

BUILD AN EVENT MANAGEMENT USING SALESFORCE

1. INTRODUCTION:

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.

1.1 OVERVIEW :

An event management system **facilitates instant communication between planners and providers and makes it easier to share timely information to students, faculty, catering, operations, and more.**

1.2 PURPOSE:

- 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.
- 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.

OBJECTIVES:

The main objectives of Event management software is to provide basis of service assurance, reporting and service improvement.

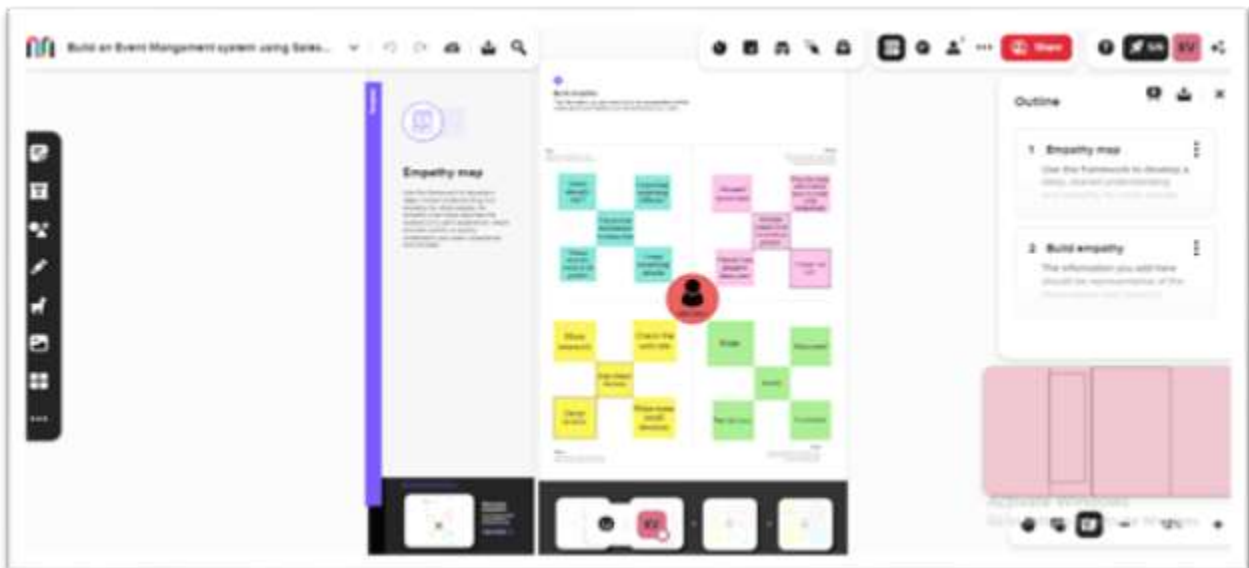
- ♣ Event management software helps event planner to speed up process of event planning.
- ♣ Event management software is famous in today's world because it is used for creation and development of large-scale events such as festivals, conferences, ceremonies, weddings, formal parties, concerts, or conventions, trade exhibitions etc.

FEATURE:

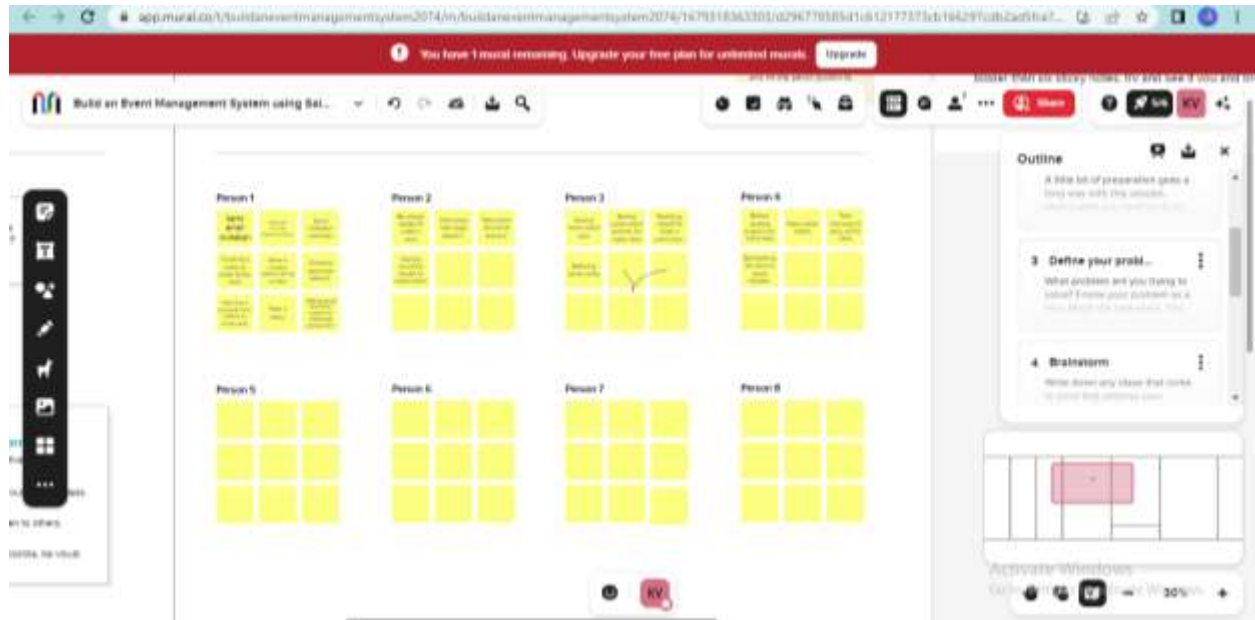
- ❧ Less effort required to add updates to existing events
- ❧ Deliver accurate services and resource order
- ❧ Eliminate missed communications
- ❧ Quick retrieval of invoices and payments
- ❧ Automated reminders and notifications
- ❧ Maintain event history and Attendance summary
- ❧ Save time for planning future
- ❧ Create customized scheduling process

