

## **BUILD AN EVENT MANAGEMENT SYSTEM USING SALESFORCE**

### **1. INTRODUCTION**

#### **1.1 Overview**

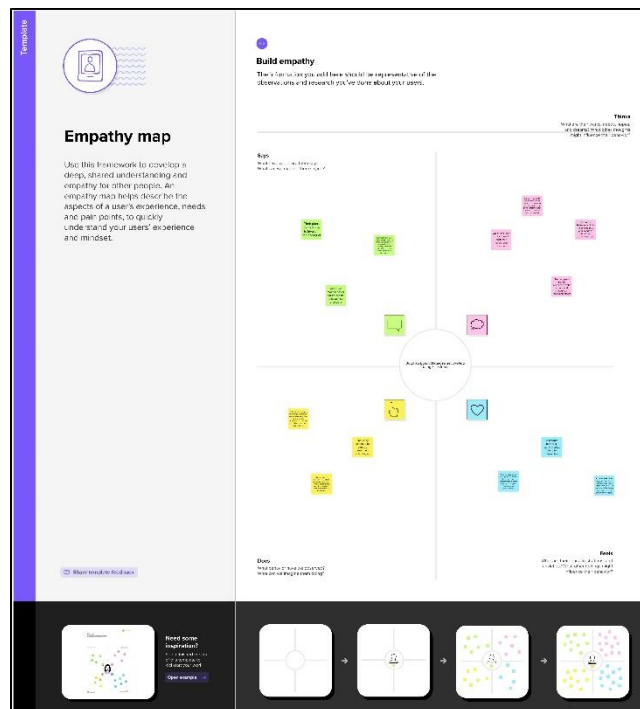
Salesforce event management is a module within the Salesforce platform that allows businesses to plan, organize, and execute events. The module is designed to help businesses streamline the event planning process, manage attendee data, and provide a personalized experience for event attendees.

#### **1.2 Purpose**

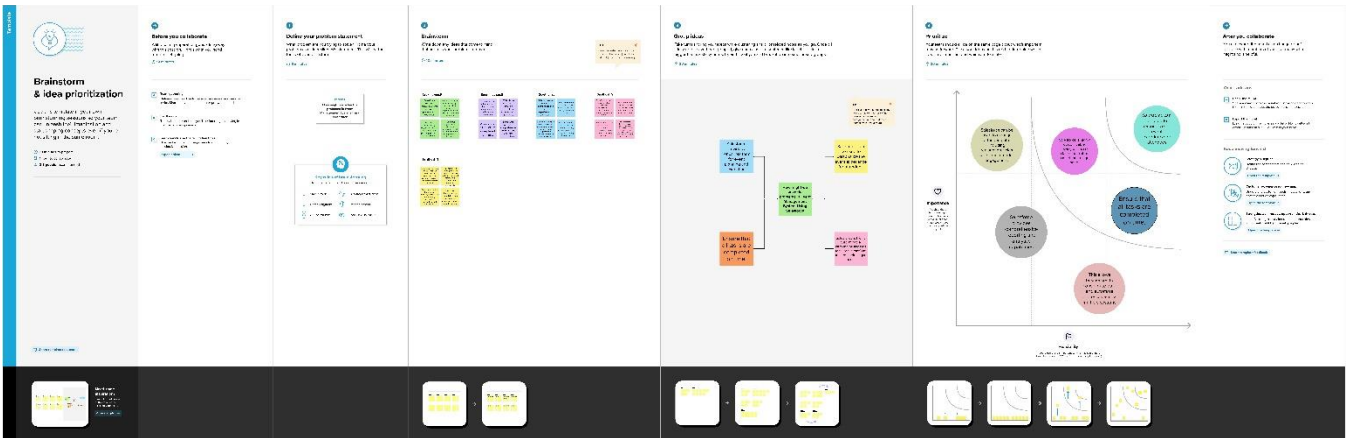
The purpose of Salesforce event management is to provide businesses with a comprehensive solution for planning, managing, and executing events. The module is designed to help businesses streamline the event planning process, manage attendee data, and provide a personalized experience for event attendees.

