

EVENT MANAGEMENT SYSTEM

A PROJECT REPORT

TEAM ID : NM2023TMID04665

Submitted by

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BUILD AN EVENT MANAGEMENT SYSTEM USING SALESFORCE

1. INTRODUCTION :

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 alive and provide an opportunity for a destination to showcase its tourism experience and increase economic activity. Event contribute significantly to community building, life style and leisure enhancement, cultural development, tourism promotion and increased visitation, volunteer participation, fund raising 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.

1.1 OVERVIEW :

In this project we explored “Build an event management system using salesforce”. Initially we created salesforce login Id using salesforce .com website. Afterwards we completed course videos. Created empathy map ideation and Brainstorming using mural account. Then we created objects, tabs, applications, fields, profiles, user and permission sets and finally reports. Finally, we created GitHub account and submitted project through GitHub.

1.2 PURPOSE :

At the start, an event manager makes planning decision , such as the time, location , and theme of their event. During an event, event managers observes the events live and make sure things run smoothly. after an event, event managers are tasked with reviewing event data, submitting KPI and ROI findings, and staying on the ball for any post-event offerings.

2.PROBLEM DEFINITION & DESIGN THINKING :

2.1 EMPATHY MAP

An empathy map is a collaborative visualization used to articulate what we know about a particular type of user. It externalizes knowledge about users in order to

- 1) create a shared understanding of user needs, and
- 2) aid in decision making



2.2 BRAINSTORMING :

Brainstorming is a group problem-solving method that involves the spontaneous contribution of creative ideas and solutions. This technique requires intensive, freewheeling discussion in which every member of the group is encouraged to think aloud and suggest as many ideas as possible based on their diverse knowledge.



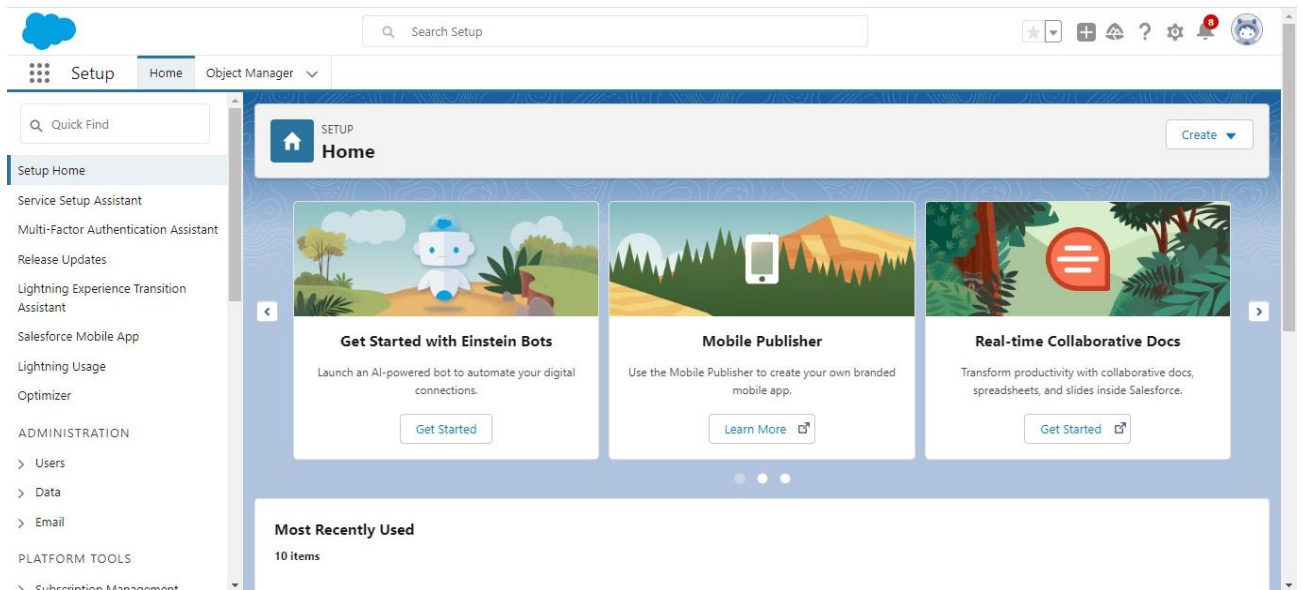
3. RESULT

3.1 DATA MODEL

| Object Name | Fields in the Object | |
|---------------------|----------------------|-------------|
| Obj 1 : EVENT | Field Label | Data type |
| | City | Text |
| | Start Date | Date/Time |
| Obj 2 : ATTENDEE | Field Label | Data type |
| | Id | Auto number |
| | Phone | Phone |
| Obj 3 : SPEAKER | Field Label | Data type |
| | Bio | Text Area |
| | E-mail | Email |
| Obj 4 : VENDOR | Field Label | Data type |
| | E-mail | Email |
| | Phone | Phone |

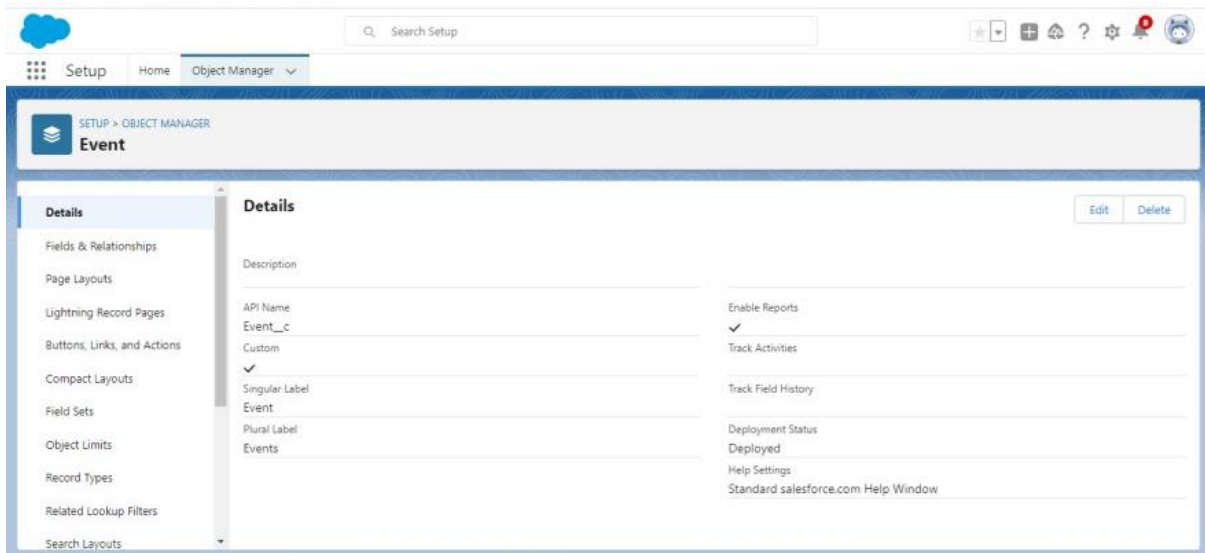
3.2 ACTIVITIES & SCREENSHOT

MILESTONE 1 :

