

# 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>

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.	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.
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## 2.2 Ideation and Brainstorming map Screenshot:

#### 1. Define the Problem:

Start by defining the problem you are trying to solve or the goal you want to achieve with your event management using Salesforce. For example, you may want to increase attendance at your events, improve attendee engagement, or streamline your event management processes.



#### 2. Generate Ideas:

Use brainstorming techniques to generate ideas for how Salesforce can help you achieve your event management goals. Encourage team members to share their ideas and build on each other's ideas. You can use tools like mind mapping or whiteboarding to visualize your ideas and make connections between them.



#### 3. Categorize Ideas:

Once you have generated a list of ideas, categorize them based on their potential impact and feasibility. Use a scoring system to rate each idea based on factors such as the resources required, the level of effort, and the potential impact on your event management goals.



#### 4. Prioritize ideas:

Use your scoring system to prioritize the ideas that are most likely to have a significant impact on your event management goals and are feasible given your resources and capabilities. Consider which ideas are most aligned with your organization's mission and values.



#### 5. Create an action plan

Once you have identified your top ideas, create an action plan for how you will implement them using Salesforce. Assign roles and responsibilities, set timelines and milestones, and establish metrics for measuring success.



#### 6. Test and refine:

Implement your ideas using Salesforce and test them in real-world scenarios. Continuously monitor your progress and refine your approach based on feedback and data.