## 2. PROBLEM DEFINITION & DESIGN THINKING

### 2.1 Empathy Map



2.2 Ideation & Brainstorming Map



3. Result

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

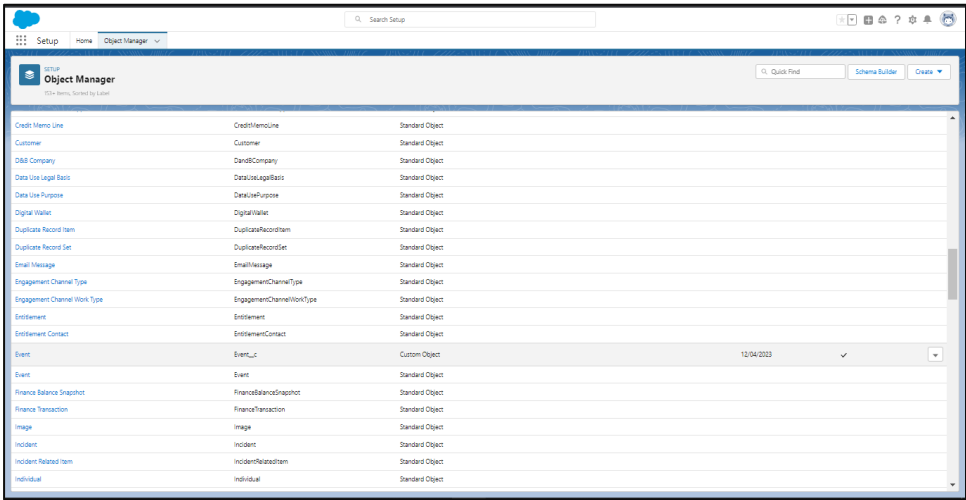
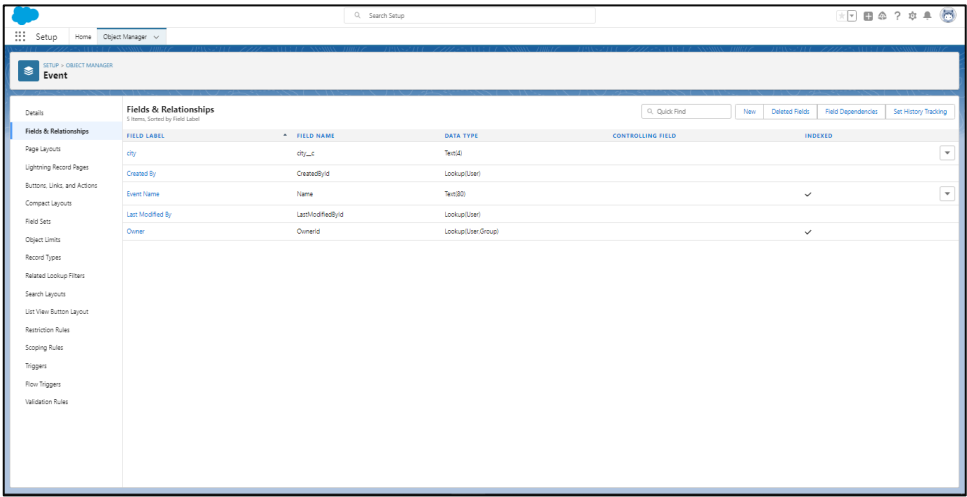
Object Name	FIELD IN THE OBJECT	
FIELDS & RELATIONSHIPS	Field Label	Data Type
	City	Text (4)
	Created By	Lookup (User)
	Event Name	Text (40)
	Last Modified By	Lookup (User)
	Owner	Lookup (User, Group)

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



Setup

Home

Object Manager

app manager

Apps

App Manager

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

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

22 Items • Sorted by App Name • Filtered by All app ecosystems • Action Type

App Name ?	Developer Name	Description	Last Modified Date	App Type	Visible in ...
1 All Tabs	AITabSet		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 recpids.	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, 10:45 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	✓

