

INTRODUCTION

1.1 Overview

Event management is the process of creating and maintaining an event. This process spans from the very beginning of planning all the way to post-event strategizing. At the start, an event manager makes planning decisions, such as the time, location, and theme of their event. During an event, event managers oversee the event 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. All different branches of planning go into event management, including various types of sourcing, designing, regulation checks, and on-site management. In event management, you could be in the process of creating a conference, a product launch, an internal sales kick-off, or even a wedding. Really, any event that requires considerable planning and execution is event management.

1.2 Purpose

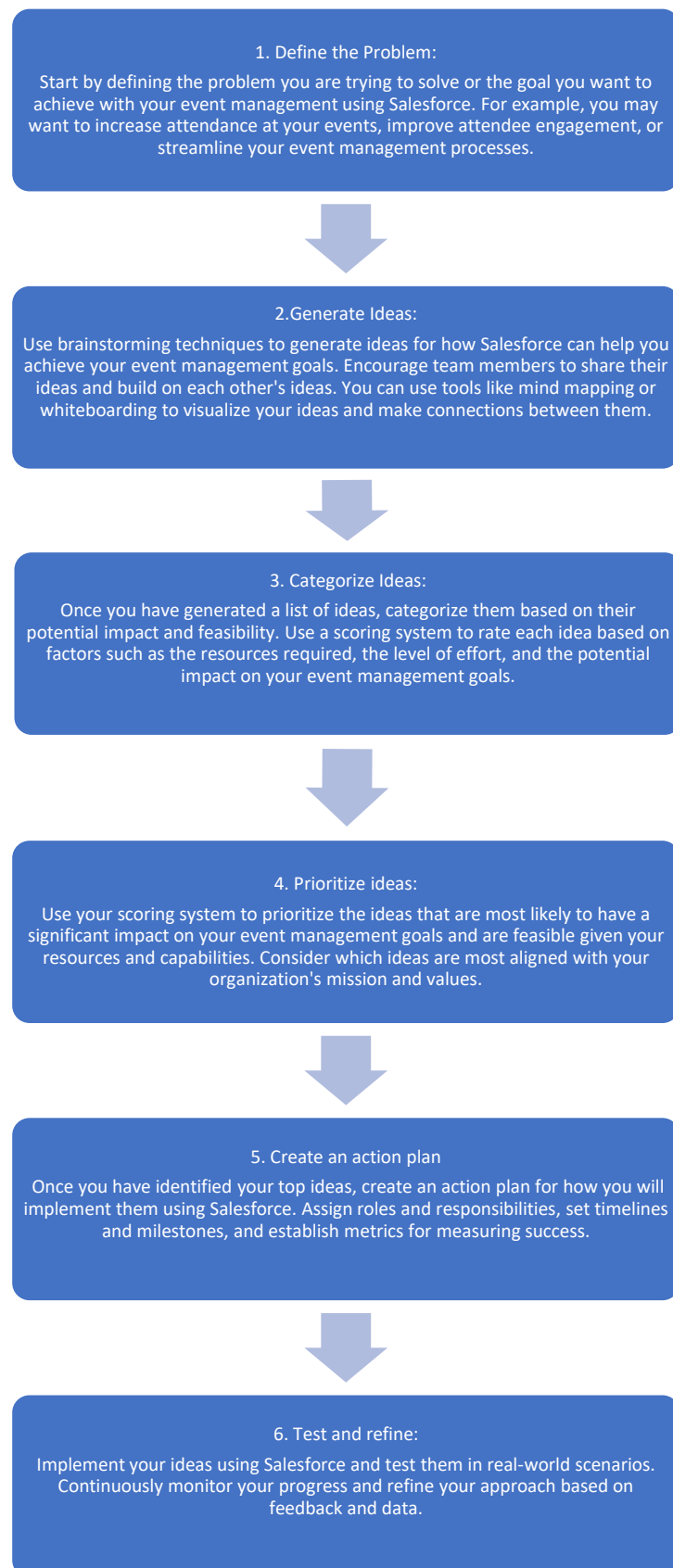
- **Manage Attendee Information:**
Salesforce can be used to capture and store attendee information, including registration details, contact information, and preference.
- **Marketing and Communication:**
Salesforce provides powerful marketing and communication tools that can be used to promote the event, send email invitations, and track RSVPs.

2. Problem Definition and Design Thinking:

2.1 Empathy Map

<p>Start by defining the target audience for your event. Who are the attendees, and what are their characteristics and preferences? Use Salesforce's data and analytics tools to gain insights into your audience, such as demographics, interests, and behavior.</p>	<p>Identify the key touchpoints that attendees will have with your event, such as registration, check-in, sessions, and networking events. Use Salesforce to map out the attendee journey and identify areas where you can improve the attendee experience.</p>
<p>Use the empathy mapping framework to define the attendee's experience at each touchpoint. What are the attendee's thoughts, feelings, and motivations at each stage of the journey? Use data and feedback from previous events to inform your understanding of the attendee experience.</p>	<p>Identify the pain points that attendees may experience at each touchpoint. What are the barriers to attendance or engagement, and how can Salesforce be used to address these challenges? Use Salesforce's automation and personalization tools to improve the attendee experience and reduce friction points.</p>
<p>Based on your empathy map, develop solutions to improve the attendee experience at each touchpoint. Use Salesforce's customization and integration tools to implement these solutions and track their impact on attendee satisfaction and engagement.</p>	<p>Continuously monitor attendee feedback and engagement using Salesforce's analytics tools, and use this feedback to refine your event management processes and improve the attendee experience over time.</p>

