# BUILD AN EVENT MANAGEMENT SYSTEM USING SALESFORCE

## 1. INTRODUCTION

### 1.1 Overview

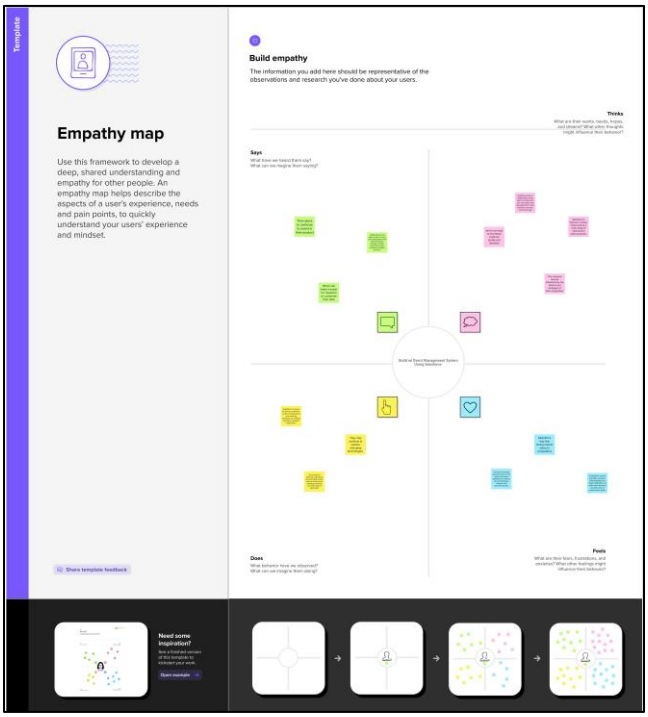
Salesforce event management is a module within the Salesforce platform that allows businesses to plan, organize, and execute events. The module is designed to help businesses streamline the event planning process, manage attendee data, and provide a personalized experience for event attendees.

### 1.2 Purpose

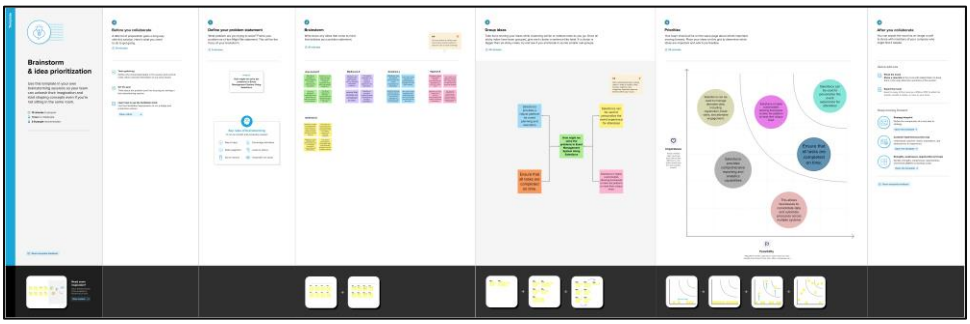
The purpose of Salesforce event management is to provide businesses with a comprehensive solution for planning, managing, and executing events. The module is designed to help businesses streamline the event planning process, manage attendee data, and provide a personalized experience for event attendees.

## 2. PROBLEM DEFINITION & DESIGN THINKING

### 2.1 Empathy Map



## 2.2 Ideation & Brainstorming Map




## 3. Result

| Object Name | FIELD IN THE OBJECT | |
|---|---|---|
| CUSTOME OBJECT | **Field Label** | **Data Type** |
| | Tab Label | Events |
| | Object | Event |
| | Tab style | Alaram Clock |
| | Created By | Gowtham.J |

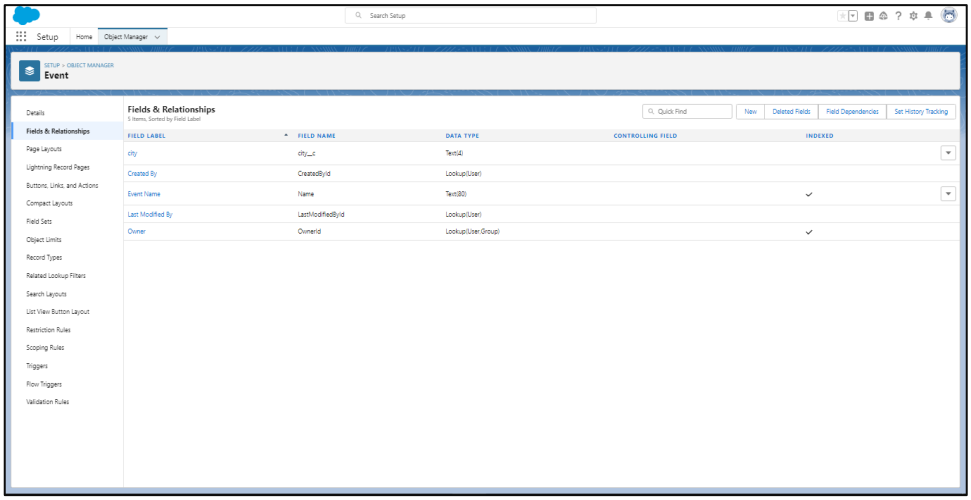
| Object Name | FIELD IN THE OBJECT | |
|---|---|---|
| **FIELDS & RELATIONSHIPS** | **Field Label** | **Data Type** |
| | City | Text (4) |
| | Created By | Lookup (User) |
| | Event Name | Text (40) |
| | Last Modified By | Lookup (User) |
| | Owner | Lookup (User, Group) |

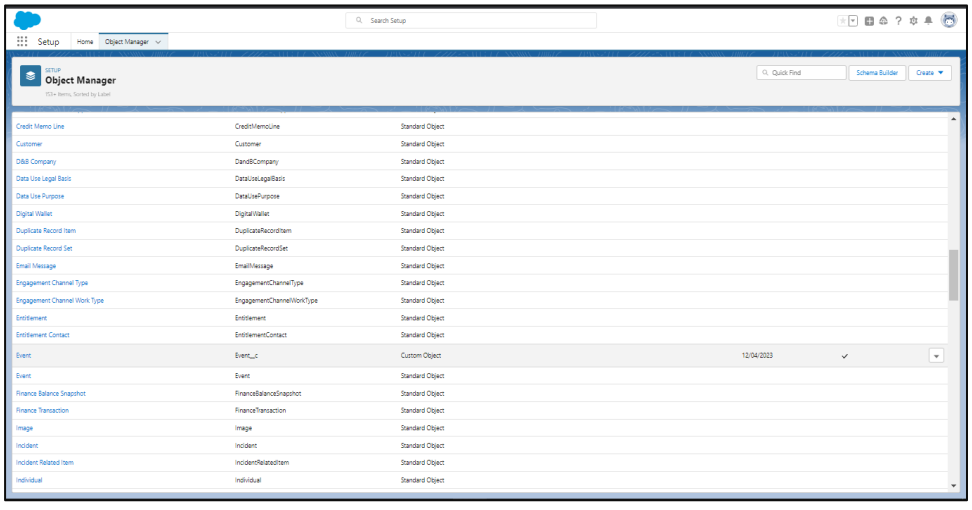
| Object Name | FIELD IN THE OBJECT | |
|---|---|---|
| **Event Custom Field** | **Field Label** | **Data Type** |
| | Field Name | City |
| | Object Name | Event |
| | Data Type | Text |
| | Created By | Gowtham.J |
| | Modified By | Gowtham.J |