2. PROBLEM DEFINITION AND DESIGN THINKING

2.1 EMPATHY MAP



2.2 BRAINSTORMING



3. RESULT

3.1 DATA MODEL:

OBJECT NAME	FIELDS IN THE OBJECT	
OBJECT 1 EVENT	Field Label	Data Type
	City	Text
OBJECT 2 ATTENDEES	Field Label	Data Type
	Id	Auto Number
	Phone	Phone
	E-mail	E-mail
OBJECT 3 SPEAKER	Field Label	Data Type
	Bio	Text Area
	E- mail	E- mail

OBJECT 4 VENDOR	Field Label	Data Type
	E-mail	E- mail
	Phone	Phone
	Service Provider	Text

3.2 ACTIVITIES AND SCREENSHOT

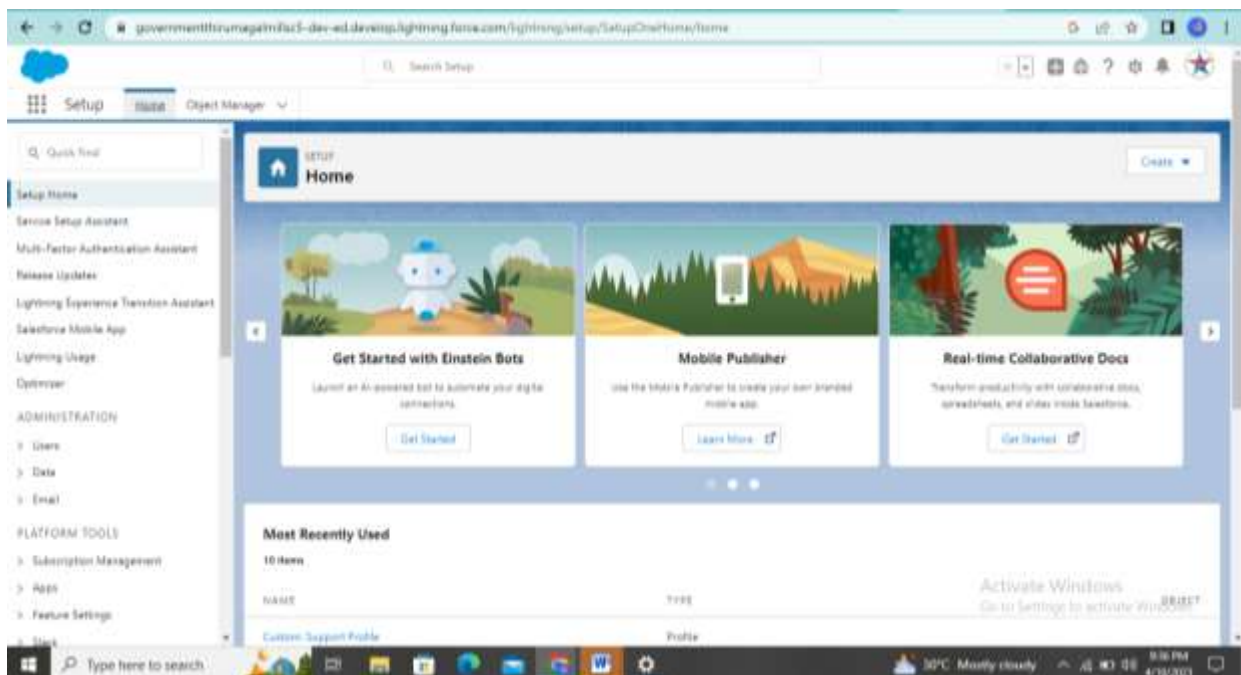
MILESTONE 1 – SALESFORCE:

CREATION A SALESFORCE DEVELOPER ORG:

A Developer org has all the features and licenses you need to get started with Salesforce.