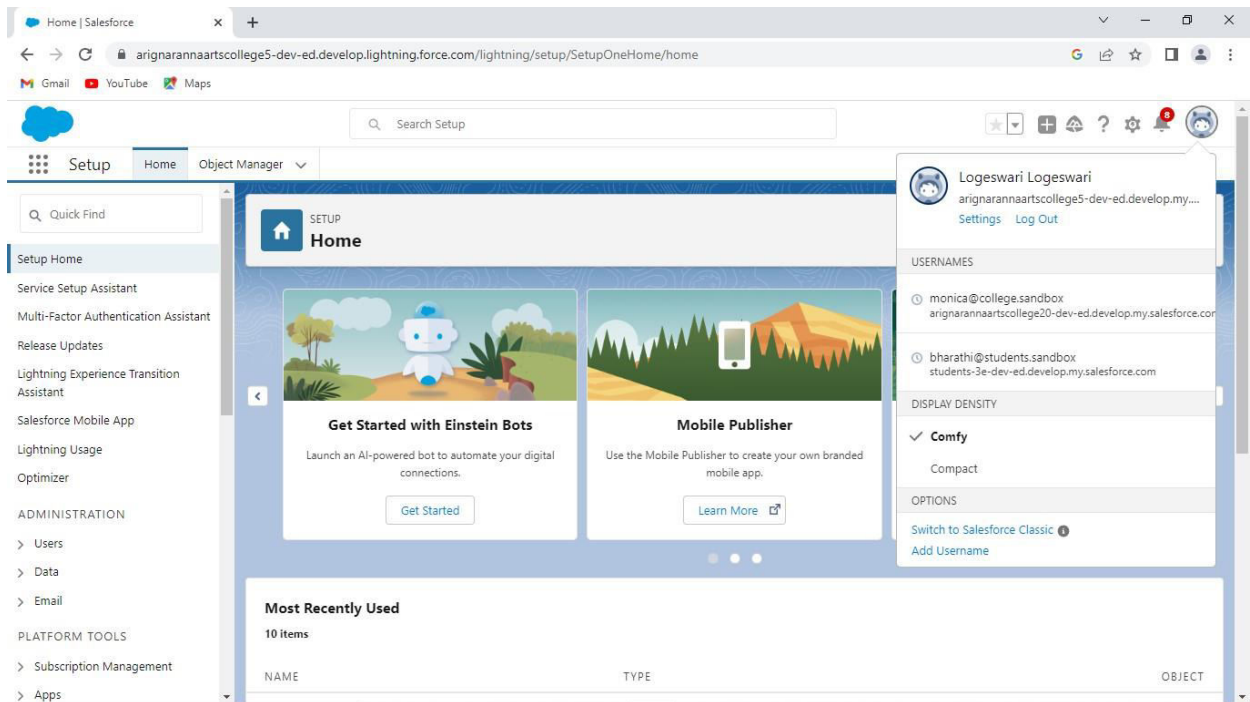
### 3. Result

#### 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

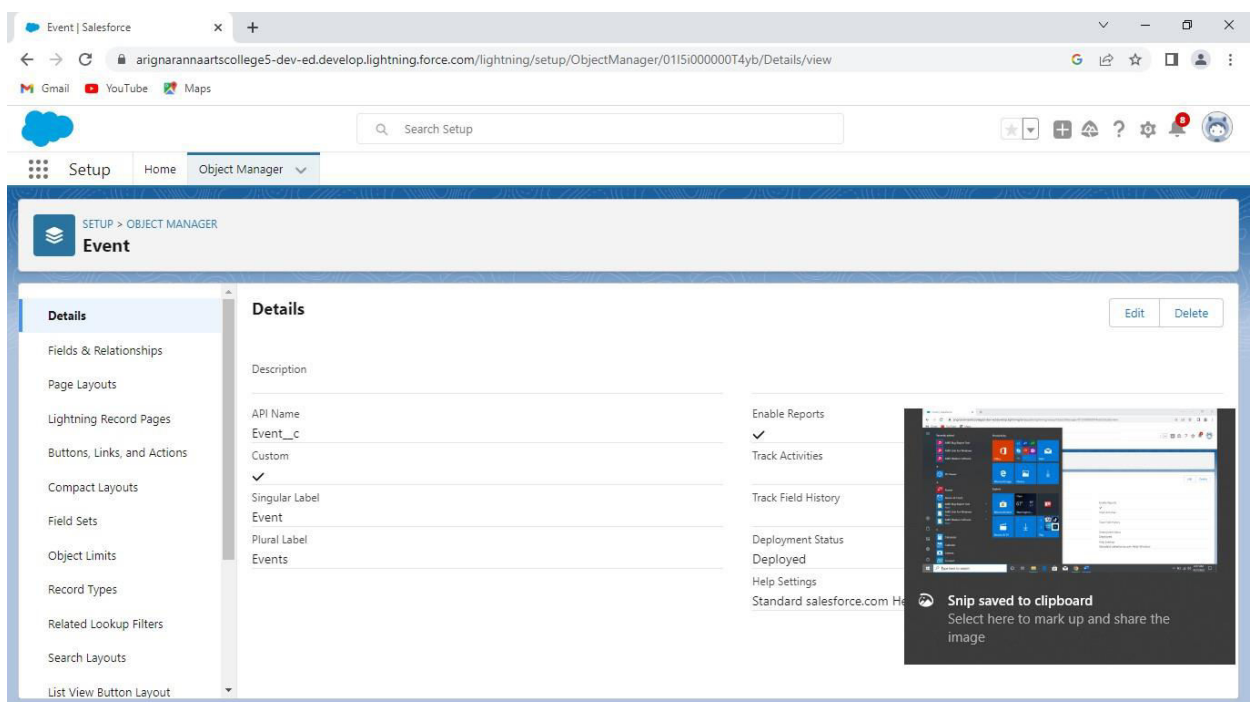
## 3.2 Activity and Screenshot

### Create Salesforce Org-creating Developer Account



## Object

### Creating of Event Object



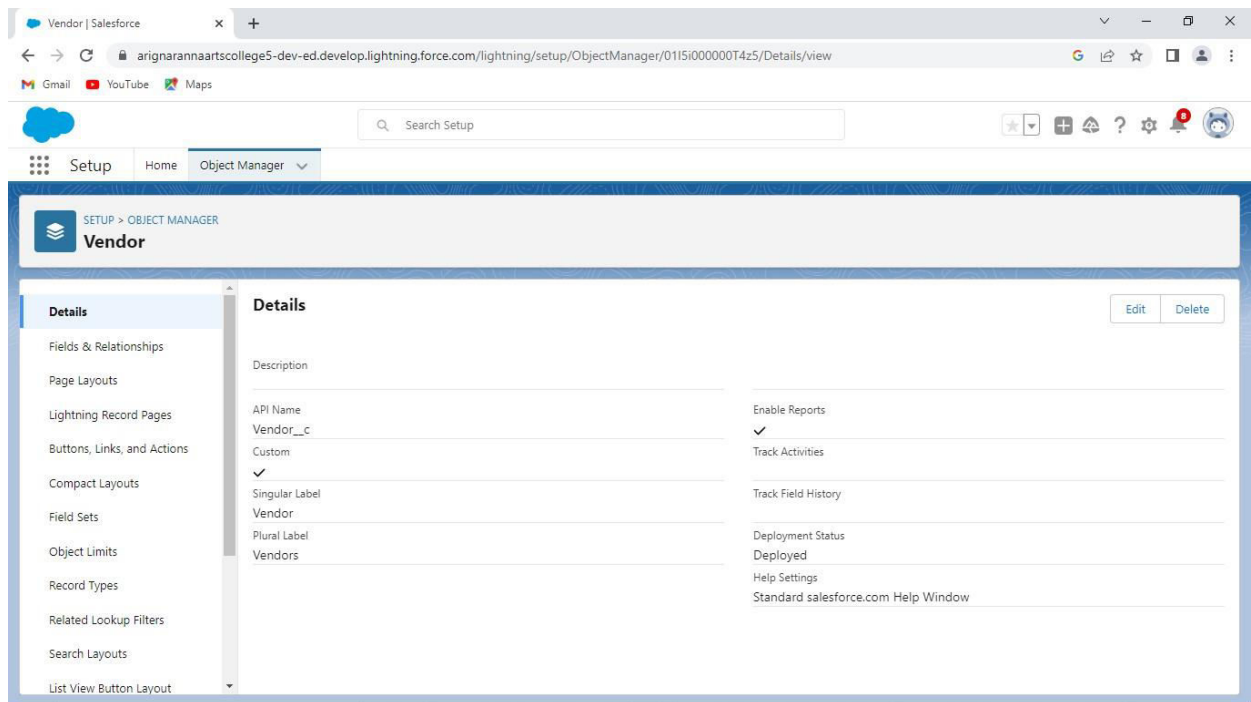
## Creating of Attendee Object

The screenshot shows the Salesforce Setup interface for the 'Attendee' object. The browser address bar displays the URL: `arignarannaartscollege5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115i000000T4y/Details/view`. The page title is 'Attendee' under the 'Object Manager' section. A left-hand navigation menu lists various 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, Search Layouts, and List View Button Layout. The 'Details' section is active, showing fields for Description, API Name (Attendee\_\_c), Custom (checked), Singular Label (Attendee), and Plural Label (Attendees). On the right, there are checkboxes for 'Enable Reports' (checked), 'Track Activities', and 'Track Field History'. Below these, the 'Deployment Status' is set to 'Deployed', and the 'Help Settings' are set to 'Standard salesforce.com Help Window'. 'Edit' and 'Delete' buttons are located in the top right corner of the details section.

## Creation of Speaker Object

The screenshot shows the Salesforce Setup interface for the 'Speaker' object. The browser address bar displays the URL: `arignarannaartscollege5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115i000000T4z0/Details/view`. The page title is 'Speaker' under the 'Object Manager' section. A left-hand navigation menu lists various 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, Search Layouts, and List View Button Layout. The 'Details' section is active, showing fields for Description, API Name (Speaker\_\_c), Custom (checked), Singular Label (Speaker), and Plural Label (Speaker Name). On the right, there are checkboxes for 'Enable Reports' (checked), 'Track Activities', and 'Track Field History'. Below these, the 'Deployment Status' is set to 'Deployed', and the 'Help Settings' are set to 'Standard salesforce.com Help Window'. 'Edit' and 'Delete' buttons are located in the top right corner of the details section.