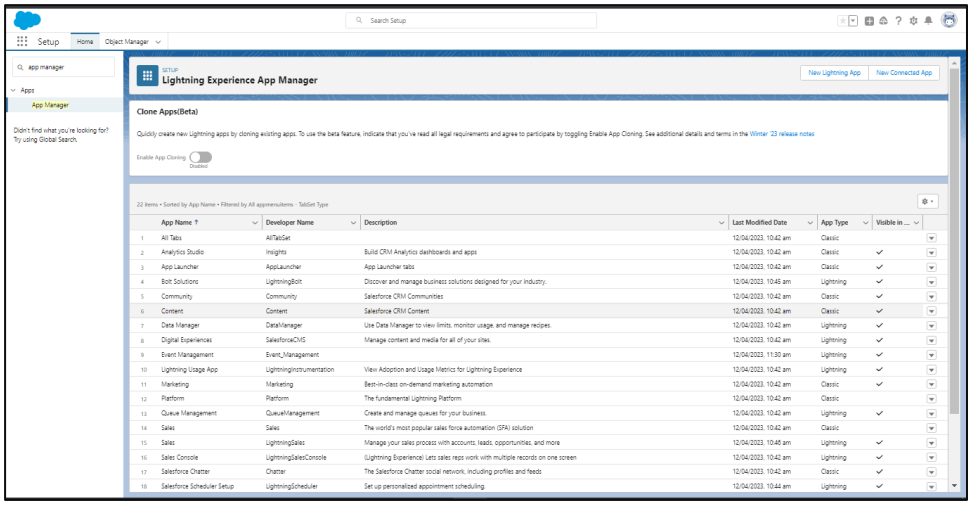
| Object Name | FIELD IN THE OBJECT | |
|---|---|---|
| **Project Detail** | **Field Label** | **Data Type** |
| | Name | Event |
| | User License | Analytics Cloud Integration User |
| | Created By | Gowtham.J |
| | Modified By | Gowtham.J |

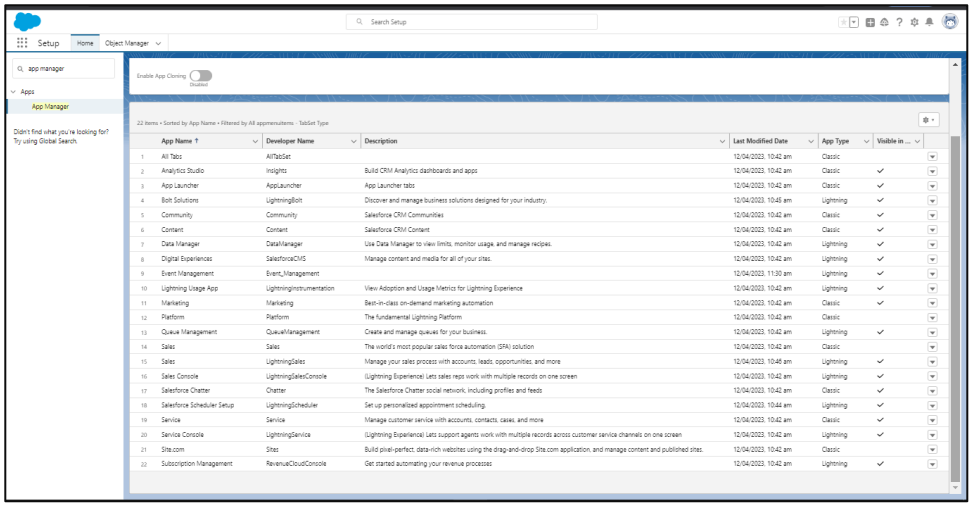
| Object Name | FIELD IN THE OBJECT | |
|---|---|---|
| **Event Compact Layout** | **Field Label** | **Data Type** |
| | Label | System Default |
| | API Name | System |
| | Included Events | Event Name |
| | Object Name | Event |

