BUILD AN EVENT MANAGEMENT SYSTEM USING SALESFORCE

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PROJECT NAME

Build an Event Management System Using Salesforce

TEAM ID: NM2023TMID07532

TEAM LEADER: KEERTHANA.G

TEAM MEMBERS: 1) KARTHIKA.M

2) KAVITHA.V

3) KEERTHANA.N

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EVENT MANAGEMENT

Event management is the application of project management to the creation and development of small and/or large-scale personal or corporate events such as festivals, conferences, ceremonies, weddings, formal parties, concerts, or conventions. It involves studying the brand, identifying its target audience, devising the event concept, and coordinating the technical aspects before actually launching the event.

The events industry now includes events of all sizes from the Olympics down to business breakfast meetings. Many industries, celebrities, charitable organizations, and interest groups hold events in order to market their label, build business relationships, raise money, or celebrate achievement.

The process of planning and coordinating the event is usually referred to as event planning and which can

include budgeting, scheduling, site selection, acquiring necessary permits, coordinating transportation and parking, arranging for speakers or entertainers, arranging decor, event security, catering, coordinating with third-party vendors, and emergency plans. Each event is different in its nature so process of planning and execution of each event differs on basis of the type of event.

The event manager is the person who plans and executes the event, taking responsibility for the creative, technical, and logistical elements. This includes overall event design, brand building, marketing and communication strategy, audio-visual production, script writing, logistics, budgeting, negotiation, and client service.
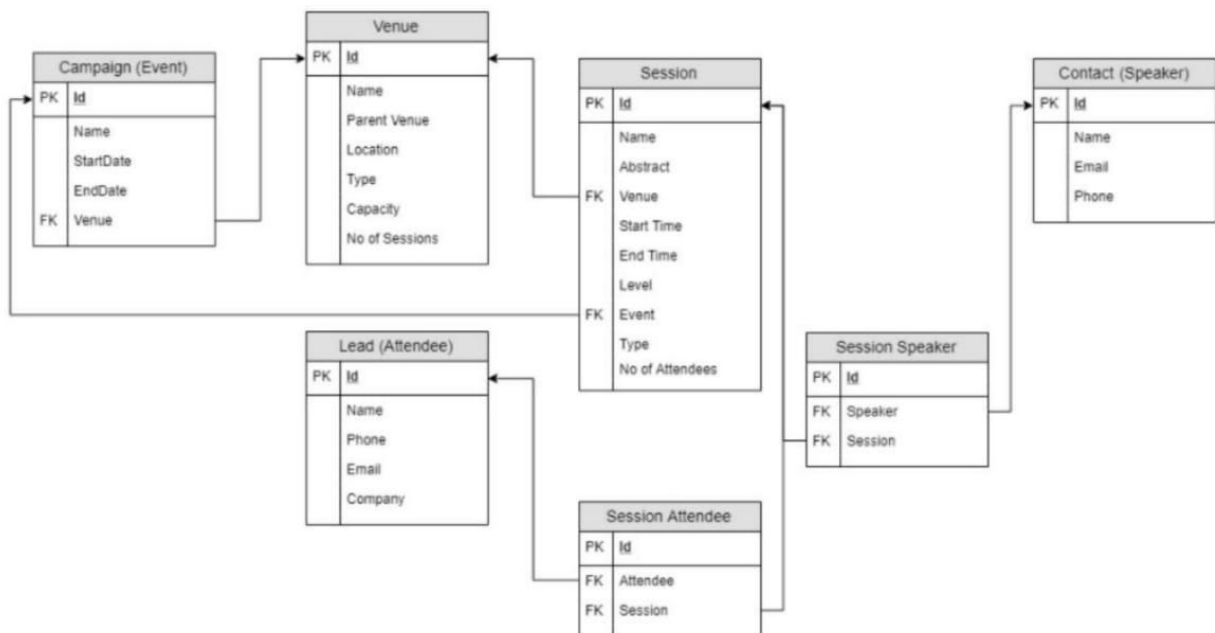
BUSINESS IN CASE

 *FEATURES COVERED

The following features will be covered in this project-

1) Schema: Objects, Fields, Validation, Rules & Relationships
2) Automation: Workflows/Processes, Flows
3) Analytics: Reports & Dashboards
4) Development: Apex, Visualforce

ERD

SCHEMA

Every app needs a place where it can store data. When it comes to salesforce ,we use objects to store the data as records. The organizers should be able to capture the following information-

1) As an organizer, I should be able to store the information about the event which includes the name of the event, start date ,end date and the venue.
2) As an organizer, I should be able to store the information about the venue which includes the name of the venue, the location, the capacity, the type of the venue and the parent venue.

