

Build An Event Management system using Salesforce

1 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.

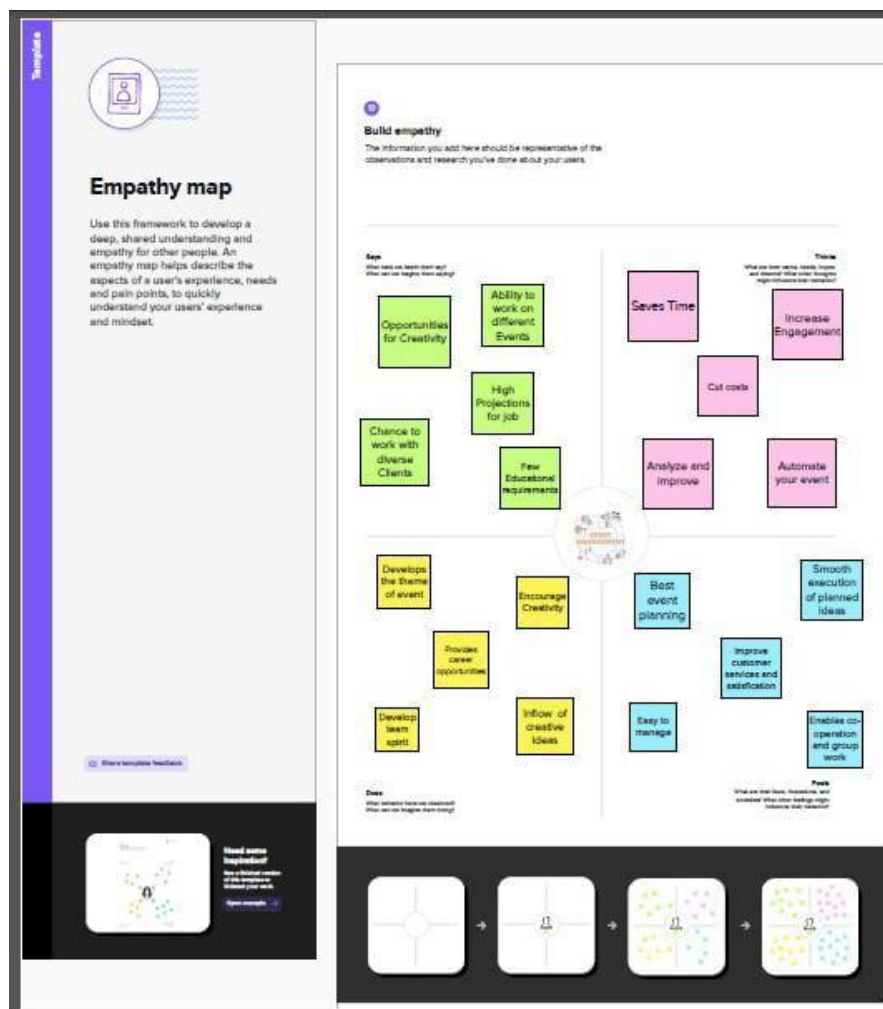
1.2 Purpose

The sole purpose of any event is that a group of people will convene in one particular place for one particular purpose at a given time. Now that could be various purposes such as a wedding, a business networking function, a church gathering, etc. All of which is to come together to explore that purpose.