2.2 Ideation and Brainstorming map Screenshot:



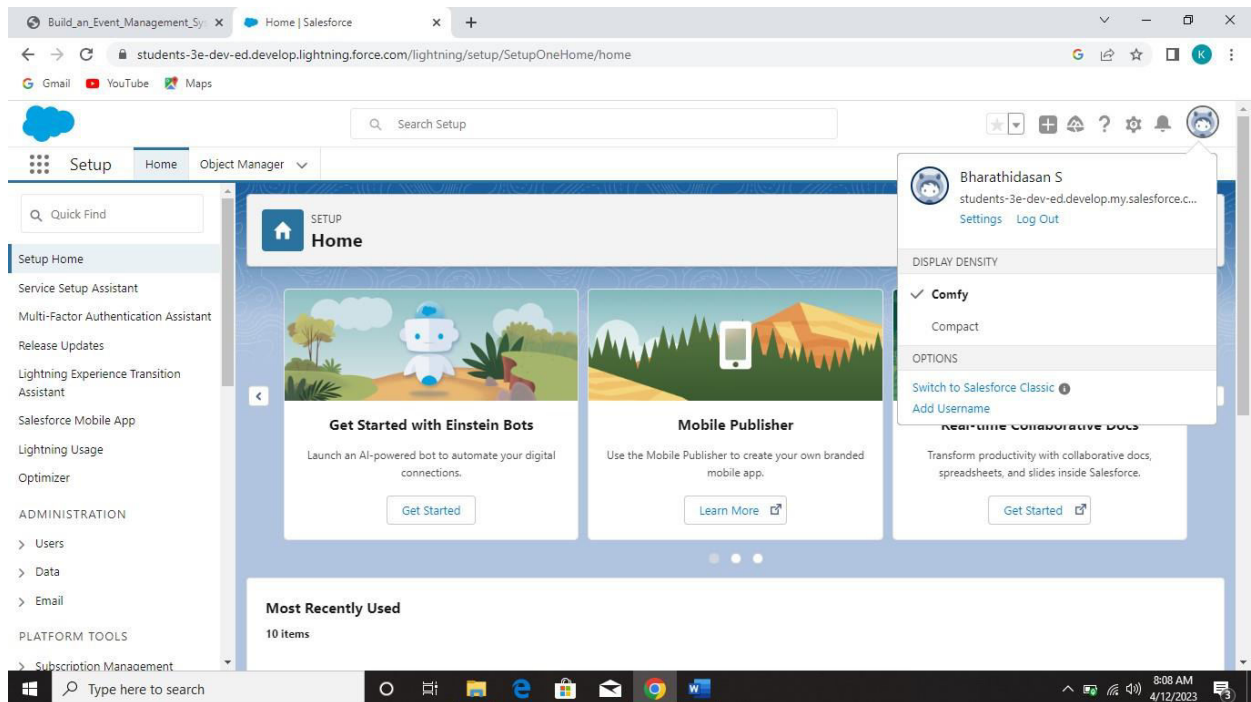
3. Result

3.1 Data Model

Object Name	Fields in the Object
Event	Field Label: City Data Type: Text
Attendee	Field Label: Id Data Type: Auto number Field Label: Phone Data Type: Phone Field Label: Email Data Type: Email Field Label: Tickets Data Type: Picklist Field Label: Event Name Data Type: Master-detail Relationship
Speaker	Field Label: Bio Data Type: Text Area Field Label: e-mail Data Type: Email Field Label: Event Name Data Type: Look-up Relationship

