

Build An Event Management System Using Salesforce

Team id:NM2023TMID36551

1.INTRODUCTION

1.1 Overview

An Event Management System provides campus event planners a flexible, fully integrated solution to simplify the event management process and keep your customers, faculty and students happy, while maintaining important reports and data for making real estate and future planning decisions

1.2 Purpose

An Event Management System minimizes the steps needed to manage your events, creating a much more efficient administrative process. This way, event planners can focus more on the details, without getting lost in administrative tasks.


2 Problem Definition & Design Thinking

2.1 Empathy Map

An empathy map is a widely used visualization tool. The primal purpose of an empathy map is to bridge the understanding of the end user. Within context of its application, this tool is used to build a shared understanding of the user's needs and provide context to a user centered solution. The traditional empathy map begins with four categories they are says, thinks, does and feels.

- Says category contains what the user says out loud during research.
- Thinks category contains what the user is thinking
- Does category contains the user's action and behavior.
- Feels category contains the user's emotional state in context with their experience.

Template



Empathy map

Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.

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Build empathy

The information you add here should be representative of the observations and research you've done about your users.

Says
What have we heard them say?
What can we imagine them saying?

While many businesses, nonprofits, and other organizations use Salesforce for some part of their event management strategy, many of these event planning teams aren't using their CRM to its fullest potential. (Just they may not even know it!)

Planning events is a major undertaking. No matter what type of organization you are or what type of events you're planning, staying on top of logistics, guests, and everything else can lead to major frustration if you don't have an outright strategy to streamline the process.

Sound familiar? Don't worry, we'll break down each module and ensure that your team knows how to remedy these potential pitfalls and get more from your Salesforce event strategy.

Does
What behavior have we observed?
What can we imagine them doing?

If you're using a third-party platform to plan your events, all of your event data exists separately from your Salesforce data, making it difficult to ever get one clear picture of your efforts as a whole.

If you haven't considered personalizing your ticket or registration pricing strategy, here are a few ways to get started easily.

Thinks
What are their wants, needs, hopes, and dreams? What other thoughts might influence their behavior?

Unlike non-native apps, native event management apps were built to work seamlessly in Salesforce. Basically, they operate as an extension of your CRM, ensuring to remain on with tools that are accustomed to be compatible with Salesforce.


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Feels
What are their fears, frustrations, and anxieties? What other feelings might influence their behavior?

General questions (such as, "Did you enjoy the event?") are a good starting point, but to truly assess your event strategy, you should ask detailed questions about each portion of your event, including entertainment, speakers, venue, registration, and more.

Provision: you should be careful that you find culture, where event topics are truly considered. If you don't have full control over the event you present to the public, you might miss out on opportunities to engage potential guests.




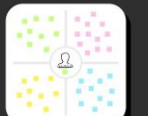
You can also amp up your event experience by branching out and including even more engagement opportunities such as merchandise sales, sponsorship recognition, or additional donation opportunities.



Need some inspiration?

See a finished version of this template to kickstart your work.

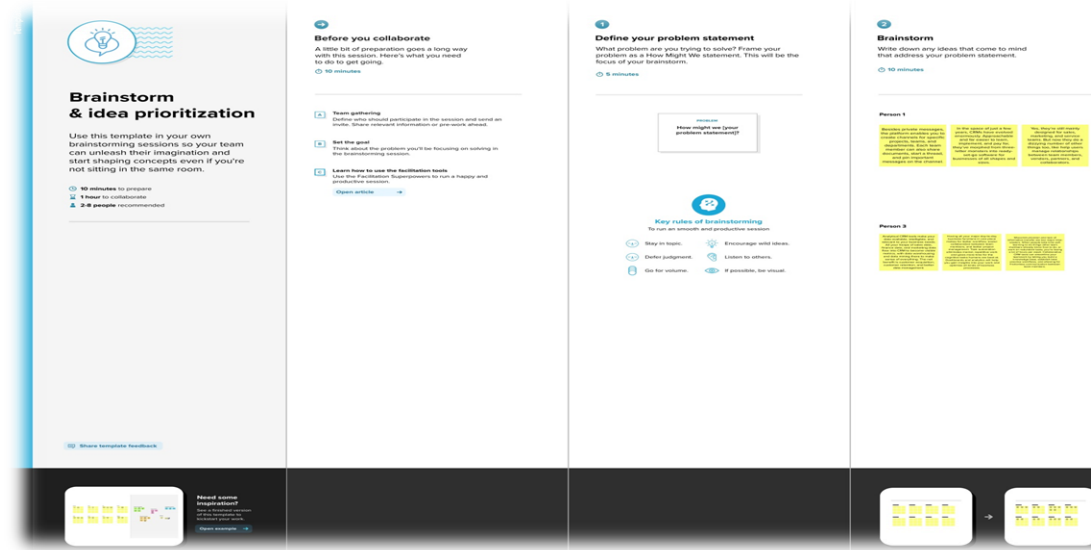
[Open example](#)

2.2 Ideation & Brainstorming Map

Brainstorming is an activity that will help you generate more innovative ideas. Its one of many methods of ideations. The process of coming up with new ideas and its core to the design thinking process. It is a process of forming ideas from conception to implementation, most often in a business setting. It is expressed via graphical, written or verbal methods and arises from past or present knowledge, influences, opinions, experiences and personal convictions. There are four types of brainstorming. They are reverse brainstorming, Stops-and-Go brainstorming, Phillips 66 brainstorming, brain writing.

Project Report Template



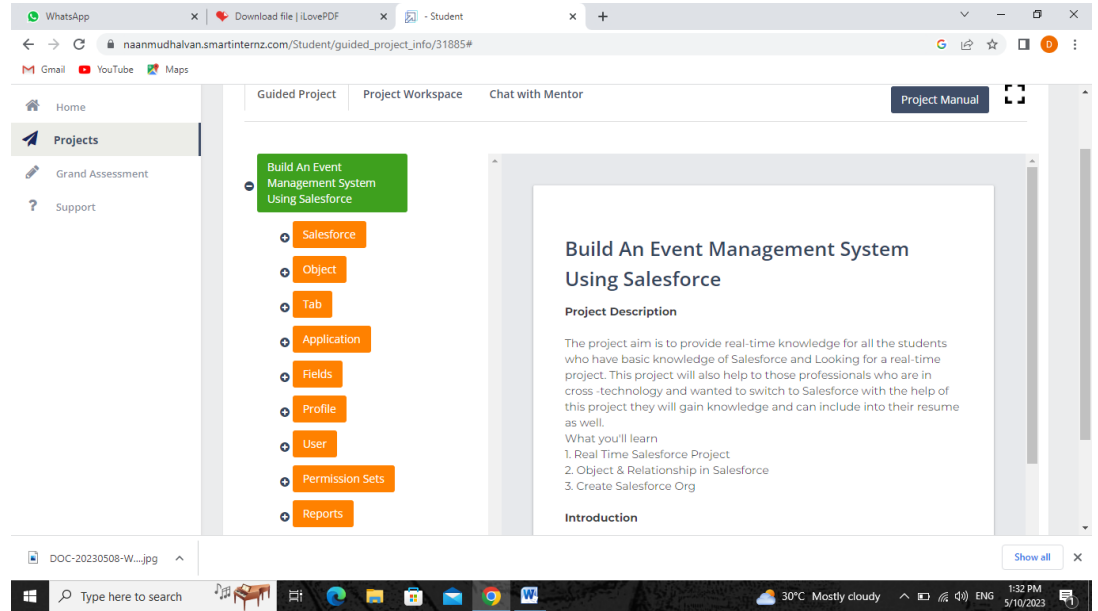
3 RESULT

3.1 Data Model:

Object name	Fields in the Object
Event	Lable:Event Plural Lable:Events
Attendees	Lable:Attendee Plural Lable:Attendees
Speaker	Lable:Speaker Plural Lable:Speakers
Vendor	Lable:Vendor Plural Lable:Vendors

3.2 Activity & Screenshot

Creating a Salesforce Developer Org:



WhatsApp | Download file | iLovePDF | - Student

naanmudhalvan.smartinternz.com/Student/guided_project_info/31885#

Gmail | YouTube | Maps

Home | Projects | Grand Assessment | Support

Guided Project | Project Workspace | Chat with Mentor | Project Manual

Build An Event Management System Using Salesforce

- Salesforce
- Object
- Tab
- Application
- Fields
- Profile
- User
- Permission Sets
- Reports

Project Description

The project aim is to provide real-time knowledge for all the students who have basic knowledge of Salesforce and Looking for a real-time project. This project will also help to those professionals who are in cross-technology and wanted to switch to Salesforce with the help of this project they will gain knowledge and can include into their resume as well.