## Creation of Vendor Object



## Tab

## Creation of Event Tab



Salesforce Setup page for Custom Tabs. The browser address bar shows the URL: `arignarannaartscollege5-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01r5i000000UsfE%3Fsetupid%3DCustomTabs`.

The left sidebar shows the navigation menu with "Setup" selected. The "User Interface" section is expanded, showing "Loaded Console Tab Limit", "Rename Tabs and Labels", and "Tabs".

The main content area displays the "Custom Object Tab" configuration for "Events". The "Tab Label" is "Events", the "Object" is "Event", and the "Tab Style" is "Books". The "Created By" is "Logeswari Logeswari" on "10/04/2023, 2:50 am".

Tab Label	Events	Tab Style	Books
Object	Event	Splash Page Custom Link	
Description			
Created By	Logeswari Logeswari	Modified By	Logeswari Logeswari
	10/04/2023, 2:50 am		10/04/2023, 2:50 am

## Creation of Attendee Tab

Salesforce Setup page for Custom Tabs. The browser address bar shows the URL: `arignarannaartscollege5-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01r5i000000UsfE%3Fsetupid%3DCustomTabs`.

The left sidebar shows the navigation menu with "Setup" selected. The "User Interface" section is expanded, showing "Loaded Console Tab Limit", "Rename Tabs and Labels", and "Tabs".

The main content area displays the "Custom Object Tab" configuration for "Attendees". The "Tab Label" is "Attendees", the "Object" is "Attendee", and the "Tab Style" is "Apple". The "Created By" is "Logeswari Logeswari" on "10/04/2023, 2:53 am".

Tab Label	Attendees	Tab Style	Apple
Object	Attendee	Splash Page Custom Link	
Description			
Created By	Logeswari Logeswari	Modified By	Logeswari Logeswari
	10/04/2023, 2:53 am		10/04/2023, 2:53 am

## Creation of Speaker Tab

Browser tabs: Tabs | Salesforce

Address bar: arignarannaartscollege5-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01r5i000000UsfT%3Fsetupid%3DCustomTabs

Navigation: Setup Home Object Manager

Search Setup

Left sidebar: tab

User Interface

- Loaded Console Tab Limit
- Rename Tabs and Labels
- Tabs**

Didn't find what you're looking for? Try using Global Search.

### SETUP Tabs

Custom Object Tab

Speaker Name Help for this Page

Below is the information for the custom tab. Click Edit to change the custom tab.

**Custom Tab Definition Detail** Edit Delete

Tab Label	Speaker Name	Tab Style	Outline
Object	Speaker	Splash Page Custom Link	
Description			
Created By	Logeswari Logeswari, 10/04/2023, 2:54 am	Modified By	Logeswari Logeswari, 10/04/2023, 2:54 am

## Creation of Vendor Tab

Browser tabs: Tabs | Salesforce

Address bar: arignarannaartscollege5-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01r5i000000UsfY%3Fsetupid%3DCustomTabs