1. Search Developer.salesforce.com

The setup page will appear as below



2. Enter the following details like First name, last name, Email, Role, Company, Country/Region, Postal code, and Username must be unique.

3. Click sign me up, after a few min you will reserve a mail salesforce org and by using the verify account link you can create your new password.

4. Click save.

5. Search login.salesforce.com

6. By using username and password you can into the salesforce org.

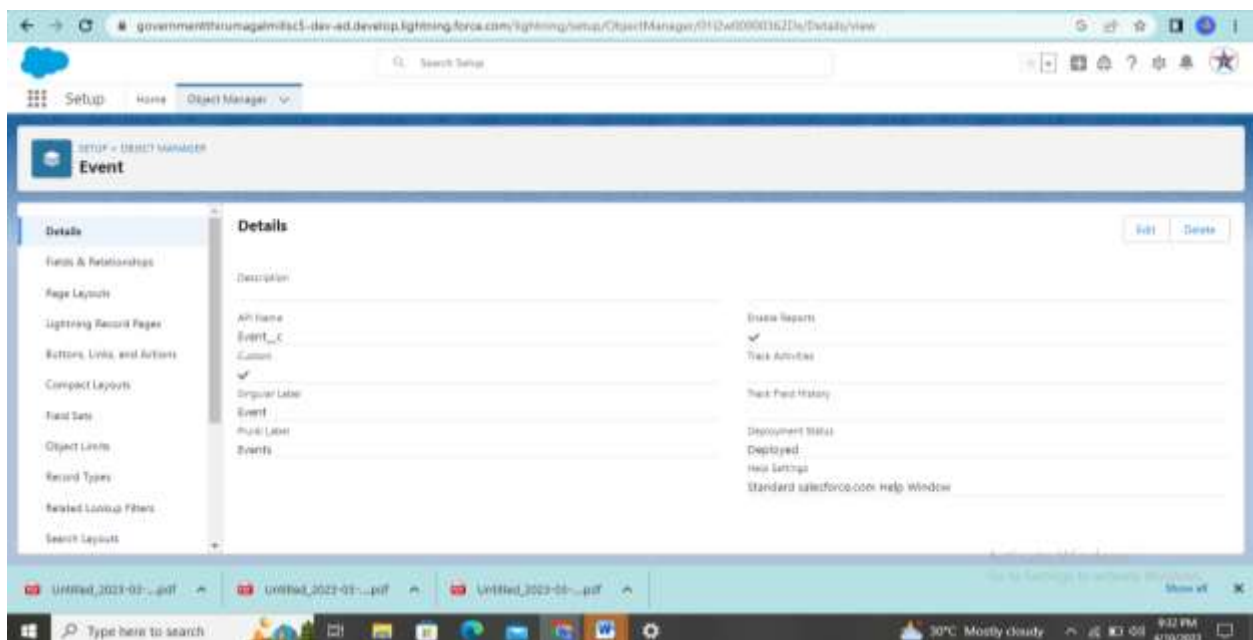
MILESTONE 2 – OBJECT:

ACTIVITY1:

CREATION OF OBJECTS FOR EVENT MANAGEMENT

For this Event management we need to create 4 objects i.e Events, Attendees, Speakers and vendors. The below steps will assist you in creating those objects.

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab



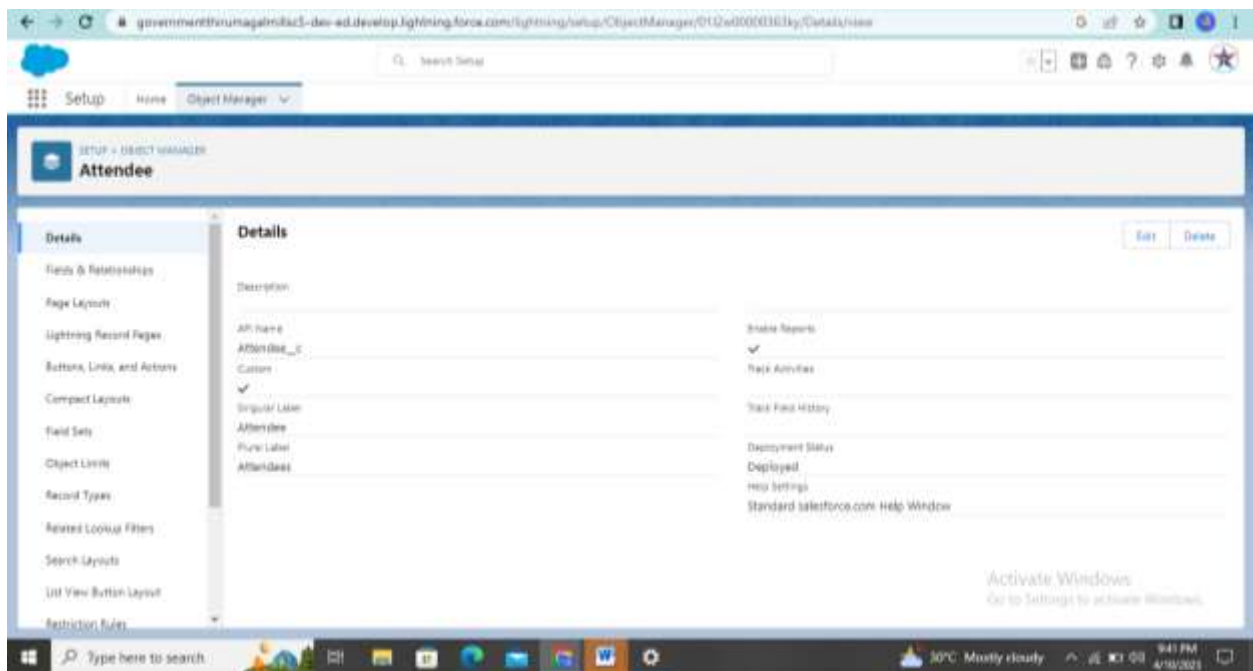
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.