    Example: City, Hotel/convention center, Hall.

3) As an organizer, I should be able to store the information about the sessions.
    - ❖ A session would typically store the following information-
        i. Name
        ii. Abstract
        iii. Venue
        iv. Start time
        v. End time
        vi. Level
        vii. Type
        viii. Event
4) As an organizer, I should be able to store information about the speakers that includes the Name, Email and Phone number.

5) As an organizer, I should be able to store information about the attendees that includes-Name, Email, Phone number and Company.

BUSINESS PROCESS AUTOMATION

The organizers had also asked to setup some business process automation. This includes-

1) As a session coordinator, I should be notified when a new session has been assigned to me.
2) As a session coordinator, I should be notified when the number of attendees attending a session has reached the capacity(Capacity + Waitlist) of the hall.
3) As an attendee, I must receive an Email whenever a session has been added or removed to my agenda or has been confirmed from the waitlist.
4) Two hours before the start time of the session, the speakers must receive a remainder email with count of attendees , and venue/hall details.
5) As a session coordinator, I should be able to see post on sessions chatter feed when speakers have been allocated for the session.

EVENT PLANNING

Event planning is the process of managing a project such as a meeting, convention, tradeshow, ceremony, (link is external)team building activity, party, or convention. Event planning includes budgeting, establishing timelines, selecting and reserving the event sites, acquiring permits, planning food, coordinating transportation, developing a theme, arranging for activities, selecting speakers and keynotes, arranging for equipment and facilities, managing risk, and developing contingency plans.

The following steps are to plan the Event-

- Step1. Determine your event goals and objectives
- Step2. Assemble your team
- Step3. Establish an Event Budget
- Step4. Choose Date & Venue
- Step5. Select the Speakers
- Step6. Event Marketing & Advertising
- Step7. Execute your Event

8 Stages Of Event Planning

Set Goals & objectives

Allocate a budget

Assemble a team

Select date & venue

Select external suppliers

Create a marketing plan

Execute your event

post event analysis

10 Steps to Plan an Event

1. Define Goals & Objectives
2. Select Event Date
3. Create Master Plan
4. Make Budget
5. Create Event Branding & Start Publicity
6. Secure Sponsorship & Speakers
7. Launch Ticket Sales
8. Coordinate With Event Suppliers
9. Manage Day-of Set Up & Execution
10. Conduct Post-Event Analysis