Navigation: Setup Home Object Manager

Search Setup

Left sidebar: tab

User Interface

- Loaded Console Tab Limit
- Rename Tabs and Labels
- Tabs**

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### SETUP Tabs

Custom Object Tab

Vendors Help for this Page

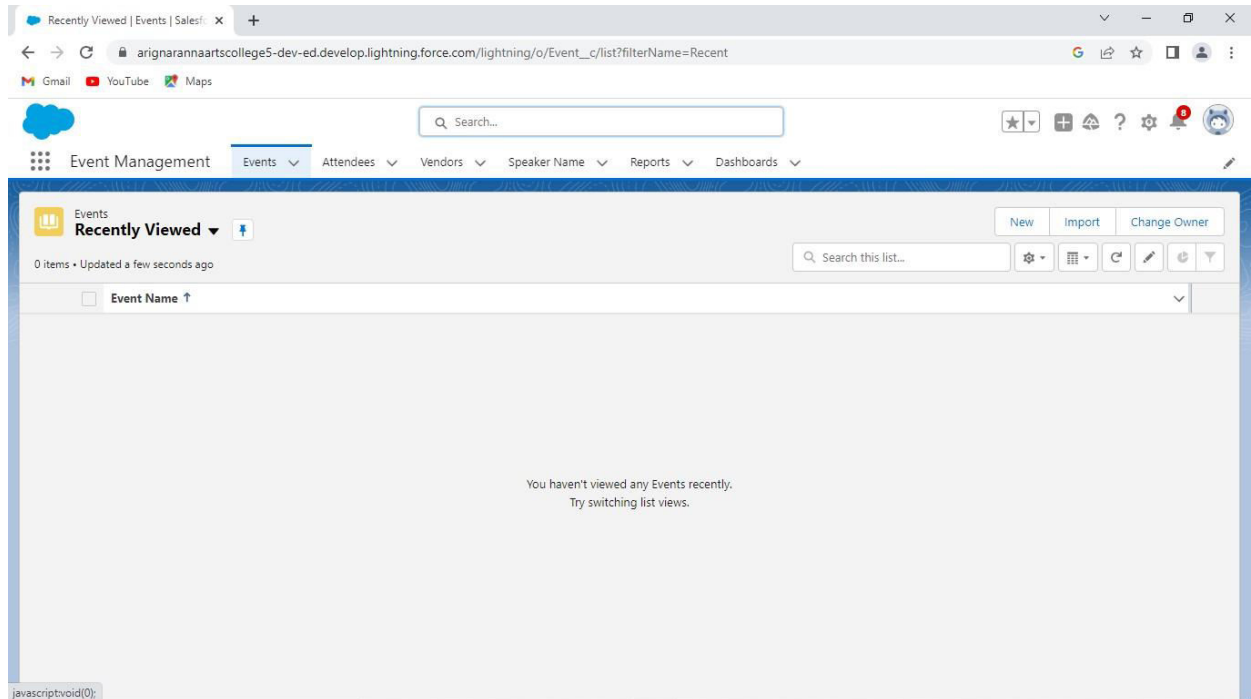
Below is the information for the custom tab. Click Edit to change the custom tab.

**Custom Tab Definition Detail** Edit Delete

Tab Label	Vendors	Tab Style	Flag
Object	Vendor	Splash Page Custom Link	
Description			
Created By	Logeswari Logeswari, 10/04/2023, 2:54 am	Modified By	Logeswari Logeswari, 10/04/2023, 2:54 am

# Lightning App

## Creation of Event Management App



## Fields

### Creation of Field for The Event Object

Event | Salesforce

arignarannaartscollege5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115i000000T4yb/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Event**

Details

**Fields & Relationships**  
5 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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)		✓

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

## Creation of Field for The Attendee Object

Attendee | Salesforce

arignarannaartscollege5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115i000000T4yb/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Attendee**

Details

**Fields & Relationships**  
10 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Attendee Name	Name	Text(80)		✓
Bio	Bio__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
e-mail	e_mail__c	Email		
Email	Email__c	Email		
enter id	enter_id__c	Auto Number		
Event	Event__c	Lookup(Event)		✓
Event Name	Event Name__c	Master-Detail(Event)		✓

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

## Creation of Field for The Speaker 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, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled 'Fields & Relationships' and shows 4 items, sorted by Field Label. The table below lists the fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
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 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, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled 'Fields & Relationships' and shows 9 items, sorted by Field Label. The table below lists the fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
e-mail	e_mail__c	Email		
e-mail 1	e_mail_1__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(50)		

## Profile

### Creation on Profile:(Event User Profile)

The screenshot shows the Salesforce Setup interface for the 'Event User Profile'. The left sidebar includes a search bar with 'profil' and a list of 'Profiles'. The main content area is titled 'Event User Profile' and includes a 'Help for this Page' 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 dates. The 'Page Layouts' section displays a table of standard object layouts and their assignments.