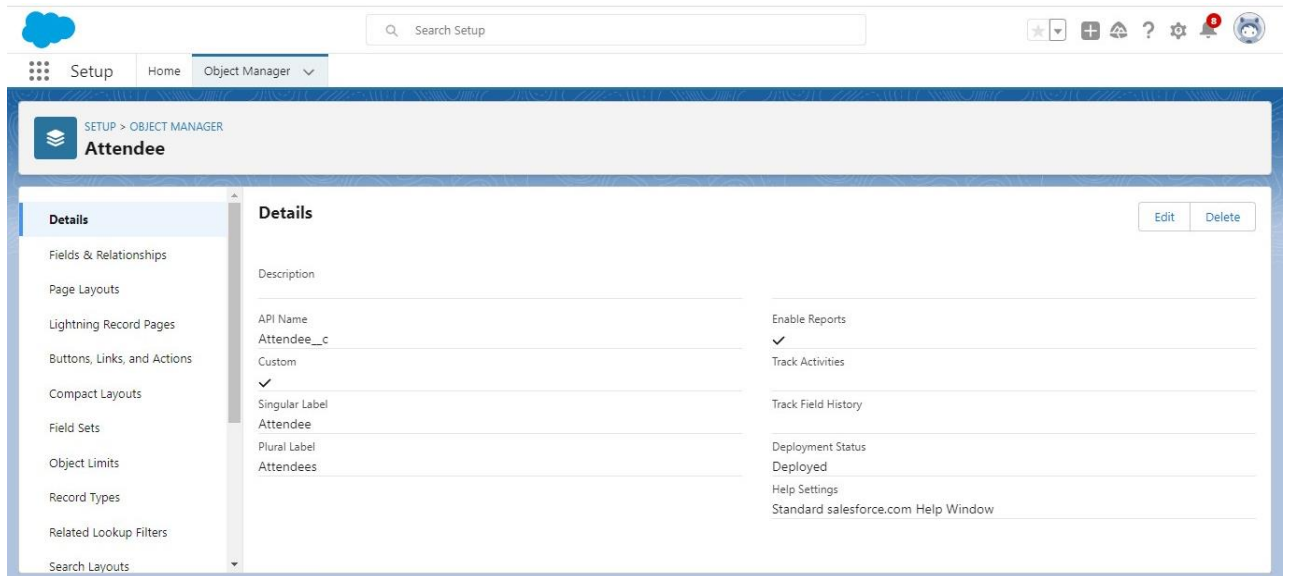


Milestone 2 : Object

Activity 1: Event Management



Activity 2: Attendees Object



The screenshot shows the Salesforce Setup interface for the 'Attendee' object. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The left sidebar shows the 'Setup' menu with 'Object Manager' selected. The main content area is titled 'Attendee' and contains a 'Details' section. The 'Details' section has a left-hand menu with options like '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 'Details' section itself has a 'Description' field and a 'Fields & Relationships' section. The 'Fields & Relationships' section includes fields for 'API Name' (Attendee__c), 'Custom' (checked), 'Singular Label' (Attendee), and 'Plural Label' (Attendees). The 'Fields & Relationships' section also includes a 'Fields & Relationships' section with fields for 'Enable Reports' (checked), 'Track Activities' (checked), 'Track Field History' (checked), 'Deployment Status' (Deployed), 'Help Settings' (Standard salesforce.com Help Window), and 'Standard salesforce.com Help Window'.