- On the Custom Object Definition page, create the object as follows:
- Label: Event ● Plural Label: Events
- Record Name: Event Name
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save

ACTIVITY2:

CREATION OF ATTENDEES OBJECT:

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
- a. On the Custom Object Definition page, create the object as follows:
 - b. Label: Attendee
 - c. Plural Label: Attendees
 - d. Record Name: Attendee Name
 - e. Check the Allow Reports checkbox
 - f. Check the Allow Search checkbox
 - g. Click Save.



ACTIVITY3:

CREATION OF SPEAKER OBJECT:

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.

3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.

a. On the Custom Object Definition page, create the object as follows:

b. Label: Speaker

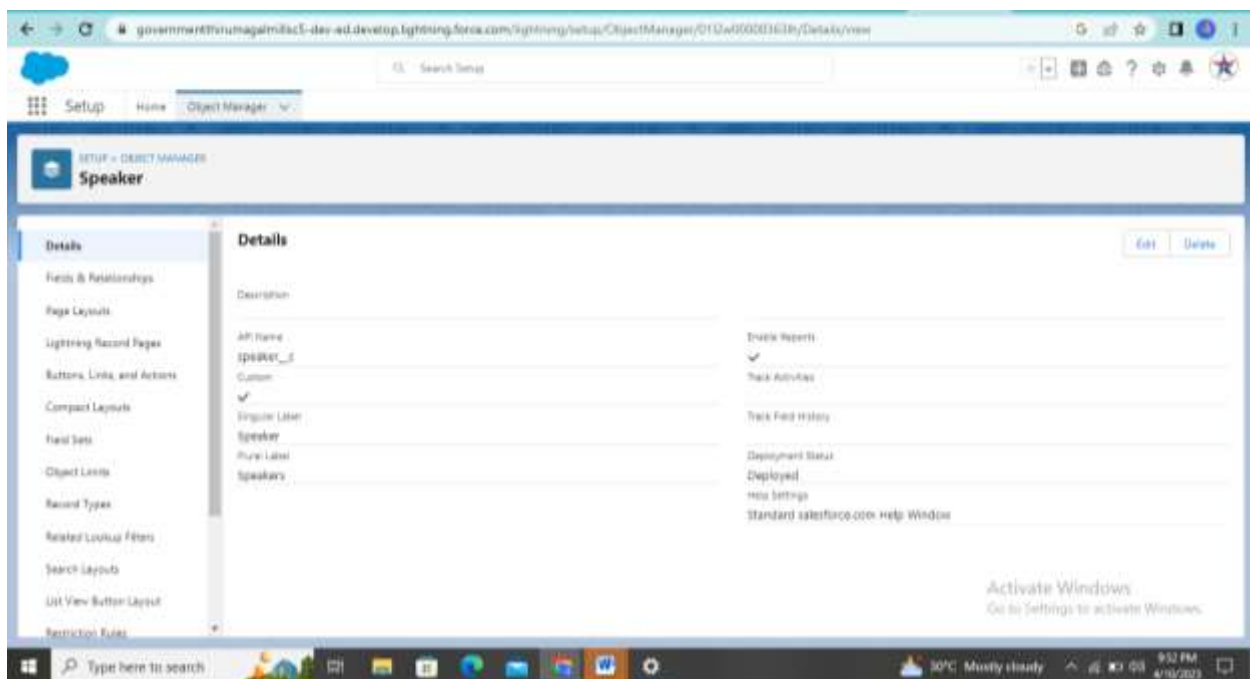
c. Plural Label: Speakers

d. Record Name: Speaker Name

e. Check the Allow Reports checkbox

f. Check the Allow Search checkbox

g. Click Save.



