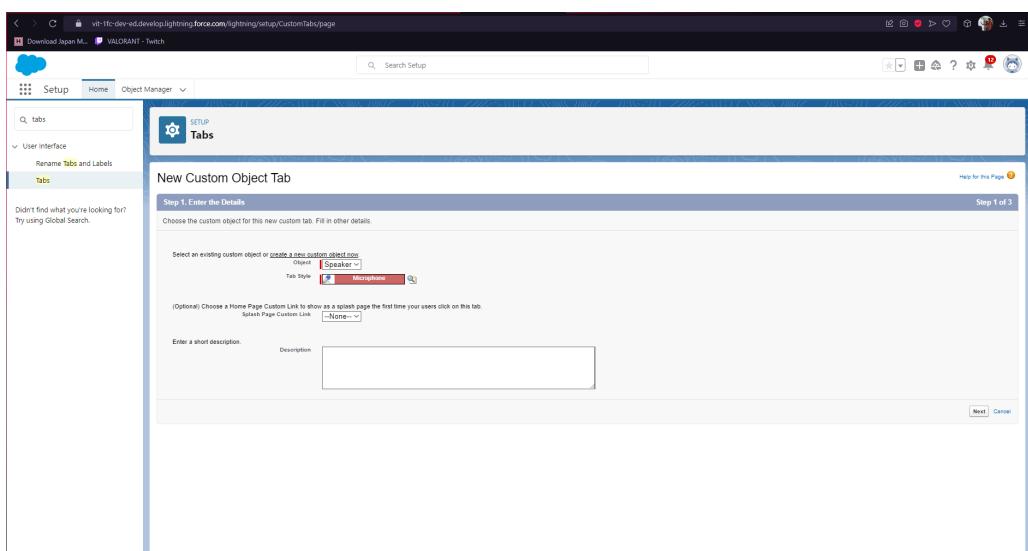
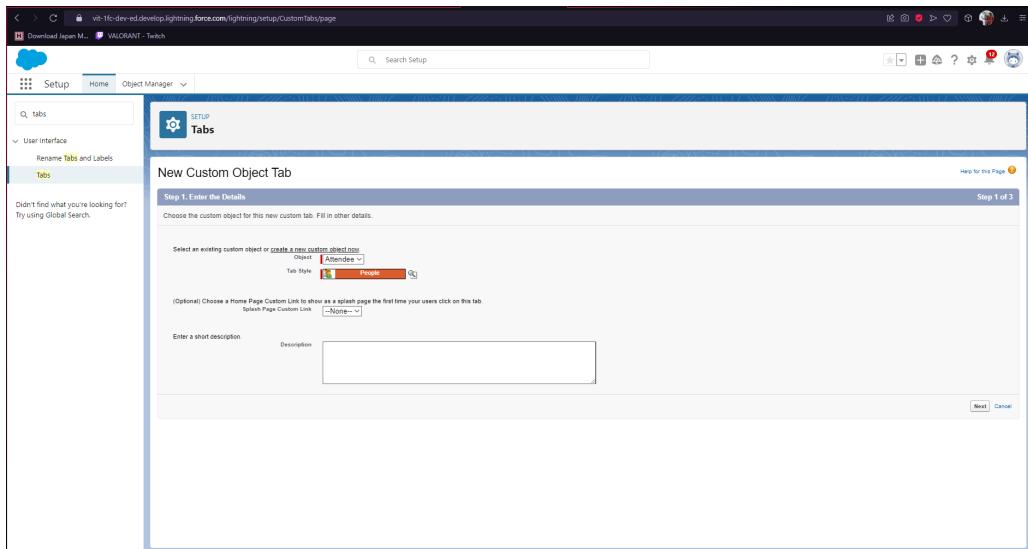


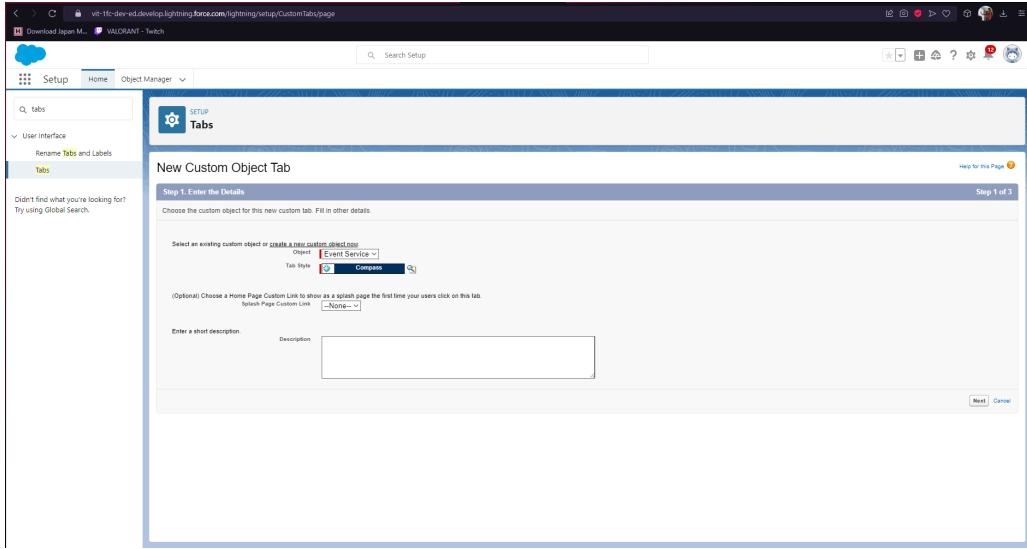
iii. For Object, select Occasion.

iv. For Tab Style, select any icon.

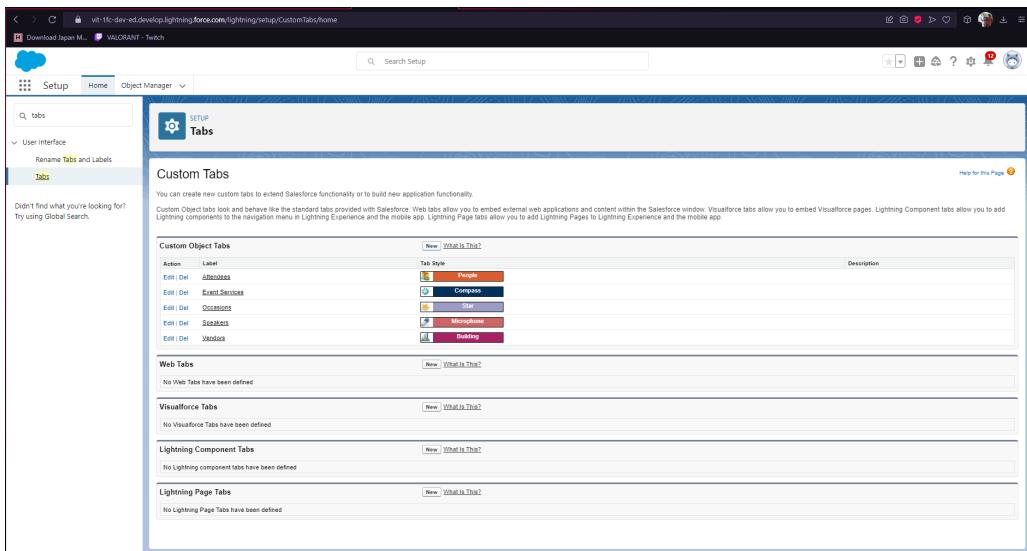
v. Leave all defaults as is. Click Next, Next, and Save.

vi. Follow the same above steps to create the custom Attendee, Speaker, Vendor and Event Service Tabs.





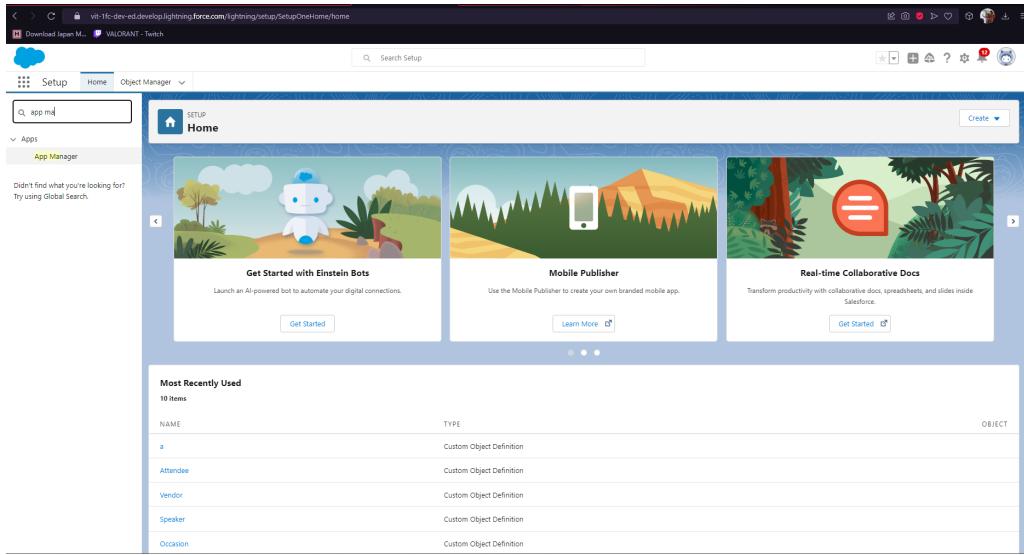
vi. After the creation of all the tabs, we can see them in the custom tabs list as shown below.



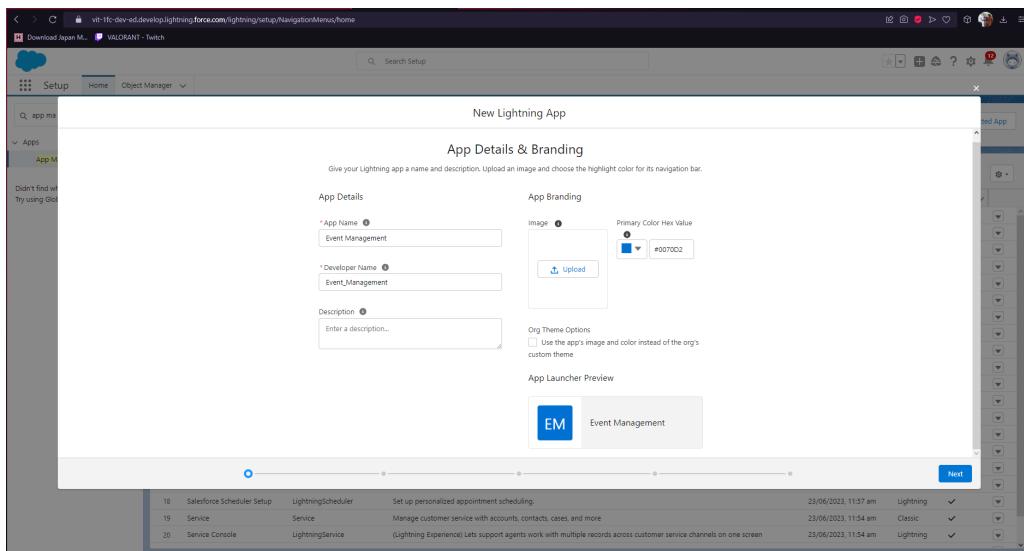
#### 4.4 Creating the Event Management Lightning App:

Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. There are two types of Salesforce Applications: Standard Apps and Custom Apps.