Setup > OBJECT MANAGER

Attendee

Details

Edit Delete

Description

API Name
Attendee__c

Custom
✓

Singular Label
Attendee

Plural Label
Attendees

Enable Reports
✓

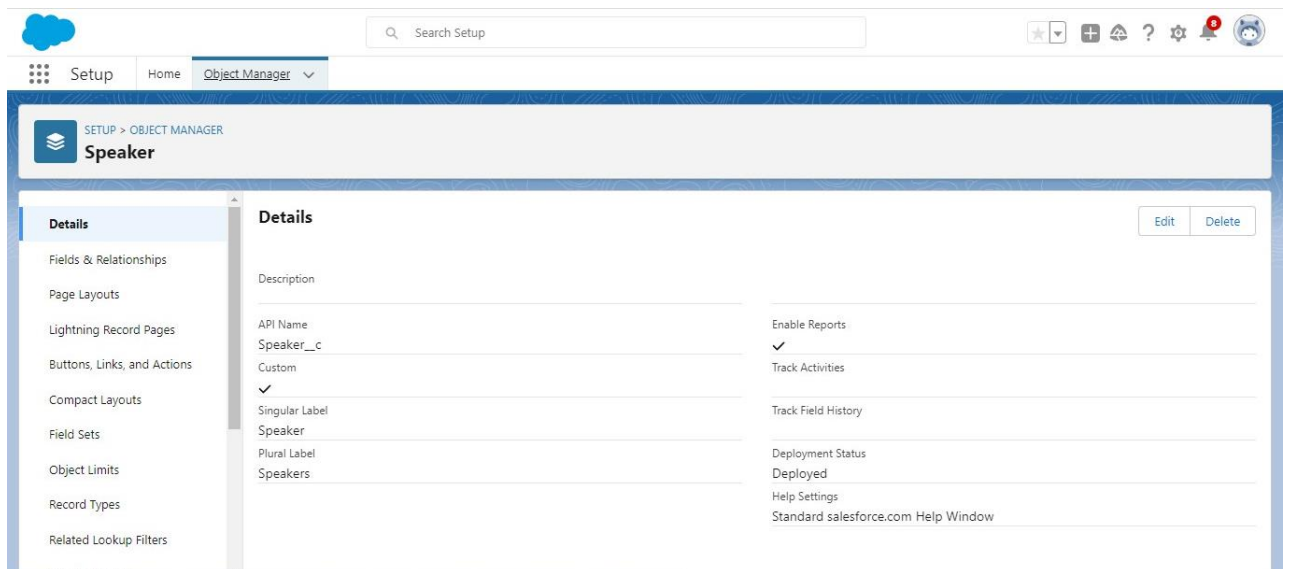
Track Activities
✓

Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Activity 3: Speaker Object



The screenshot shows the Salesforce Setup interface for the 'Speaker' object. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The left sidebar shows the 'Setup' menu with 'Object Manager' selected. The main content area is titled 'Speaker' and contains a 'Details' section. The 'Details' section has a left-hand menu with options like '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 'Details' section itself has a 'Description' field and a 'Fields & Relationships' section. The 'Fields & Relationships' section includes fields for 'API Name' (Speaker__c), 'Custom' (checked), 'Singular Label' (Speaker), and 'Plural Label' (Speakers). The 'Fields & Relationships' section also includes a 'Fields & Relationships' section with fields for 'Enable Reports' (checked), 'Track Activities' (checked), 'Track Field History' (checked), 'Deployment Status' (Deployed), 'Help Settings' (Standard salesforce.com Help Window), and 'Standard salesforce.com Help Window'.

Setup > OBJECT MANAGER

Speaker

Details

Edit Delete

Description

API Name
Speaker__c

Custom
✓

Singular Label
Speaker

Plural Label
Speakers

Enable Reports
✓

Track Activities
✓

Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Activity 4: Vendors object

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various configuration options under 'Details', with 'Fields & Relationships' selected. The main content area displays the 'Details' for the 'Vendor' object. It includes fields for 'Description', 'API Name' (Vendor__c), 'Custom' (checked), 'Singular Label' (Vendor), 'Plural Label' (Vendors), 'Enable Reports' (checked), 'Track Activities' (checked), 'Track Field History' (unchecked), 'Deployment Status' (Deployed), and 'Help Settings' (Standard salesforce.com Help Window). 'Edit' and 'Delete' buttons are visible in the top right corner.

Milestone 3 –Tab:

Activities 1,2,3,4:

Event tab, Attendee tab, Speaker tab, vendor tab:

The screenshot shows the Salesforce Setup interface for the 'Tabs' section. The left sidebar lists 'User Interface' options, with 'Tabs' selected. The main content area displays the 'Custom Tabs' page. It includes a 'Custom Object Tabs' table with columns for 'Action', 'Label', 'Tab Style', and 'Description'. The table lists four tabs: 'Attendees' (Chess piece icon), 'Events' (Chess piece icon), 'Speakers' (Chess piece icon), and 'Vendors' (Chip icon). Below the table, there is a 'Web Tabs' section with a message: 'No Web Tabs have been defined'.

| Action | Label | Tab Style | Description |
|--|-----------|-------------|-------------|
| Edit Del | Attendees | Chess piece | |
| Edit Del | Events | Chess piece | |
| Edit Del | Speakers | Chess piece | |
| Edit Del | Vendors | Chip | |

Activity:

← Lightning App Builder

App Settings

Pages ▾

Event Management

? Help

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name ⓘ

Event Management

* Developer Name ⓘ

Vanmathi

Description ⓘ

Build an Event Management system

App Branding

Image ⓘ

Upload

Primary Color Hex Value ⓘ

▾

#0070D2

Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

EM

Event Management
Build an Event Management system

Milestone 4-Fields:

Activity 1: Fields for the Event objects

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Event

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

Fields & Relationships

8 Items, Sorted by Field Label

Q, Quick Find

New

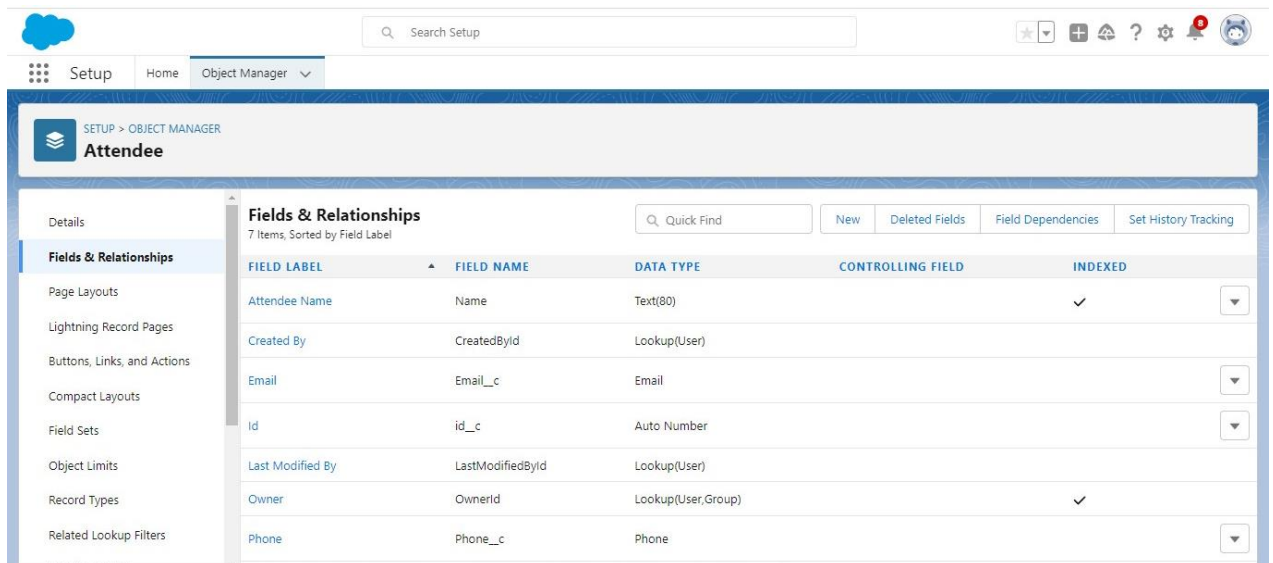
Deleted Fields

Field Dependencies

Set History Tracking

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------|------------------|----------------------------|-------------------|---------|
| City | City__c | Text(12) | | |
| Created By | CreatedById | Lookup(User) | | |
| End Date | End_Date__c | Date/Time | | |
| Event Name | Event_Name__c | Lookup(Event) | | ✓ |
| Event Name | EventName__c | Master-Detail(Entitlement) | | ✓ |
| Event Name | Name | Text(80) | | ✓ |
| Last Modified By | LastModifiedById | Lookup(User) | | |