**Profile Detail**

Name	Event User Profile
User License	Salesforce Platform
Description	
Created By	Logeswari Logeswari
Modified By	Logeswari Logeswari

**Page Layouts**

Standard Object Layouts	Global	Object Milestone	Object Milestone Layout
Email Application	Not Assigned	Operating Hours	Operating Hours Layout
Home Page Layout	Home Page Default	Order	Order Layout
Account	Account Layout	Order Product	Order Product Layout

### Creation on Profile:(Event Vendor Profile)

The screenshot shows the Salesforce Setup interface for the 'Event Vendor Profile'. The left sidebar includes a search bar with 'profil' and a list of 'Profiles'. The main content area is titled 'Event Vendor Profile' and includes a 'Help for this Page' 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 dates. The 'Page Layouts' section displays a table of standard object layouts and their assignments.

**Profile Detail**

Name	Event Vendor Profile
User License	Salesforce
Description	
Created By	Logeswari Logeswari
Modified By	Logeswari Logeswari

**Page Layouts**

Standard Object Layouts	Global	Object Milestone	Object Milestone Layout
Email Application	Not Assigned	Operating Hours	Operating Hours Layout
Home Page Layout	DE Default	Opportunity	Opportunity Layout
Account	Account Layout	Opportunity Product	Opportunity Product Layout



## Users

### Creation on User:(Event User Profile)

The screenshot shows the Salesforce Setup page for User Management. The left sidebar contains a navigation menu with options like 'Users', 'Feature Settings', and 'User Interface'. The main content area displays the 'Users' section for a user named 'Bhavani Bhavani'. The 'Permission Set Assignments' table shows two assignments: 'Event Permits and Save' and 'Vendor Permits and Save'. The 'Profile' dropdown is set to 'Event User Profile'.

Action	Permission Set Label	Date Assigned	Expires On
Del	<a href="#">Event Permits and Save</a>	11/04/2023	
Del	<a href="#">Vendor Permits and Save</a>	11/04/2023	

Field	Value	Profile	Event User Profile
Email	logeshbhanesh302@gmail.com	Profile	<a href="#">Event User Profile</a>
Username	bhavanibhavani@thesmartbridge.com	Active	<input checked="" type="checkbox"/>
Nickname	Bhavani	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"/>
Language	English	Mobile Push Registrations	<a href="#">View</a>
Delegated Approver		Data.com User Type	<a href="#">View</a>

### Creation on User:(Event Vendor Profile)

The screenshot shows the Salesforce Setup page for Profile Management. The left sidebar contains a navigation menu with options like 'Profiles', 'Feature Settings', and 'User Interface'. The main content area displays the 'Event Vendor Profile' for a user named 'Logeswari Logeswari'. The 'Profile Detail' section shows the profile name, user license, and creation/modification dates. The 'Page Layouts' section shows the standard object layouts for the profile.

Field	Value
Name	Event Vendor Profile
User License	Salesforce
Description	
Created By	Logeswari Logeswari, 11/04/2023, 1:02 am
Modified By	Logeswari Logeswari, 11/04/2023, 1:26 am

Standard Object Layouts	Object Milestone
Global: <a href="#">Global Layout</a> [View Assignment]	<a href="#">Object Milestone Layout</a> [View Assignment]
Email Application: <a href="#">Not Assigned</a> [View Assignment]	<a href="#">Operating Hours Layout</a> [View Assignment]
Home Page Layout: <a href="#">DE Default</a> [View Assignment]	<a href="#">Opportunity Layout</a> [View Assignment]
Account: <a href="#">Account Layout</a>	<a href="#">Opportunity Product Layout</a>

## 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 "perm" and a list of navigation items: Users, Permission Set Groups, Permission Sets (selected), Custom Code, and Custom Permissions. The main content area is titled "Permission Sets" and "Event Permits and Save". It includes a search bar for settings, buttons for "Clone", "Edit Properties", and "Manage Assignments", and a "Video Tutorial | Help for this Page" link. The "Permission Set Overview" section displays the following details:

Field	Value
Description	
License	
Session Activation Required	<input type="checkbox"/>
Last Modified By	Logeswari Logeswari
API Name	Event_Permits_and_Save
Namespace Prefix	
Created By	Logeswari Logeswari
Created Date	11/04/2023, 1:14 am