## 3.2 Activity & Screenshot




Search Setup
Setup
Home
Object Manager
app manager
Apps
App Manager
Didn't find what you're looking for?
Try using Global Search.
SETUP
Lightning Experience App Manager
New Lightning App
New Connected App
Clone Apps(Beta)
Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the Winter '23 release notes
Enable App Cloning
Disabled
22 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type
App Name
Developer Name
Description
Last Modified Date
App Type
Visible in ...
1 All Tabs AllTabSet 12/04/2023, 10:42 am Classic
2 Analytics Studio Insights Build CRM Analytics dashboards and apps 12/04/2023, 10:42 am Classic
3 App Launcher AppLauncher App Launcher tabs 12/04/2023, 10:42 am Classic
4 Bolt Solutions LightningBolt Discover and manage business solutions designed for your industry. 12/04/2023, 10:45 am Lightning
5 Community Community Salesforce CRM Communities 12/04/2023, 10:42 am Classic
6 Content Content Salesforce CRM Content 12/04/2023, 10:42 am Classic
7 Data Manager DataManager Use Data Manager to view limits, monitor usage, and manage recipes. 12/04/2023, 10:42 am Lightning
8 Digital Experiences SalesforceCMS Manage content and media for all of your sites. 12/04/2023, 10:42 am Lightning
9 Event Management Event_Management 12/04/2023, 11:30 am Lightning
10 Lightning Usage App LightningInstrumentation View Adoption and Usage Metrics for Lightning Experience 12/04/2023, 10:42 am Lightning
11 Marketing Marketing Best-in-class on-demand marketing automation 12/04/2023, 10:42 am Classic
12 Platform Platform The fundamental Lightning Platform 12/04/2023, 10:42 am Classic
13 Queue Management QueueManagement Create and manage queues for your business. 12/04/2023, 10:42 am Lightning
14 Sales Sales The world's most popular sales force automation (SFA) solution 12/04/2023, 10:42 am Classic
15 Sales LightningSales Manage your sales process with accounts, leads, opportunities, and more 12/04/2023, 10:46 am Lightning
16 Sales Console LightningSalesConsole (Lightning Experience) Lets sales reps work with multiple records on one screen 12/04/2023, 10:42 am Lightning
17 Salesforce Chatter Chatter The Salesforce Chatter social network, including profiles and feeds 12/04/2023, 10:42 am Classic
18 Salesforce Scheduler Setup LightningScheduler Set up personalized appointment scheduling. 12/04/2023, 10:44 am Lightning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Apps
App Manager
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Disabled
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Developer Name
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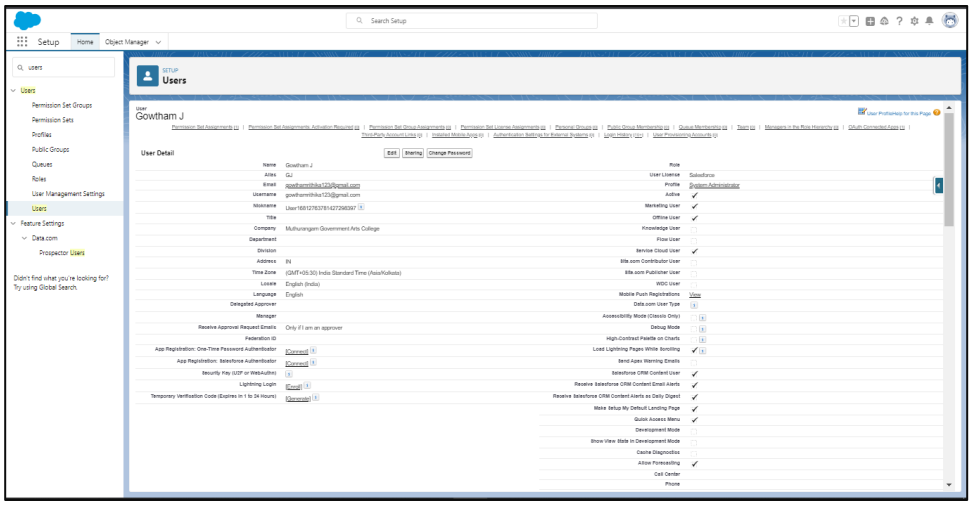
18 Salesforce Scheduler Setup LightningScheduler Set up personalized appointment scheduling. 12/04/2023, 10:44 am Lightning
19 Service Service Manage customer service with accounts, contacts, cases, and more 12/04/2023, 10:42 am Classic
20 Service Console LightningService (Lightning Experience) Lets support agents work with multiple records across customer service channels on one screen 12/04/2023, 10:42 am Lightning
21 Site.com Sites Build pixel-perfect, data-rich websites using the drag-and-drop Site.com application, and manage content and published sites. 12/04/2023, 10:42 am Classic
22 Subscription Management RevenueCloudConsole Get started automating your revenue processes 12/04/2023, 10:42 am Lightning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Home
Object Manager
Search Setup
users
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
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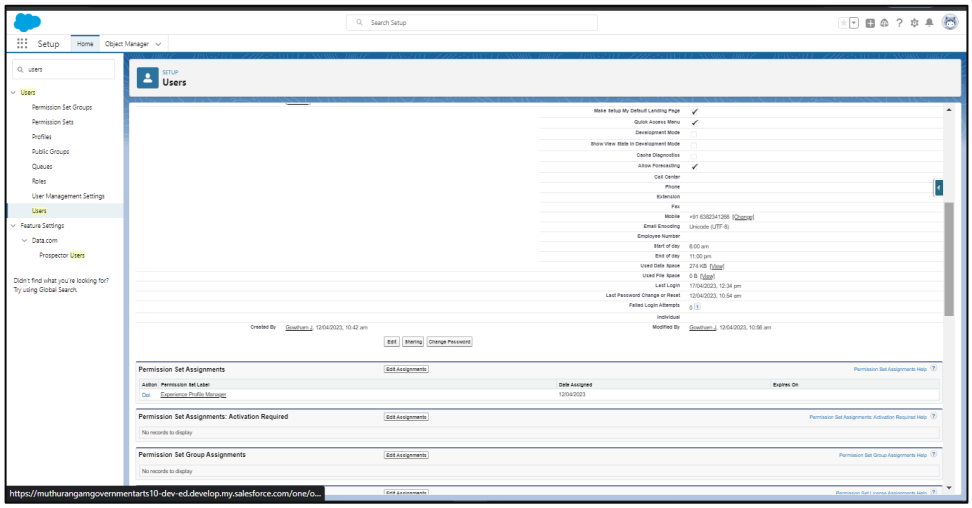
Data.com
Prospector Users
Didn't find what you're looking for?
Try using Global Search.
SETUP
Users
User
Gowtham J
User Detail
Edit
Sharing
Change Password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Data.com
Prospector Users
Didn't find what you're looking for?
Try using Global Search.
SETUP
Users
Permission Set Assignments
Edit Assignments
Permission Set Assignments: Activation Required
No records to display
Permission Set Group Assignments
No records to display
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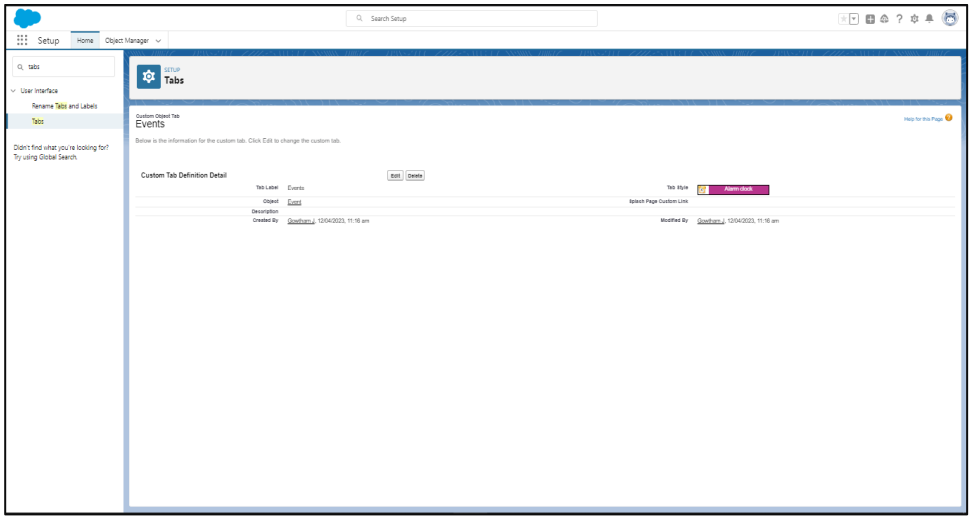
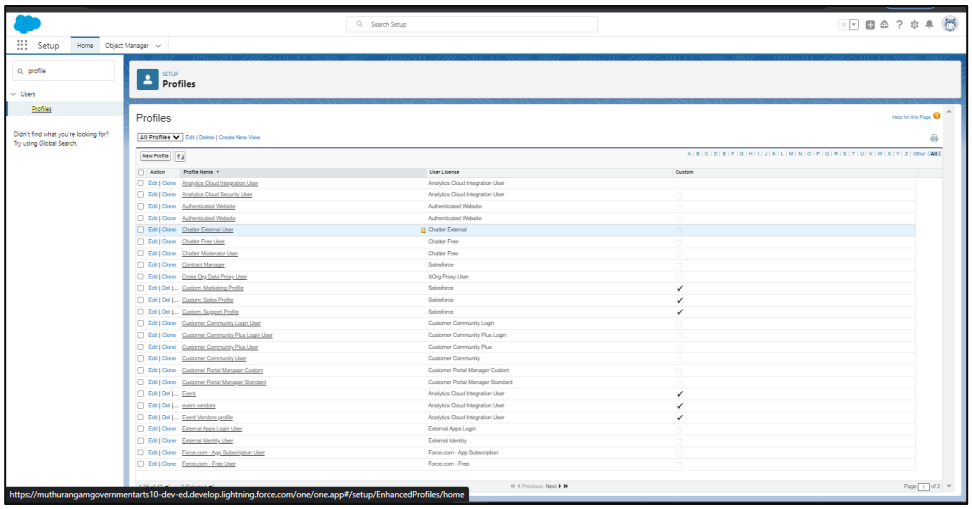

Setup
Home
Object Manager
Search Setup
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for?
Try using Global Search.
SETUP
Tabs
Custom Object Tab
Events
Below is the information for the custom tab. Click Edit to change the custom tab.
Custom Tab Definition Detail
Edit
Delete