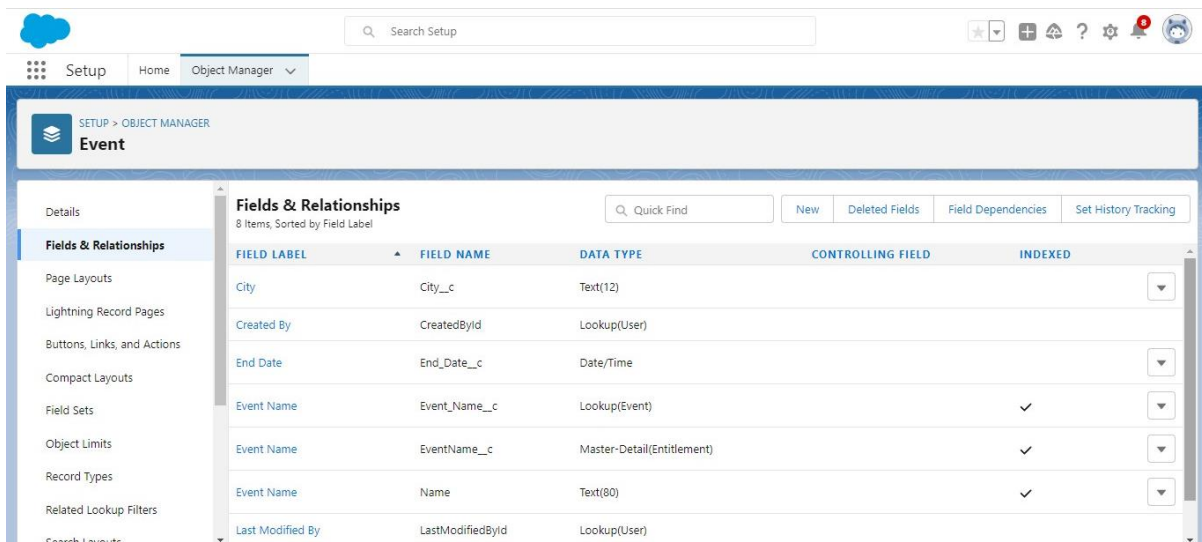
Activity 2: Fields for the Attendees object:



The screenshot shows the Salesforce Setup interface for the 'Attendee' object. The 'Fields & Relationships' tab is selected, displaying a list of 7 fields sorted by Field Label. The fields are: Attendee Name, Created By, Email, Id, Last Modified By, Owner, and Phone. Each field entry includes its Field Label, Field Name, Data Type, Controlling Field status, and Indexed status.

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------|------------------|--------------------|-------------------|---------|
| Attendee Name | Name | Text(80) | | ✓ |
| Created By | CreatedById | Lookup(User) | | |
| Email | Email__c | Email | | |
| Id | id__c | Auto Number | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Owner | OwnerId | Lookup(User,Group) | | ✓ |
| Phone | Phone__c | Phone | | |

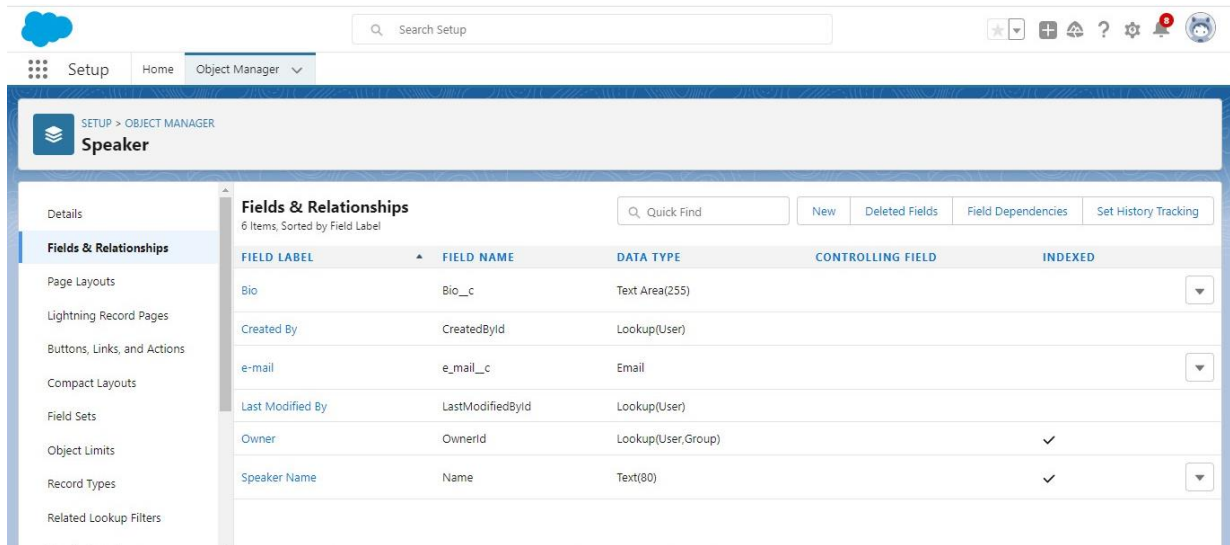
Activity 3: Master-detail relationship with Event objects:



The screenshot shows the Salesforce Setup interface for the 'Event' object. The 'Fields & Relationships' tab is selected, displaying a list of 8 fields sorted by Field Label. The fields are: City, Created By, End Date, Event Name, Event Name (Master-Detail), Event Name, and Last Modified By. Each field entry includes its Field Label, Field Name, Data Type, Controlling Field status, and Indexed status.