What you'll learn

1. Real Time Salesforce Project
2. Object & Relationship in Salesforce
3. Create Salesforce Org

Introduction

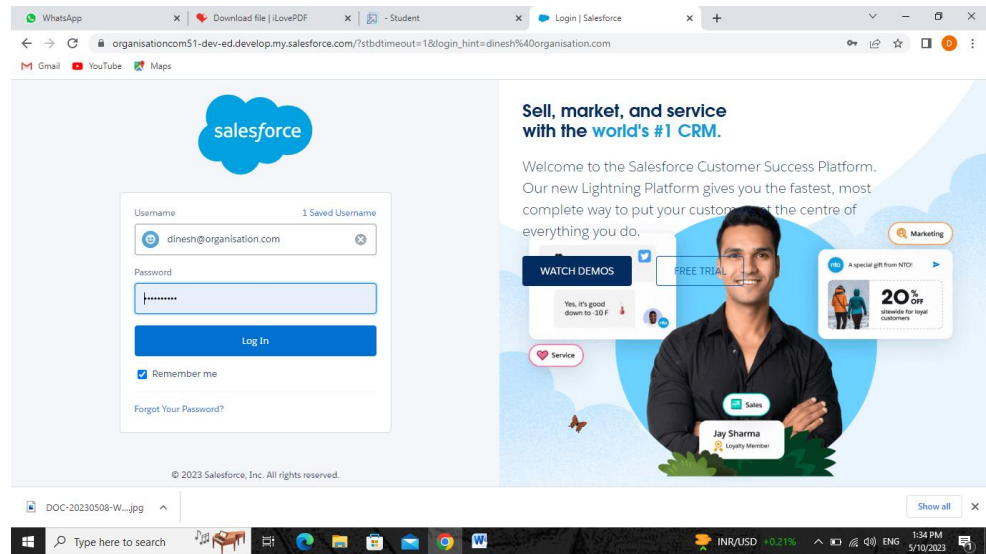
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1:32 PM 5/10/2023



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organisationcom51-dev-ed.develop.my.salesforce.com/?stbtimeout=1&login_hint=dinesh%40organisation.com

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salesforce

Username 1 Saved Username

dinesh@organisation.com

Password

Log In

Remember me

Forgot Your Password?

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Sell, market, and service with the world's #1 CRM.

Welcome to the Salesforce Customer Success Platform. Our new Lightning Platform gives you the fastest, most complete way to put your customers at the centre of everything you do.

WATCH DEMOS

FREE TRIAL

Yes, it's good down to 30°F

A special gift from NDC

20% Off

Marketing

Service

Sales

Jay Sharma

Loyalty Member

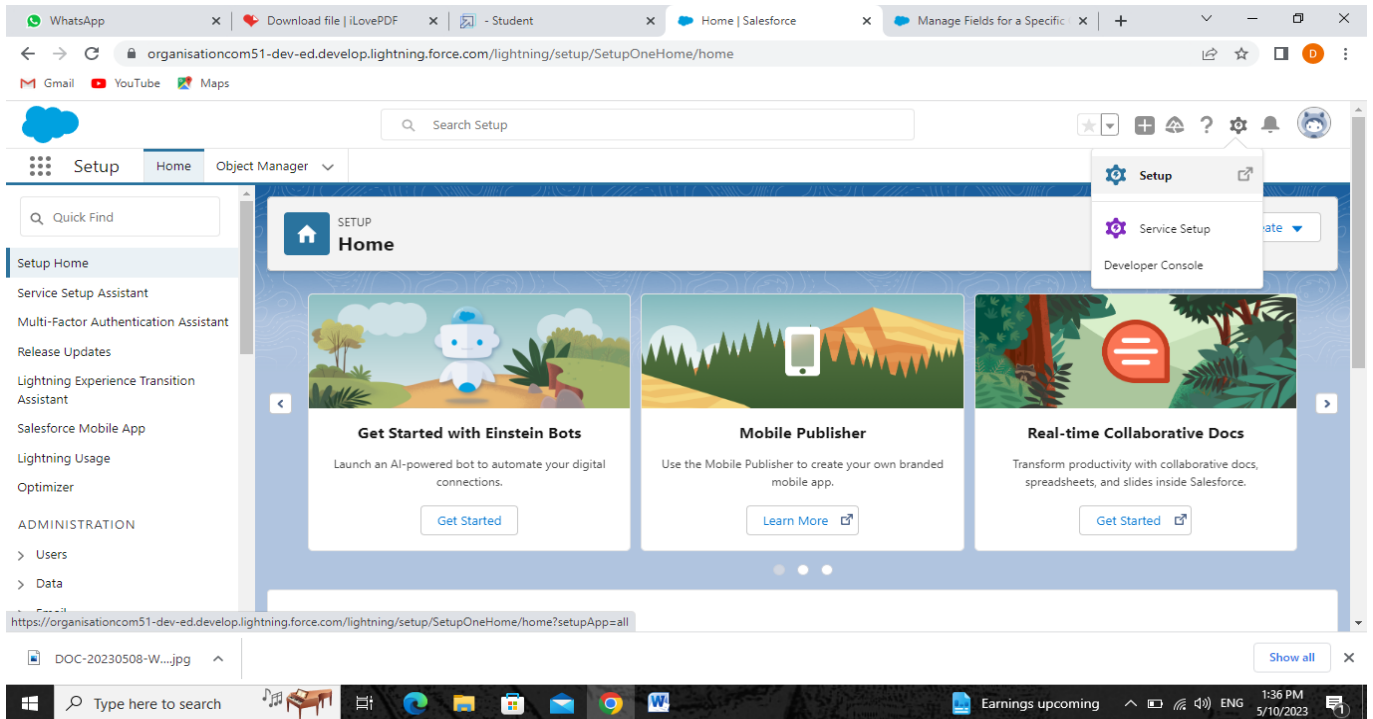
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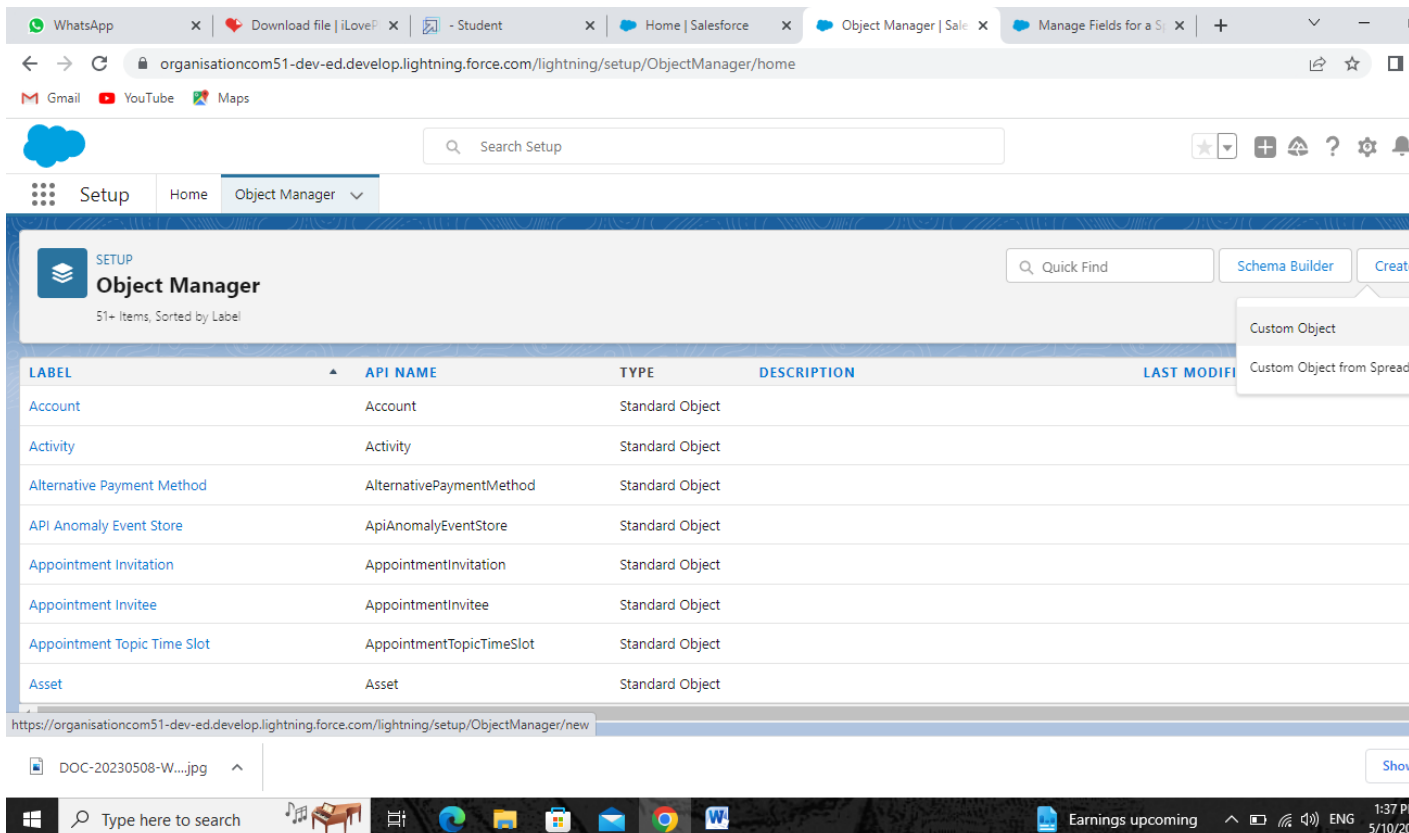
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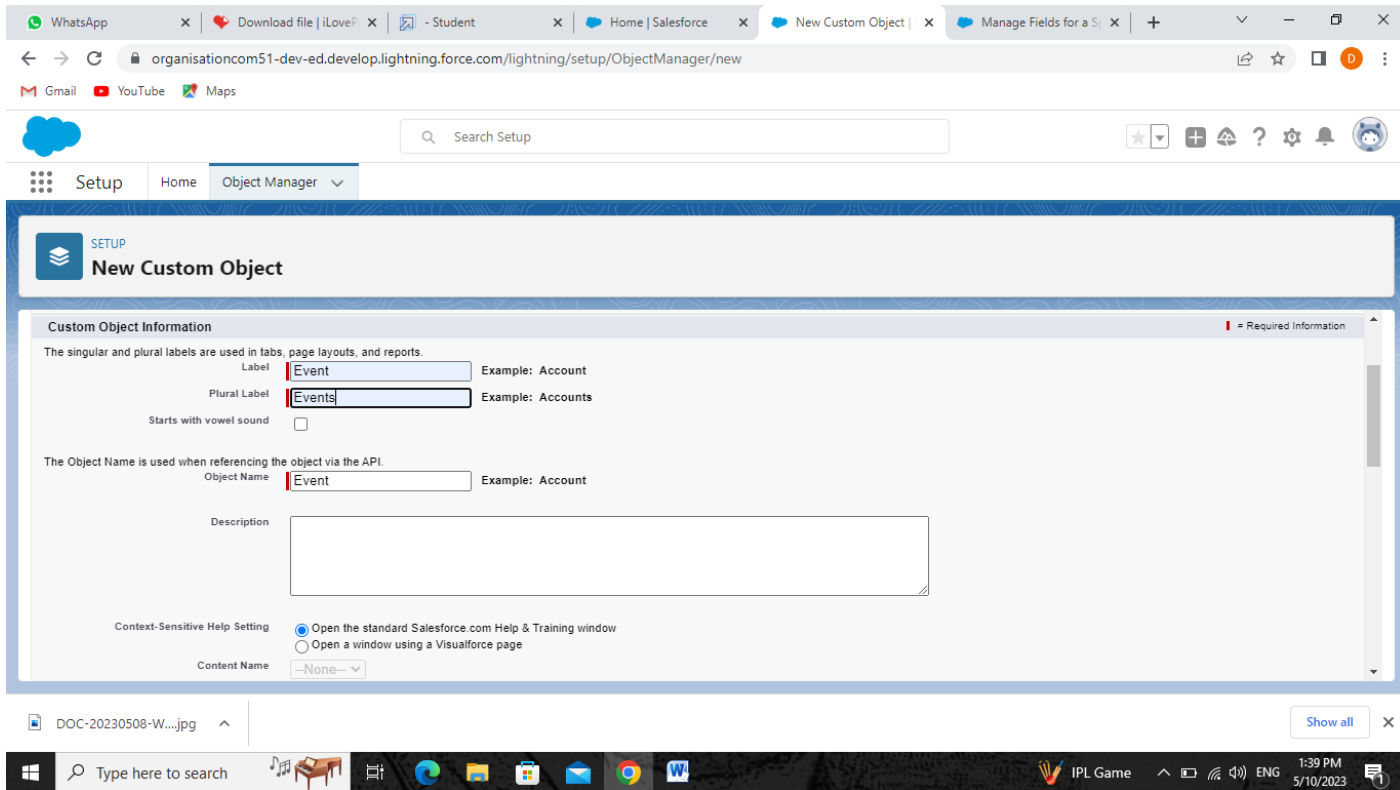
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Salesforce is your customer success platform ,designed to help you sell,service,market,analyz connect with your customers.