Setup

Home

Object Manager

app manager

Apps

App Manager

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

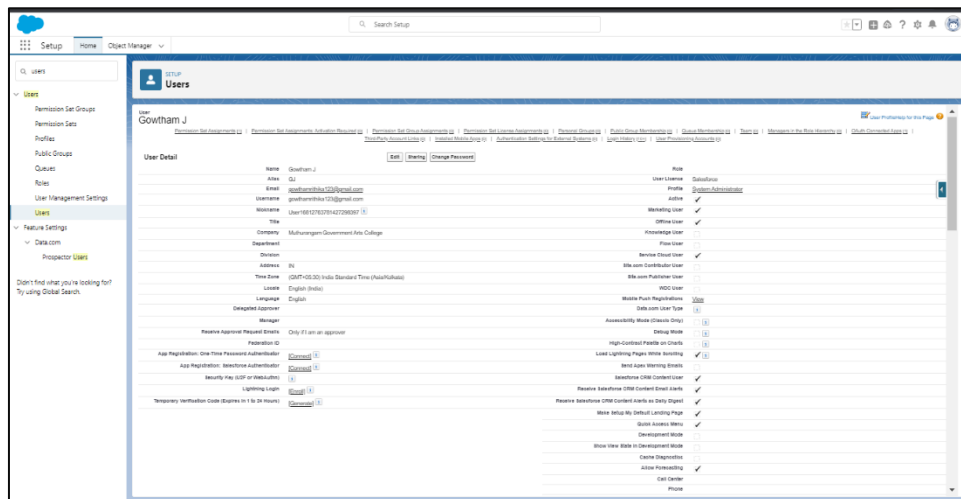
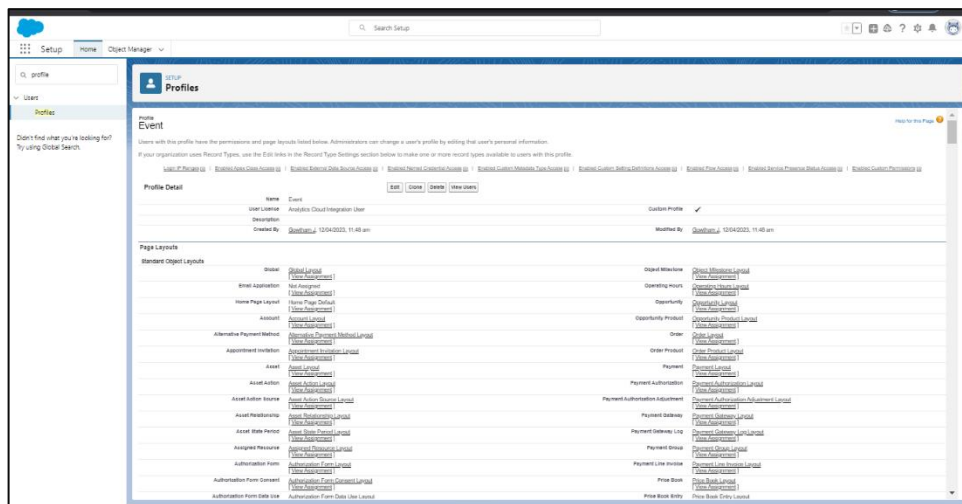
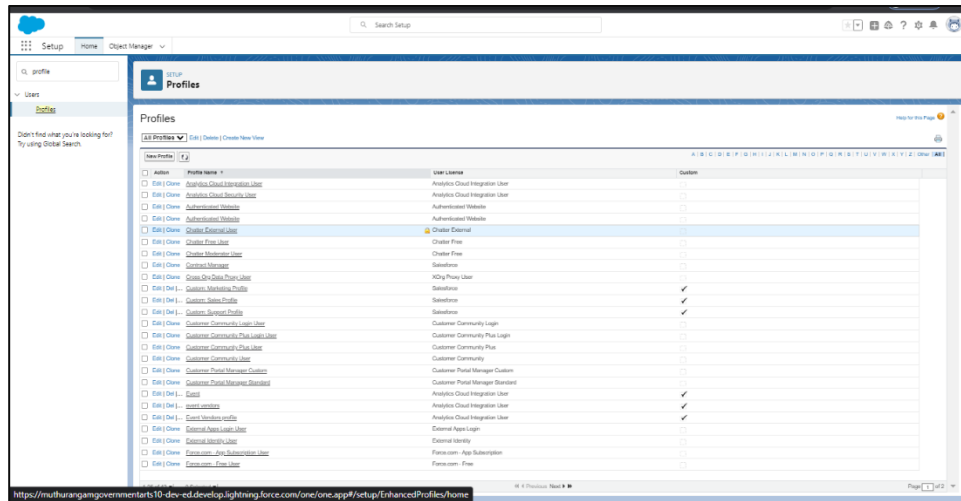
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18 Salesforce Scheduler Setup	LightningScheduler	Set up personalized appointment scheduling.	12/04/2023, 10:44 am	Lightning	✓
19 Service	Service	Manage customer service with accounts, contacts, cases, and more.	12/04/2023, 10:42 am	Classic	✓
20 Service 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	✓