Setup
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Profiles
Didn't find what you're looking for?
Try using Global Search.
SETUP
Profiles
Profiles
All Profiles
Edit | Delete | Create New View
New Profile
Action
Profile Name
User License
Custom
Edit | Clone Analytics Cloud Integration User
Edit | Clone Analytics Cloud Security User
Edit | Clone Authenticated Website
Edit | Clone Authenticated Website
Edit | Clone Chatter External User
Edit | Clone Chatter Free User
Edit | Clone Chatter Moderator User
Edit | Clone Contract Manager
Edit | Clone Cross Org Data Proxy User
Edit | Del | ... Custom: Marketing Profile
Edit | Del | ... Custom: Sales Profile
Edit | Del | ... Custom: Support Profile
Edit | Clone Customer Community Login User
Edit | Clone Customer Community Plus Login User
Edit | Clone Customer Community Plus User
Edit | Clone Customer Community User
Edit | Clone Customer Portal Manager Custom
Edit | Clone Customer Portal Manager Standard
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Edit | Del | ... Event Vendors profile
Edit | Clone External Apps Login User
Edit | Clone External Identity User
Edit | Clone Force.com - App Subscription User
Edit | Clone Force.com - Free User
Previous Next
Page 1 of 2
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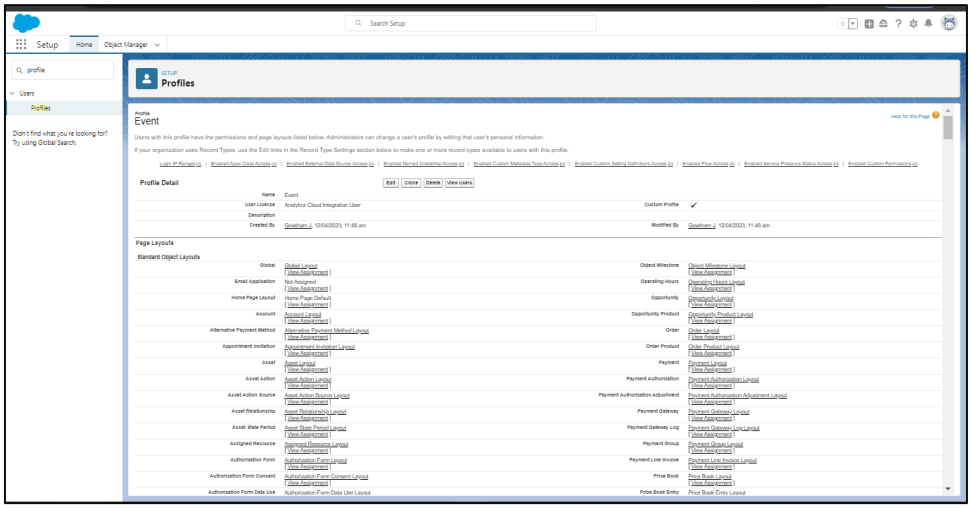
Setup
Home
Object Manager
Search Setup
profile
Users
Profiles
Didn't find what you're looking for?
Try using Global Search.
SETUP
Profiles
Home
Event
Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal 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.
Login IP Ranges | Enabled Apex Class 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 | Enabled Custom Permissions
Profile Detail
Edit
Clone
Delete
View Users
Name
Event
User License
Analytics Cloud Integration User
Custom Profile
Description
Created By
Gowtham J, 12/04/2023, 11:48 am
Modified By
Gowtham J, 12/04/2023, 11:48 am
Page Layouts
Standard Object Layouts
Global
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[ View Assignment ]
Email Application
Not Assigned
[ View Assignment ]
Home Page Layout
Home Page Default
[ View Assignment ]
Account
Account Layout
[ View Assignment ]
Alternative Payment Method
Alternative Payment Method Layout
[ View Assignment ]
Appointment Invitation
Appointment Invitation Layout
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Asset
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Asset Action Layout
[ View Assignment ]
Asset Action Source
Asset Action Source Layout
[ View Assignment ]
Asset Relationship
Asset Relationship Layout
[ View Assignment ]
Asset State Period
Asset State Period Layout
[ View Assignment ]
Assigned Resource
Assigned Resource Layout
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Authorization Form
Authorization Form Layout
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Authorization Form Consent
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Authorization Form Data Use
Authorization Form Data Use Layout
Object Milestone
Object Milestone Layout
[ View Assignment ]
Operating Hours
Operating Hours Layout
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Opportunity
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Order
Order Layout
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Order Product Layout
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Payment
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Payment Authorization Layout
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Payment Authorization Adjustment
Payment Authorization Adjustment Layout
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Payment Gateway
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Payment Gateway Log
Payment Gateway Log Layout
[ View Assignment ]
Payment Group
Payment Group Layout
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Payment Line Invoice
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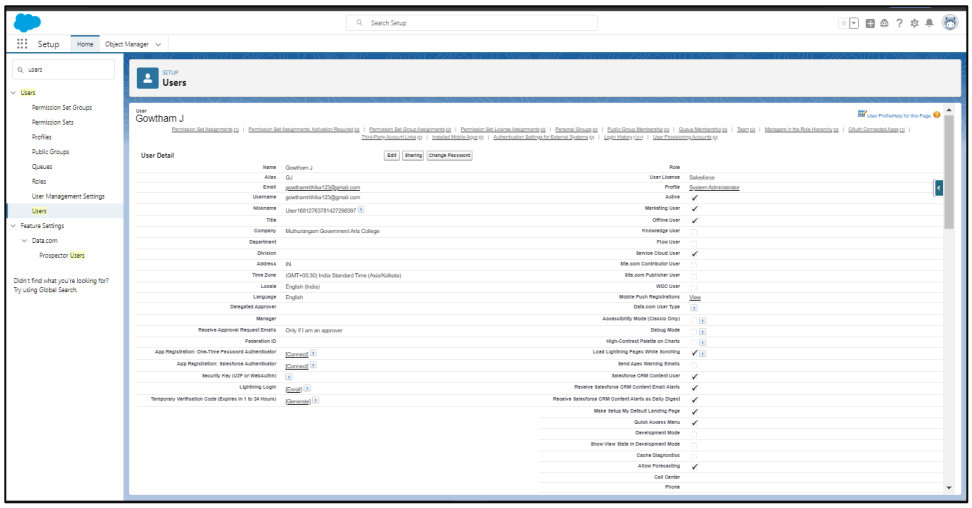
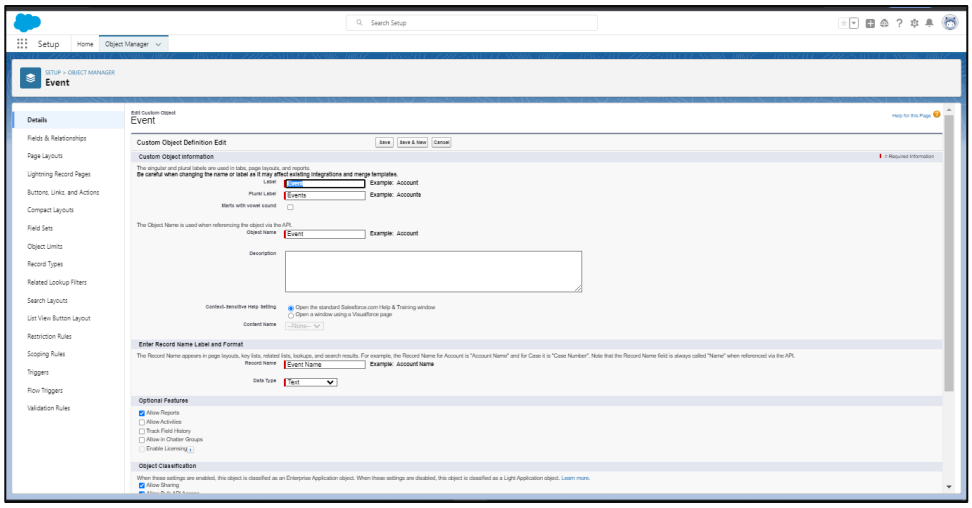
Price Book
Price Book Layout
[ View Assignment ]
Price Book Entry
Price Book Entry Layout