Creating a custom objects:





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organisationcom51-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

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Search Setup

Setup Home Object Manager

SETUP New Custom Object

Custom Object Information ! Required Information

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

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

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

Object Name Example: Account

Description

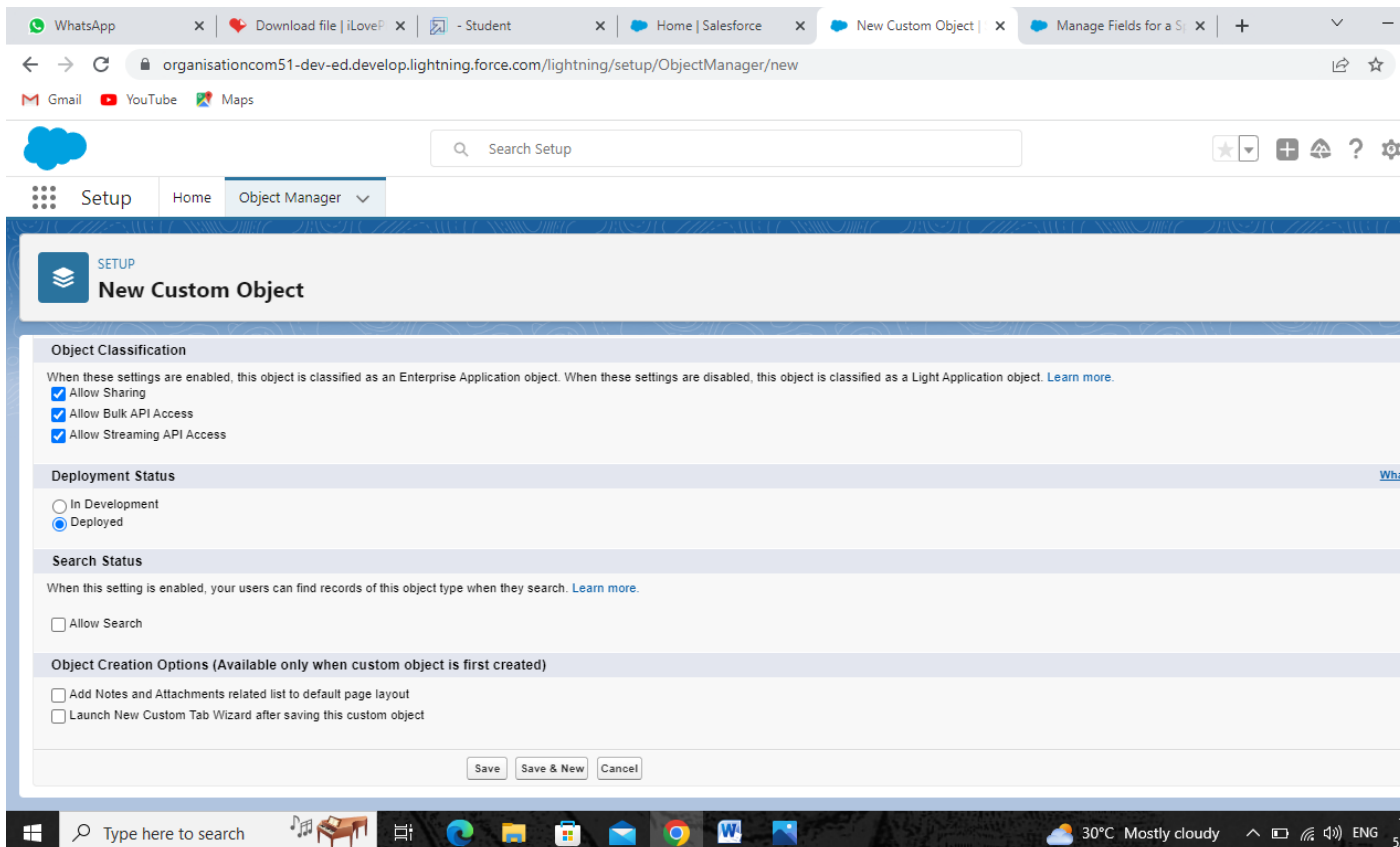
Context-Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window ☐ Open a window using a Visualforce page