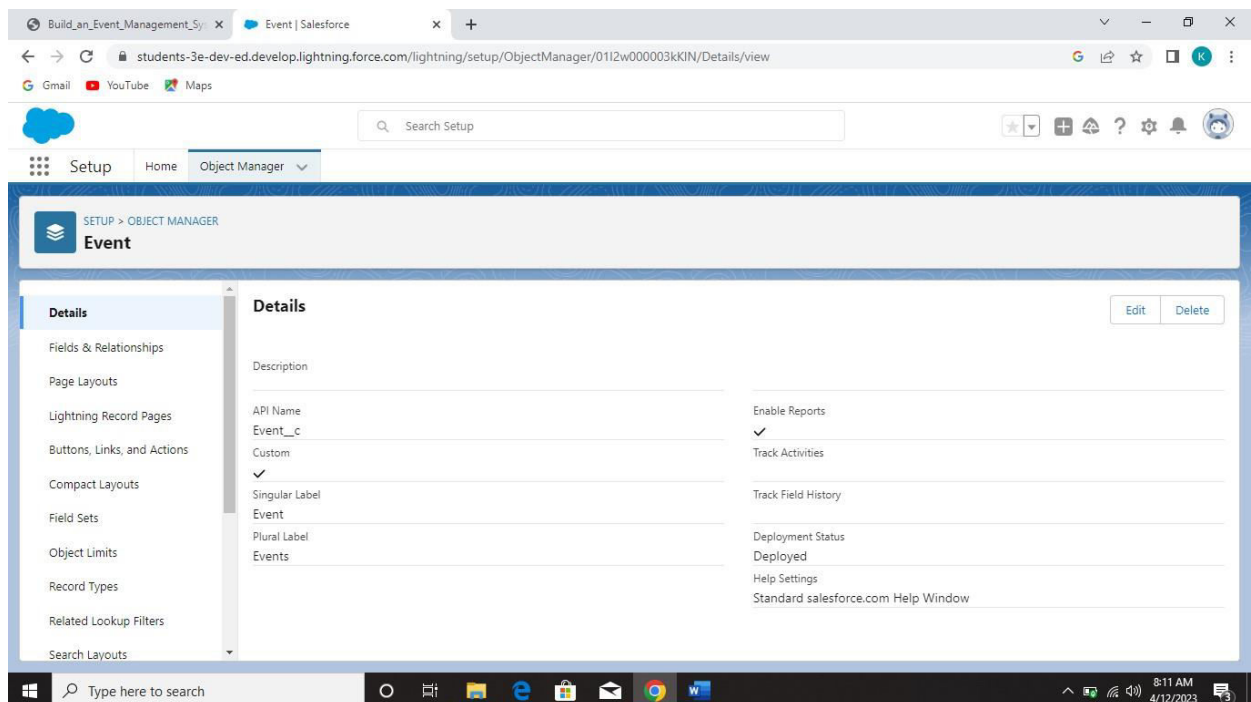
3.2 Activity and Screenshot

Create Salesforce Org-creating Developer Account



Object

Creating of Event Object



Creating of Attendee Object

The screenshot shows the Salesforce Setup interface for the 'Attendee' object. The browser address bar displays the URL: `students-3e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003kKpf/Details/view`. The page title is 'Attendee'. On the left, a sidebar lists configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The 'Details' section is active, showing the following configuration:

Field	Value
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

Buttons for 'Edit' and 'Delete' are located in the top right corner of the details section. The Windows taskbar at the bottom shows the time as 8:13 AM on 4/12/2023.

Creation of Speaker Object

The screenshot shows the Salesforce Setup interface for the 'Speaker' object. The browser address bar displays the URL: `students-3e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003kKpp/Details/view`. The page title is 'Speaker'. The sidebar and configuration details are similar to the Attendee object page:

Field	Value
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

Buttons for 'Edit' and 'Delete' are located in the top right corner of the details section. The Windows taskbar at the bottom shows the time as 8:15 AM on 4/12/2023.

Creation of Vendor Object

The screenshot shows the Salesforce Setup interface for the 'Vendor' object. The left sidebar contains a navigation menu with options like 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', and 'Search Layouts'. The main content area is titled 'Details' and includes fields for 'Description', 'API Name' (Vendor__c), 'Custom' (checked), 'Singular Label' (Vendor), 'Plural Label' (Vendors), 'Enable Reports' (checked), 'Track Activities', 'Track Field History', 'Deployment Status' (Deployed), and 'Help Settings' (Standard salesforce.com Help Window). 'Edit' and 'Delete' buttons are visible in the top right corner.

Tab

Creation of Event Tab

The screenshot shows the Salesforce Setup interface for the 'Events' custom object tab. The left sidebar shows a search for 'tab' with results under 'User Interface' including 'Loaded Console Tab Limit', 'Rename Tabs and Labels', and 'Tabs'. The main content area is titled 'Custom Object Tab Events' and includes a 'Help for this Page' link. Below the title, it states: 'Below is the information for the custom tab. Click Edit to change the custom tab.' The 'Custom Tab Definition Detail' section includes fields for 'Tab Label' (Events), 'Object' (Event), 'Description', 'Created By' (Rharathidasan S, 02/04/2023, 4:48 pm), 'Tab Style' (Factory), 'Splash Page Custom Link', and 'Modified By' (Rharathidasan S, 10/04/2023, 3:14 pm). 'Edit' and 'Delete' buttons are present.

Creation of Attendee Tab

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'tab' entered. Under 'User Interface', the 'Tabs' section is selected. The main content area is titled 'Custom Object Tab Attendees'. Below the title, it says 'Below is the information for the custom tab. Click Edit to change the custom tab.' The 'Custom Tab Definition Detail' table shows the following information:

Tab Label	Attendees	Tab Style	Books
Object	Attendee	Splash Page Custom Link	
Description			
Created By	Bharathidasan S. 02/04/2023, 4:51 pm	Modified By	Bharathidasan S. 10/04/2023, 3:13 pm

Creation of Speaker Tab

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'tab' entered. Under 'User Interface', the 'Tabs' section is selected. The main content area is titled 'Custom Object Tab Speakers'. Below the title, it says 'Below is the information for the custom tab. Click Edit to change the custom tab.' The 'Custom Tab Definition Detail' table shows the following information:

Tab Label	Speakers	Tab Style	Car
Object	Speaker	Splash Page Custom Link	
Description			
Created By	Bharathidasan S. 02/04/2023, 4:50 pm	Modified By	Bharathidasan S. 02/04/2023, 4:50 pm

Creation of Vendor Tab

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'tab' entered, and the 'Tabs' section is selected under 'User Interface'. The main content area is titled 'Custom Object Tab Vendors' and shows the details for a custom tab. The 'Custom Tab Definition Detail' table lists the following information:

Tab Label	Vendors	Tab Style	Hammer
Object	Vendor	Splash Page Custom Link	
Description			
Created By	Bharathidasan S.	Modified By	Bharathidasan S.
	02/04/2023, 4:50 pm		02/04/2023, 4:50 pm

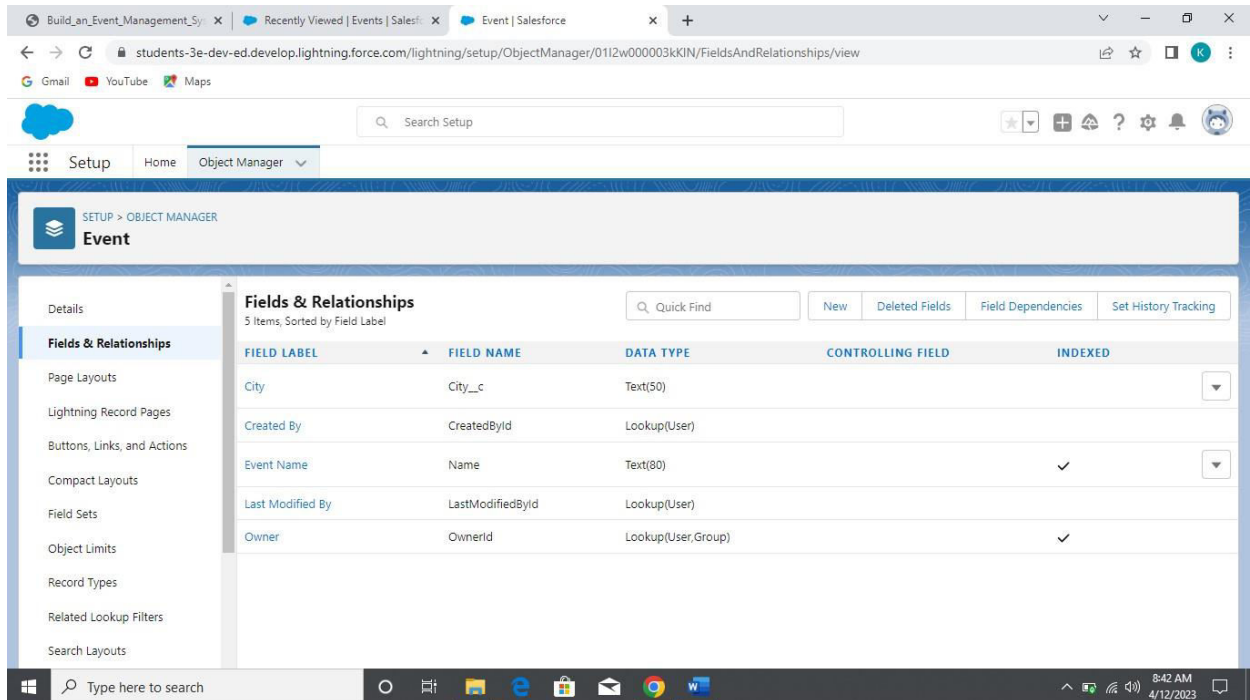
Lightning App

Creation of Event Management App

The screenshot shows the Salesforce Lightning App interface. The top navigation bar has 'Event Management' selected. The main content area is titled 'Events Recently Viewed' and shows a list of events. The list is currently empty, with the message 'You haven't viewed any Events recently. Try switching list views.' displayed. The list view controls show '0 items' and 'Updated a few seconds ago'.