Setup
Home
Object Manager
Search Setup
users
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Didn't find what you're looking for?
Try using Global Search.
SETUP
Users
User
Gowtham J
User Profile Help for this Page
Permission Set Assignments | Permission Set Assignments: Activation Required | Permission Set Group Assignments | Permission Set License Assignments | Personal Groups | Public Group Memberships | Queue Memberships | Team | Managers in the Role Hierarchy | Grant Connected Apps | Third-Party Account Links | Installed Mobile Apps | Authentication Settings for External Systems | Login History | User Provisioning Accounts
User Detail
Edit
Sharing
Change Password
Name
Gowtham J
Alias
GJ
Email
gowthamrithika123@gmail.com
Username
gowthamrithika123@gmail.com
Nickname
User16512783781427296397
Title
Company
Muthurangam Government Arts College
Department
Division
Address
IN
Time Zone
(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale
English (India)
Language
English
Delegated Approver
Manager
Receive Approval Request Emails
Only if I am an approver
Federation ID
App Registration: One-Time Password Authenticator
[Connect]
App Registration: Salesforce Authenticator
[Connect]
Security Key (U2F or WebAuthn)
Lightning Login
[Enroll]
Temporary Verification Code (Expires in 1 to 24 Hours)
[Generate]
Role
User License
Salesforce
Profile
System Administrator
Active
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
Mobile Push Registrations
View
Data.com User Type
Accessibility Mode (Classic Only)
Debug Mode
High-Contrast Palette on Charts
Lead Lightning Pages While Scrolling
Send Apex Warning Emails
Salesforce CRM Content User
Receive Salesforce CRM Content Email Alerts
Receive Salesforce CRM Content Alerts as Daily Digest
Make Setup My Default Landing Page
Quick Access Menu
Development Mode
Show View State in Development Mode
Cache Diagnostics
Allow Forecasting
Call Center
Phone


Search Setup
Setup
Home
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SETUP > OBJECT MANAGER
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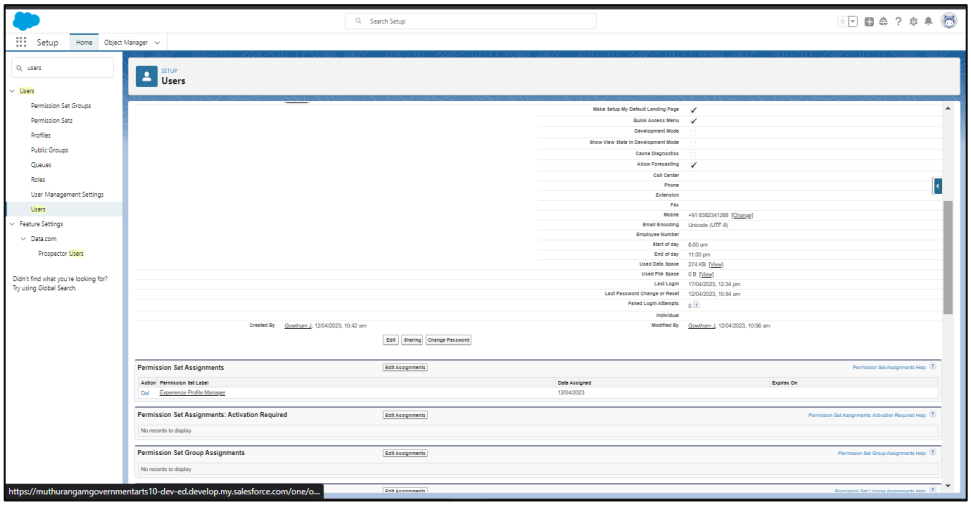
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules
Edit Custom Object
Event
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
Label
Example: Account
Plural Label
Events
Example: Accounts
Starts with vowel sound
Object Name
Event
Example: Account
Description
Context-Sensitive Help Setting
Content Name
Enter Record Name Label and Format
Record Name
Event Name
Example: Account Name
Data Type
Text
Optional Features
Allow Reports
Allow Activities
Track Field History
Allow in Chatter Groups
Enable Licensing
Object Classification
Allow Sharing


Search Setup
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Try using Global Search.
SETUP
Users
Make Setup My Default Landing Page
Quick Access Menu
Development Mode
Show View State in Development Mode
Cache Diagnostics
Allow Forecasting
Call Center
Phone
Extension
Fax
Mobile
Email Encoding
Employee Number
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End of day
Used Data Space
Used File Space
Last Login
Last Password Change or Reset
Failed Login Attempts
Individual
Created By
Modified By
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Sharing
Change Password
Permission Set Assignments
Edit Assignments
Action
Permission Set Label
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Expires On
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Experience Profile Manager
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Permission Set Assignments: Activation Required
No records to display
Permission Set Group Assignments
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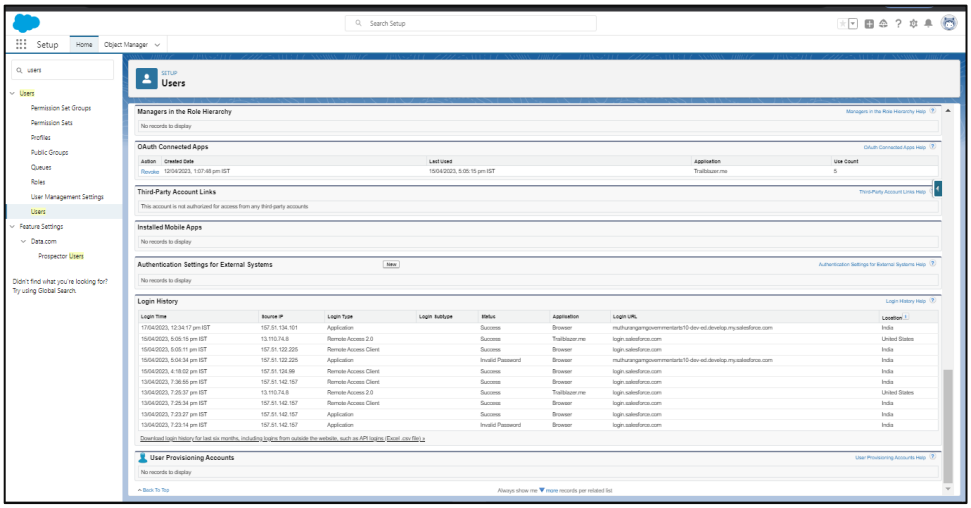
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Feature Settings
Data.com
Prospector Users
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SETUP
Users
Managers in the Role Hierarchy
No records to display
OAuth Connected Apps
Action
Created Date
Last Used
Application
Use Count
Revoke
12/04/2023, 1:07:48 pm IST
15/04/2023, 5:05:15 pm IST
Trailblazer.me
5
Third-Party Account Links
This account is not authorized for access from any third-party accounts
Installed Mobile Apps
No records to display
Authentication Settings for External Systems
New
No records to display
Login History
Login Time
Source IP
Login Type
Login Subtype
Status
Application
Login URL
Location
17/04/2023, 12:34:17 pm IST
157.51.134.101
Application
Success
Browser
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India
15/04/2023, 5:05:15 pm IST
13.110.74.8
Remote Access 2.0
Success
Trailblazer.me
login.salesforce.com
United States
15/04/2023, 5:05:11 pm IST
157.51.122.225
Remote Access Client
Success
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login.salesforce.com
India
15/04/2023, 5:04:34 pm IST
157.51.122.225
Application
Invalid Password
Browser
muthurangamgovernmentarts10-dev-ed.develop.my.salesforce.com
India
15/04/2023, 4:18:02 pm IST
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Remote Access Client
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13/04/2023, 7:23:14 pm IST
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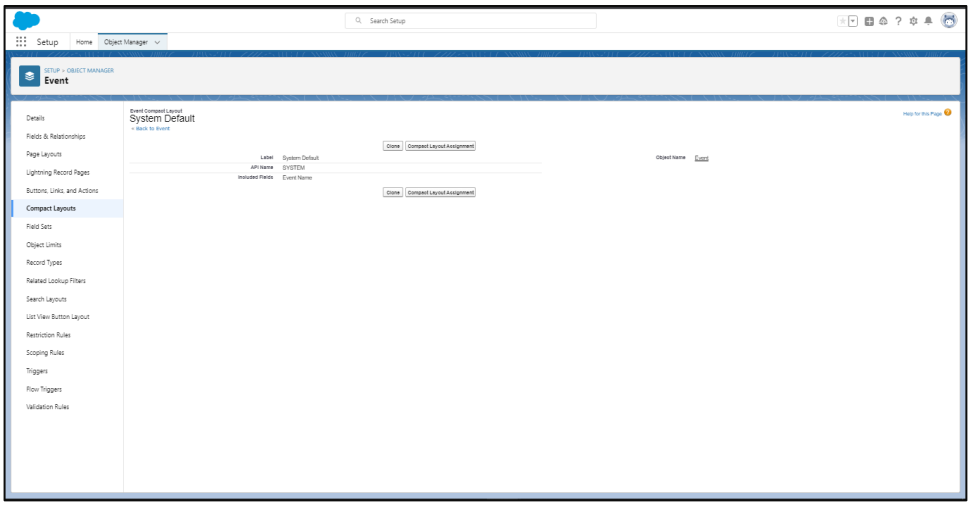
Application
Invalid Password
Browser
login.salesforce.com
India
Download login history for last six months, including logins from outside the website, such as API logins (Excel .csv file)
User Provisioning Accounts
No records to display
Back To Top