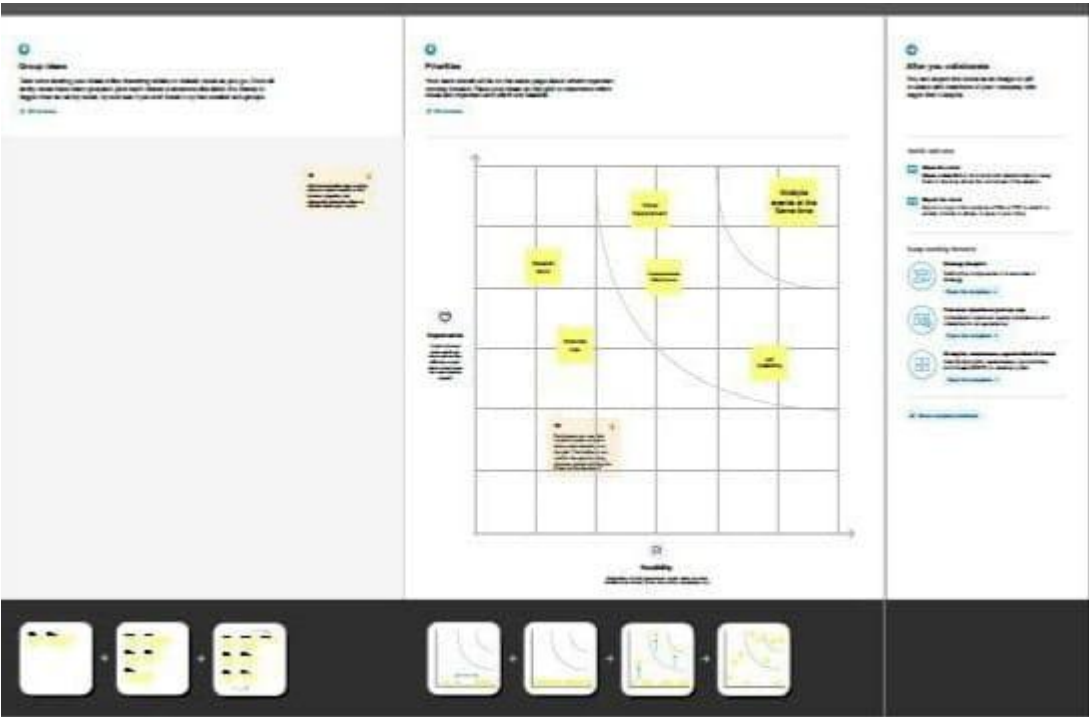
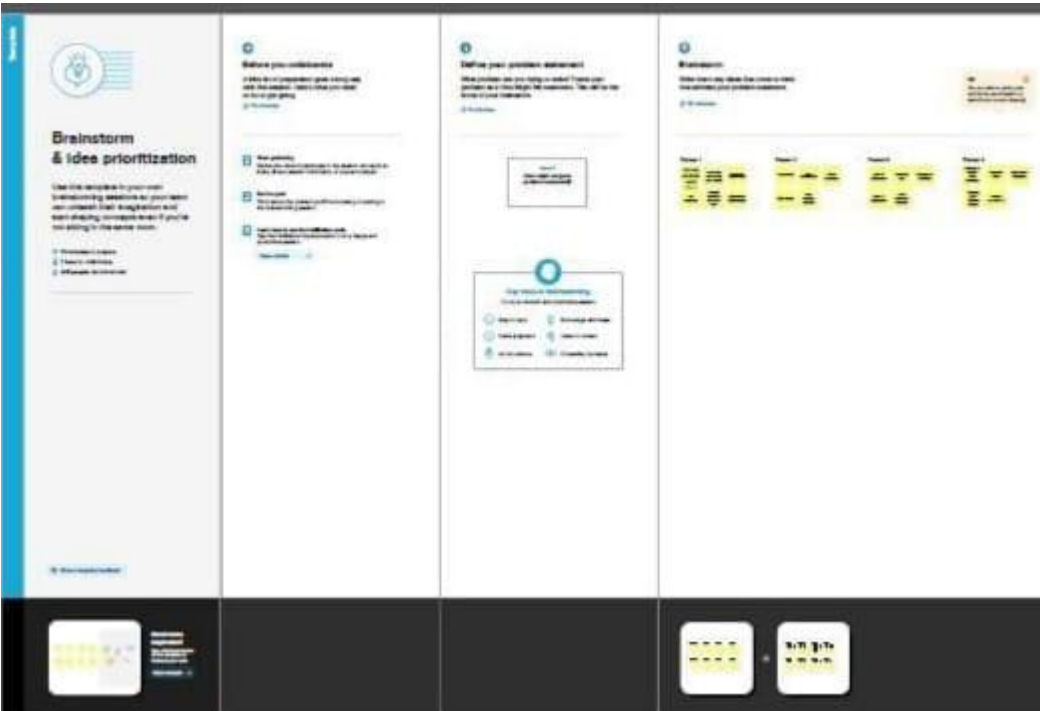
Hiring an event planner to conceptualize, prepare for, and coordinate an event alleviates much of the stress and pressure, allowing you to relax and look forward to your event. Event planners can save you money, cover all the details, and organize a better event.