ACTIVITY 4:

CREATION OF VENDORS OBJECT:

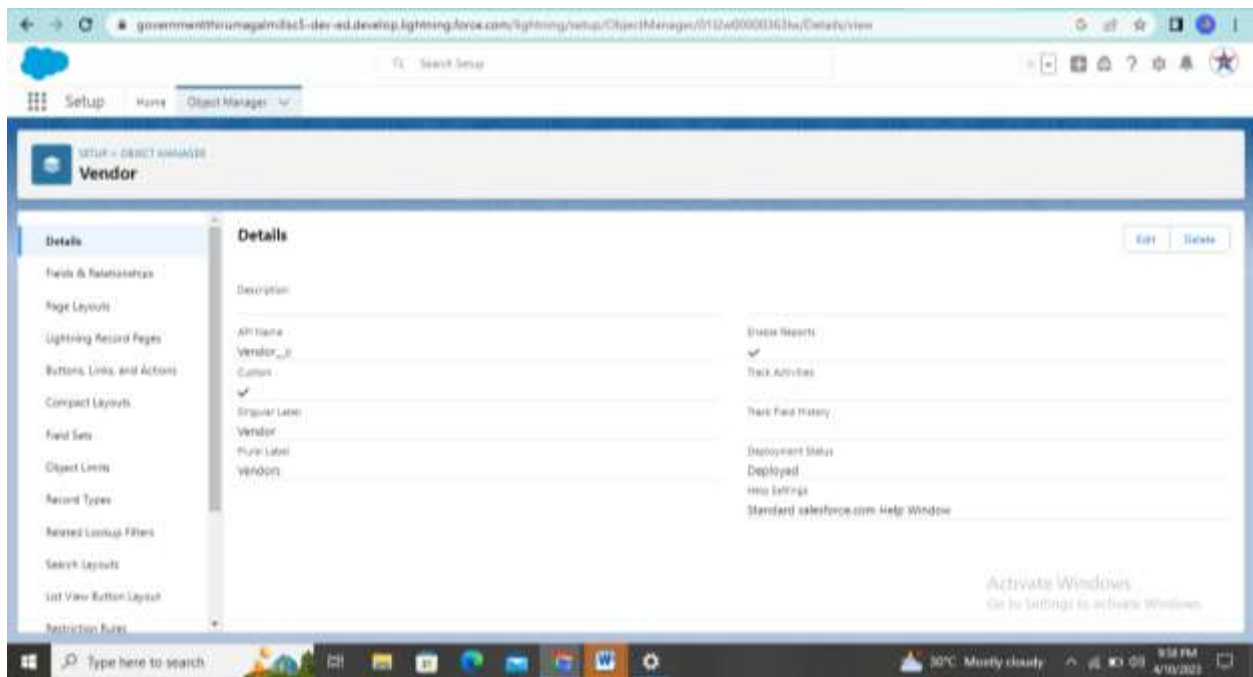
1. Click on the gear icon and then select Setup.

2. Click on the object manager tab just beside the home tab.

3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.

a. On the Custom Object Definition page, create the object as follows:

- b. Label: Vendor
- c. Plural Label: Vendors
- d. Record Name: Vendor Name
- e. Check the Allow Reports checkbox
- f. Check the Allow Search checkbox
- g. Click save



MILESTONE 3 - TAB:

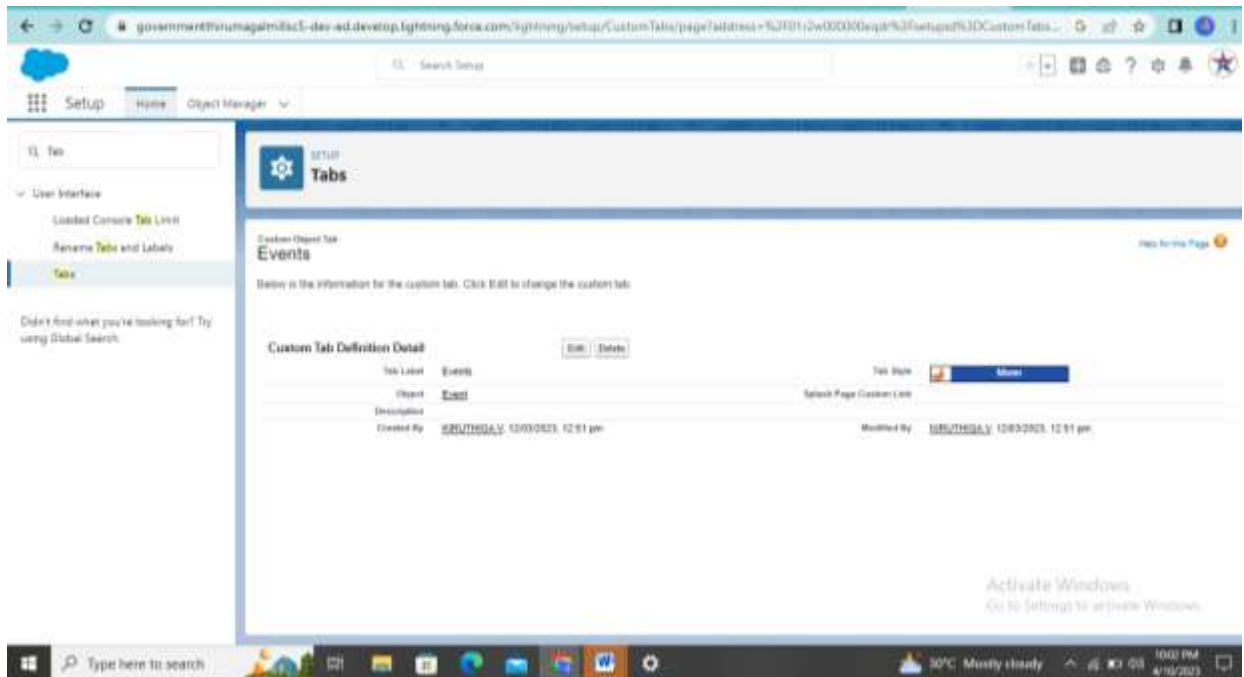
ACTIVITY 1:

CREATION OF EVENT TAB:

Now create a custom tab.

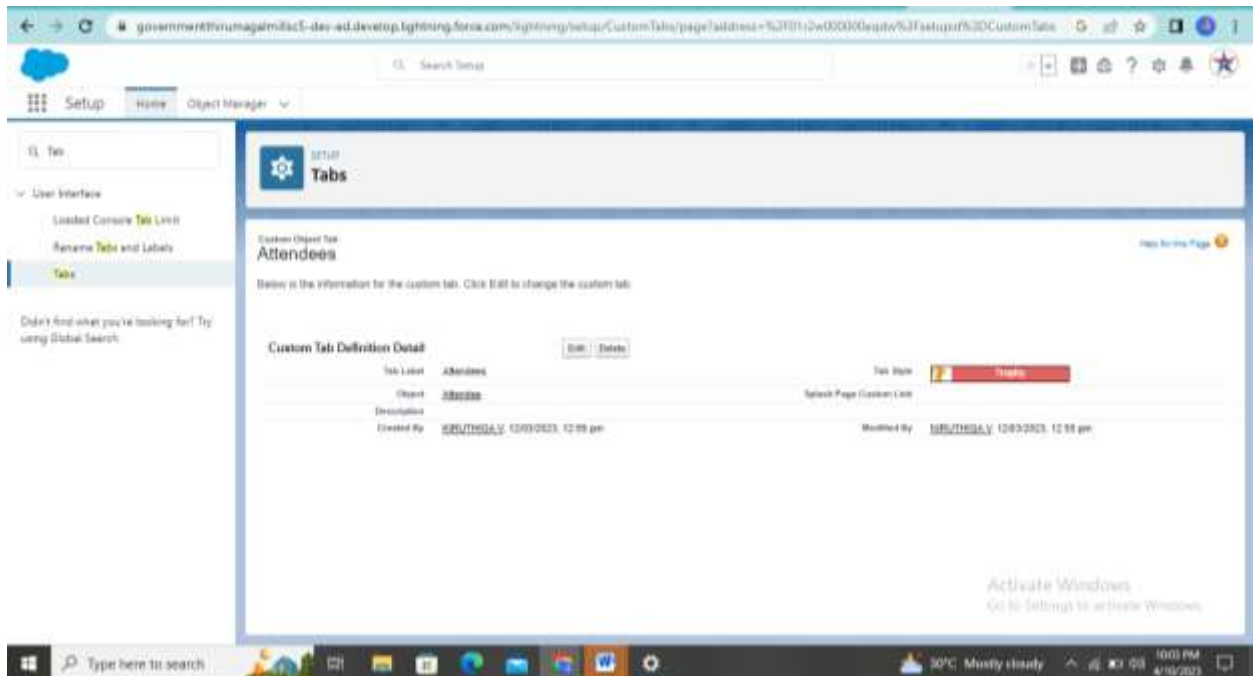
1. Click on Home tab, enter Tabs in Quick Find and select Tabs.
2. Under custom object tabs, click New.
3. For Object, select Event.
4. For Tab Style, select any icon.
5. Leave all defaults as is.

Click Next, Next, and Save



ACTIVITY 2:

CREATION OF ATTENDEE TAB:



Now create a custom tab.