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



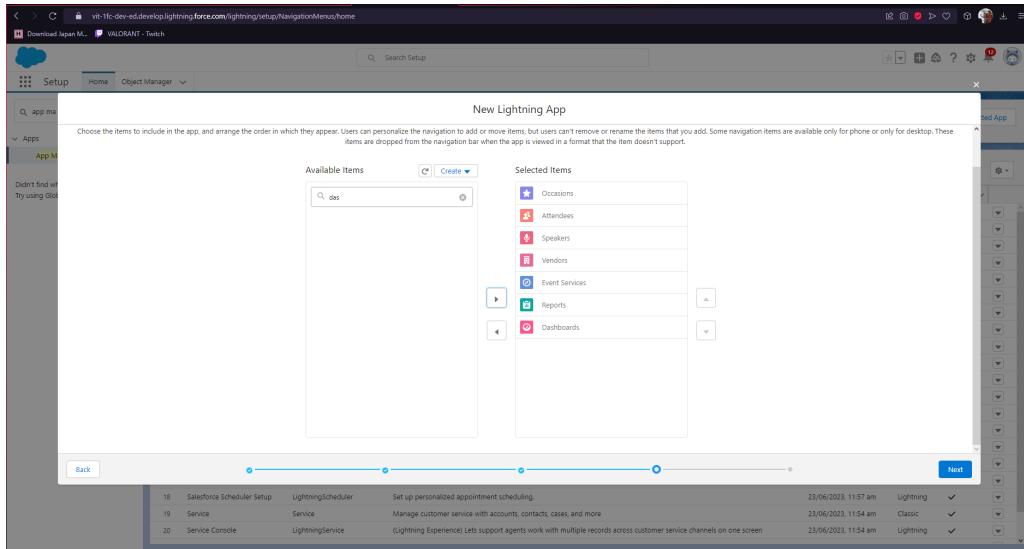
ii. Click New Lightning App. Enter Event Management as the App Name, then click Next.



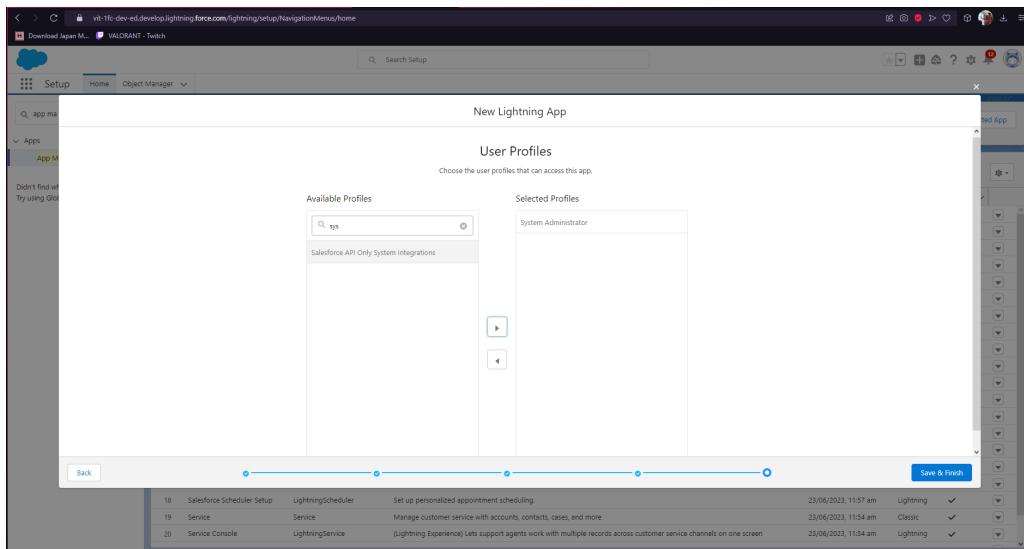
iii. Under App Options, leave the default selections and click Next.

iv. Under Utility Items, leave as is and click Next.

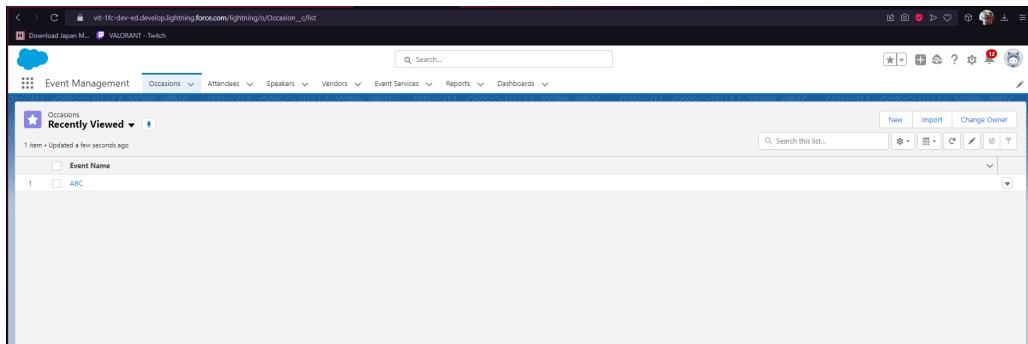
v. From Available Items, select Occasions, Attendees, speakers, vendors, Event Service, Reports and Dashboards and move them to Selected Items. Click next.



vi. From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.



vii. To verify your changes, click the App Launcher, type Event Management and select the Event Management app.

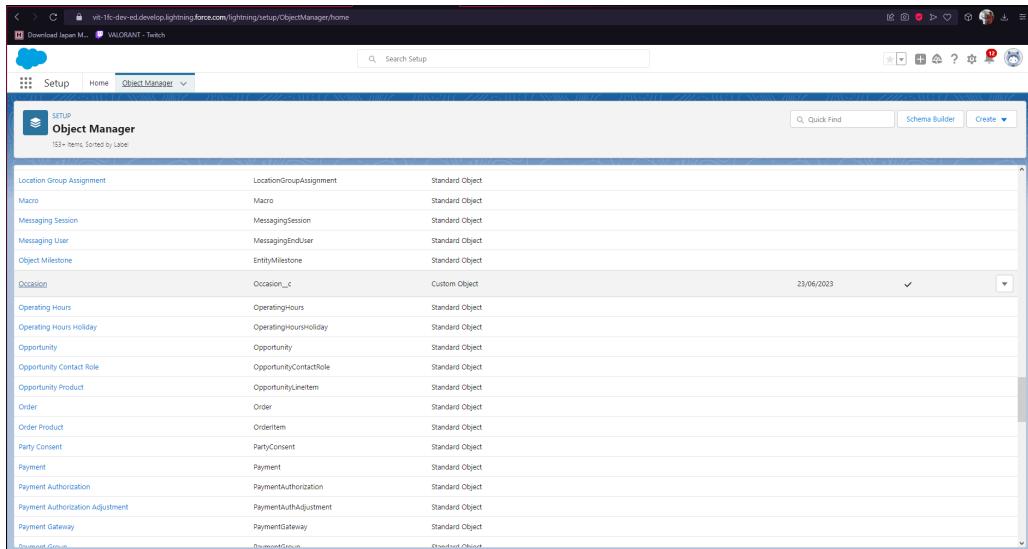


## 4.5 Creating Field and Relationships for the Objects:

Fields in Salesforce represent what the columns represent in relational databases. It can store data values which are required for a particular object in a record. There are two types of fields: Standard fields and Custom fields. We will be making custom fields for the custom objects which we have defined.

### I. Creation of fields for the Occasion Object:

- Click the gear icon and select Setup. This launches Setup in a new tab.
- Click the Object Manager tab next to Home.
- Select Occasion.



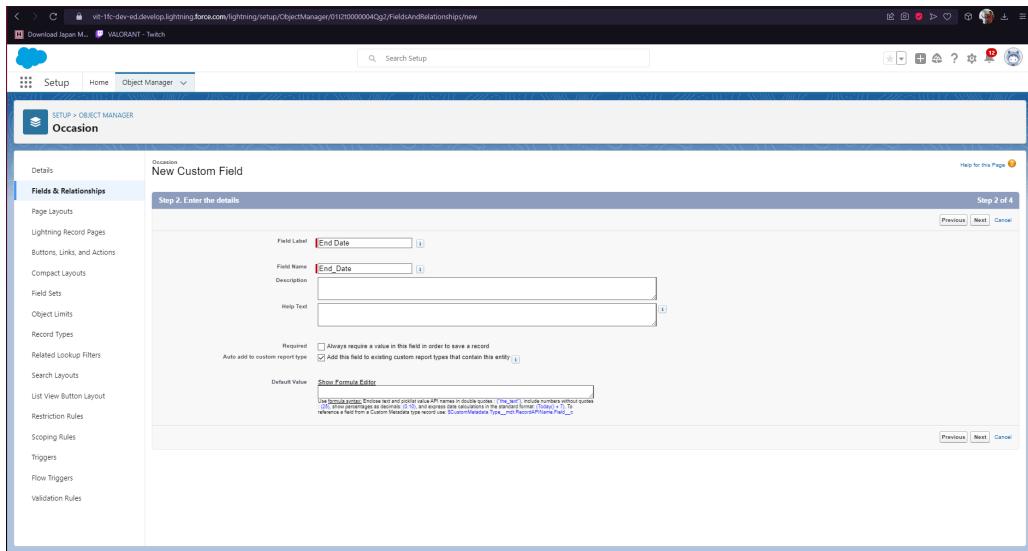
- Select Fields & Relationships from the left navigation, and click New.

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

v. For Field Label, enter City. And length (20).

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

vi. Similarly create an End Date field also.