Content Name

DOC-20230508-W....jpg Show all

Type here to search

IPL Game 1:39 PM 5/10/2023



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organisationcom51-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

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Search Setup

Setup Home Object Manager

SETUP New Custom Object

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

☒ Allow Sharing

☒ Allow Bulk API Access

☒ Allow Streaming API Access

Deployment Status

☐ In Development

☒ Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

☐ Allow Search

Object Creation Options (Available only when custom object is first created)

☐ Add Notes and Attachments related list to default page layout

☐ Launch New Custom Tab Wizard after saving this custom object

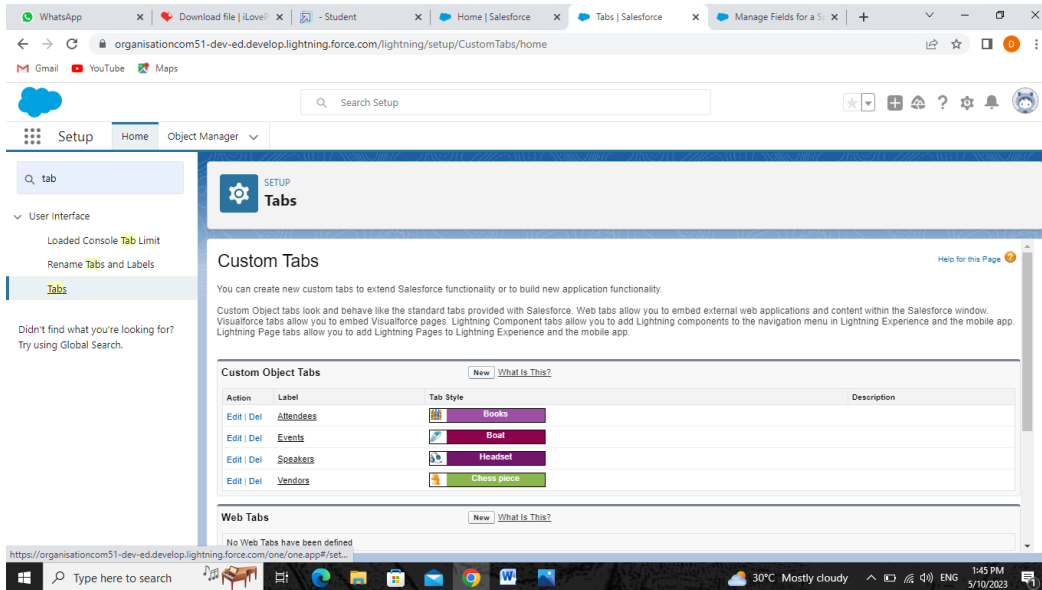
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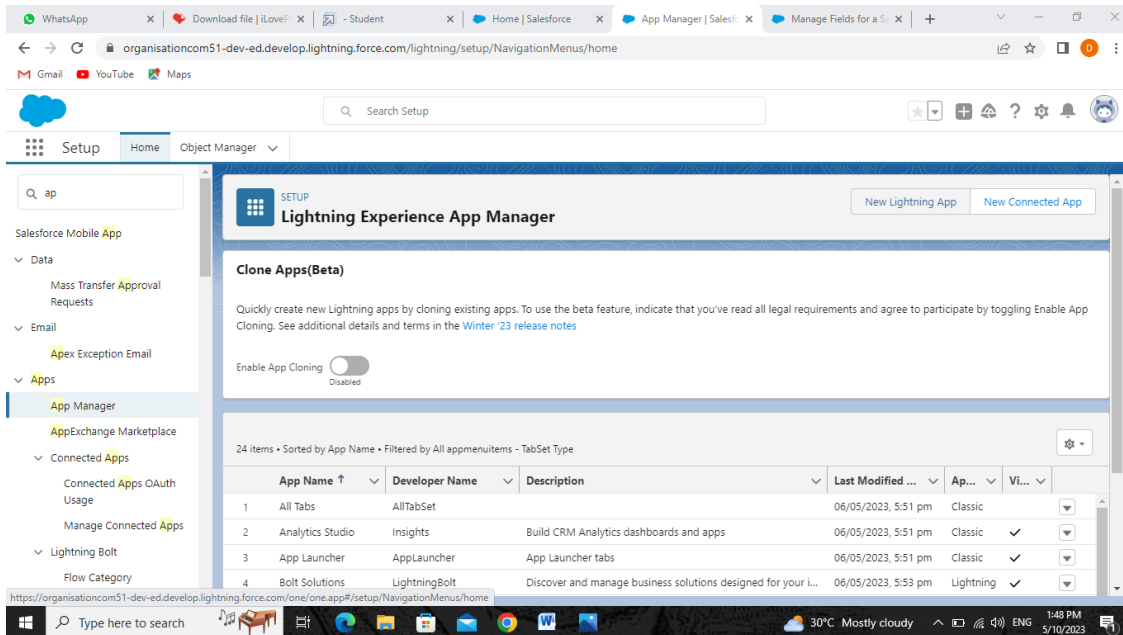
Salesforce object are database tables that permit you to store data

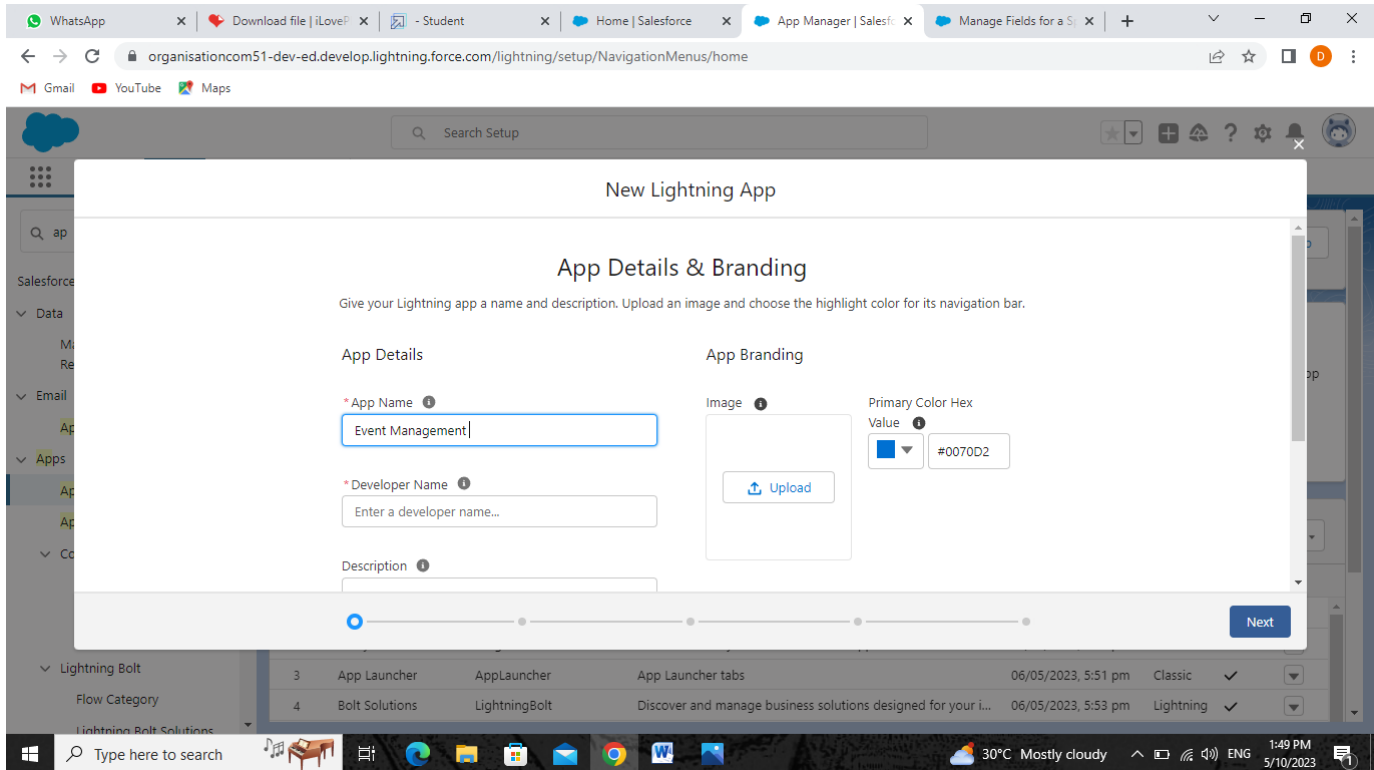
that is specific to an organization.it consists of fields and records.