1. Click on Home tab, enter Tabs in Quick Find and select Tabs.

2. Under custom object tabs, click New.

3. For Object, select Attendee.

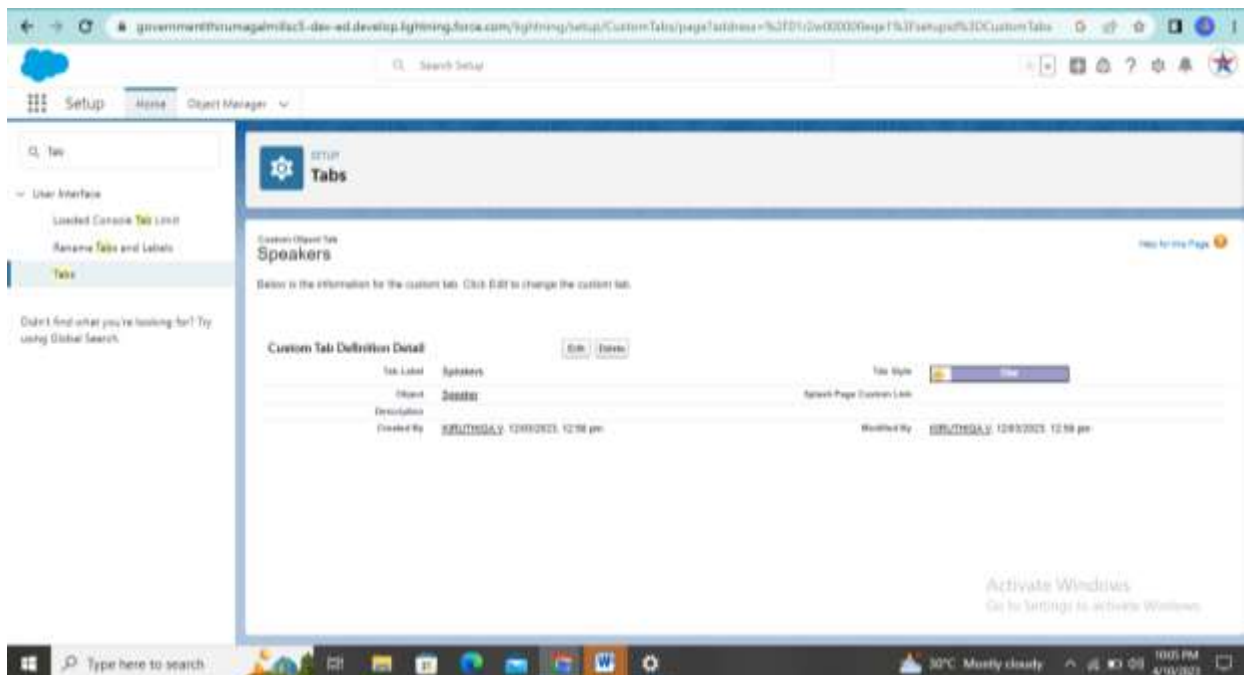
4. For Tab Style, select any icon.

5. Leave all defaults as is.

Click Next, Next, and Save

ACTIVITY 3:

CREATION OF SPEAKERS TAB:



Now create a custom tab.