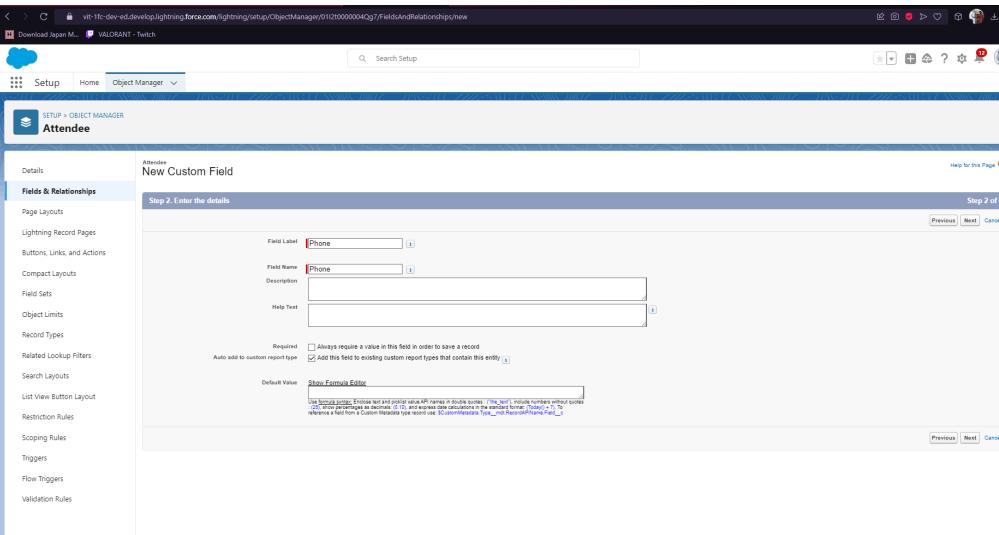


## II. Creation of fields for the Attendees Object:

- i. Follow steps i to iv from I
- ii. Select the Auto number as the Data Type, then click Next. For Field Label, enter Id. & starting number(0001)
- iii. Click Next, Next, then Save & New

The screenshot shows the Salesforce Setup Object Manager interface for creating a new custom field. The left sidebar lists various setup categories: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Triggers, Flow Triggers, and Validation Rules. The main content area is titled 'Attendee' and 'New Custom Field'. It is Step 2 of 4, titled 'Enter the details'. The field label is 'Id', display format is '0001', starting number is '0001', and field name is 'Id'. The description and help text fields are empty. Under 'External ID', the 'Set this field as the unique record identifier from an external system' checkbox is unchecked. Under 'Auto add to custom report type', the 'Add this field to existing custom report types that contain this entry' checkbox is checked. Navigation buttons at the bottom include 'Previous', 'Next', and 'Cancel'.

- iv. Select the phone as the Data Type, then click Next. For Field Label, Phone.
- v. Click Next, Next, then Save & New



The screenshot shows the Salesforce Setup interface for creating a new custom field. The left sidebar is titled 'Attendee' and lists various object settings: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Scoping Rules, Triggers, Flow Triggers, and Validation Rules. The main content area is titled 'Attendee New Custom Field' and is on 'Step 2: Enter the details'. The field is named 'Phone' with a label 'Phone'. It is a required field ('Always require a value in this field in order to save a record') and is added to existing report types. The 'Default Value' is set to 'Show Formula Editor' with the formula: `Use formula editor. Enclose text and picker value API names in double quotes ( "Text" ) or include numbers without quotes ( 12345 ). To reference a field from a custom metadata type record use <CustomMetadataType>__r.<field> or <CustomMetadataType>__r.<field>_label. To reference a field from a Custom Metadata Type record use <CustomMetadataType>__r.<field>_label.`. The top right shows 'Step 2 of 4' with 'Previous', 'Next', and 'Cancel' buttons. The top navigation bar includes the URL 'vt-lfc-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01l200000040g7/FieldsAndRelationships/new', the user 'VALORANT - Twitch', and various global navigation icons.

- vi. Select the Email as the Data Type, then click Next. For Field Label, enter Email.
- vii. Click Next, Next, then Save & New

viii. Select Picklist as the Data Type and click Next.

ix. For Field Label enter Tickets. Select Enter values, with each value separated by a new line and enter these values:

## Premium

Gold

## Silver

x. Click Next, Next, then Save & New

### III. Creation of Master Detail Relationship with the Occasion Object:

### i. Click fields & relationships and click new

ii. Select Master relationship & click next

iii. Choose the related object as Occasion & click next Give the field label(Event Name) & click next, next, next and Save.

**Step 1. Choose the field type**

Specify the type of information that the custom field will contain.

**Data Type**

None Selected

Select one of the data types below.

Auto Number

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-up Summary

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a pop-up list. The other object is the source of the values in the list.

Master-Detail Relationship

Creates a master-detail relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The ownership and creation of a detail record are determined by the master record.
- Users can create and edit detail records.
- You can create roll-up summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a pop-up list. The master object is the source of the values in the list.

External Lookup Relationship

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Checkbox

Allows users to select a True (checked) or False (unchecked) value.

Currency

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Date

Allows users to enter a date or pick a date from a visual calendar.

Date/Time

Allows users to enter a date and time, or pick a date from a visual calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Email

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for email entry.

Geolocation

Allows users to define locations, including latitude and longitude components, and can be used to calculate distance.

**Step 2. Choose the related object**

Select the other object to which this object is related.

Related To:

**Step 3. Enter the label and name for the lookup field**

Field Label:

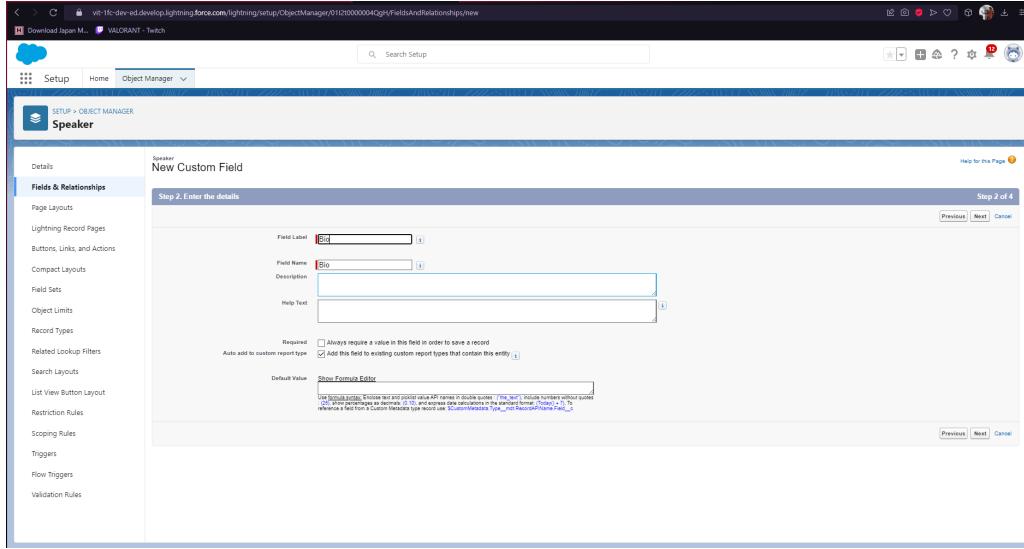
Field Name:

Description:

Help Text:

#### IV. Creation of fields for the Speakers Object:

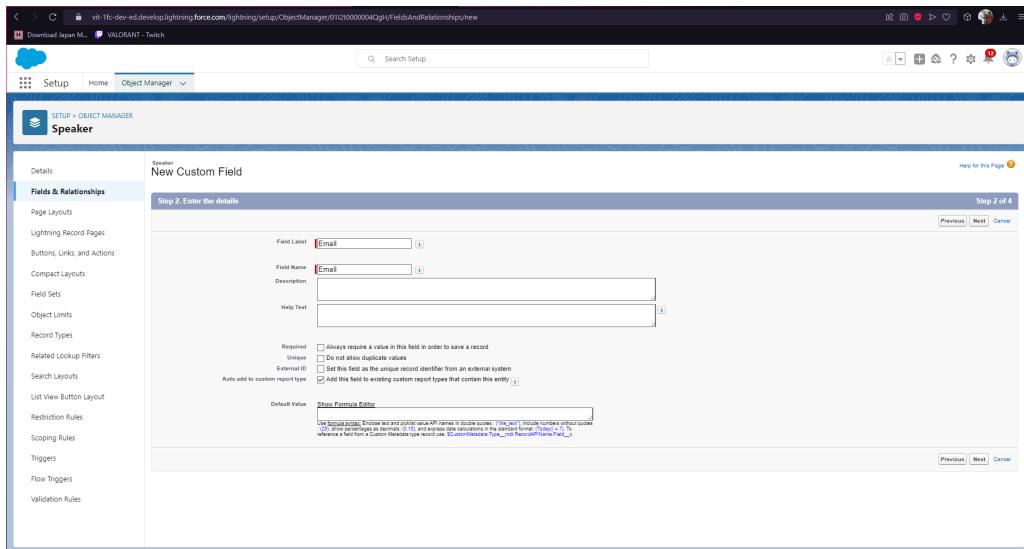
- i. Select the Text Area as the Data Type, then click Next. For Field Label, enter Bio.
- ii. Click Next, Next, then Save & New.



The screenshot shows the 'New Custom Field' page in the Salesforce Setup Object Manager. The 'Field Label' is set to 'Bio', 'Field Name' is 'Bio', and 'Required' is checked. The 'Description' and 'Help Text' fields are empty. The 'Auto add to custom report type' section is visible, and the 'Default Value' section shows a formula editor with a placeholder for a formula. Navigation buttons 'Previous', 'Next', and 'Cancel' are at the bottom right.

- iii. Select the Email as the Data Type, then click Next. For Field Label, Email.

- iv. Click Next, Next, then Save & New.



The screenshot shows the 'New Custom Field' page in the Salesforce Setup Object Manager. The 'Field Label' is set to 'Email', 'Field Name' is 'Email', and 'Required' is checked. The 'Description' and 'Help Text' fields are empty. The 'Auto add to custom report type' section is visible, and the 'Default Value' section shows a formula editor with a placeholder for a formula. Navigation buttons 'Previous', 'Next', and 'Cancel' are at the bottom right.

- v. Select the Phone as the Data Type, then click Next. For Field Label, Phone.

- vi. Click Next, Next, then Save & New.

SETUP > OBJECT MANAGER  
Speaker

New Custom Field

Step 2. Enter the details

Field Label:  Field Name:

Required:  Always require a value in this field in order to save a record.

Auto add to custom report type:  Add this field to existing custom report types that contain this entity.

Default Value:  Show Formula Editor

Step 2 of 4

Previous Next Cancel

- vii. Create a Lookup relationship with the Occasion object. Click fields & relationships and click new
- viii. Select Lookup relationship & click next
- ix. Choose the related object as Occasion & click next
- x. Give the field label(Event Name) & click next, next, next and Save.