Setup

Home

Object Manager

Search Setup

Event

Help for this Page

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

ListView Button Layout

Restriction Rules

Triggers

Flow Triggers

Validation Rules

Event

Save

Save & New

Cancel

Custom Object Definition Edit

Custom Object Information

Label

Example: Account

Plural Label

Example: Accounts

Starts with word sound

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

Object Name

Example: Account

Description

Context-sensitive help settings

Open the standard Salesforce.com Help & Training window

Open a window using a Visualforce page

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name

Example: Account Name

Field Type

Text

Optional Features

View Reports

Allow Relations

Track Field History

Allow in Chatter Groups

Enable Streaming

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.

When Set as an App

When Set as a Web Resource

Setup

Home

Object Manager

Search Setup

Users

Help for this Page

Users

Users

Home Setup By Default: Learning Page

Quick Access Menu

Development Mode

Show View State in Development Mode

Enable Diagnostics

Allow Forwarding

Get Center

Phone

Extension

Pin

Mobile

+91 63624 108

Mobile Number

Univalue (UTF-8)

Start of day

8:00 am

End of day

11:00 pm

Used Date Range

274 MB

Used File Name

0.9 KB

Used Logs

1/10/2023, 10:34 pm

Load Password Change or Read

1/10/2023, 10:34 pm

Print Login Attempts

0/10

Modified By

1/10/2023, 10:34 pm

Created By

1/10/2023, 10:42 am

Edit

Share

Change Password

Permission Set Assignments

Admin: Permission Set user

For

Example: Public Manager

Date Assigned

1/10/2023

Expires On

Permission Set Assignments: Activation Required

No records to display

Permission Set Group Assignments