Creation of Tabs:(Event,attendee,speaqker,vendor)

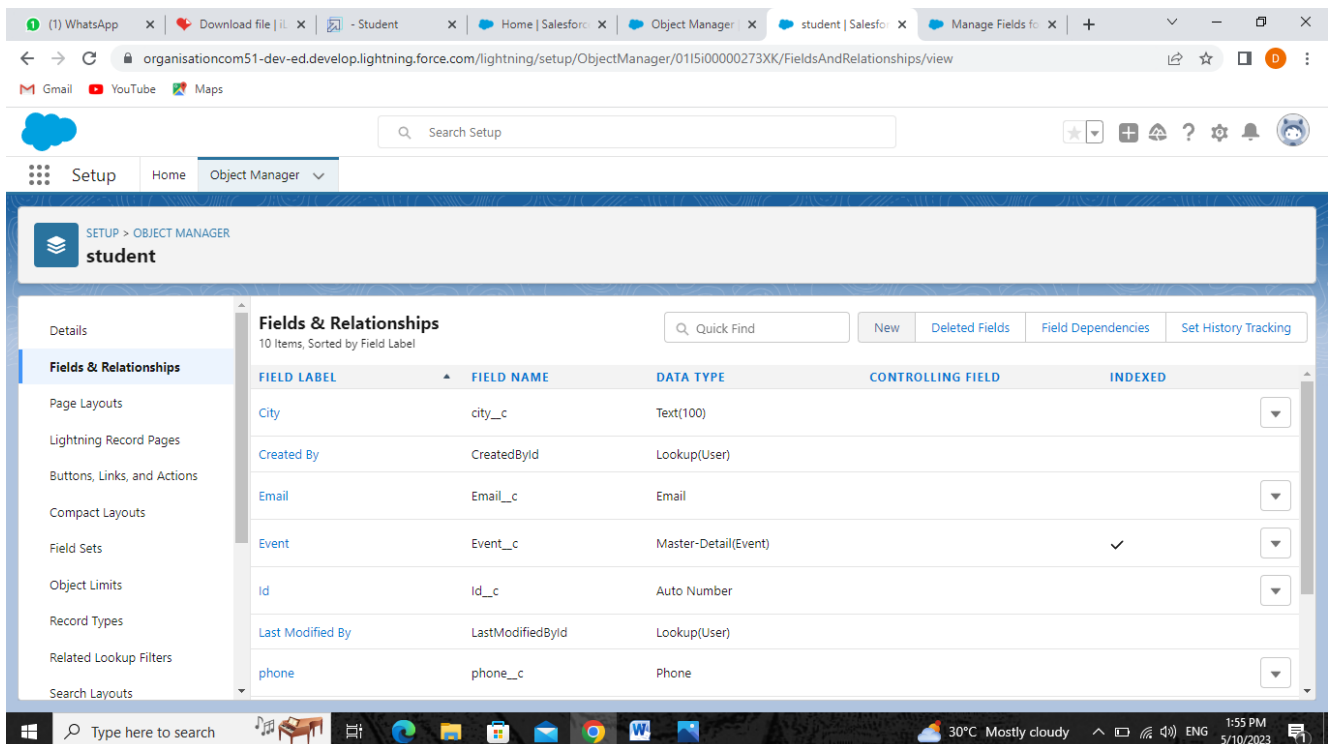


Create the Event Management construction App:



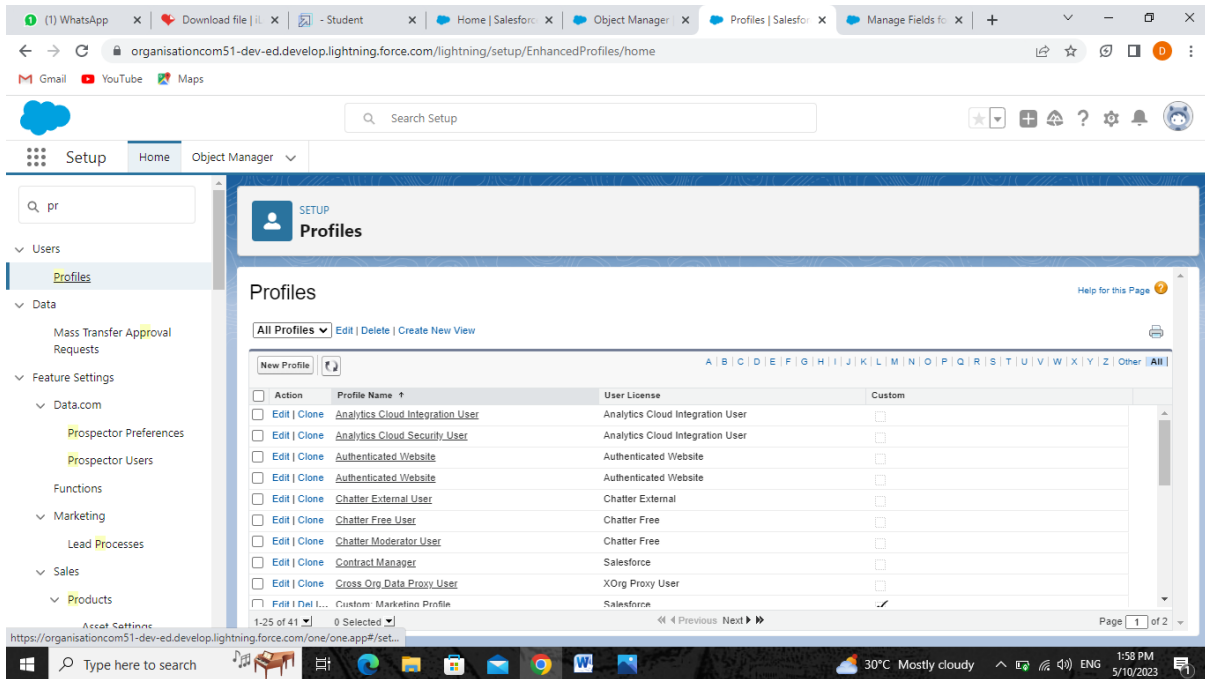


Creating Custom Fields:



Fields in salesforce represents what the columns represent In relation databases.it can store data values which are required for a particular object in a record.

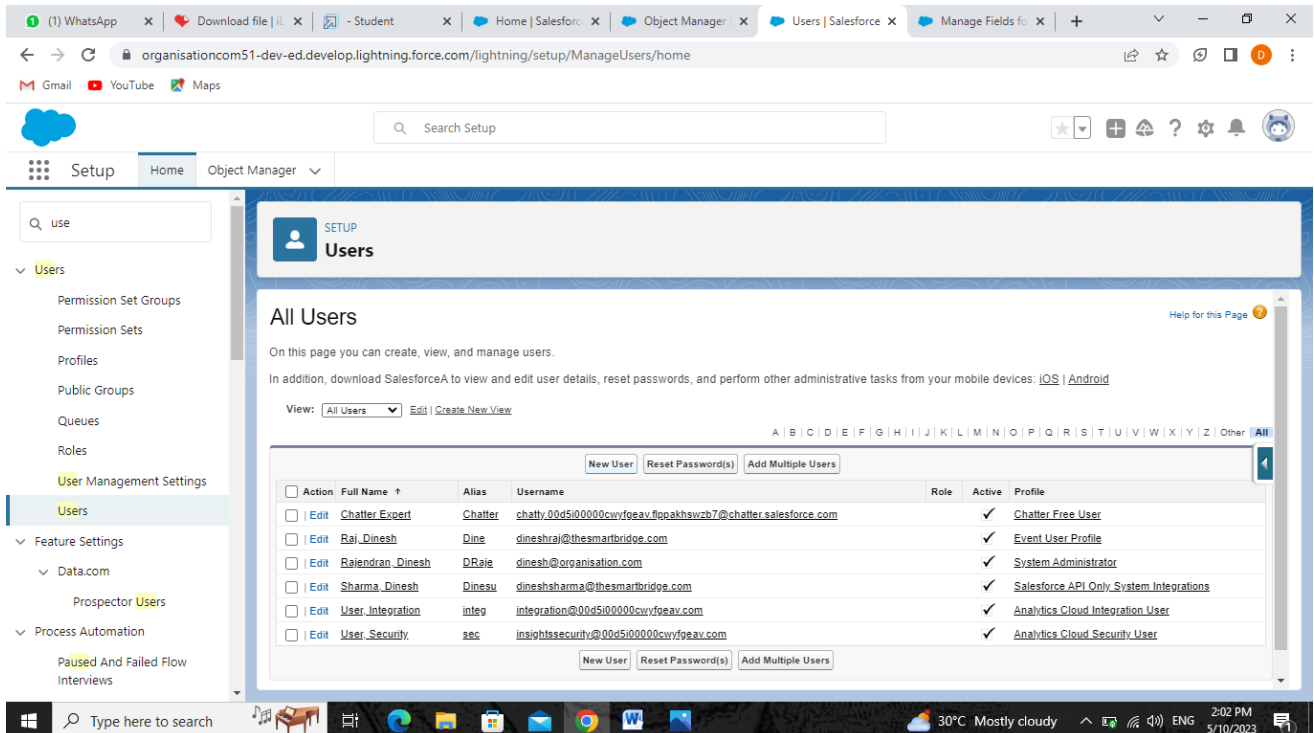
Create a Custom Profile:



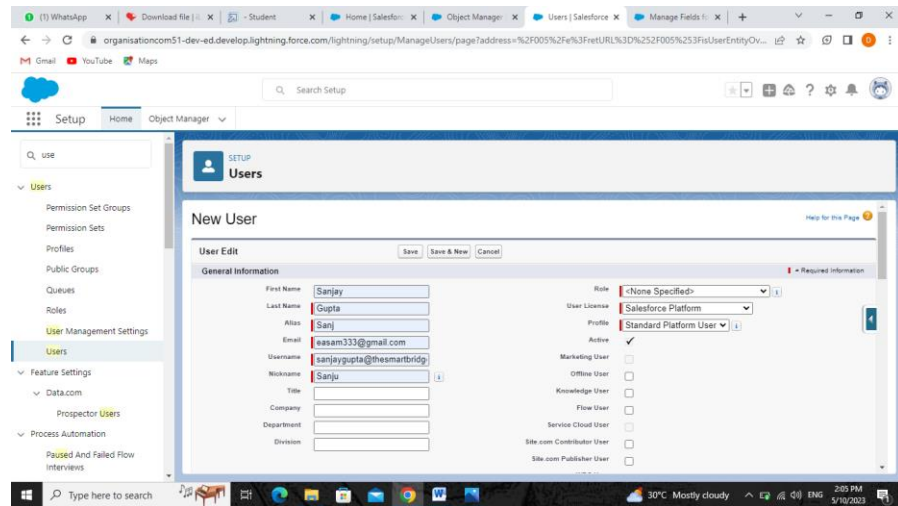
The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains a navigation menu with options like Users, Profiles, Data, Feature Settings, and Products. The main content area displays a table of existing profiles, including 'Analytics Cloud Integration User', 'Analytics Cloud Security User', 'Authenticated Website', 'Chatter External User', 'Chatter Free User', 'Chatter Moderator User', 'Contract Manager', 'Cross Org Data Proxy User', and 'Custom Marketing Profile'. Each profile has an 'Action' column with 'Edit' and 'Clone' links, and a 'User License' column. A 'New Profile' button is visible at the top left of the table.

A Profile is a group /collection of settings and permissions that define what a user can do in salesforce.

Creating a Users:

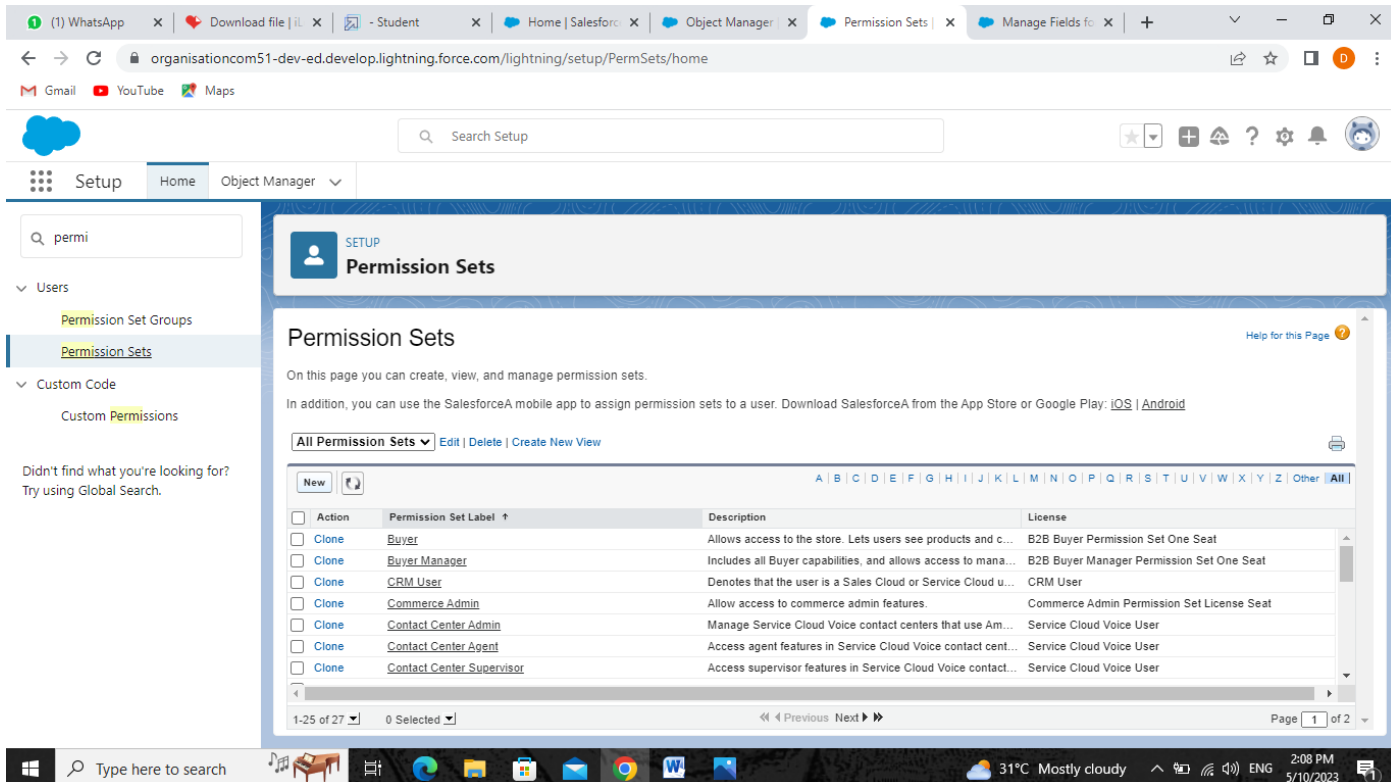


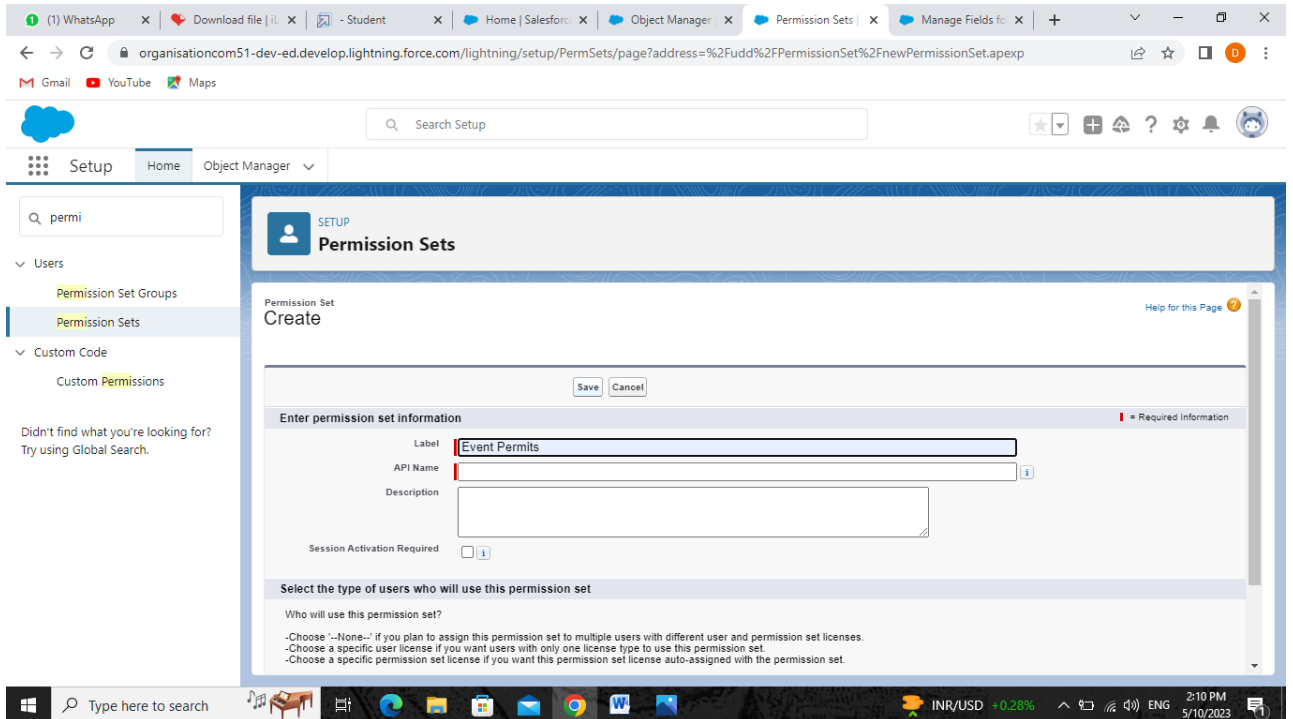
The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains a navigation menu with options like Users, Profiles, Data, Feature Settings, and Process Automation. The main content area displays a table of existing users, including 'Chatter Expert', 'Raj_Dinesh', 'Rajendran_Dinesh', 'Sharma_Dinesh', 'User Integration', and 'User Security'. Each user has an 'Action' column with 'Edit' and 'Clone' links, and a 'Profile' column. A 'New User' button is visible at the top left of the table.