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------|------------------|----------------------------|-------------------|---------|
| City | City__c | Text(12) | | |
| Created By | CreatedById | Lookup(User) | | |
| End Date | End_Date__c | Date/Time | | |
| Event Name | Event_Name__c | Lookup(Event) | | ✓ |
| Event Name | EventName__c | Master-Detail(Entitlement) | | ✓ |
| Event Name | Name | Text(80) | | ✓ |
| Last Modified By | LastModifiedById | Lookup(User) | | |

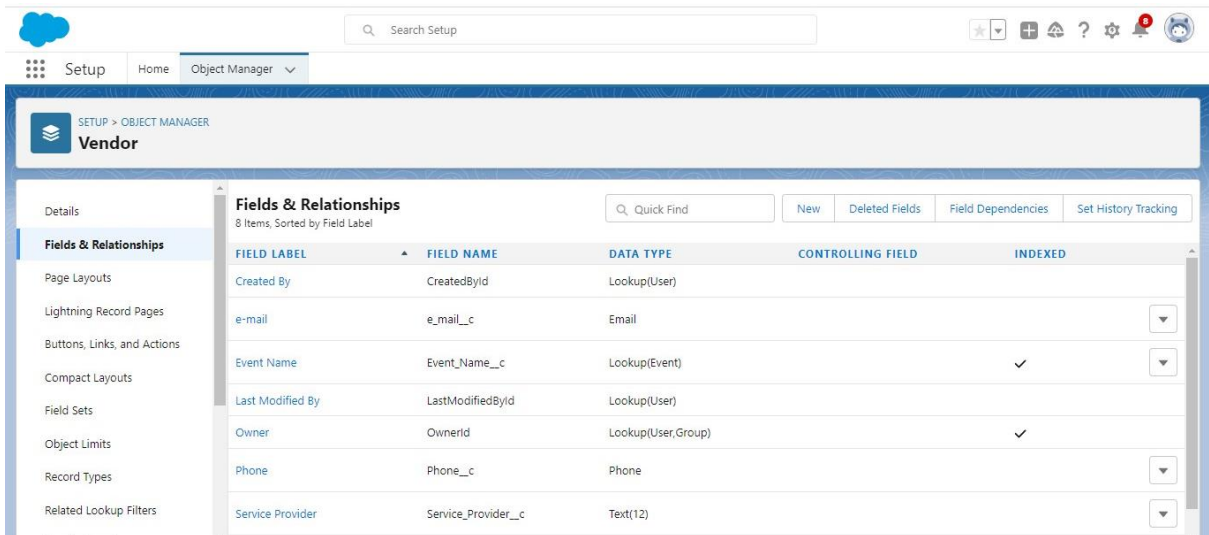
Activity 4: Fields for the Speakers object:



The screenshot shows the Salesforce Setup interface for the 'Speaker' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Fields & Relationships' and shows a list of 6 fields, sorted by Field Label. The fields are: Bio, Created By, e-mail, Last Modified By, Owner, and Speaker Name. Each field row includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status. The 'Speaker Name' field is highlighted.

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------|------------------|--------------------|-------------------|---------|
| Bio | Bio__c | Text Area(255) | | |
| Created By | CreatedById | Lookup(User) | | |
| e-mail | e_mail__c | Email | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Owner | OwnerId | Lookup(User,Group) | | ✓ |
| Speaker Name | Name | Text(80) | | ✓ |

Activity 5: Fields for the Vendors object:



The screenshot shows the Salesforce Setup interface for the 'Vendor' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Fields & Relationships' and shows a list of 8 fields, sorted by Field Label. The fields are: Created By, e-mail, Event Name, Last Modified By, Owner, Phone, and Service Provider. Each field row includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status. The 'Event Name' field is highlighted.

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------|---------------------|--------------------|-------------------|---------|
| Created By | CreatedById | Lookup(User) | | |
| e-mail | e_mail__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(12) | | |

Milestone 5 –Profile:

Activity 1: Event user profile:

The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains a search bar with 'Prof' and a list of navigation items: 'Users' and 'Profiles'. The main content area is titled 'Event user profile' and includes a help link. Below the title, there is a description and a list of enabled permissions. The 'Profile Detail' section shows the profile name, user license, description, and creation/modification details. The 'Page Layouts' section displays the standard object layouts for various objects.

Profile Detail

| Name | Event user profile |
|--------------|---------------------------------|
| User License | Salesforce |
| Description | |
| Created By | VANMATHI V. 16/04/2023, 2:46 pm |
| Modified By | VANMATHI V. 16/04/2023, 2:47 pm |

Page Layouts

| Standard Object Layouts | Global | Object Milestone |
|-------------------------|---------------------------------|---|
| Global | Global Layout [View Assignment] | Object Milestone Layout [View Assignment] |
| Email Application | Not Assigned [View Assignment] | Operating Hours Layout [View Assignment] |
| Home Page Layout | DE Default | Opportunity Layout |

Activity 2: Event vendors profile:

The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains a search bar with 'Prof' and a list of navigation items: 'Users' and 'Profiles'. The main content area is titled 'Event Vendors profile' and includes a help link. Below the title, there is a description and a list of enabled permissions. The 'Profile Detail' section shows the profile name, user license, description, and creation/modification details. The 'Page Layouts' section displays the standard object layouts for various objects.