SETUP > OBJECT MANAGER  
Speaker

New Relationship

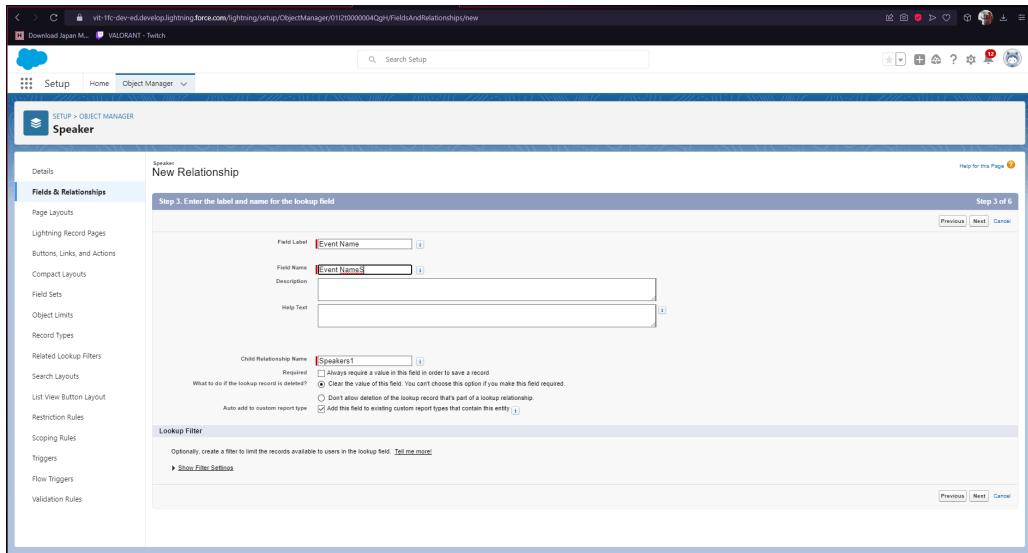
Step 2. Choose the related object

Select the other object to which this object is related.

Related To:

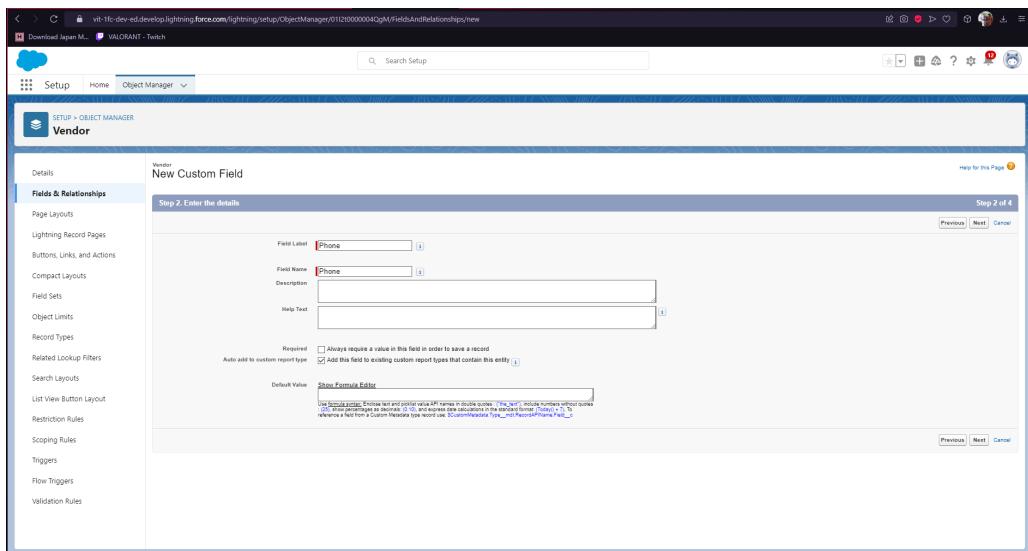
Step 2

Previous Next Cancel



## V. Creation of fields for the Speakers Object:

- i. Select the phone as the Data Type, then click Next. For Field Label, Phone.
  - ii. Click Next, Next, then Save & New.



- iii. Select the Email as the Data Type, then click Next. For Field Label, Email.
  - iv. Click Next, Next, then Save & New.

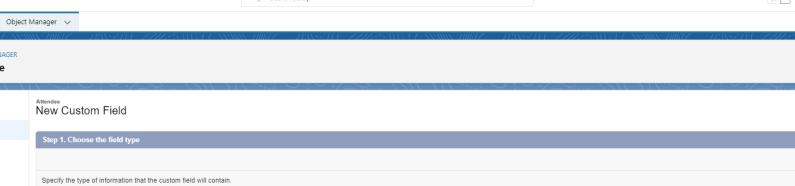
The screenshot shows the 'New Custom Field' page in the Salesforce Setup. The 'Field Label' is set to 'Email' and the 'Field Name' is also 'Email'. The 'Length' is set to 30. The 'Required' checkbox is checked. The 'Description' and 'Help Text' fields are empty. The 'Default Value' field contains a formula editor. The 'Auto add to custom report type' checkbox is checked. The 'Show Formula Editor' button is visible. The 'Step 2 of 4' progress bar is at the top right.

- v. Select the Text as the Data Type, then click Next. For Field Label, enter Service Provider and length (30).
- vi. Click Next, Next, then Save & New.

The screenshot shows the 'New Custom Field' page in the Salesforce Setup. The 'Field Label' is set to 'Service Provider' and the 'Field Name' is also 'Service Provider'. The 'Length' is set to 30. The 'Required' checkbox is checked. The 'Description' and 'Help Text' fields are empty. The 'Default Value' field contains a formula editor. The 'Auto add to custom report type' checkbox is checked. The 'Show Formula Editor' button is visible. The 'Step 2 of 4' progress bar is at the top right.

## VI. Creation of Relationships on Event Service Object:

- i. Create a Master-Detail relationship with the Event Service object.
- ii. Click fields & relationships and click new
- iii. Select Master-Detail relationship & click next
- iv. Choose the related object as Occasion & click next Give the field label(Event Name) & click next, next, next and Save.



Event Service

SETUP > OBJECT MANAGER

Attendee

New Custom Field

Step 1. Choose the field type

Specify the type of information that the custom field will contain.

Data Type

None Selected

Auto Number

Formula

Text 1

Lookup Relationship

Master-Detail Relationship 1

External Lookup Relationship

Checkbox

Currency

Date

DateTime

Email

Geolocation

Search Setup

Help for this Page

Next Cancel

vt-1fc-dev-ed.lightning.force.com/lightning/setup/ObjectManager/0120000004Cg7/FieldsAndRelationships/new

Download Japan M. VALORANT - Twitch

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER

## Event Service

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Attended New Relationship

Step 2. Choose the related object

Select the other object to which this object is related.

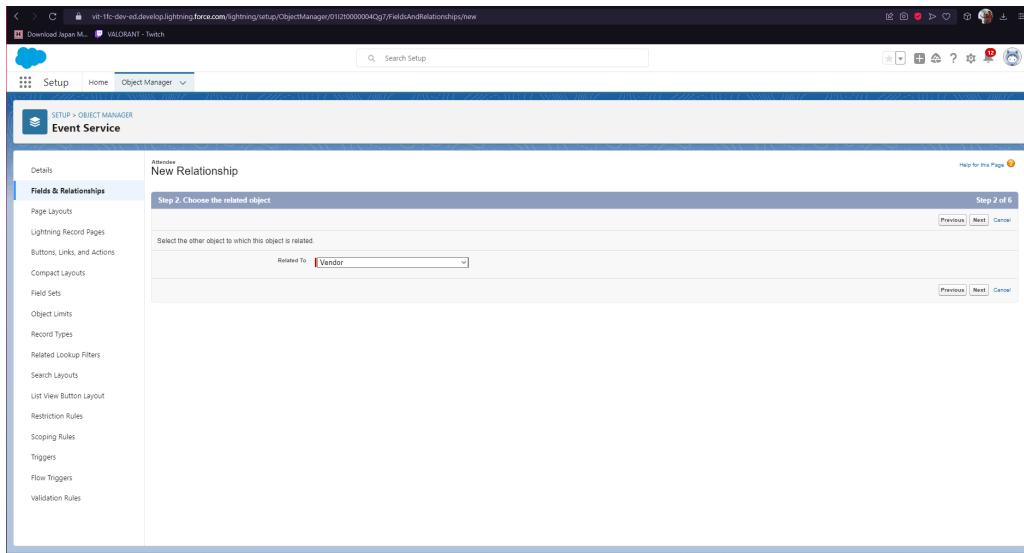
Related To: Occasion

Step 2 of 6

Previous Next Cancel

Help for this Page

- v. Create a Master-Detail relationship with Event Service object
  - vi. Click fields & relationships and click new
  - vii. Select Master-Detail relationship & click next
  - viii. Choose the related object as Vendor & click next
  - ix. Give the field label(Vendor Name) & click next, next, next and Save



## 4.6 Creating Profiles:

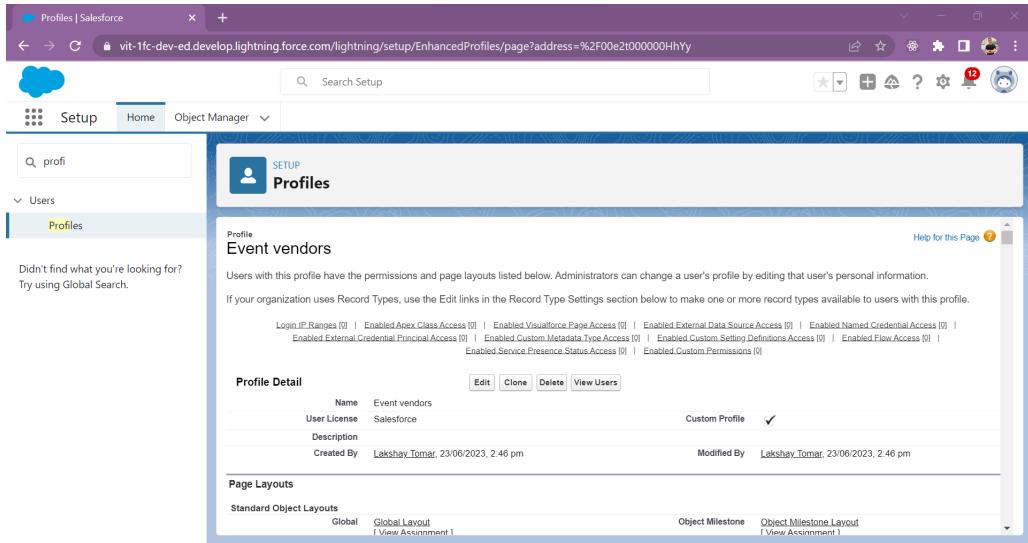
A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges.

- i. From Setup enter Profiles in the Quick Find box, and select Profiles.
- ii. From the list of profiles, find Standard User.
- iii. Click Clone.

- iv. For Profile Name, enter Event user profile and Click Save.
- vi. While still on the Event profile page, then click Edit.
- vii. Scroll down to Custom Object Permissions and Give view all access permissions to the Attendees, speakers and vendors.