Setup
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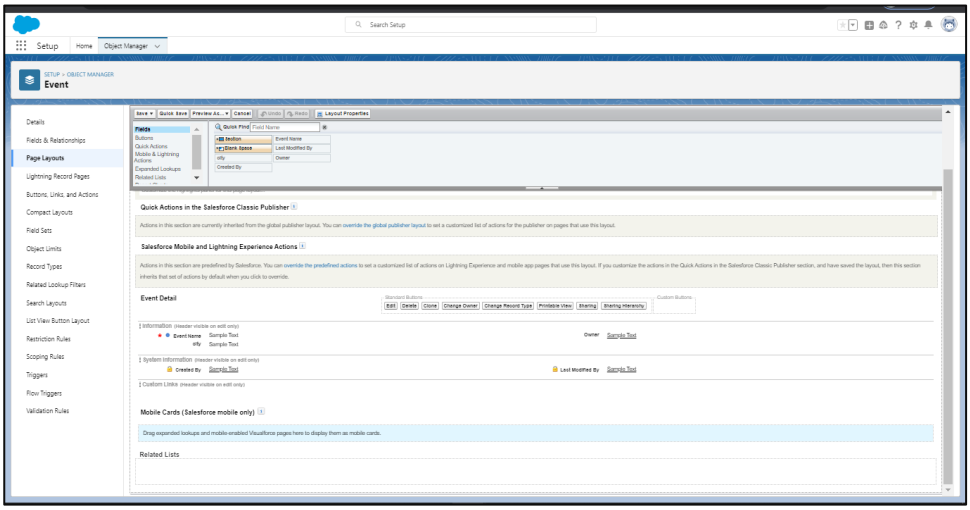
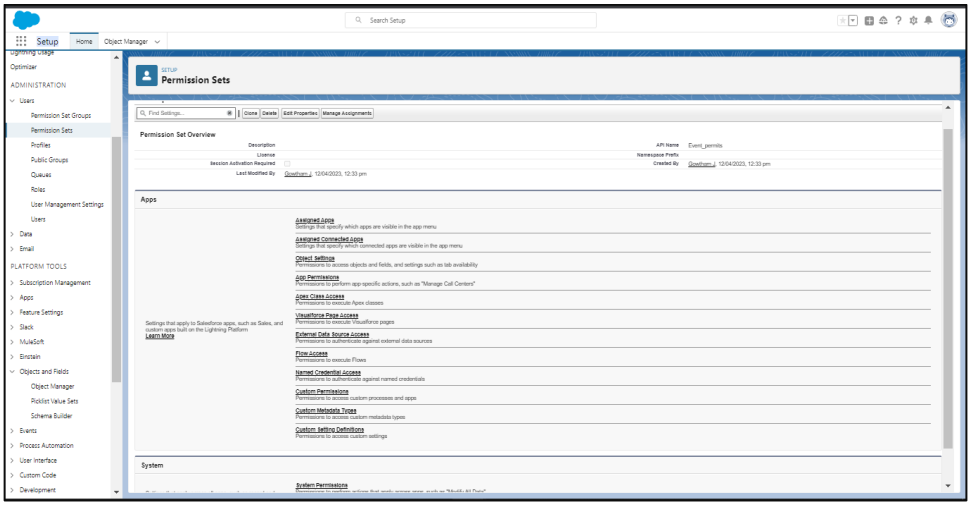
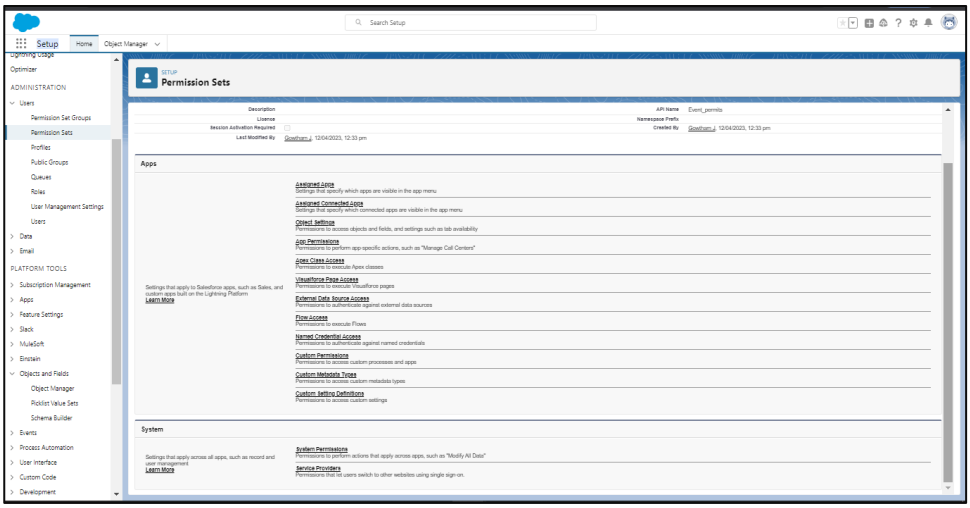
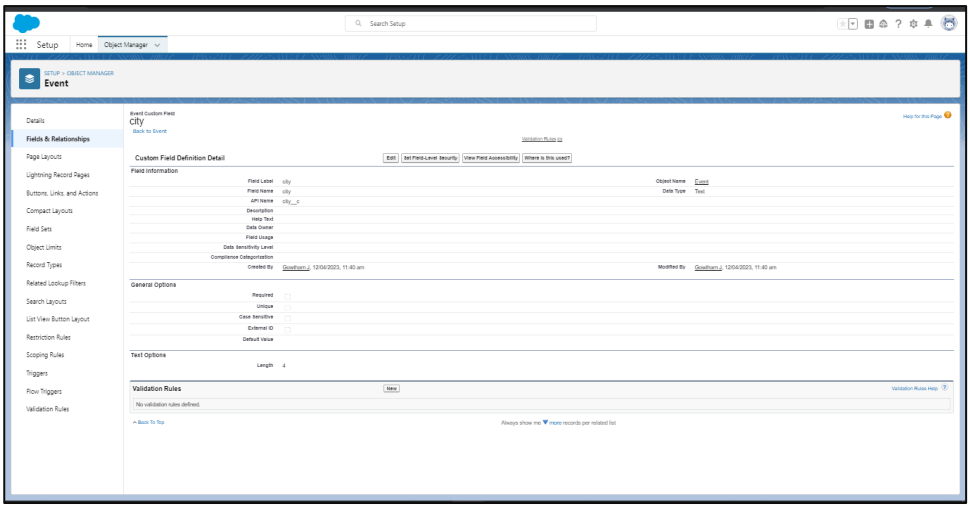
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules
Event Compact Layout
System Default
Clone
Compact Layout Assignment
Label
System Default
API Name
SYSTEM
Included Fields
Event Name
Object Name
Event