2.Problem definition & Design Thinking

2.1 Empathy Map



2.2 Ideation & Brainstorming Map



3.Result

3.1 Data Model

Object Name	Fields in the Object	
Events	Field label	Data Type
	Email	Email
	Event name	Text(80)
	Id	Auto number
	Tickets	picklist
Attendees	Field label	Data Type
	Email	Email
	Attendee name	Text(80)
	Id	Auto number
	Tickets	picklist
	Phone	Phone

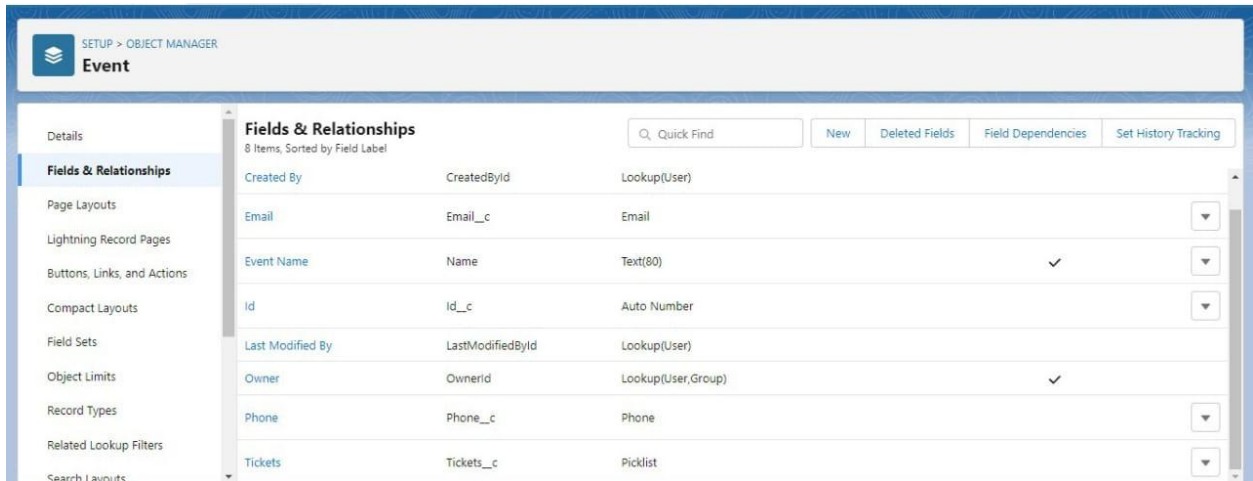
Speaker	Field label	Data Type
	Speaker Name	Text(80)
	Bio	Text
	Email	e-mail
Vendors	Field label	Data Type
	Vendors name	Text(80)
	Email	e-mail
	Phone	Phone
	Service provider	Text

3.2 Activity & Screenshot

1.Package Installation:



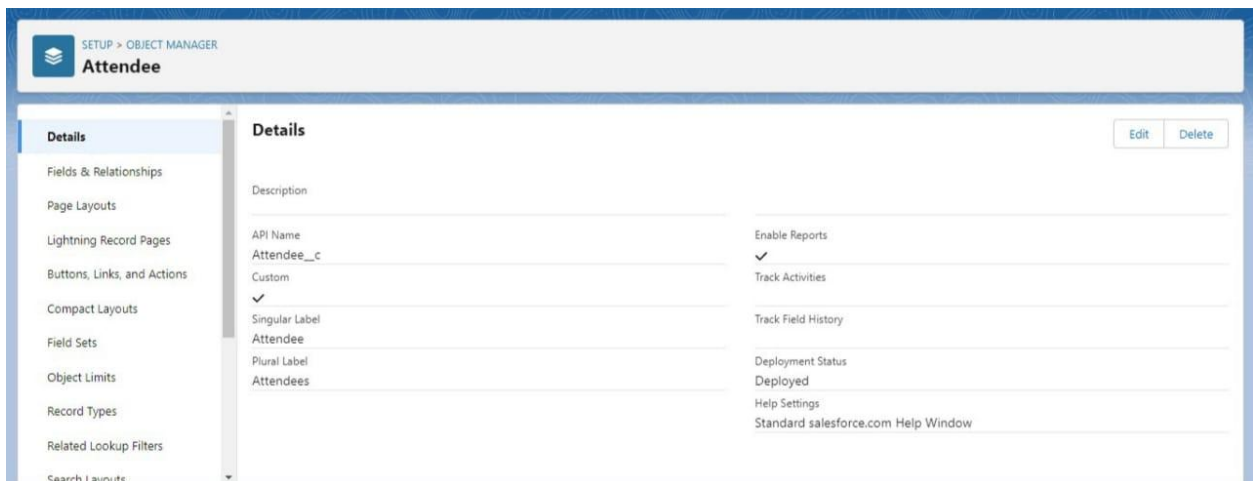
2.Create Custom object for Events:



The screenshot shows the Salesforce Setup > Object Manager interface for the 'Event' 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, and Search Layouts. The main content area is titled 'Fields & Relationships' and shows a list of 8 fields, sorted by Field Label. The fields are:

Field Label	Field Name	Field Type	Required
Created By	CreatedById	Lookup(User)	
Email	Email__c	Email	
Event Name	Name	Text(80)	✓
Id	Id__c	Auto Number	
Last Modified By	LastModifiedById	Lookup(User)	
Owner	OwnerId	Lookup(User,Group)	✓
Phone	Phone__c	Phone	
Tickets	Tickets__c	Picklist	

3.Create Custom object for Attendees:



The screenshot shows the Salesforce Setup > Object Manager interface for the 'Attendee' object. The left sidebar contains a navigation menu with options: Details (selected), Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Details' and shows the configuration for the 'Attendee' object. The configuration includes:

Field	Value
Description	
API Name	Attendee__c
Custom	✓
Singular Label	Attendee
Plural Label	Attendees
Enable Reports	✓
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

4.Create Custom object for Speaker:

The screenshot shows the Salesforce Setup interface for the 'Speaker' object. The left sidebar contains a list of 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, and Search Layouts. The 'Details' section is selected and expanded, showing the following configuration details:

Field	Value
Description	
API Name	Speaker__c
Custom	<input checked="" type="checkbox"/>
Singular Label	Speaker
Plural Label	Speakers
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	<input type="checkbox"/>
Track Field History	<input type="checkbox"/>
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Buttons: Edit, Delete

5.Create Custom object for Vendors:

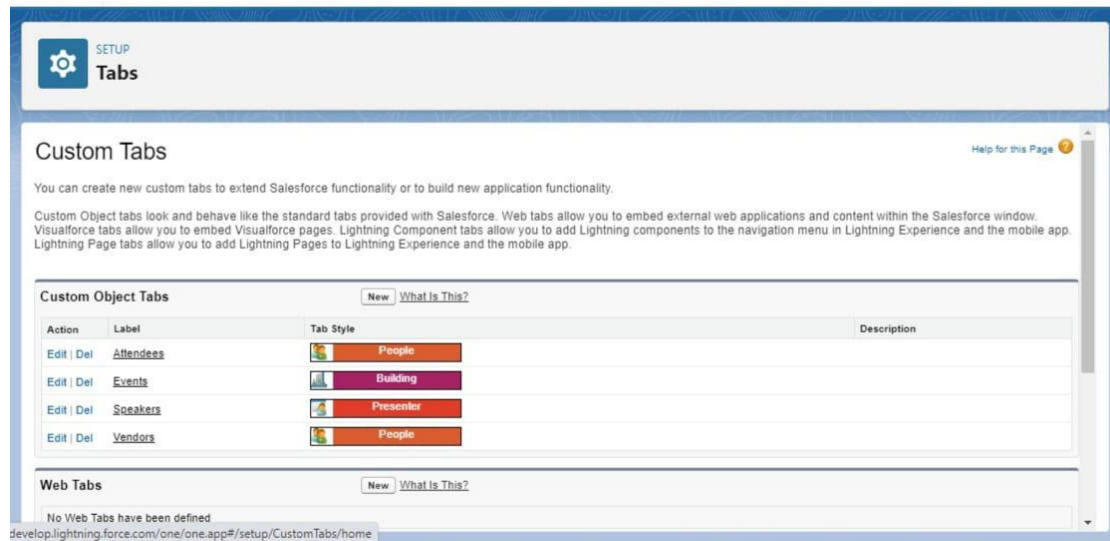
The screenshot shows the Salesforce Setup interface for the 'Vendor' object. The left sidebar contains a list of configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The 'Details' section is selected and expanded, showing the following configuration details:

Field	Value
Description	
API Name	Vendor__c
Custom	<input checked="" type="checkbox"/>
Singular Label	Vendor
Plural Label	Vendors
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	<input type="checkbox"/>
Track Field History	<input type="checkbox"/>
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

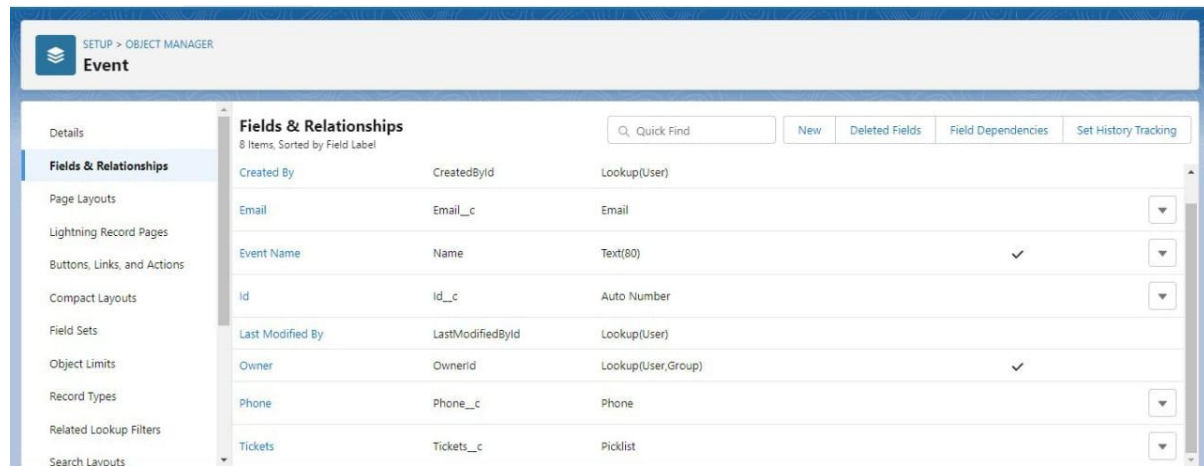
Buttons: Edit, Delete

6.Crea

te Tab:



7.Create New Field for Events:



8.Create New Field for Speakers:

SETUP > OBJECT MANAGER
Speaker

Details

Fields & Relationships
4 Items, Sorted by Field Label

Q, Quick Find

New Deleted Fields Field Dependencies Set History Tracking

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)		✓

Search | Actions

9.Create New Field for Attendees:

SETUP > OBJECT MANAGER
Attendee

Details

Fields & Relationships
4 Items, Sorted by Field Label

Q, Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Attendee Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

10.Create New Field for Vendors:

SETUP > OBJECT MANAGER
Vendor

Details

Fields & Relationships
4 Items, Sorted by Field Label

Q, Quick Find

New Deleted Fields Field Dependencies Set History Tracking

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)		✓
Vendor Name	Name	Text(80)		✓

11.Create Profile:

SETUP

Profiles

Profiles

Help for this Page

All Profiles

Edit | Delete | Create New View

New Profile

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

Other

All

	Action	Profile Name	User License	Custom
<input type="checkbox"/>	Edit Clone	Customer Community Plus Login User	Customer Community Plus Login	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Customer Community Plus User	Customer Community Plus	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Customer Community User	Customer Community	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Customer Portal Manager Custom	Customer Portal Manager Custom	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Customer Portal Manager Standard	Customer Portal Manager Standard	<input type="checkbox"/>
<input type="checkbox"/>	Edit Del ...	Event user profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Edit Del ...	Event vendors profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Edit Clone	External Apps Login User	External Apps Login	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	External Identity User	External Identity	<input type="checkbox"/>
<input type="checkbox"/>	Edit Clone	Force.com - App Subscription User	Force.com - App Subscription	<input type="checkbox"/>

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0 Selected

Previous

Next

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12.Create User:

SETUP

Users

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

App Registration: Salesforce Authenticator

Security Key (U2F or WebAuthn)

Lightning Login

Temporary Verification Code (Expires in 1 to 24 Hours)

[Generate](#)

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

☐

Load Lightning Pages While Scrolling

☒

Salesforce CRM Content User

☒

Receive Salesforce CRM Content Email Alerts

☒

Receive Salesforce CRM Content Alerts as Daily Digest

☒

Make Setup My Default Landing Page

☐

Allow Forecasting

☐

Call Center

Phone

Extension

Fax

13. Create Permission Set for Events:

The screenshot shows the Salesforce 'Permission Sets' setup page for a permission set named 'Event permits'. The page has a top navigation bar with a 'SETUP' icon and the title 'Permission Sets'. Below this, the 'Event permits' section includes a search bar, 'Clone', 'Edit Properties', and 'Manage Assignments' buttons. The 'Permission Set Overview' section displays the following details:

Field	Value
Description	Event permits
License	
Session Activation Required	<input type="checkbox"/>
API Name	Event_permits
Namespace Prefix	
Created By	Karthika Murugan
Created On	16/04/2023, 8:40 pm
Last Modified By	Karthika Murugan
Last Modified On	16/04/2023, 8:40 pm

Below the overview, the 'Apps' section lists the following settings:

- 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".

14. Create a Report:

The screenshot shows the Salesforce 'Reports' page. The top navigation bar includes a 'Reports' icon and the title 'Recent'. Below this, the 'Recent' section includes a search bar, 'New Report', 'New Folder', and a settings icon. The 'Recent' section displays a list of reports with the following columns:

Report Name	Description	Folder	Created By	Created On	Subscribed
Cases by Status		Public Reports	Karthika Murugan	20/4/2023, 10:24 am	

The left sidebar shows the following navigation options:

- REPORTS
 - Recent
 - Created by Me
 - Private Reports
 - Public Reports
 - All Reports
- FOLDERS
 - All Folders
 - Created by Me
 - Shared with Me
- FAVORITES

At the bottom of the page, there is a 'To Do List' icon and the text 'To Do List'.

4. Trailhead Profile Public URL:

Team Leader: <https://trailblazer.me/id/kgopalakrishnan5>

Team Member1: <https://trailblazer.me/id/mkarthika02>

Team Member2: <https://trailblazer.me/id/knatarajamanik>

Team Member3: <https://trailblazer.me/id/kavi2583>

5.ADVANTAGES & DISADVANTAGES:

Advantages:

- 1) Opportunities for creativity
- 2) Ability to Work on different events
- 3) Chance to work with diverse clients
- 4) Collaborative work environment
- 5) High Projections for job growth
- 6) Few educational requirements

Disadvantages:

- 1) Unconventional Work hours
- 2) Time away from family and friends
- 3) Experience Requirements
- 4) Job instability
- 5) Multiple events at the same time
- 6) High level of Responsibilities

6.APPLICATIONS:

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.

7.Conclusions:

Event Management System is user friendly and cost effective system, it is customized with activities related to event management life-cycle. It provides a new edge to management industry. SolutionDot always keep your objectives and goals on top priority while developing any plan of work.

8.Future Scope:

The System provides an online interface to customers where participants can Registered for any happening event from anywhere. Event Manager can keep Records of participants. The Data is Organized in a Central way which is available to all the Event Managers .The Authority concerned with the Management of Event process the Application in a fast manner and makes the Event successful.