- viii. From Setup enter Profiles in the Quick Find box, and select Profiles.
- ix. From the list of profiles, find Standard User.
- x. Click Clone.
- xi. For Profile Name, enter Event vendors profile.
- xii. Click Save.

- xiii. While still on the Event profile page, then click Edit.
- xiv. Scroll down to Custom Object Permissions and Give view all access permissions to the Attendees, speakers and vendors like we did for the Event User Profile.



## 4.7 Creating Users:

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

- i. From setup type “users” in quick find and select users, then click New User.

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

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

| Action               | Full Name        | Alias   | Username   | Role                                | Active                              | Profile                          |
|----------------------|------------------|---------|--|-------------------------------------|-------------------------------------|----------------------------------|
| <a href="#">Edit</a> | Chatter Expert   | Chatter | chatty.00d21000000cy7seae.u40bogofdjqpw@chatter.salesforce.com | <input type="checkbox"/>            | <input type="checkbox"/>            | Chatter Free User                |
| <a href="#">Edit</a> | Gupta_Sanjay     | Sanj    | sanjaygupta@112thesmartbridge.com                              | <input type="checkbox"/>            | <input type="checkbox"/>            | Event user                       |
| <a href="#">Edit</a> | Sharma_Rahul     | Rahus   | rahulsharma@112thesmartbridge.com                              | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Event vendors                    |
| <a href="#">Edit</a> | Tomar_Lakshay    | LToma   | eventmanagement@vit.vellore                                    | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | System Administrator             |
| <a href="#">Edit</a> | User_Integration | integ   | integration@00d21000000cy7seae.com                             | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Analytics Cloud Integration User |
| <a href="#">Edit</a> | User_Security    | sec     | insightssecurity@00d21000000cy7seae.com                        | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Analytics Cloud Security User    |

ii. Enter the following details for the new user

First Name: Sanjay

Last Name: Gupta

Alias: Sanj

Email: provide your personal email id for future reference

Username: sanjaygupta@thesmartbridge.com

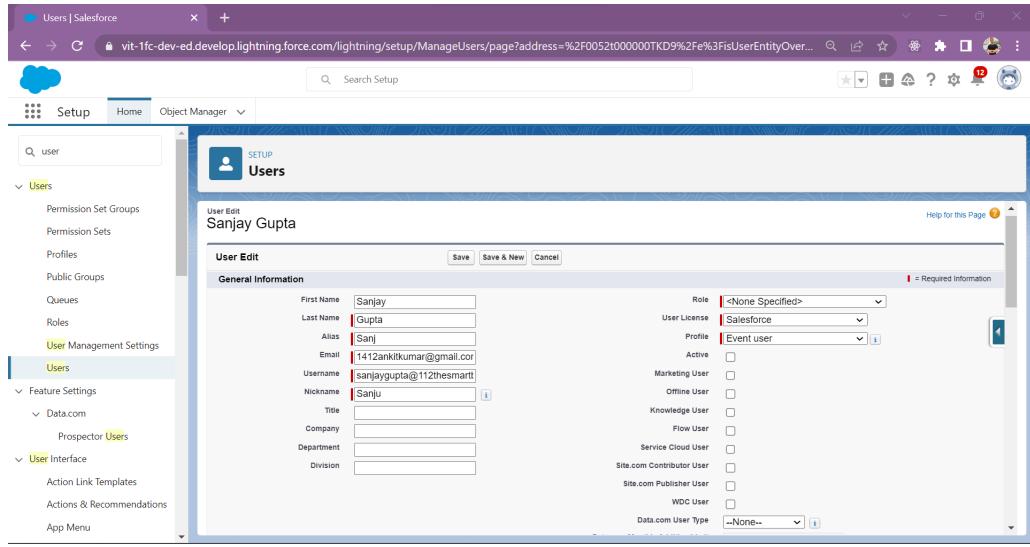
Nickname: Sanju

Role: leave it as default

User License: Salesforce

Profile: Event User Profile

iii. Click on save.



iv. Create a user with a username as “Rahul Sharma”, and assign him the sales executive profile. From setup type “users” in quick find and select users, then click New User and enter the following details:

First Name: Rahul

Last Name: Sharma

Alias: Rahus

Email: provide your personal email id for future reference

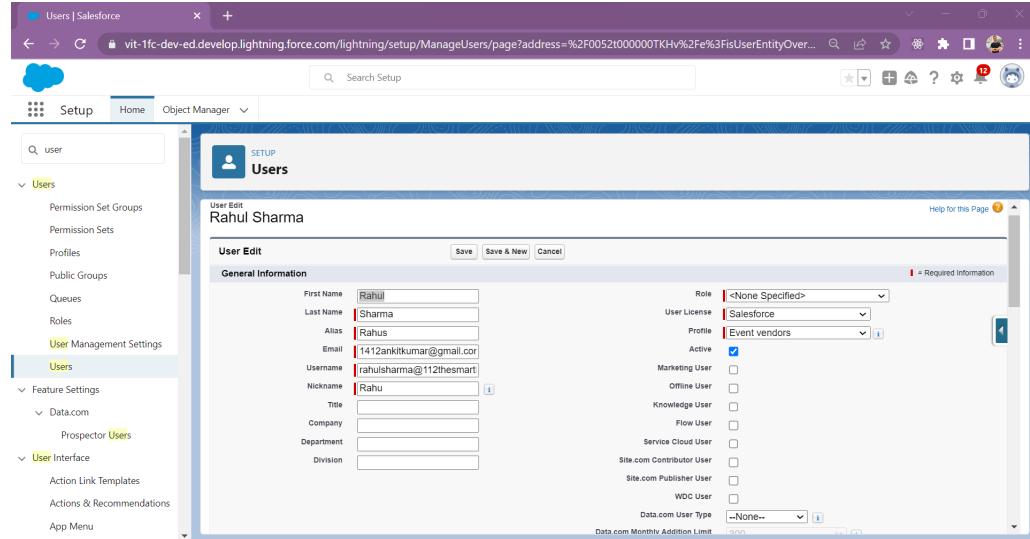
Username: rahulsharma@thesmartbridge.com

Nickname: Rahu

Role: leave it as default

User License: Salesforce Platform

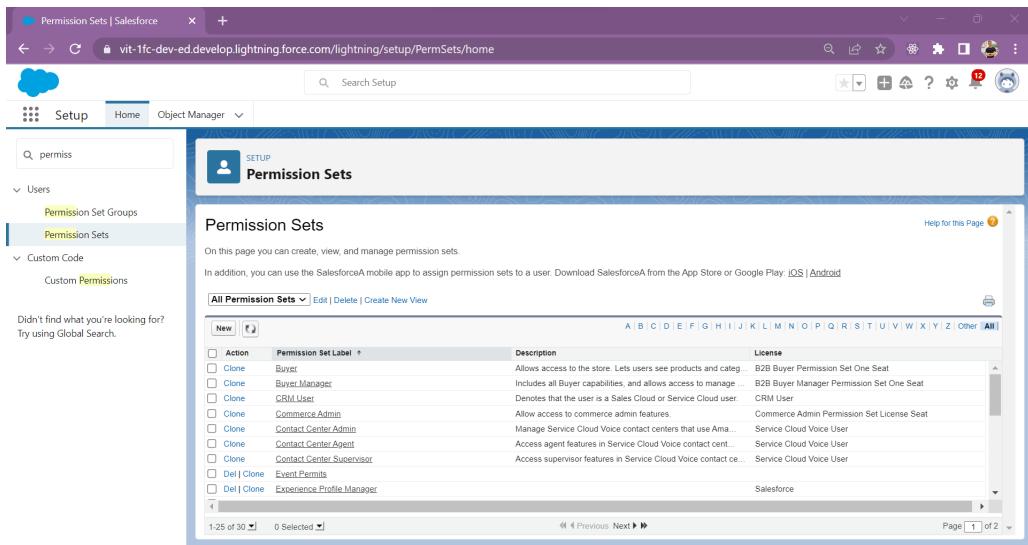
Profile: Event vendors profile



## 4.8 Creating Permission Sets:

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles. Create permission sets to grant access among logical groupings of users, regardless of their primary job function.

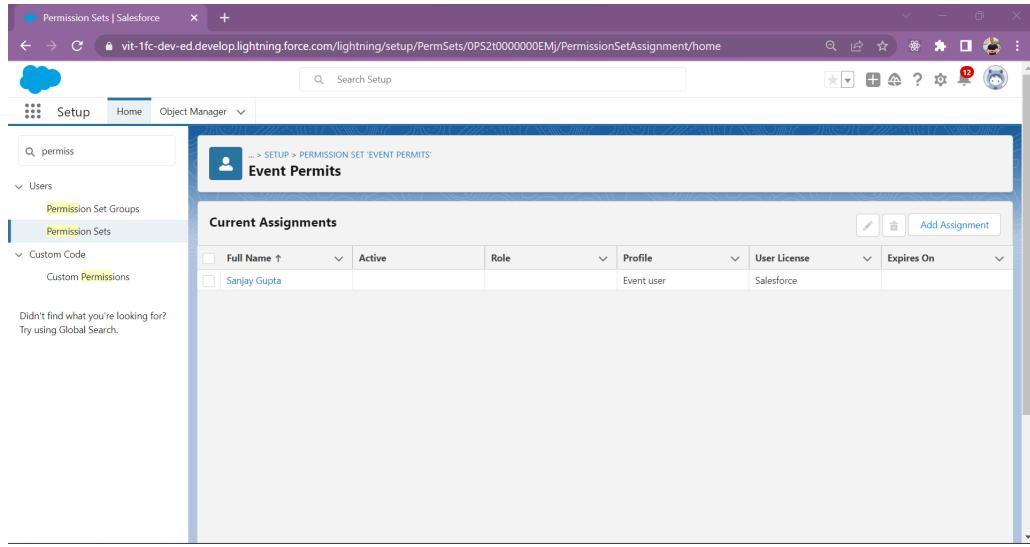
- i. From setup search “permission sets” in quick find and select permission set then click on New.