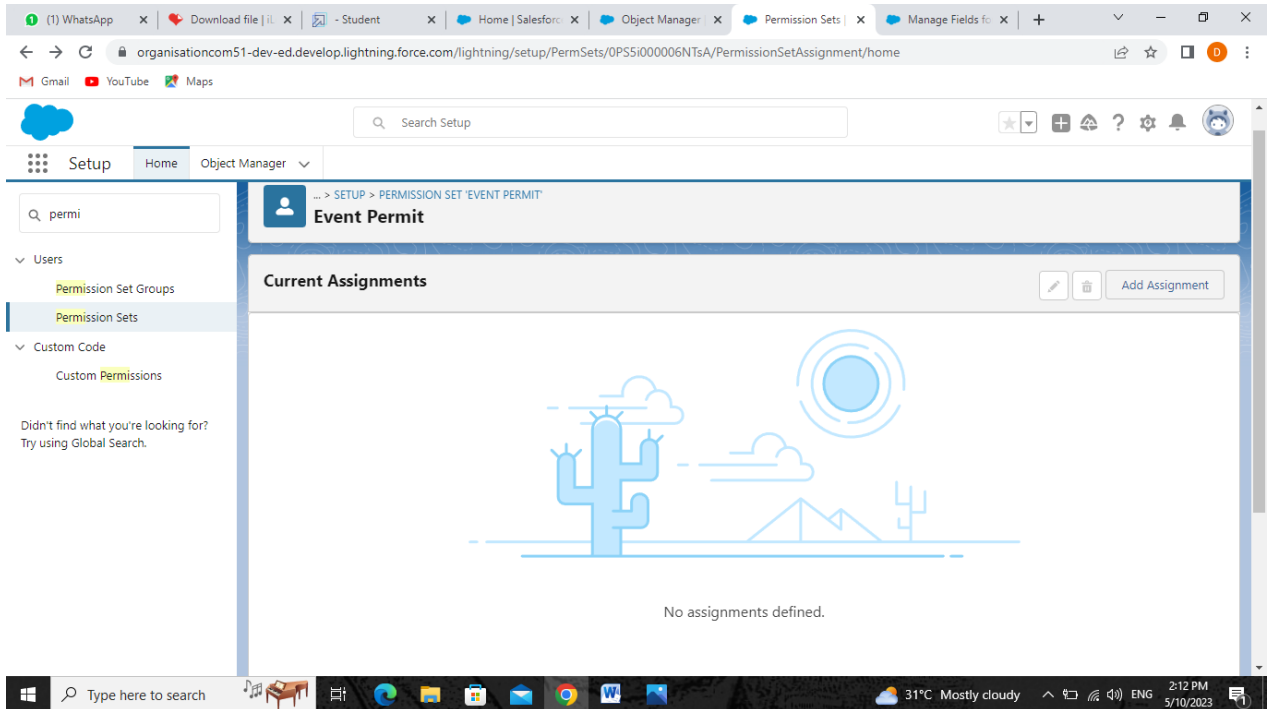
A user is anyone who logs in two salesforce.users are who need access to the companies record.

Creating a Permission Sets:

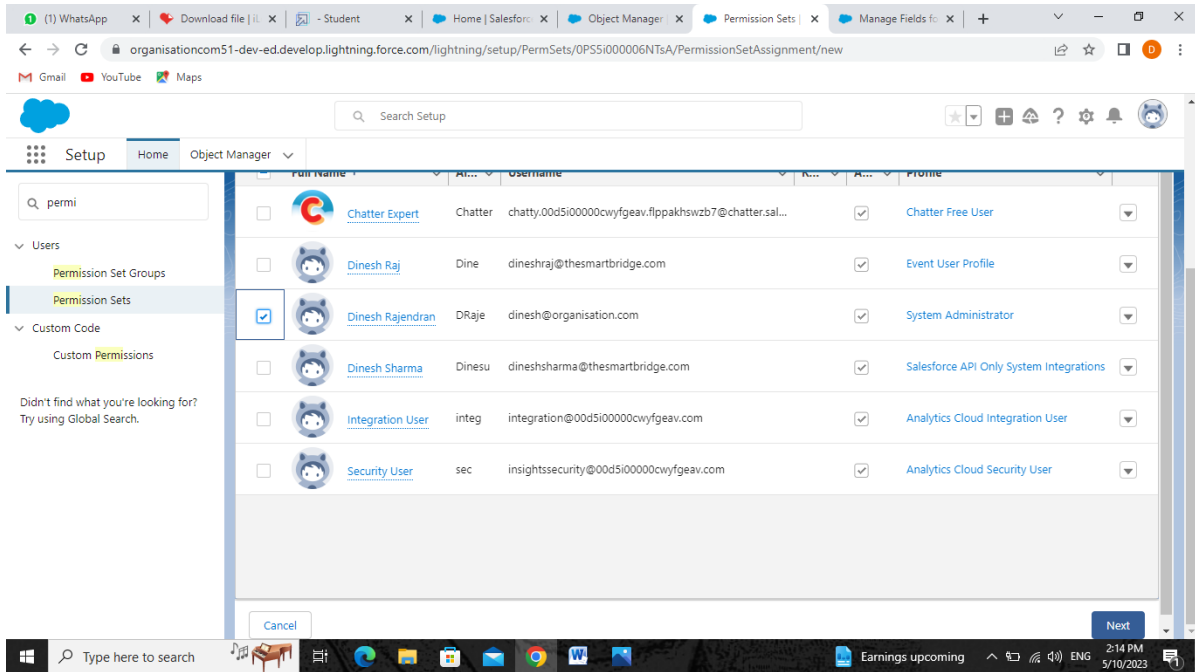




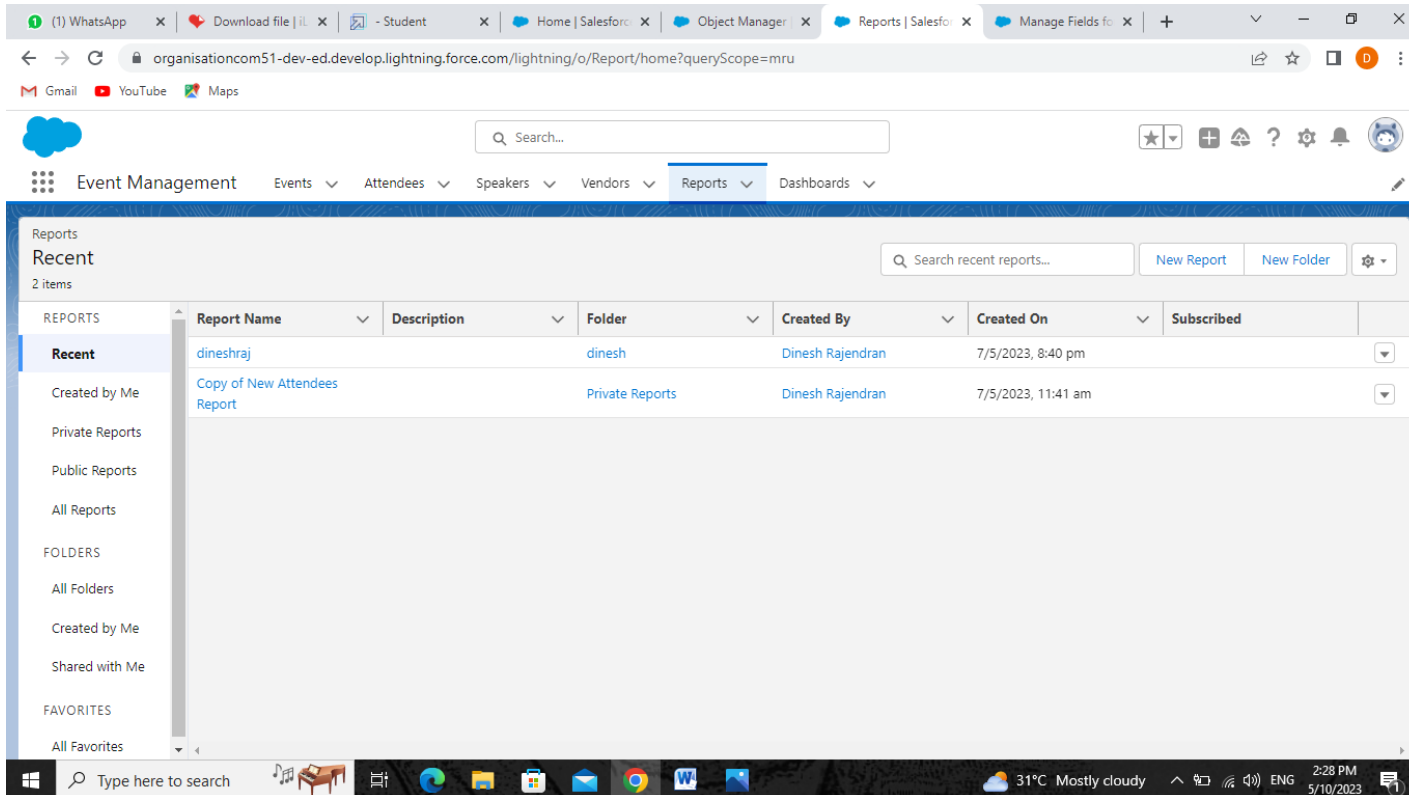
The screenshot shows the Salesforce Setup interface for creating a new permission set. The browser address bar displays the URL: `organisationcom51-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2FnewPermissionSet.apexp`. The left sidebar contains navigation links for Users, Permission Set Groups, Permission Sets (selected), and Custom Code. The main content area is titled "Permission Sets" and "Create". It includes a "Save" button and a "Cancel" button. The "Enter permission set information" section contains fields for Label (filled with "Event Permits"), API Name, and Description. Below this, there is a checkbox for "Session Activation Required". The "Select the type of users who will use this permission set" section provides instructions on choosing user licenses.

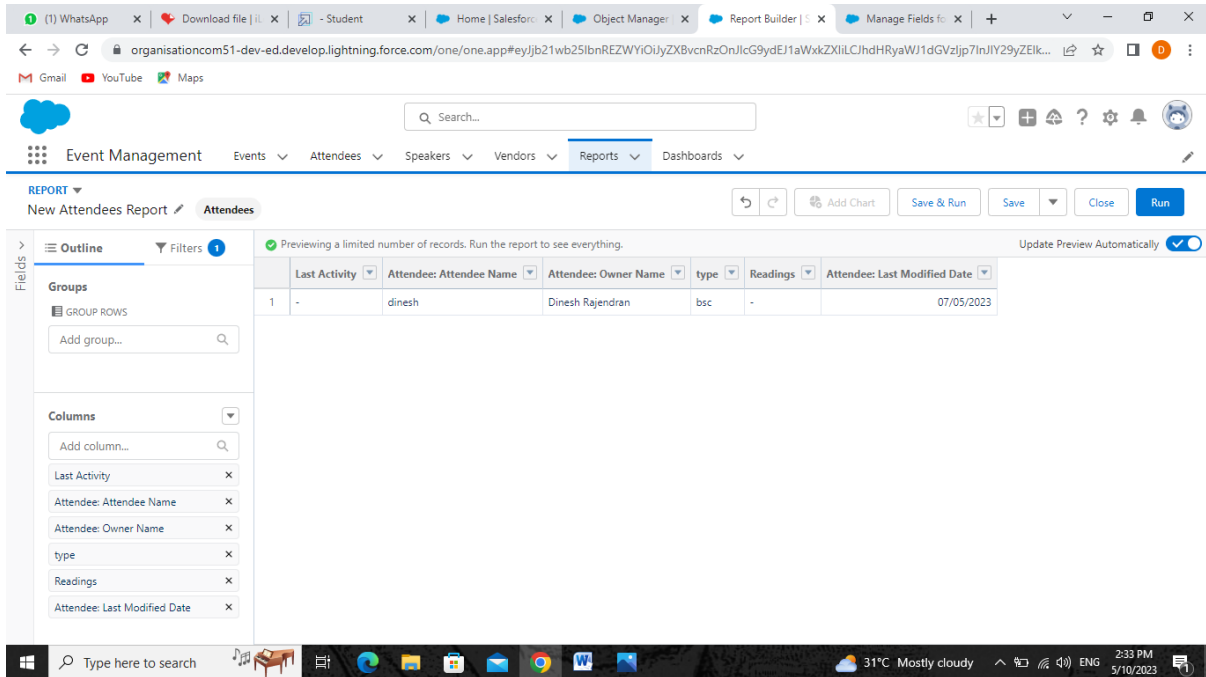


The screenshot shows the Salesforce Setup interface for the "Event Permit" permission set. The browser address bar displays the URL: `organisationcom51-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/0PS51000006NTsA/PermissionSetAssignment/home`. The left sidebar is identical to the previous screenshot. The main content area is titled "Event Permit" and "Current Assignments". It features a large illustration of a cactus and a sun. Below the illustration, it states "No assignments defined." and includes an "Add Assignment" button.



Creating a Reports:





The screenshot shows the Salesforce Report Builder interface. The top navigation bar includes 'Event Management', 'Events', 'Attendees', 'Speakers', 'Vendors', 'Reports', and 'Dashboards'. The 'Reports' section is active, showing a 'New Attendees Report' with options to 'Add Chart', 'Save & Run', 'Save', 'Close', and 'Run'. The report preview shows a table with columns: Last Activity, Attendee: Attendee Name, Attendee: Owner Name, type, Readings, and Attendee: Last Modified Date. The table contains one record for 'dinesh' with owner 'Dinesh Rajendran' and type 'bsc', last modified on '07/05/2023'. The left sidebar shows the 'Outline' and 'Columns' sections, with 'Attendee: Last Modified Date' selected.

A report is a list of records that meet the criteria you define.

4 Trailhead Profile Public URL

Team Lead –

<https://trailblazer.me/id/dineshraj01>

Team Member 1 -

<https://trailblazer.me/id/ddinesh65>

Team Member 2 –

<https://trailblazer.me/id/dhraj15>

Team Member 3 –

<http://trailblazer.me/id/momed5>

5 **ADVANTAGES & DISADVANTAGE**

There are several advantages and disadvantages of using an Event Planner management service. These include: - Experience requirements, - Cost, - Loose coupling and - Stress. Experience is one of the most important factors. - Loose coupling is a disadvantage: a manager may not be aware of the costs and risks of the job.

6 **TABLE OF CONTENTS**

- Experience requirements
- Cost
- Stress
- Loose coupling
- Conclusion

7 **APPLICATIONS**

- **Set ROI-Driven Event Goals and Objectives. The event's over, and you deem it a success. ...**
- **Create a Solid Event Budget Design and Plan a Memorable Event**
- **Coordinate the Day of the Event.**
- **Evaluate Your Event's Performance and Power Future Events**

8 **CONCLUSION**

Loose coupling has many applications. Its benefits go beyond simple event management. It can help companies improve their workflow by streamlining the process of organizing and executing events. It also makes the implementation of a service more reliable. You can learn a lot more about event management from the experts at Mavrix.

9 **FUTURE SCOPE**

Nowadays, there is a requirement for an event manager in almost every field like in corporate sector, hotel industry, tourism, fashion industry, film and media industries, social events etc. the talented youngsters can either work as a professional or set up his/her own business. Professionals in this field also get the opportunity to showcase their talent at international levels where delegates from our country participate in cultural festivals and exchange programs, trade shows, conferences, exhibitions, corporate events and so on. A successful event manager can earn in lakhs and cores. So, the demand for creative and talented event managers is never ending.