Fields

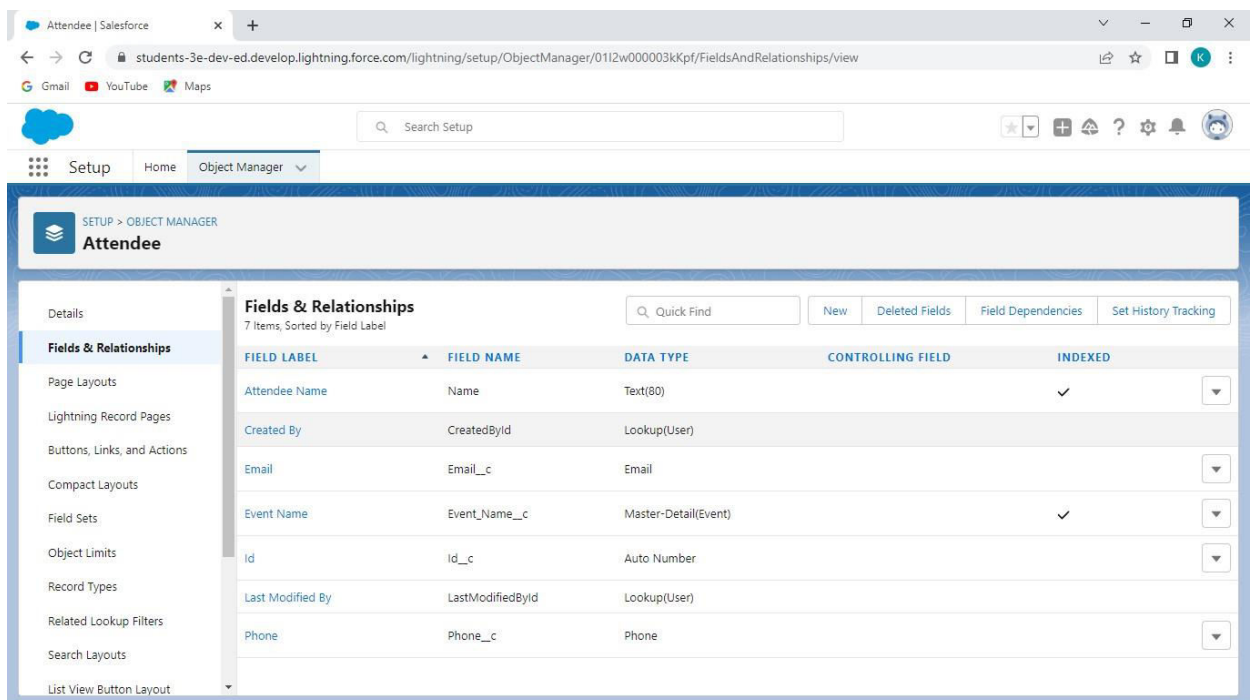
Creation of Field for The Event Object



The screenshot shows the Salesforce Setup interface for the 'Event' object. The 'Fields & Relationships' section is active, displaying a table of 5 fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are City, Created By, Event Name, Last Modified By, and Owner. The 'Event Name' field is highlighted in blue.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Text(50)		
Created By	CreatedById	Lookup(User)		
Event Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User, Group)		✓

Creation of Field for The Attendee Object



The screenshot shows the Salesforce Setup interface for the 'Attendee' object. The 'Fields & Relationships' section is active, displaying a table of 7 fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are Attendee Name, Created By, Email, Event Name, Id, Last Modified By, and Phone. The 'Event Name' field is highlighted in blue.

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

Creation of Field for The Speaker Object

The screenshot shows the Salesforce Setup interface for the 'Speaker' object. The 'Fields & Relationships' section is active, displaying a table of 7 fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: Bio (Text Area(255)), Created By (Lookup(User)), e-mail (Email), Event Name (Lookup(Event), indexed), Last Modified By (Lookup(User)), Owner (Lookup(User,Group), indexed), and Speaker Name (Text(80), indexed).

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		
Event Name	Event_Name__c	Lookup(Event)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Speaker Name	Name	Text(80)		✓

Creation of Field for The Vendor Object

The screenshot shows the Salesforce Setup interface for the 'Vendor' object. The 'Fields & Relationships' section is active, displaying a table of 9 fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: Created By (Lookup(User)), e-mail (Email), e-mail1 (Email), Event Name (Lookup(Event), indexed), Last Modified By (Lookup(User)), Owner (Lookup(User,Group), indexed), Phone (Phone), Service Provider (Text(10)), and Vendor Name (Text(80), indexed).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
e-mail	e_mail__c	Email		
e-mail1	e_mail1__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(10)		
Vendor Name	Name	Text(80)		✓

Profile

Creation on Profile:(Event User Profile)

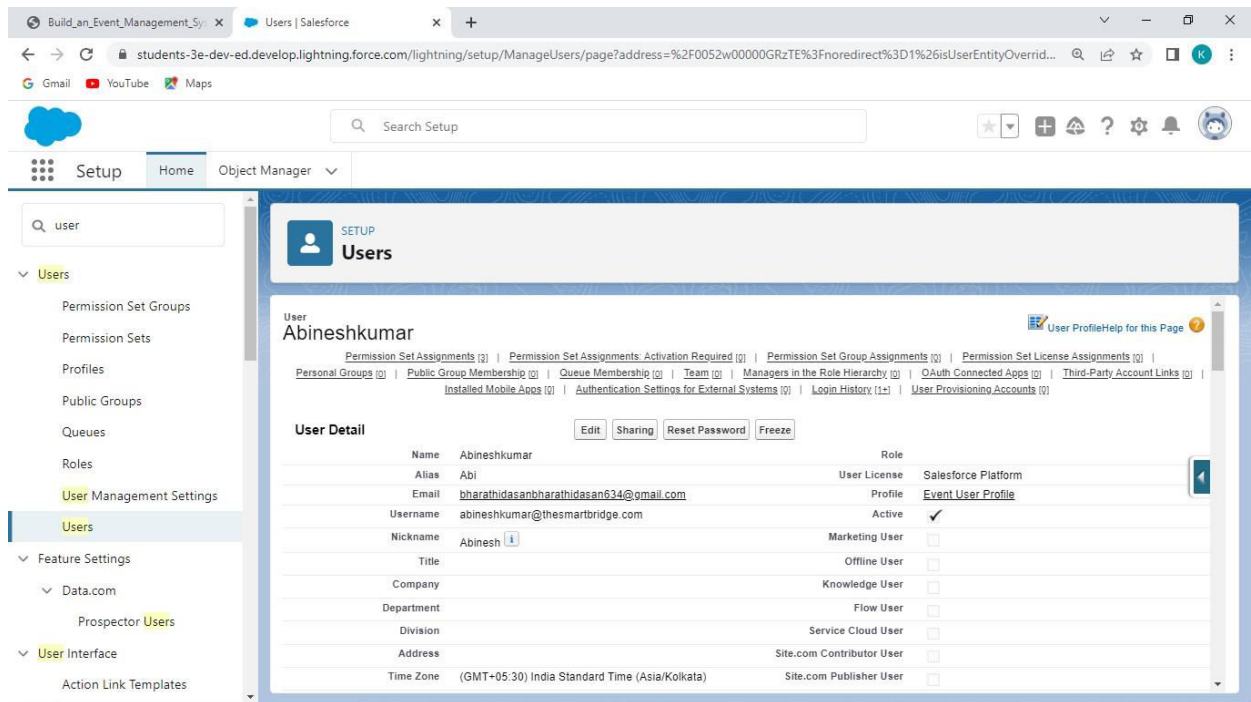
The screenshot shows the Salesforce Setup interface for the 'Event User Profile'. The left sidebar contains a search bar with 'profile' and a 'Users' section with a 'Profiles' link. The main content area is titled 'Event User Profile' and includes a description: 'Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information. If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.' Below this, there are links for 'Login IP Ranges', 'Enabled Apex Class Access', 'Enabled Visualforce Page Access', 'Enabled External Data Source Access', 'Enabled Named Credential Access', 'Enabled Custom Metadata Type Access', 'Enabled Custom Setting Definitions Access', 'Enabled Flow Access', 'Enabled Service Presence Status Access', and 'Enabled Custom Permissions'. The 'Profile Detail' section shows the profile name 'Event User Profile', user license 'Salesforce Platform', and a checked 'Custom Profile' checkbox. It also displays the description, created by 'Bharathidasan S.' on 07/04/2023 at 10:45 am, and modified by 'Bharathidasan S.' on 11/04/2023 at 10:00 pm. The 'Page Layouts' section shows the standard object layouts: 'Global' with 'Global Layout' and 'Object Milestone' with 'Object Milestone Layout'.