Setup
Home
Object Manager
Search Setup
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
List View Button Layout
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules
Quick Actions in the Salesforce Classic Publisher
Salesforce Mobile and Lightning Experience Actions
Event Detail
Mobile Cards (Salesforce mobile only)
Related Lists


Setup
Home
Object Manager
Search Setup
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
PLATFORM TOOLS
Objects and Fields
Object Manager
Picklist Value Sets
Schema Builder
SETUP
Permission Sets
Permission Set Overview
Apps
System


Setup
Home
Object Manager
Search Setup
SETUP
Permission Sets
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Data
Email
PLATFORM TOOLS
Subscription Management
Apps
Feature Settings
Slack
MuleSoft
Einstein
Objects and Fields
Object Manager
Picklist Value Sets
Schema Builder
Events
Process Automation
User Interface
Custom Code
Development
Apps
Assigned Apps
Assigned Connected Apps
Object Settings
App Permissions
Apex Class Access
Visualforce Page Access
External Data Source Access
Flow Access
Named Credential Access
Custom Permissions
Custom Metadata Types
Custom Setting Definitions
System
System Permissions
Service Providers


Setup
Home
Object Manager
Search Setup
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
List View Button Layout
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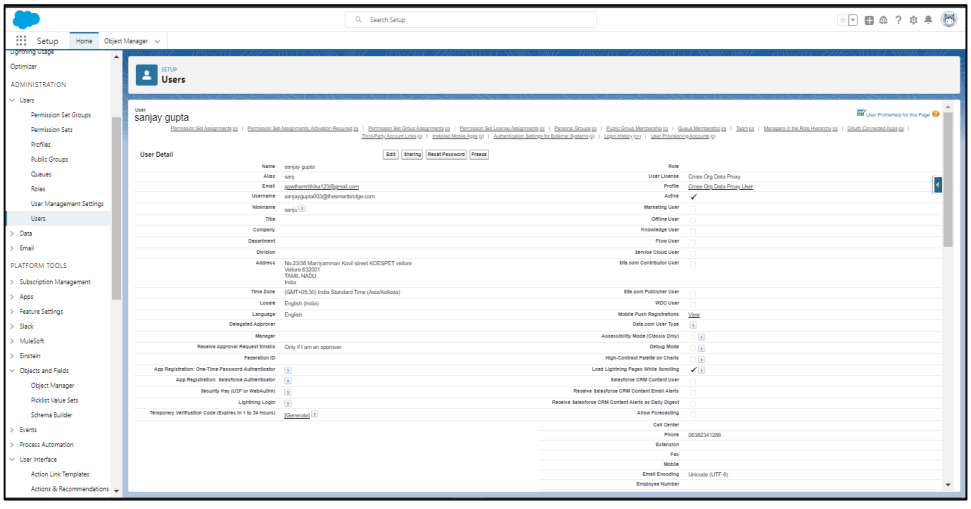
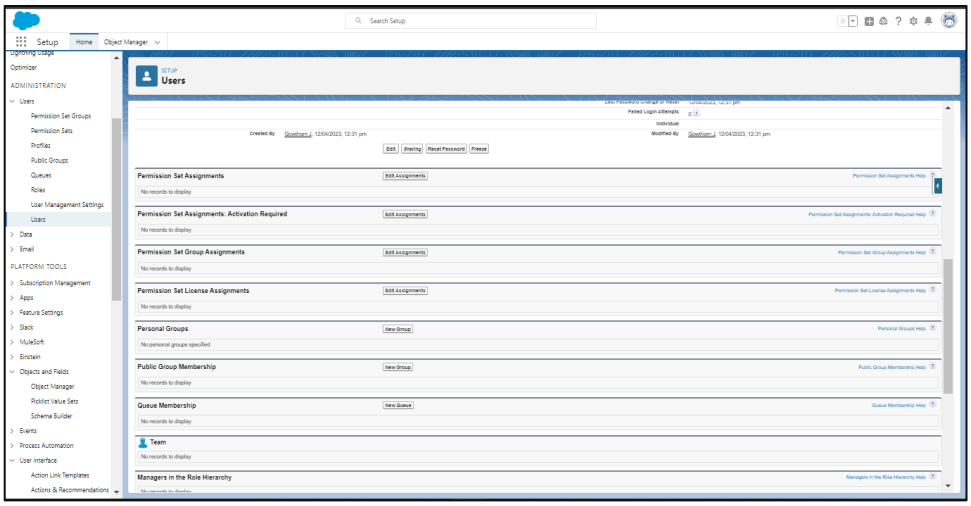
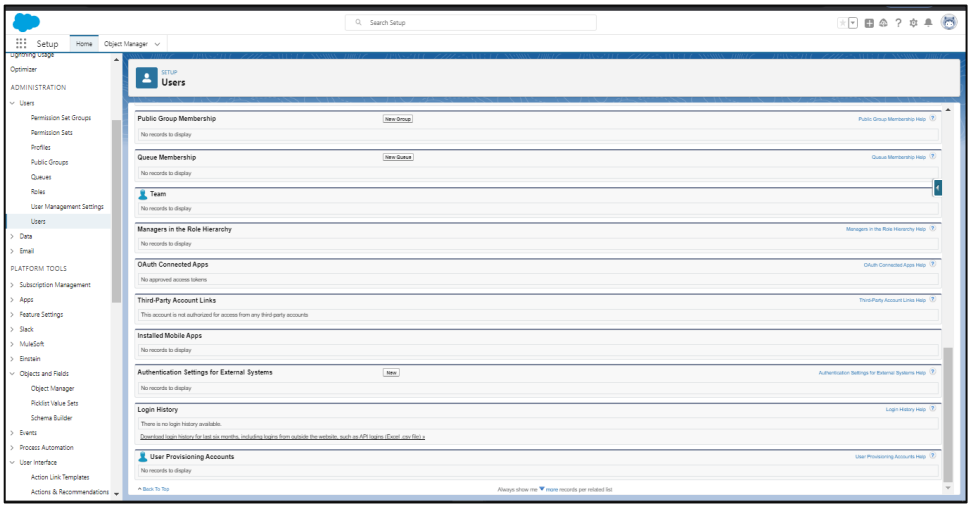
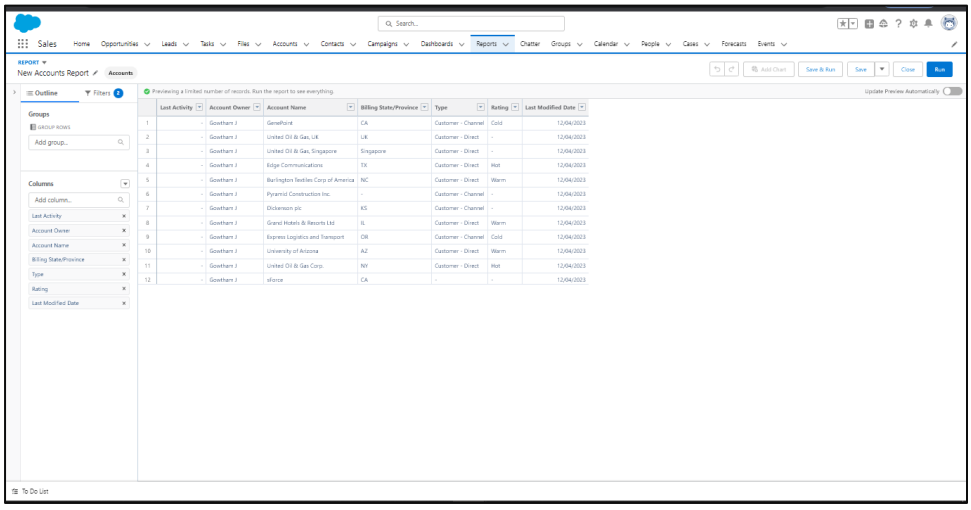
Scoping Rules
Triggers
Flow Triggers
Validation Rules
Custom Field Definition Detail
Field Information
General Options
Text Options
Validation Rules