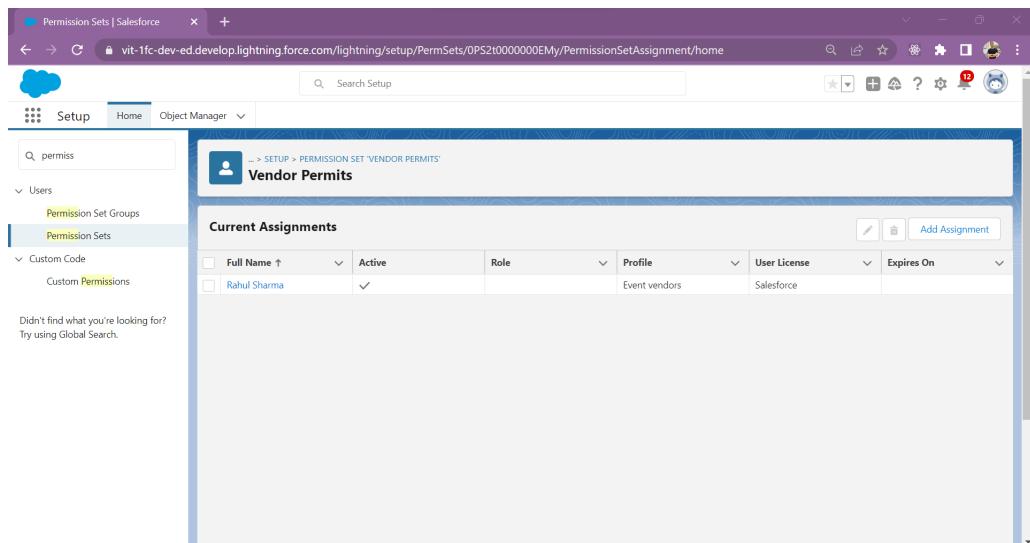
The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page open. The left sidebar shows 'Permission Set Groups' and 'Permission Sets' selected. The main area displays a table of permission sets with columns for Action, Permission Set Label, Description, and License. The table includes rows for various roles like Buyer, Buyer Manager, CRM User, etc. The 'New' button is visible at the top left of the table area.

| Action                   | Permission Set Label | Description                | License   |
|--------------------------|----------------------|----------------------------|---|
| <input type="checkbox"/> | Clone                | Buyer                      | Allows access to the store. Lets users see products and categories. |
| <input type="checkbox"/> | Clone                | Buyer Manager              | Includes all Buyer capabilities, and allows access to manage.       |
| <input type="checkbox"/> | Clone                | CRM User                   | Denotes that the user is a Sales Cloud or Service Cloud user.       |
| <input type="checkbox"/> | Clone                | Commerce Admin             | Allow access to commerce admin features.                            |
| <input type="checkbox"/> | Clone                | Contact Center Admin       | Manage Service Cloud Voice contact centers that use Amazon Connect. |
| <input type="checkbox"/> | Clone                | Contact Center Agent       | Access agent features in Service Cloud Voice contact centers.       |
| <input type="checkbox"/> | Clone                | Contact Center Supervisor  | Access supervisor features in Service Cloud Voice contact centers.  |
| <input type="checkbox"/> | Del   Clone          | Event Permit               | Salesforce  |
| <input type="checkbox"/> | Del   Clone          | Experience Profile Manager |   |

- ii. Enter label as: Event Permits and Save.
- iii. After saving the permission click on the Manage assignment.
- iv. Now click on the Add Assignment
- v. Now select the users which you have created and click on next, then Assign and then Done.
- vi. It will appear like this when added successfully.



- vii. Now create another permission set with the label as Vendor Permits and Save.
- viii. After saving the permission click on the Manage assignment
- ix. Now click on the Add Assignment
- x. Now select the users and click on next then Assign and then Done.
- xi. It will appear like this when added successfully.

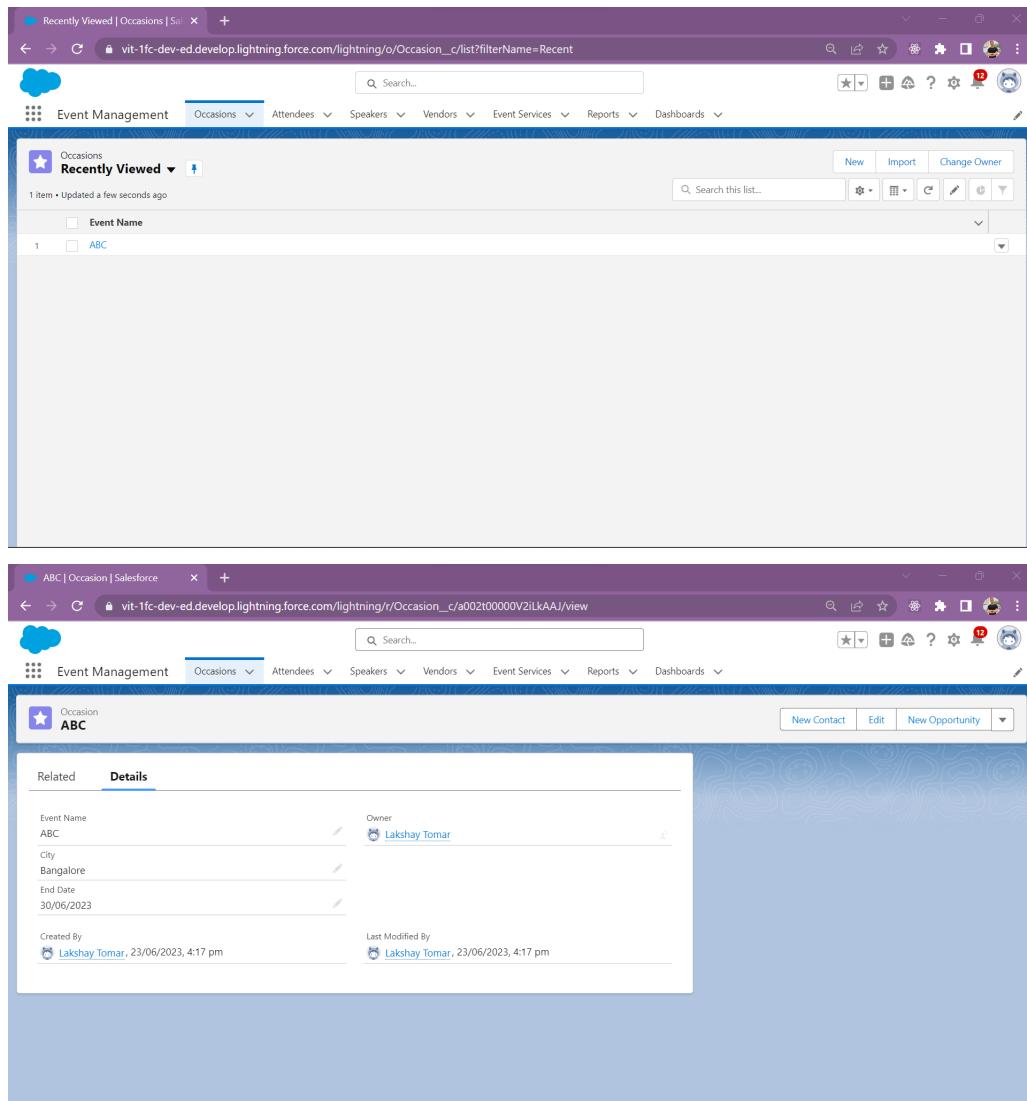


## 4.9 User Adoption:

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles. Create permission sets to grant access among logical groupings of users, regardless of their primary job function.

## I. Create a Record (Occasion)

- i. Click on App Launcher on the left side of the screen.
- ii. Search Event Management & click on it.
- iii. Click on Occasion Tab.
- iv. Click new and fill details & Save



The image contains two screenshots of the Salesforce Lightning interface. The top screenshot shows the 'Occasions' list view, with a single record 'ABC' selected. The bottom screenshot shows the detail view for the 'ABC' record, displaying fields for Event Name, City, End Date, Owner, and Created/Last Modified By.

**Occasion ABC Details**

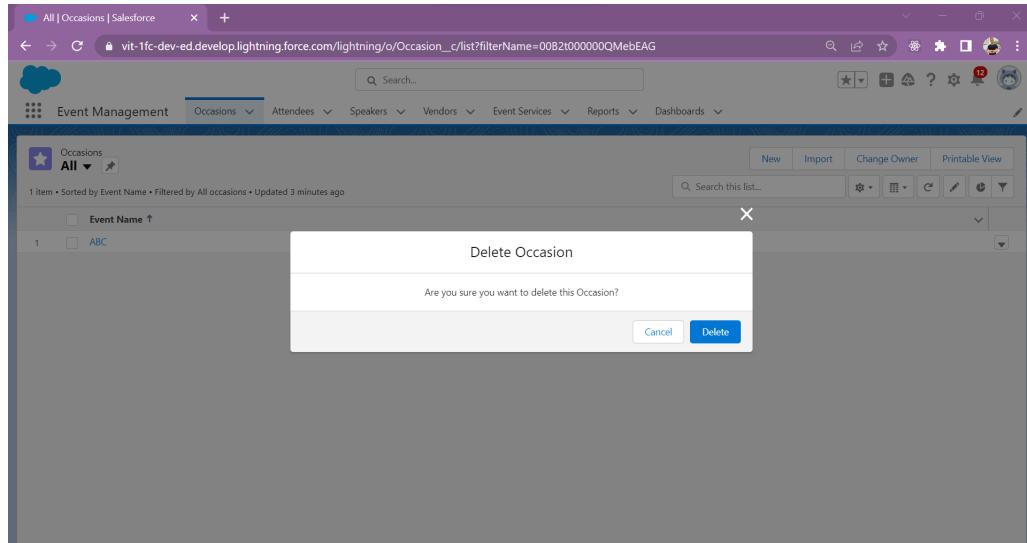
| Field            | Value                              |
|------------------|------------------------------------|
| Event Name       | ABC                                |
| City             | Bangalore                          |
| End Date         | 30/06/2023                         |
| Owner            | Lakshay Tomar                      |
| Created By       | Lakshay Tomar, 23/06/2023, 4:17 pm |
| Last Modified By | Lakshay Tomar, 23/06/2023, 4:17 pm |

## II. View a Record (Occasion)

- i. Click on App Launcher on the left side of the screen.
- ii. Search Event Management & click on it.
- iii. Click on Occasion Tab.
- iv. Click new and fill details & Save

## III. Delete a Record (Occasion)

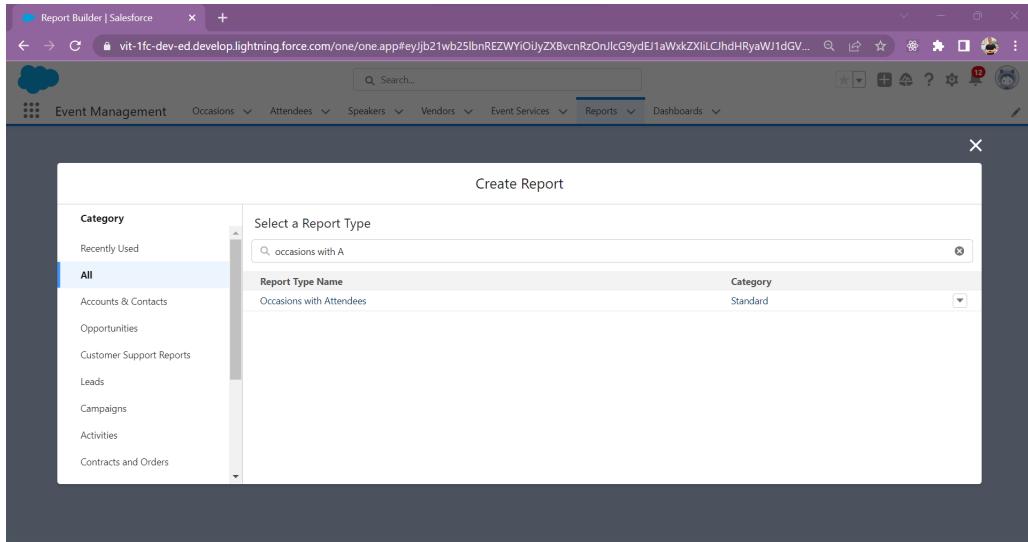
- i. Click on App Launcher on the left side of the screen.
- ii. Search Event Management & click on it.
- iii. Click on Occasion Tab.
- iv. Click on Arrow at the right hand side on that Particular record.
- v. Click delete and delete again.