Creation on Profile:(Event Vendor Profile)

The screenshot shows the Salesforce Setup interface for the 'Event vendors profile'. The left sidebar contains a search bar with 'profile' and a 'Users' section with a 'Profiles' link. The main content area is titled 'Event vendors profile' and includes a description: 'Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information. If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.' Below this, there are links for 'Login IP Ranges', 'Enabled Apex Class Access', 'Enabled Visualforce Page Access', 'Enabled External Data Source Access', 'Enabled Named Credential Access', 'Enabled Custom Metadata Type Access', 'Enabled Custom Setting Definitions Access', 'Enabled Flow Access', 'Enabled Service Presence Status Access', and 'Enabled Custom Permissions'. The 'Profile Detail' section shows the profile name 'Event vendors profile', user license 'Salesforce', and a checked 'Custom Profile' checkbox. It also displays the description, created by 'Bharathidasan S.' on 03/04/2023 at 8:38 pm, and modified by 'Bharathidasan S.' on 11/04/2023 at 10:00 pm. The 'Page Layouts' section shows the standard object layouts: 'Global' with 'Global Layout' and 'Object Milestone' with 'Object Milestone Layout'.

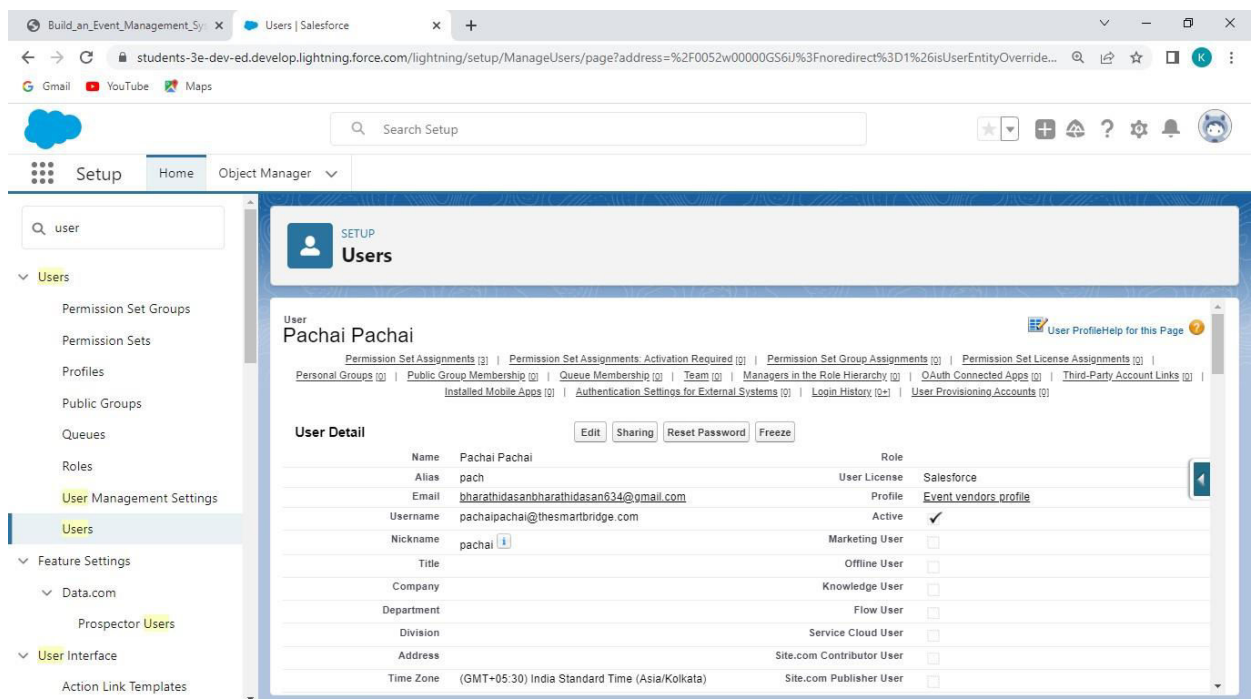
Users

Creation on User:(Event User Profile)