Setup
Home
Object Manager
Search Setup
SETUP
Users
sanjay gupta
User Detail
ADMINISTRATION
PLATFORM TOOLS


Setup
Home
Object Manager
Search Setup
SETUP
Users
Permission Set Assignments
Permission Set Assignments: Activation Required
Permission Set Group Assignments
Permission Set License Assignments
Personal Groups
Public Group Membership
Queue Membership
Team
Managers in the Role Hierarchy


Setup
Home
Object Manager
Search Setup
SETUP
Users
Public Group Membership
Queue Membership
Team
Managers in the Role Hierarchy
OAuth Connected Apps
Third-Party Account Links
Installed Mobile Apps
Authentication Settings for External Systems
Login History
User Provisioning Accounts


Sales
Home
Opportunities
Leads
Tasks
Files
Accounts
Contacts
Campaigns
Dashboards
Reports
Chatter
Groups
Calendar
People
Cases
Forecasts
Events
REPORT
New Accounts Report
Accounts
Run
Outline
Filters
Groups
Columns
Last Activity
Account Owner
Account Name
Billing State/Province
Type
Rating
Last Modified Date
To Do List

4. **TRAILHEAD PROFILE PUBLIC URL**

Team Lead - https://trailblazer.me/id/gowtj4

Team Member 1 - https://trailblazer.me/id/arunp148

Team Member 2 - https://trailblazer.me/id/madhs47

Team Member 3 - https://trailblazer.me/id/vignr30

Team Member 4 - https://trailblazer.me/id/sants65

5. **Advantages & Disadvantages**

➢ **Advantages:**

✧ **Comprehensive event management features**: Salesforce event management provides a robust set of features for planning, managing, and executing events. This includes event registration, agenda building, attendee tracking, and post-event follow-up.

✧ **Personalized event experiences:** Salesforce allows businesses to personalize the event experience for attendees based on their interests and preferences. This can increase attendee engagement and satisfaction.

✧ **Integration with other Salesforce products**: Salesforce event management can be integrated with other Salesforce products, such as marketing automation and CRM, to provide a seamless end-to-end solution for event management.

✧ **Real-time analytics and reporting**: Salesforce provides real-time analytics and reporting capabilities, which allow businesses to track event performance metrics and make data-driven decisions

✧ **Scalability**: Salesforce is a cloud-based solution, which makes it highly scalable and suitable for businesses of all sizes. Businesses can easily add or remove users and features as needed, without having to worry about infrastructure or hardware

➢ **Disadvantages:**

✧ **Cost**: Salesforce event management is a paid product and can be expensive, especially for small businesses or those with limited budgets.

✧ **Complexity**: Salesforce can be complex to set up and use, which may require businesses to invest time and resources in training.

✧ **Dependence on internet connectivity**: As Salesforce is a cloud-based solution, businesses are dependent on internet connectivity to access the platform. This can be a disadvantage in areas with poor internet connectivity.

✧ **Customization**: Customizing the platform to meet specific business needs may require additional development resources, which can be expensive and time-consuming

✧ **Integration with non-Salesforce systems:** While Salesforce can integrate with other systems, businesses using non-Salesforce systems may face challenges in integrating their event management with other business applications.

**6. Applications:**

✧ **Conference and trade show management**: Salesforce event management can be used to manage conferences and trade shows, including registration, booth assignments, and speaker management.

✧ **Corporate Events**: Salesforce event management can be used for organizing corporate events such as conferences, meetings, product launches, and seminars. Businesses can use the platform to manage event logistics, attendee registration, and post-event follow-up.

✧ **Non-profit fundraising events**: Non-profit organizations can use Salesforce event management to manage fundraising events such as charity auctions and galas.

✧ **Webinars:** Salesforce event management can be used to manage online events such as webinars, including registration, attendee tracking, and post-event follow-up.

✧ **Community events:** Salesforce event management can help organizations manage community events such as festivals, parades, and sports tournaments, including registration and attendee tracking.

✧ **Trade Shows and Exhibitions:** Salesforce can be used to manage trade shows and exhibitions, including booth management, lead capture, and follow-up.

✧ **Higher Education:** Universities and colleges can use Salesforce to manage events such as orientation sessions, graduation ceremonies, and alumni events

✧ **Healthcare:** Healthcare providers can use Salesforce to manage events such as health fairs, conferences, and training sessions.

## 7. Conclusion

Salesforce event management is a powerful tool for businesses and organizations to plan, manage, and execute events of all sizes. With its comprehensive set of features, personalized event experiences, integration with other Salesforce products, real-time analytics and reporting, and scalability, it offers many advantages to businesses looking to streamline their event management processes.

However, it's important to keep in mind that Salesforce event management may not be suitable for every business, as it comes with some potential disadvantages such as cost, complexity, dependence on internet connectivity, customization, and integration challenges.

Overall, Salesforce event management can help businesses enhance their event management capabilities, engage attendees, and drive business outcomes. With its versatility and flexibility, it has many applications across industries, making it a valuable tool for businesses of all sizes.

## 8. Future Scope

✧ **Integration with Virtual and Hybrid Events:** With the growing trend of virtual and hybrid events, there is a huge scope for Salesforce event management to integrate with virtual event platforms and offer seamless event experiences to attendees.

✧ **Artificial Intelligence and Machine Learning:** Salesforce event management could use artificial intelligence and machine learning to offer personalized event recommendations, content suggestions, and real-time event feedback.

✧ **Enhanced Networking Opportunities:** Salesforce event management could offer enhanced networking opportunities to attendees by leveraging data analytics and artificial intelligence to connect attendees with similar interests and backgrounds.

✧ **Improved Event Marketing:** Salesforce event management could help businesses improve their event marketing by offering targeted event promotion, personalized messaging, and optimized social media integration .

✧ **Enhanced Event ROI:** Salesforce event management could offer improved event ROI by integrating with Salesforce's other products such as Sales Cloud and Marketing Cloud to track leads, opportunities, and customer engagement.

✧ **Further Integrations:** Salesforce event management can be further integrated with other business systems, such as marketing automation platforms, customer relationship management (CRM) tools, and financial management systems. This will enable businesses to streamline their event management processes and gain deeper insights into attendee behavior.

✧ **Artificial Intelligence:** Salesforce can leverage artificial intelligence (AI) to provide personalized recommendations for attendees and optimize event experiences. For example, it can suggest relevant sessions or products to attendees based on their interests and behaviors

✧ **Virtual Events:** With the rise of virtual events due to the COVID-19 pandemic, there is a huge potential for Salesforce event management to offer more virtual event management capabilities, such as virtual registration, virtual sessions, virtual booths, and virtual networking

✧ These are just a few examples of the future scopes of Salesforce event management. As technology continues to evolve, there will be many new opportunities to enhance the platform and offer better event experiences to businesses and attendees alike