Personify

EVENT MANAGEMENT vs EVENT PLANNING

Event Management vs. Event Planning

Reserving a location for an event — Selecting an overall event theme

Coordinating outside vendors — Negotiating hotel contracts

Managing staff — Hiring a caterer

Resolving event situations on site — Developing invitations

ADMINISTATOR

ADMINISTRATOR

LOGIN — VIEW BOOKINGS — VIEW REGISTERED USERS — REPLY TO USERES
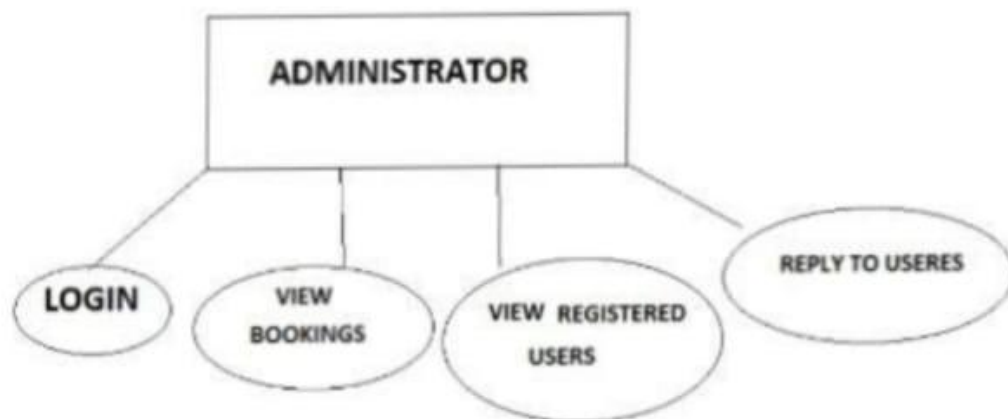
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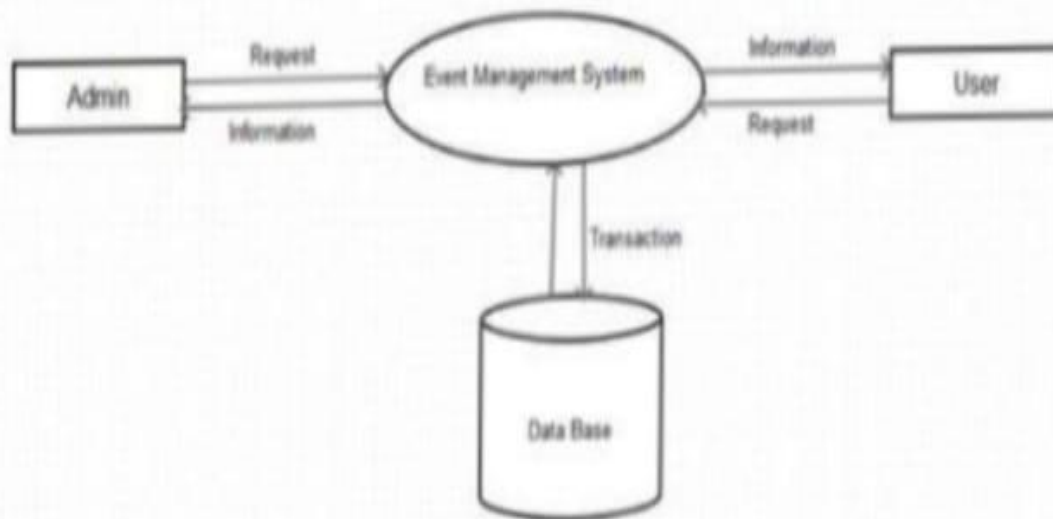
EVENT VENUE

An event venue may be an onsite or offsite location. The event manager is responsible for operations at a rented event or entertainment venue as they are coordinating directly with the property owner. An event manager will monitor all aspects of the event on-site. Some of the tasks listed in the introduction may pass to the venue, but usually at a cost.

Events present substantial liability risk to organizers and venues. Consequently, most venues require the organizers to obtain blanket or event-specific general liability insurance of an amount not less than $1,000,000 per occurrence and $2,000,000 aggregate, which is the industry standard.

Corporate event managers book event venues to host corporate meetings, conferences, networking events, trade

shows, product launches, team-building retreats or training sessions in a more tailored environment.

There are many types of venue for Meeting, Parties, …etc. Some of the venue's are here….

- Conference Centers
- Convention Centers
- College and Universities
- Party venue
- Resorts
- Hotels
- Restaurants
- Social club and Lounges
- Community Centers
- Outdoor venue

Event venue
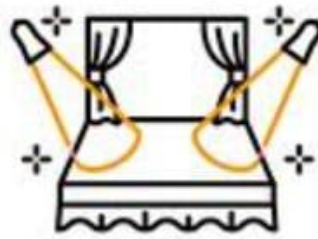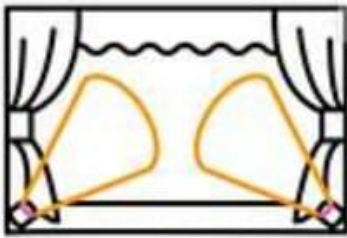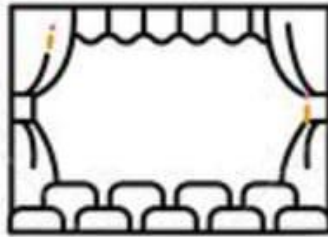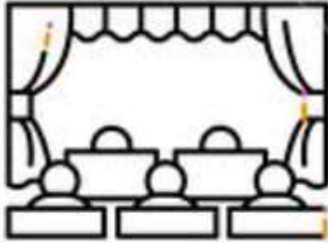
❖Conference venue

❖Party venue

❖Outdoor Event

DAY OF EVENT CHECKLIST