The screenshot shows the Salesforce Setup page for a user named Abineshkumar. The left sidebar contains a navigation menu with options like Permission Set Groups, Profiles, Public Groups, Queues, Roles, and User Management Settings. The main content area displays the user's details, including Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, and Time Zone. The user is active and has the role of Salesforce Platform. The profile is set to Event User Profile. The user is also assigned the Marketing User role.

User Detail	
Name	Abineshkumar
Alias	Abi
Email	bharathidasanbharathidasan634@gmail.com
Username	abineshkumar@thesmartbridge.com
Nickname	Abinesh
Title	
Company	
Department	
Division	
Address	
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Role	Salesforce Platform
User License	Event User Profile
Profile	Active
Marketing User	<input checked="" type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>



The screenshot shows the Salesforce Setup page for a user named Pachai Pachai. The left sidebar contains a navigation menu with options like Permission Set Groups, Profiles, Public Groups, Queues, Roles, and User Management Settings. The main content area displays the user's details, including Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, and Time Zone. The user is active and has the role of Salesforce. The profile is set to Event vendors profile. The user is also assigned the Marketing User role.

User Detail	
Name	Pachai Pachai
Alias	pach
Email	bharathidasanbharathidasan634@gmail.com
Username	pachaipachai@thesmartbridge.com
Nickname	pachai
Title	
Company	
Department	
Division	
Address	
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Role	Salesforce
User License	Event vendors profile
Profile	Active
Marketing User	<input checked="" type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>

Creation on User:(Event Vendor Profile)

Permission Sets

Creation a Permission Sets:(Event Permits and Save)

The screenshot shows the Salesforce Setup interface for a permission set named "Event Permits and Save". The left sidebar contains a search bar with "user" and a list of navigation items including Users, Feature Settings, Data.com, and User Interface. The main content area displays the "Permission Set Overview" for "Event Permits and Save". The overview table includes fields for Description, License, Session Activation Required, Last Modified By, API Name, Namespace Prefix, and Created By. Below the overview, there are sections for "Apps" with sub-sections for "Assigned Apps", "Assigned Connected Apps", and "Object Settings".

Permission Set Overview	
Description	Event Permits and Save
License	
Session Activation Required	<input type="checkbox"/>
Last Modified By	Bharathidasan S. 07/04/2023, 11:05 am
API Name	Event_Permits_and_Save
Namespace Prefix	
Created By	Bharathidasan S. 07/04/2023, 11:02 am

Apps

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

Creation a Permission Sets:(Vendor Permits and Save)

The screenshot shows the Salesforce Setup interface for a permission set named "Vendor Permits and Save". The left sidebar contains a search bar with "Quick Find" and a list of navigation items including Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, and Users. The main content area displays the "Permission Set Overview" for "Vendor Permits and Save". The overview table includes fields for Description, License, Session Activation Required, Last Modified By, API Name, Namespace Prefix, and Created By. Below the overview, there are sections for "Apps" with sub-sections for "Assigned Apps", "Assigned Connected Apps", and "Object Settings".

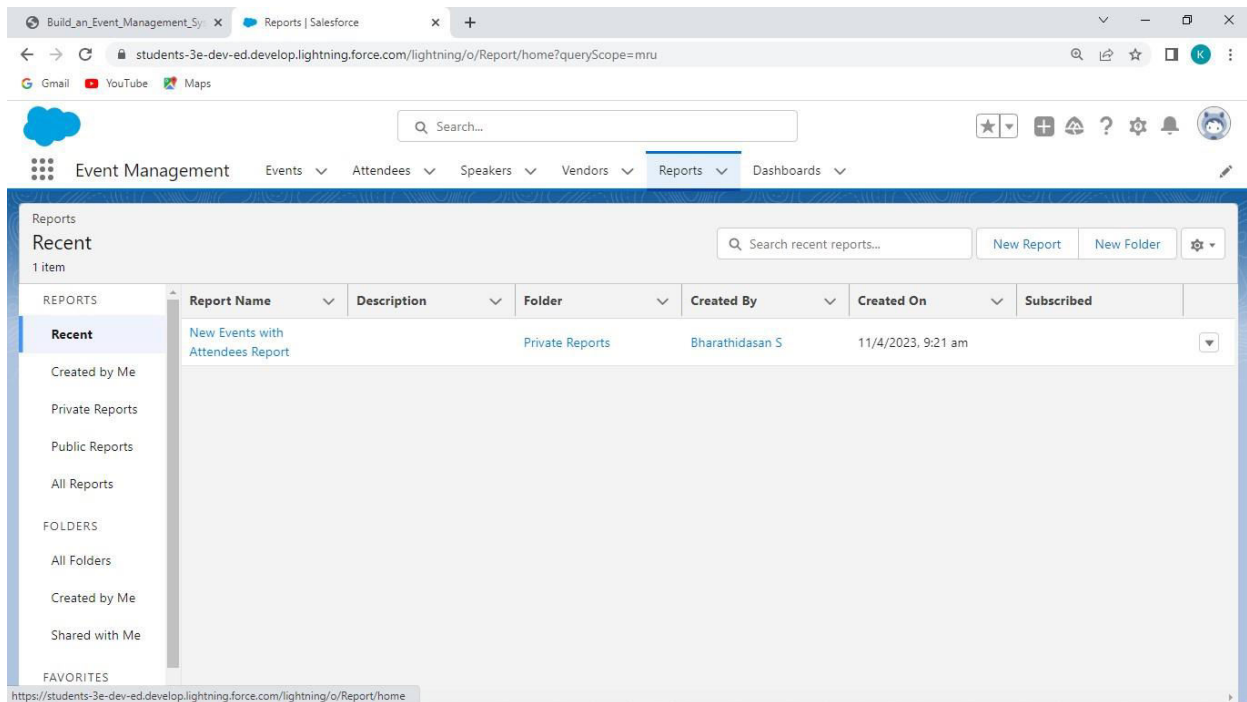
Permission Set Overview	
Description	Vendor Permits and Save
License	
Session Activation Required	<input type="checkbox"/>
Last Modified By	Bharathidasan S. 03/04/2023, 9:06 pm
API Name	Vendor_Permits_and_Save
Namespace Prefix	
Created By	Bharathidasan S. 03/04/2023, 9:06 pm