Profile Detail

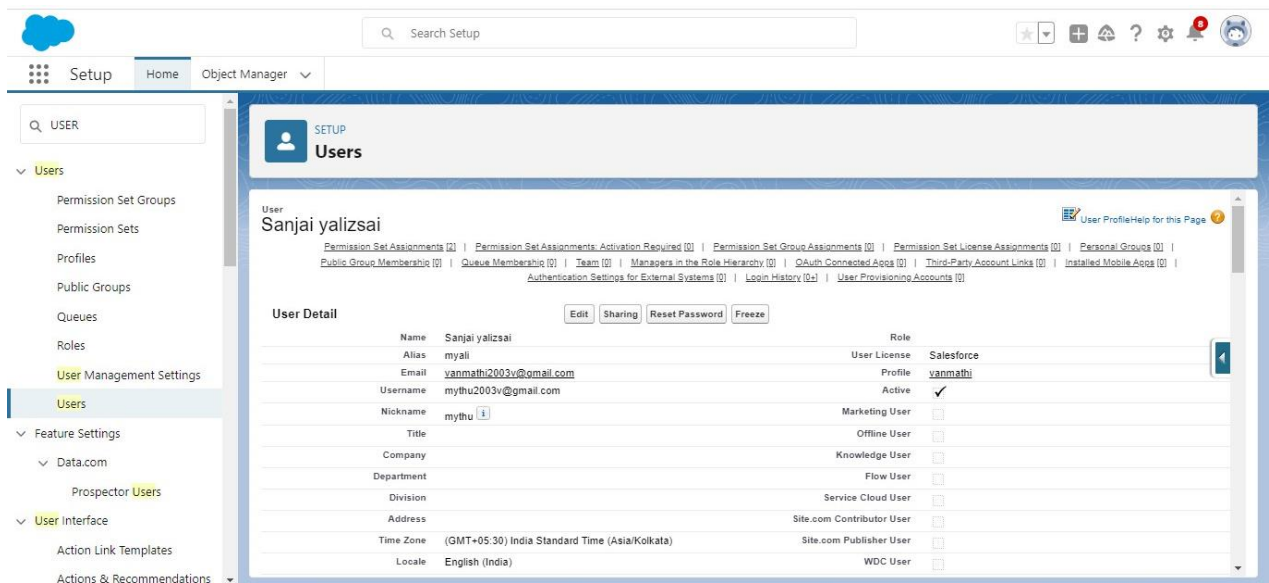
| Name | Profile: Event Vendors profile - Salesforce - Developer Edition |
|--------------|---|
| User License | Salesforce |
| Description | |
| Created By | VANMATHI V. 16/04/2023, 2:44 pm |
| Modified By | VANMATHI V. 16/04/2023, 2:45 pm |

Page Layouts

| Standard Object Layouts | Global | Object Milestone |
|-------------------------|---------------------------------|---|
| Global | Global Layout [View Assignment] | Object Milestone Layout [View Assignment] |
| Email Application | Not Assigned [View Assignment] | Operating Hours Layout [View Assignment] |

Milestone 6 –User:

Activity 1:

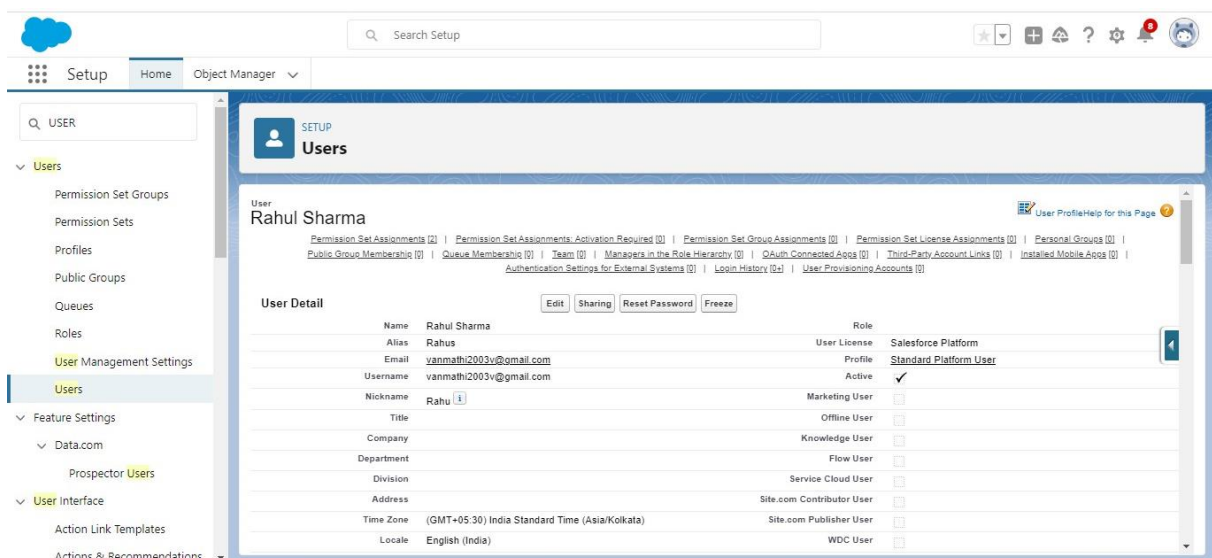


The screenshot shows the Salesforce Setup page for a user named Sanjai yalzsai. The left sidebar contains a navigation menu with options like Setup, Home, Object Manager, and Users. The main content area displays the user's details, including Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, and Locale. The user is active and has a role of Salesforce. The page also includes links for various settings and a search bar at the top.

User Detail

| Field | Value | Field | Value |
|------------|--|---------------------------|-------------------------------------|
| Name | Sanjai yalzsai | Role | Salesforce |
| Alias | myali | User License | Profile |
| Email | vanmathi2003v@gmail.com | Profile | vanmathi |
| Username | mythu2003v@gmail.com | Active | <input checked="" type="checkbox"/> |
| Nickname | mythu | Marketing User | <input type="checkbox"/> |
| Title | | Offline User | <input type="checkbox"/> |
| Company | | Knowledge User | <input type="checkbox"/> |
| Department | | Flow User | <input type="checkbox"/> |
| Division | | Service Cloud User | <input type="checkbox"/> |
| Address | | Site.com Contributor User | <input type="checkbox"/> |
| Time Zone | (GMT+05:30) India Standard Time (Asia/Kolkata) | Site.com Publisher User | <input type="checkbox"/> |
| Locale | English (India) | WDC User | <input type="checkbox"/> |

Activity 2:



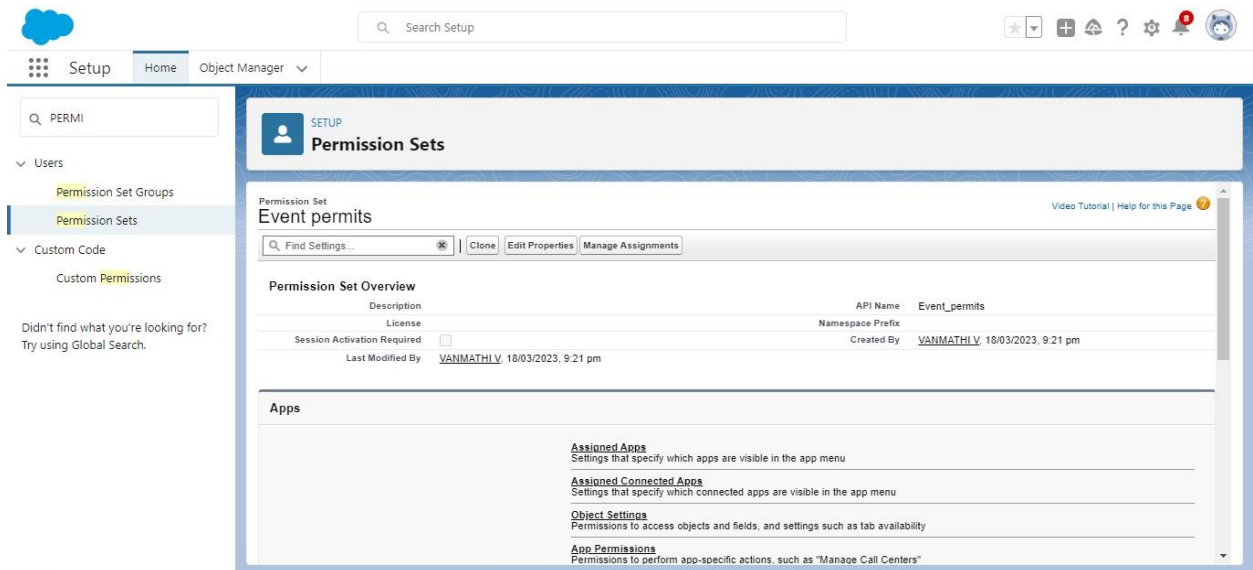
The screenshot shows the Salesforce Setup page for a user named Rahul Sharma. The left sidebar contains a navigation menu with options like Setup, Home, Object Manager, and Users. The main content area displays the user's details, including Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, and Locale. The user is active and has a role of Salesforce Platform. The page also includes links for various settings and a search bar at the top.

User Detail

| Field | Value | Field | Value |
|------------|--|---------------------------|-------------------------------------|
| Name | Rahul Sharma | Role | Salesforce Platform |
| Alias | Rahus | User License | Standard Platform User |
| Email | vanmathi2003v@gmail.com | Profile | Standard Platform User |
| Username | vanmathi2003v@gmail.com | Active | <input checked="" type="checkbox"/> |
| Nickname | Rahu | Marketing User | <input type="checkbox"/> |
| Title | | Offline User | <input type="checkbox"/> |
| Company | | Knowledge User | <input type="checkbox"/> |
| Department | | Flow User | <input type="checkbox"/> |
| Division | | Service Cloud User | <input type="checkbox"/> |
| Address | | Site.com Contributor User | <input type="checkbox"/> |
| Time Zone | (GMT+05:30) India Standard Time (Asia/Kolkata) | Site.com Publisher User | <input type="checkbox"/> |
| Locale | English (India) | WDC User | <input type="checkbox"/> |

Milestone 7- Permission sets:

Activity 1:

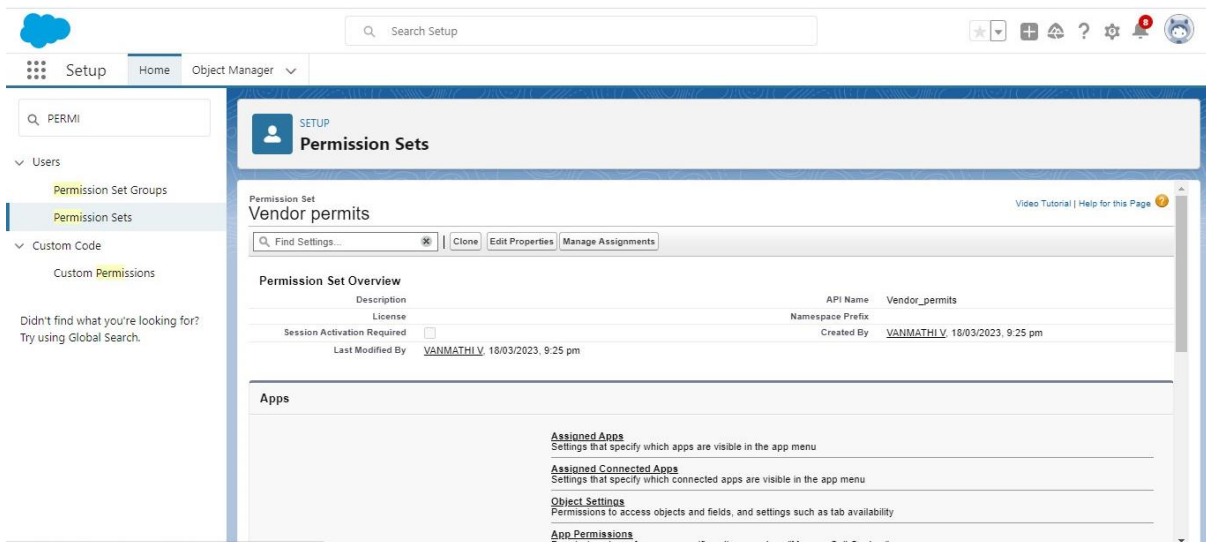


The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'PERMI' and a list of navigation items: Users, Permission Set Groups, Permission Sets (highlighted), Custom Code, and Custom Permissions. The main content area is titled 'Permission Sets' and shows the configuration for the 'Event permits' permission set. The 'Permission Set Overview' section displays the following details:

| Field | Value |
|-----------------------------|--------------------------|
| Description | Event permits |
| API Name | Event_permits |
| License | |
| Session Activation Required | <input type="checkbox"/> |
| Namespace Prefix | |
| Created By | VANMATHI.V |
| Created Date | 18/03/2023, 9:21 pm |
| Last Modified By | VANMATHI.V |
| Last Modified Date | 18/03/2023, 9:21 pm |

Below the overview, the 'Apps' section is visible, containing links to 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings', and 'App Permissions'.