#### 4.10 Creating Report:

Reports in Salesforce is a list of records that meet a particular criterion which gives an answer to a particular question. These records are displayed as a table that can be filtered or grouped based on any field. There are four types of report formats: Tabular Reports, Summary Reports, Matrix Reports and Joined Reports.

- i. From the Reports tab, click New Report.
- ii. Select the report type Occasions with Attendees for the report, and click Create.



- iii. Customize the report and include the fields according to your needs.
- iv. Reports need to be Grouped by one field, for e.g. Created by and require to enable add chart and then save (Occurrences with Attendees) or run it.

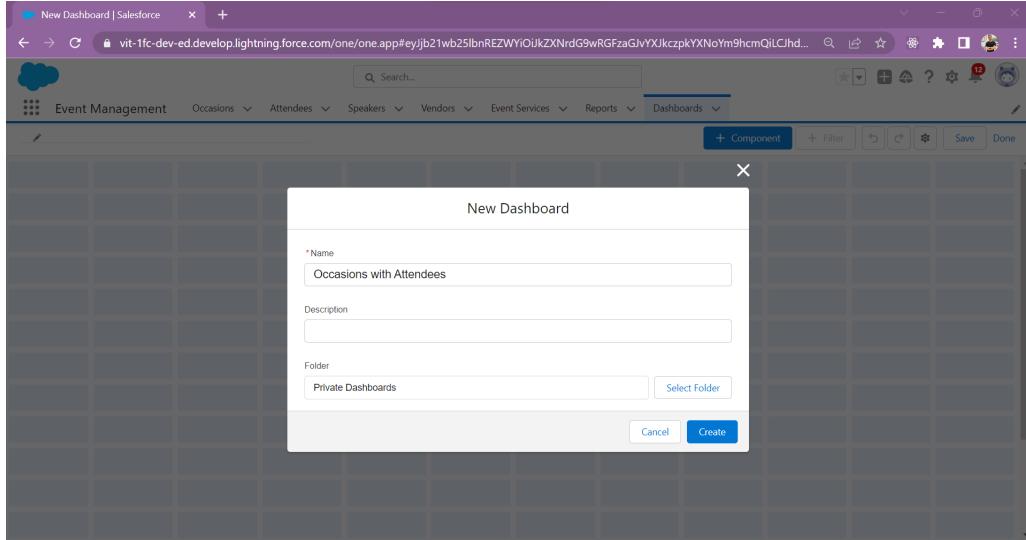
| Report: Occasions with Attendees |                      |                         |            |           |
|----------------------------------|----------------------|-------------------------|------------|-----------|
| Occurrences with Attendees       |                      |                         |            |           |
| Total Records                    |                      |                         |            |           |
| 1                                |                      |                         |            |           |
| Occasion: Created By             | Occasion: Event Name | Attendee: Attendee Name | End Date   | City      |
| Lakshay Tomar (1)                | ABC                  | dsadas                  | 30/06/2023 | Bangalore |
| Subtotal                         |                      |                         |            |           |
| Total (1)                        |                      |                         |            |           |

Row Counts:  Detail Rows:  Subtotals:  Grand Total:

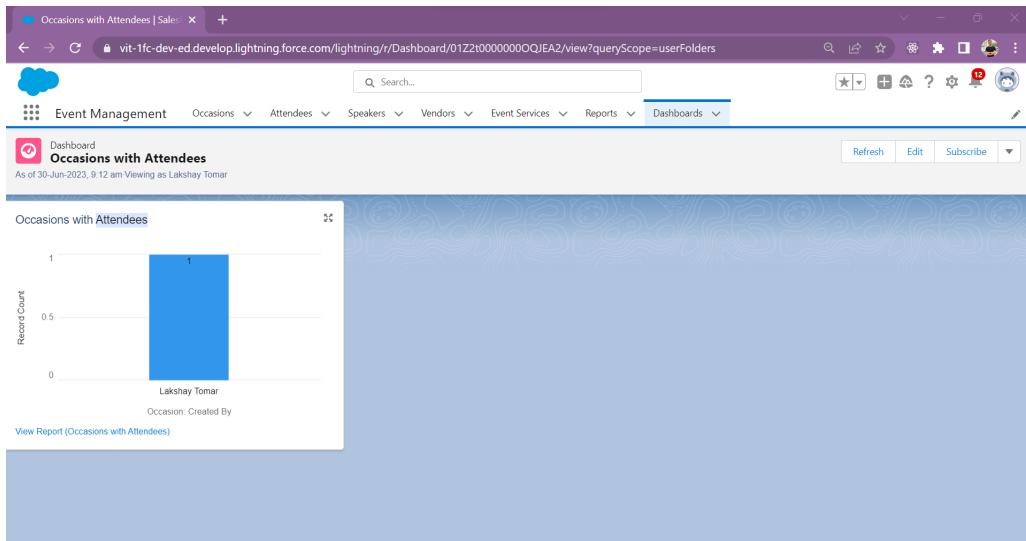
## 4.11 Creating Dashboard:

Dashboards provide more insights than reports as they combine the data from many reports and show a summarized result. Looking at many reports at a time gives the flexibility of combining the results from them quickly. Also summaries in dashboards help us decide on action plans quicker. The dashboards can contain charts, graphs and Tabular data.

- i. Click the Dashboards tab.
- ii. Click New Dashboard.
- iii. Name the dashboard Occasions with Attendees and click Create.



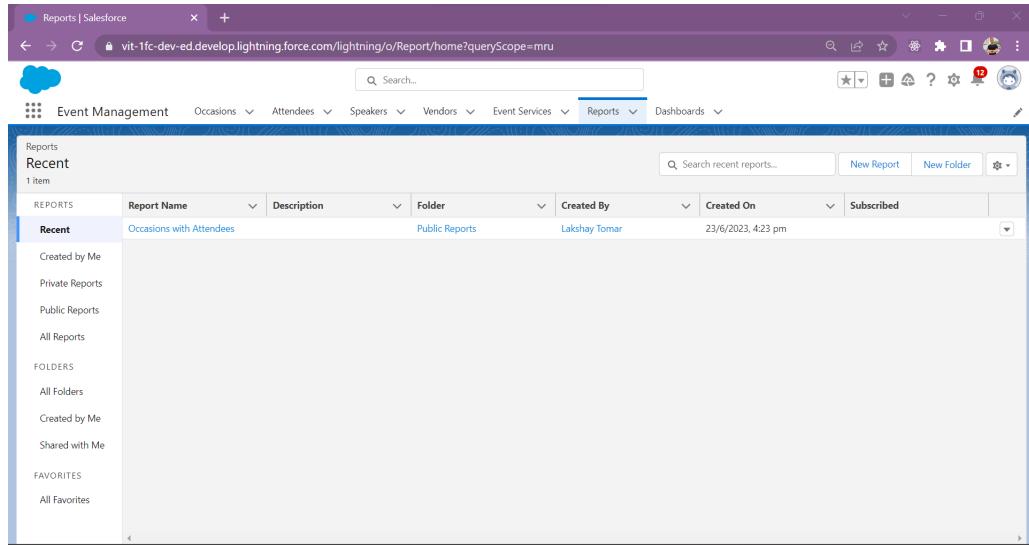
- iv. Click +Component.
- v. Select Occasions with Attendees and click Select.
- vi. Select the Vertical Bar Chart component and click Add.
- vii. Click Save and then Done.



## 4.12 View Reports and Dashboards:

- I. View Report
  - i. Click on App Launcher on the left side of the screen.

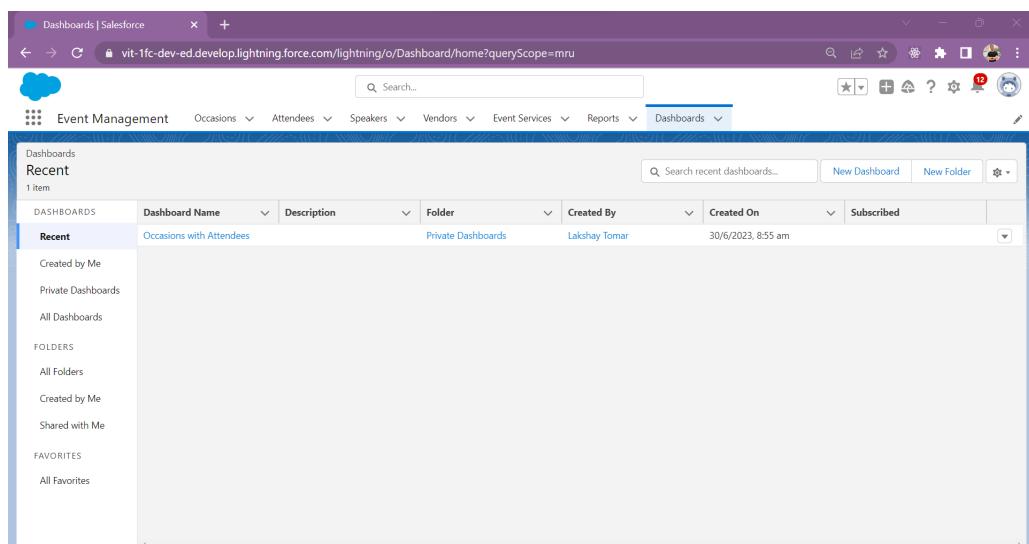
- ii. Search Event Management & click on it.
- iii. Click on Reports Tab.
- iv. Click on Occasions with Attendees & see records



The screenshot shows the Salesforce Reports interface. The top navigation bar includes 'Event Management', 'Occurrences', 'Attendees', 'Speakers', 'Vendors', 'Event Services', 'Reports', and 'Dashboards'. The 'Reports' tab is selected. The left sidebar shows 'RECENT' reports, including 'Created by Me', 'Private Reports', 'Public Reports', and 'All Reports'. The main content area displays a table for the 'Occasions with Attendees' report, which is in the 'Public Reports' folder, created by 'Lakshay Tomar' on '23/6/2023, 4:23 pm'. A search bar at the top right allows for searching recent reports.