Below the overview, the "Apps" section lists the following categories:

- 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
- App Permissions**: Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**: Permissions to execute Apex classes

### 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 "perm" and a list of navigation items: Users, Permission Set Groups, Permission Sets (selected), Custom Code, and Custom Permissions. The main content area is titled "Permission Sets" and "Vendor Permits and Save". It includes a search bar for settings, buttons for "Clone", "Edit Properties", and "Manage Assignments", and a "Video Tutorial | Help for this Page" link. The "Permission Set Overview" section displays the following details:

Field	Value
Description	
License	
Session Activation Required	<input type="checkbox"/>
Last Modified By	Logeswari Logeswari
API Name	Vendor_Permits_and_Save
Namespace Prefix	
Created By	Logeswari Logeswari
Created Date	11/04/2023, 1:17 am

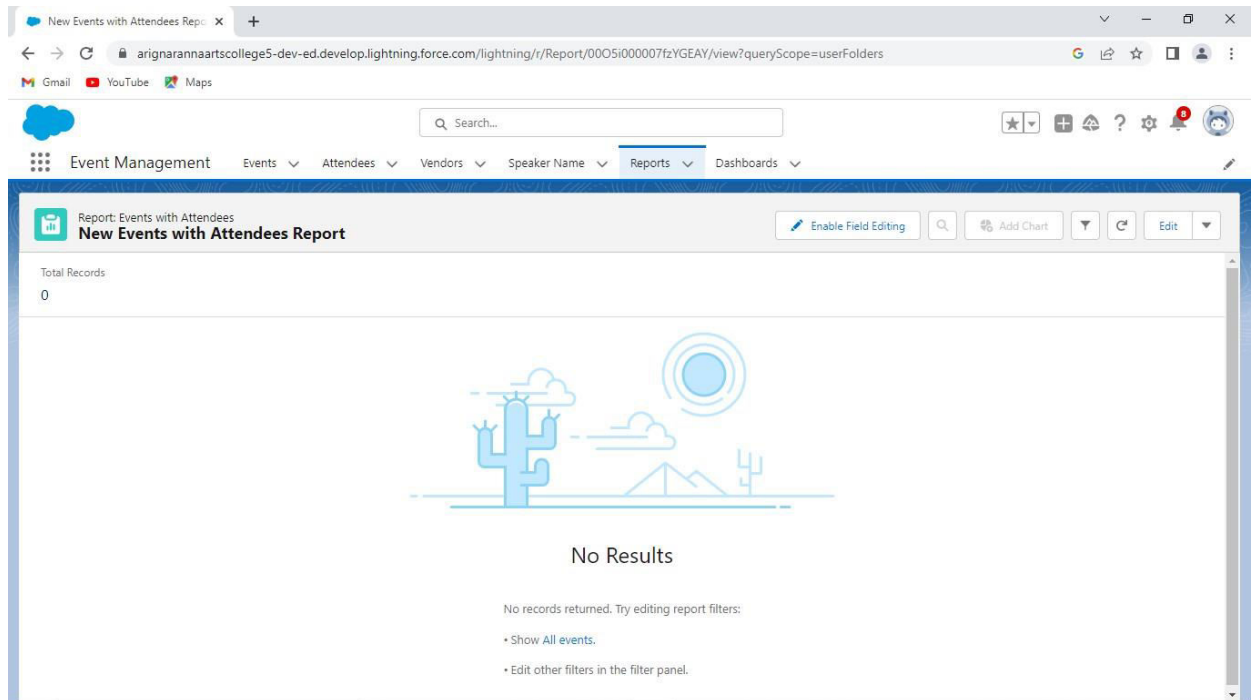
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- App Permissions**: Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**: Permissions to execute Apex classes



## Reports

### Creation on Event with Attendees



#### 4. Trailhead Profile Public URL

Team Lead – <https://trailblazer.me/id/fmnbczh>

Team Member 1- <https://trailblazer.me/id/logeshganesh302>

Team Member 2- <https://trailblazer.me/id/keerj9>

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

#### 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.