No records to display

Setup

Home

Object Manager

Search Setup

Users

Help for this Page

Users

Users

Managers in the Role Hierarchy

No records to display

OAuth Connected Apps

Action

Created Date

Last Used

Application

User Count

Example

1/10/2023, 1:07:48 pm IST

1/10/2023, 5:00:10 pm IST

Trailblazer.me

0

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

No records to display

Login History

Login Time

Source IP

Login Type

Login Success

Device

Application

Login URL

Location

1/10/2023, 12:34:17 pm IST

107.31.134.151

Application

Success

Browser

muturangangovernmentarts10-dev-ed-develop.my.salesforce.com

India

1/10/2023, 5:05:10 pm IST

107.31.134.151

Remote Access 2.0

Success

Trailblazer.me

login.salesforce.com

United States

1/10/2023, 5:05:11 pm IST

107.31.134.151

Remote Access Client

Success

Browser

login.salesforce.com

India

1/10/2023, 5:04:39 pm IST

107.31.134.151

Application

Invalid Password

Browser

muturangangovernmentarts10-dev-ed-develop.my.salesforce.com

India

1/10/2023, 4:48:02 pm IST

107.31.134.151

Remote Access Client

Success

Browser

login.salesforce.com

India

1/10/2023, 7:30:05 pm IST

107.31.142.107

Remote Access Client

Success

Browser

login.salesforce.com

India

1/10/2023, 7:30:07 pm IST

107.31.142.107

Remote Access Client

Success

Trailblazer.me

login.salesforce.com

United States

1/10/2023, 7:30:34 pm IST

107.31.142.107

Remote Access Client

Success

Browser

login.salesforce.com

India

1/10/2023, 7:30:07 pm IST

107.31.142.107

Application

Success

Browser

login.salesforce.com

India

1/10/2023, 7:30:14 pm IST

107.31.142.107

Application

Invalid Password

Browser

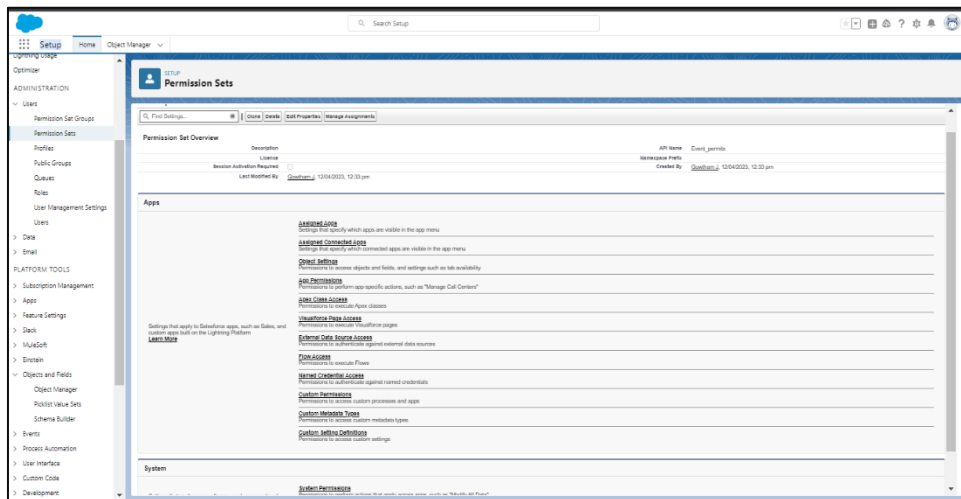
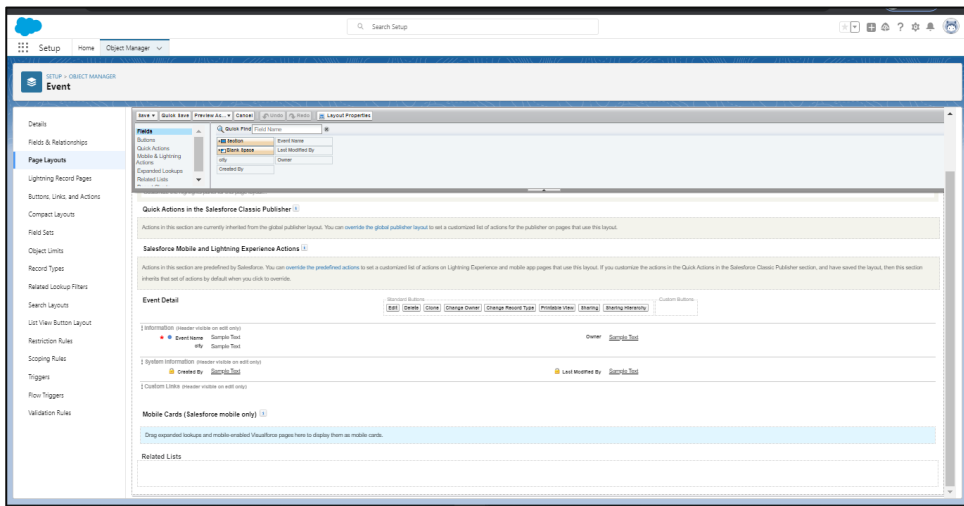
login.salesforce.com