## II. View Dashboard

- i. Click on App Launcher on the left side of the screen.
- ii. Search Event management & click on it.
- iii. Click on Dashboard Tab.
- iv. Click on Occasions with Attendees & see records



The screenshot shows the Salesforce Dashboards interface. The top navigation bar includes 'Event Management', 'Occurrences', 'Attendees', 'Speakers', 'Vendors', 'Event Services', 'Reports', and 'Dashboards'. The 'Dashboards' tab is selected. The left sidebar shows 'RECENT' dashboards, including 'Created by Me', 'Private Dashboards', and 'All Dashboards'. The main content area displays a table for the 'Occasions with Attendees' dashboard, which is in the 'Private Dashboards' folder, created by 'Lakshay Tomar' on '30/6/2023, 8:55 am'. A search bar at the top right allows for searching recent dashboards.

## 5. Advantages and disadvantages

- **Advantages**

There are several advantages of using an event management app built on the Salesforce platform:

1. **Centralized Event Management:** With Salesforce's event management app, you can consolidate all event-related information in one centralized location. This includes attendee data, event details, registration information, session schedules, and more. Having all the information in one place streamlines event planning and execution.
2. **Efficient Registration and Attendee Management:** The app enables seamless registration processes, allowing attendees to register and provide necessary information online. This simplifies the registration process, reduces paperwork, and enhances the overall attendee experience. Additionally, you can easily track and manage attendee information, such as contact details, preferences, and engagement history, to personalize interactions and tailor event experiences.
3. **Automated Communication:** The event management app in Salesforce automates communication with attendees throughout the event lifecycle. It can send automated confirmation emails, event reminders, updates, and post-event surveys. This helps to ensure attendees stay informed and engaged, leading to improved attendance rates and overall satisfaction.
4. **Real-time Analytics and Reporting:** Salesforce's robust reporting and analytics capabilities enable event organizers to gain insights into event performance, attendee demographics, session popularity, and more. Real-time dashboards and reports provide actionable data, allowing organizers to make data-driven decisions, identify trends, and improve future events.
5. **Integration with Sales and Marketing Efforts:** By leveraging Salesforce's integration capabilities, the event management app can seamlessly connect with other Salesforce tools such as Sales Cloud and Marketing Cloud. This integration enables a holistic view of customer interactions, facilitates lead generation and nurturing, and

improves sales and marketing alignment. Attendee data captured during the event can be utilized for targeted marketing campaigns, improving conversion rates and driving business growth.

6. Scalability and Customization: Salesforce's event management app can be customized and scaled to meet the specific needs of your organization. Whether you are organizing small local events or large-scale conferences, the app can adapt and grow with your requirements. You can customize workflows, fields, and page layouts to align with your event management processes.
7. Collaboration and Workflow Management: The Salesforce platform provides collaboration features, such as Chatter, allowing event teams to communicate, share documents, and collaborate in real-time. Workflow automation can be set up to streamline processes, automate tasks, and ensure efficient event execution.
8. Mobile Accessibility: Salesforce's mobile app ensures that event organizers and staff can access and manage event information on the go. This includes checking attendee lists, updating session schedules, and communicating with attendees from mobile devices, providing flexibility and convenience.

Overall, leveraging Salesforce for event management brings efficiency, organization, and data-driven insights to the event planning and execution process, ultimately enhancing attendee experiences and driving business success.

- **Disadvantages**

While Salesforce's event management app offers numerous advantages, there are also some potential disadvantages to consider:

1. Cost: Implementing and utilizing Salesforce's event management app can involve significant costs. This includes licensing fees, customization expenses, and potentially additional fees for advanced features or integrations. Small businesses or organizations with limited budgets may find it challenging to afford the full suite of Salesforce capabilities.
2. Complexity: Salesforce is a robust platform with extensive features and functionalities. As a result, it can be complex to set up and

configure the event management app according to specific requirements. Training and expertise are often required to fully leverage the platform's capabilities, which may require additional time and resources.

3. Customization Limitations: While Salesforce offers customization options, there may be limitations in terms of the extent to which the event management app can be tailored to specific needs. Customizations may require advanced development skills or additional investment in Salesforce consultants or developers.
4. Dependency on Internet Connectivity: Salesforce operates as a cloud-based platform, meaning that a stable internet connection is essential for accessing and utilizing the event management app. If there are issues with internet connectivity or if the event is held in a location with poor network coverage, it can hinder real-time data access and functionality.
5. Learning Curve: Salesforce's event management app may have a learning curve for users who are new to the platform. Training and onboarding may be necessary to familiarize event organizers, staff, and attendees with the app's features and navigation. This can require additional time and resources during the implementation process.
6. Integration Challenges: While Salesforce offers integration capabilities, integrating the event management app with other third-party systems or tools may present challenges. Compatibility issues, data synchronization, or complex integration workflows can require technical expertise or additional development efforts.
7. Vendor Lock-in: Once an organization invests heavily in Salesforce and relies on its event management app, there can be a degree of vendor lock-in. Migrating away from Salesforce or switching to alternative solutions can be complex, time-consuming, and costly, particularly if extensive data and processes are tied to the platform.

It's important to carefully evaluate these potential disadvantages against the specific needs and constraints of your organization before committing to Salesforce's event management app. Conducting a thorough cost-benefit analysis

and considering alternative solutions can help determine the most suitable choice for your event management requirements.

## 6. APPLICATIONS

- Conference Management: Event management apps can be used to organize and manage large conferences, including speaker management, session scheduling, attendee registration, badge printing, feedback collection, and post-event analytics. Salesforce's event management capabilities can streamline the entire conference planning and execution process.
- Trade Show and Exhibition Management: For trade shows and exhibitions, event management apps can handle booth allocation, exhibitor registration, lead capture, follow-up workflows, and reporting. Salesforce's integration with other sales and marketing tools allows for seamless lead management and tracking throughout the event.
- Corporate Events: Event management apps can be employed for planning and executing corporate events such as employee training programs, product launches, corporate parties, or team-building activities. These apps can handle event logistics, attendee registration, communication, and event feedback collection.
- Non-Profit Fundraising Events: Non-profit organizations can use event management apps to streamline fundraising events, such as galas, charity auctions, or benefit concerts. These apps can handle ticket sales, sponsor management, donor tracking, and volunteer coordination, helping to maximize fundraising efforts.
- Educational Workshops and Seminars: Event management apps can facilitate the organization and management of educational workshops, seminars, or training sessions. They can handle registration, session scheduling, attendance tracking, and feedback collection, ensuring a smooth and efficient learning experience.
- Community Events: Event management apps can be employed by community organizations or local governments to coordinate community events such as festivals, fairs, parades, or sports tournaments. These apps can handle event promotion, vendor management, volunteer coordination, and attendee engagement.

- Webinars and Virtual Events: With the rise of virtual events and webinars, event management apps integrated with Salesforce can be utilized to manage virtual event registrations, session scheduling, attendee engagement, and post-event analytics. They can also integrate with virtual event platforms to provide a seamless experience for participants.

These are just a few examples of how event management apps using Salesforce can be applied in real-life scenarios. The flexibility and customization options offered by Salesforce's platform make it suitable for a wide range of event management needs across various industries and sectors.

## 7. FUTURE SCOPE

The future scope of an event management app using Salesforce is promising, as technology continues to evolve and businesses increasingly rely on efficient event management solutions.

- Enhanced Personalization: As businesses strive to provide personalized experiences for attendees, event management apps can leverage Salesforce's advanced data analytics and artificial intelligence capabilities. This can enable better understanding of attendee preferences, allowing for customized event recommendations, targeted marketing, and personalized content delivery.
- Integration with Virtual and Hybrid Events: The rise of virtual and hybrid events opens up new opportunities for event management apps. Integrating with virtual event platforms and leveraging Salesforce's capabilities, these apps can seamlessly manage virtual event registrations, engagement tracking, and content delivery. The future will likely see further advancements in this area to support enhanced virtual event experiences.
- Internet of Things (IoT) Integration: IoT technology can enhance event management by enabling real-time monitoring of attendee movement, gathering data on event engagement, and facilitating personalized experiences. Integration of IoT devices with Salesforce's event management apps can provide valuable insights into attendee behavior, preferences, and event logistics.

- Augmented Reality (AR) and Virtual Reality (VR) Experiences: Event management apps using Salesforce can explore integrating AR and VR technologies to create immersive event experiences. This could include virtual venue walkthroughs, interactive product demonstrations, or virtual networking opportunities, enhancing attendee engagement and satisfaction.
- Enhanced Mobile Experience: Mobile accessibility is crucial for event management apps, allowing organizers, staff, and attendees to access information on the go. Future developments may involve leveraging mobile technologies, such as augmented reality, push notifications, and location-based services, to enhance the mobile event experience and provide real-time updates and engagement opportunities.

As technology advances and customer expectations evolve, the future of event management apps using Salesforce holds immense potential for innovation, personalization, and seamless event experiences. By leveraging Salesforce's capabilities and staying abreast of emerging trends, event management apps can continue to evolve and meet the evolving needs of businesses and attendees alike.

## 8. CONCLUSION

In conclusion, implementing an event management app using Salesforce offers numerous benefits and opportunities for streamlining and enhancing event planning and execution. The centralized nature of Salesforce allows for efficient management of event-related information, from registration and attendee data to communication and reporting.

By leveraging Salesforce's capabilities, event organizers can automate registration processes, improve attendee management, and streamline communication with attendees throughout the event lifecycle. Real-time analytics and reporting provide valuable insights for data-driven decision-making and future event improvements.

Integration with other Salesforce tools enables seamless coordination with sales and marketing efforts, leading to enhanced lead generation and customer engagement. While there may be considerations such as cost, complexity, and

customization limitations, the advantages of utilizing Salesforce for event management outweigh the potential challenges. The scalability, customization options, and mobile accessibility of Salesforce ensure that the event management app can adapt and grow with the evolving needs of the organization.

Real-life applications of event management apps using Salesforce span various industries, including conferences, trade shows, corporate events, non-profit fundraising, educational workshops, community events, and virtual gatherings. The versatility of the platform makes it a valuable tool for organizations seeking to optimize their event management processes and deliver exceptional experiences for attendees.

By harnessing the power of Salesforce's event management app, organizations can efficiently plan, execute, and analyze events, driving improved attendee satisfaction, increased event ROI, and overall business success.

## **9. REFERENCES**

<https://appexchange.salesforce.com/>

<https://success.salesforce.com/>

<https://www.salesforce.org/nonprofit/nonprofit-event-management/>

<https://smartinternz.com/student-login>

\*\*\*\*\*

**Link to document:**

<https://drive.google.com/file/d/13ecE8hxxv-RSs2AjD2fN>

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