Apps

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

Reports

Creation on Event with Attendees



4. Trailhead Profile Public URL

Team Lead - <https://trailblazer.me/id/bhars118>

Team Member 1-<https://trailblazer.me/id/dhana892003>

Team Member 2-<https://trailblazer.me/id/laksd8>

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

5. ADVANTAGES & DISADVANTAGES:

Advantages of using Salesforce for event management:

Centralized data:

Salesforce allows you to store all event-related data in one place, including registration, attendee information, tasks, and analytics. This makes it easier to manage your events and access all relevant information quickly and easily.

Customization:

Salesforce is highly customizable, so you can create custom objects, fields, and workflows to meet your specific event management needs.

Automation:

You can use Salesforce's automation tools, such as workflows and triggers, to automate event-related tasks and streamline your event management processes.

Reporting and analytics:

Salesforce provides robust reporting and analytics tools, allowing you to track event performance metrics and make data-driven decisions.

Integration:

Salesforce can be integrated with other event management tools, such as Eventbrite or Event, to provide a more comprehensive event management solution.

Disadvantages of using Salesforce for event management:

Cost:

Salesforce can be expensive, especially for smaller organizations or those with limited budgets.

Complexity:

Salesforce can be complex and require a significant amount of training to use effectively. It may not be suitable for organizations with limited technical resources or expertise.

Customization requirements:

Customizing Salesforce for event management can require a significant amount of time and resources, especially if you need to create custom objects, fields, or workflows.

Dependence on Salesforce:

If your organization relies heavily on Salesforce for event management, any downtime or issues with the platform can cause significant disruptions to your event management processes.

APPLICATION:

Set up your Salesforce account:

If you haven't already, create a Salesforce account and set up your organization. You can use the Salesforce Nonprofit Success Pack (NPSP) if you are a nonprofit organization.

Create an event object:

Create a custom object in Salesforce to store information about your events, such as the event name, date, location, and attendees.

Set up registration:

Create a custom object to store information about event registrations, such as the attendee name, contact information, and registration status. You can use Salesforce's built-in Web-to-Lead or Web-to-Case functionality to capture registration data from your website.

Manage attendees:

Use Salesforce's campaign functionality to manage event attendees. Create a campaign for each event, and add campaign members (i.e., registered attendees) to the campaign. This will allow you to track attendance and send email communications to attendees.

Manage event tasks:

Create tasks in Salesforce to manage event-related tasks, such as sending invitations, ordering supplies, and coordinating volunteers.

FUTURE SCOPE:

Salesforce has a range of features and tools that can be utilized for event management. Some potential future scopes for event management using Salesforce are:

1. Integrated event management platform: Salesforce can be used to create an integrated platform for event management. This platform can be used to manage all aspects of event planning, from creating event pages and registration forms to managing attendees, tracking payments, and handling post-event follow-ups.
2. Mobile event management app: Salesforce can also be used to create a mobile app for event management. This app can be used by event planners to manage events on the go, from any location. Attendees can also use the app to check in, access event details, and network with other attendees.
3. Personalization and automation: With Salesforce, event planners can personalize their communications with attendees by using data to segment attendees into specific groups and targeting them with relevant content. Additionally, automation can be used to streamline repetitive tasks such as email campaigns and registration reminders.
4. Analytics and reporting: Salesforce can also provide valuable insights into event performance through analytics and reporting. Event planners can use this data to optimize future events, identify areas for improvement, and measure event ROI.
5. Integration with other tools and platforms: Salesforce can be integrated with other tools and platforms to enhance event management capabilities. For example, integration with social media platforms can be used to promote events and engage

with attendees, while integration with payment gateways can streamline the payment process.

Overall, the future scope for event management using Salesforce is vast, and organizations can leverage the platform to create seamless and engaging events that deliver measurable results.