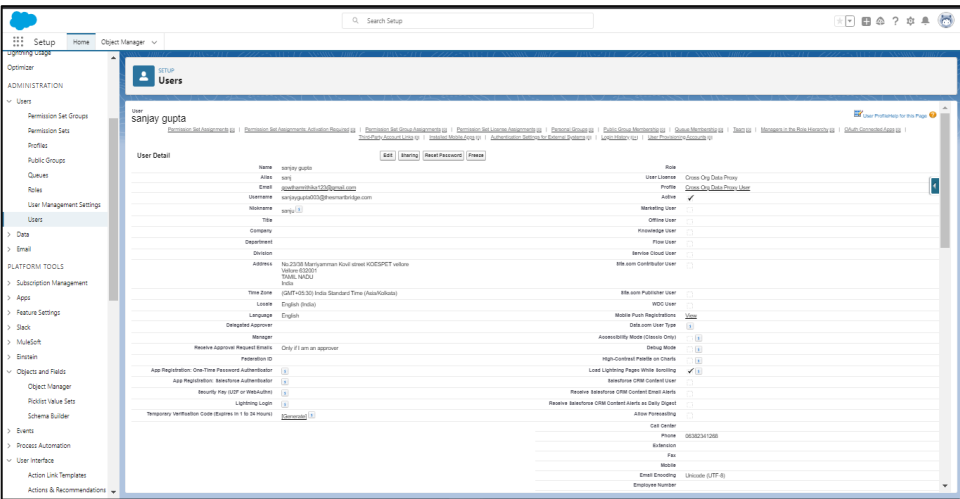
India

Download [Link] to get the login history data from the mobile app or the login history page.

User Provisioning Accounts

No records to display





Setup Home Object Manager Search Setup

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

Stack

MailSoft

Enroll

Objects and Fields

Object Manager

Rollout Value Sets

Schema Builder

Events

Process Automation

User Interface

Action Link Templates

Actions & Recommendations

Users

Created By: [Goetz](#) 12/04/2023, 12:21 pm

Individual

Modified By: [Goetz](#) 12/04/2023, 12:21 pm

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

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

Stack

MailSoft

Enroll

Objects and Fields

Object Manager

Rollout Value Sets

Schema Builder

Events

Process Automation

User Interface

Action Link Templates

Actions & Recommendations

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 Teles Files Accounts Contacts Campaigns Dashboards Reports Charter Groups Calendar People Cases Forecasts Events

REPORT

New Accounts Report Accounts

Outline

Filters

Columns

Last Activity

Account Owner

Account Name

Billing State/Province

Type

Rating

Last Modified Date

Processing a limited number of records. Run the report to see everything.

Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
11	Goetz	Goetz	CA	Customer - Channel	Cold	12/04/2023
12	Goetz	United Oil & Gas, Ltd.	UK	Customer - Direct	-	12/04/2023
13	Goetz	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	12/04/2023
14	Goetz	Edge Communications	TX	Customer - Direct	Hot	12/04/2023
15	Goetz	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	12/04/2023
16	Goetz	Pyramint Construction Inc.	-	Customer - Channel	-	12/04/2023
17	Goetz	Dickinson plc	KS	Customer - Channel	-	12/04/2023
18	Goetz	Grand Hotels & Resorts Ltd.	IL	Customer - Direct	Warm	12/04/2023
19	Goetz	Express Logistics and Transport	OH	Customer - Channel	Cold	12/04/2023
20	Goetz	University of Arizona	AZ	Customer - Direct	Warm	12/04/2023
21	Goetz	United Oil & Gas Corp.	NE	Customer - Direct	Hot	12/04/2023
22	Goetz	Alcora	CA	Customer - Direct	-	12/04/2023

#### 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/boomi143>  
Team Member 3 - <https://trailblazer.me/id/sants65>  
Team Member 4 - <https://trailblazer.me/id/santv32>

#### 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