Activity 2:



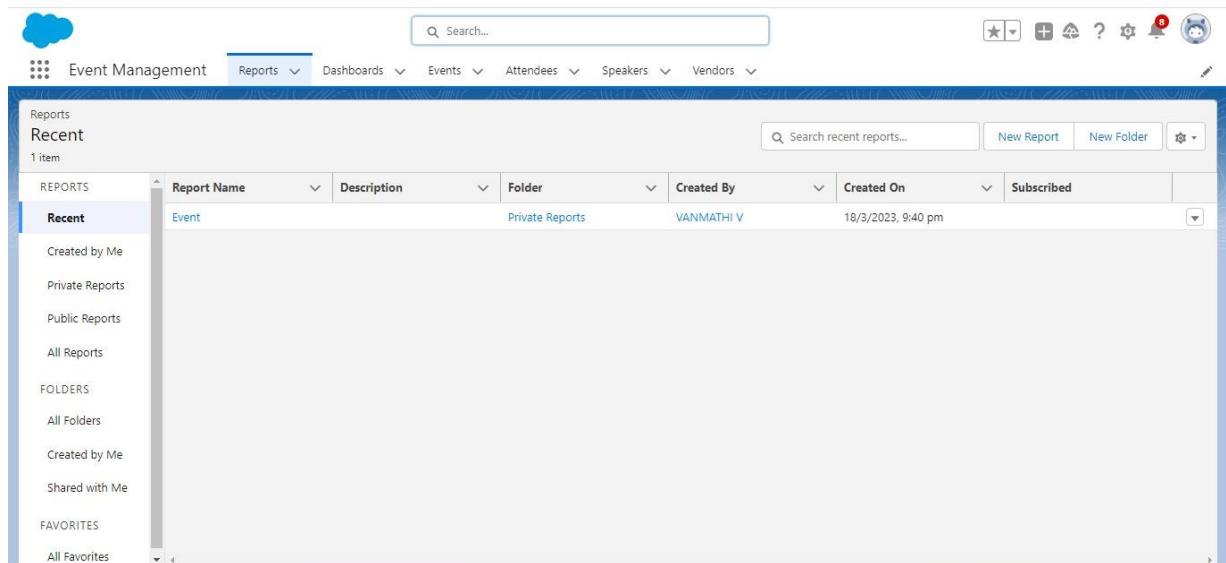
The screenshot shows the Salesforce Setup interface for the 'Vendor permits' permission set. The left sidebar is identical to the previous screenshot. The main content area displays the 'Permission Set Overview' for 'Vendor permits' with the following details:

| Field | Value |
|-----------------------------|--------------------------|
| Description | Vendor permits |
| API Name | Vendor_permits |
| License | |
| Session Activation Required | <input type="checkbox"/> |
| Namespace Prefix | |
| Created By | VANMATHI.V |
| Created Date | 18/03/2023, 9:25 pm |
| Last Modified By | VANMATHI.V |
| Last Modified Date | 18/03/2023, 9:25 pm |

The 'Apps' section below the overview also contains links to 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings', and 'App Permissions'.

Milestone 8 –Reports:

Activity:



4. Trailhead Profile Public URL:

| Team Members | Trailhead Profile Public URL |
|--------------------------------|---|
| Team Leader (Ashmil.K) | https://www.salesforce.com/trailblazer/ashmilk |
| Team Member 1 (Abhiram Suresh) | https://www.salesforce.com/trailblazer/abhiramsuresh |
| Team Member 2 (Athul Raj) | https://www.salesforce.com/trailblazer/athulraj |
| Team Member 3 (Mubashir.P.A) | https://www.salesforce.com/trailblazer/mubashirpa |

5 . ADVANTAGES & DISADVANTAGES

Advantages :

- 1.Opportunities for creativity
- 2.Ability to work different events
- 3.High projection job growth

Disadvantages :

- 1.Unconventional work hours
- 2.Time away from family and friends
- 3.Multiple events at the same time

6. APPLICATIONS

Event Planning and Organization: An Event Management System facilitates the entire event planning process, from conceptualization to execution. It helps in creating detailed event plans, including scheduling, budgeting, and task assignments.

Registration and Ticketing: It allows for online registration and ticketing processes, making it convenient for attendees to sign up for the event. This also streamlines the process for organizers, as they can easily track the number of registered attendees.

Attendee Management: The system helps in maintaining a database of attendees, including their contact information, preferences, and special requirements. This information is crucial for personalized communication and ensuring a seamless event experience.

Promotion and Marketing: Event Management Systems often come with built-in marketing tools like email campaigns, social media integration, and promotional materials. These features help in reaching a wider audience and creating a buzz around the event.

6. CONCLUSION

The integration of Salesforce as the foundation of our Event Management System has fundamentally transformed our approach to event planning and execution. Leveraging Salesforce's tailored features for event management, we streamlined processes from initial planning to post-event analysis. The platform facilitated seamless attendee registration, efficient resource management, and effective stakeholder communication. Its robust marketing tools amplified our outreach, resulting in a broader and more engaged audience. The analytics capabilities provided crucial insights into event performance and attendee satisfaction, empowering data-driven decisions for future events. Salesforce's integrated security and compliance features ensured a safe and regulatory-compliant event environment. The user-friendly interface enhanced the experience for both organizers and attendees. This integration exemplifies the potential of modern technology in redefining event management practices, promising continued excellence in our future events.

7. FUTURE SCOPE

The future of Event Management Systems (EMS) holds exciting possibilities driven by technological advancements and evolving industry trends. Here are some key areas with significant future scope:

Enhanced Personalization: EMS will increasingly focus on providing personalized experiences for attendees. This could involve tailored content, agenda recommendations, and targeted communications based on individual preferences and behavior.

Integration with Virtual and Hybrid Events: As virtual and hybrid events continue to gain popularity, EMS will evolve to seamlessly integrate with virtual event platforms, offering a unified solution for both physical and online events.

AI and Automation: AI-driven features like chatbots, predictive analytics, and automated marketing campaigns will become more prevalent. These technologies will enhance efficiency, improve attendee engagement, and provide valuable insights for event planners.

Augmented Reality (AR) and Virtual Reality (VR): AR and VR technologies will be incorporated into EMS to create immersive experiences for attendees. This could include virtual venue tours, interactive exhibits, and enhanced networking opportunities.