1. Click on Home tab, enter Tabs in Quick Find and select Tabs.

2. Under custom object tabs, click New.

3. For Object, select Speaker.

4. For Tab Style, select any icon.

5. Leave all defaults as is.

Click Next, Next, and Save

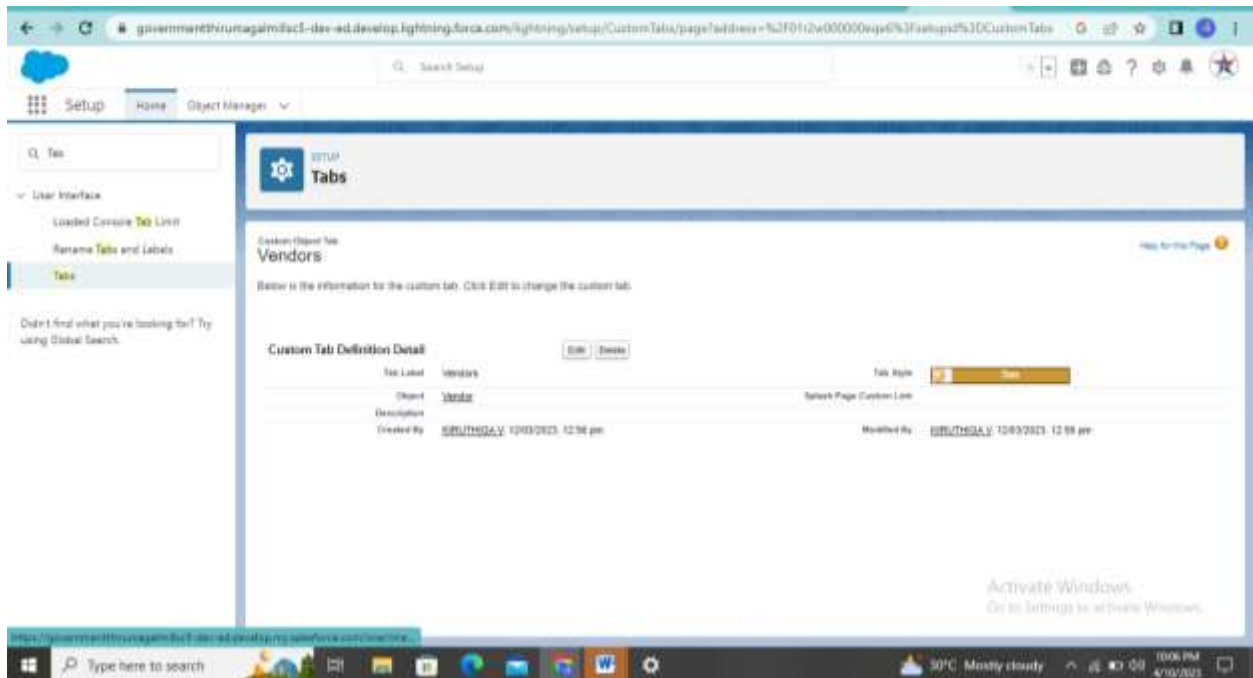
ACTIVITY 4:

CREATION OF VENDOR TAB:

Now create a custom tab.

1. Click on Home tab, enter Tabs in Quick Find and select Tabs.
2. Under custom object tabs, click New.
3. For Object, select Vendor.
4. For Tab Style, select any icon.
5. Leave all defaults as is.

Click Next, Next, and Save



MILESTONE 3 – APPLICATION:

ACTIVITY:

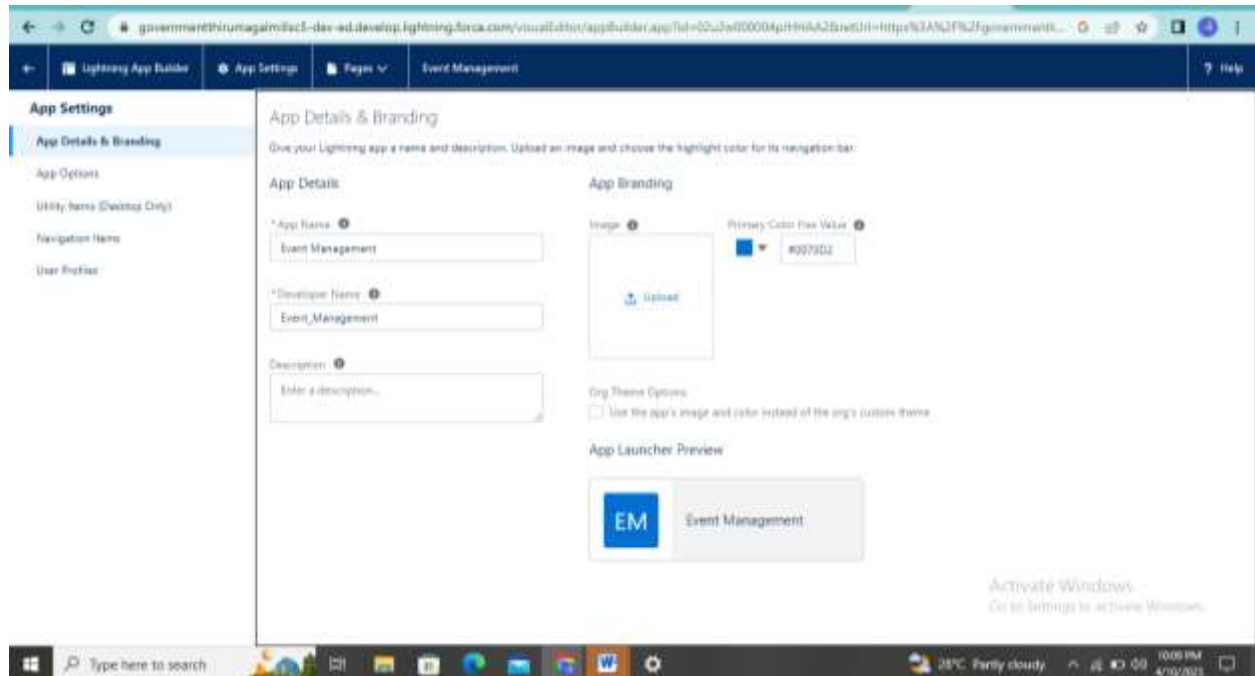
CREATE AN EVENT MANAGEMENT CONSTRUCTION APP

From Setup, enter App Manager in the Quick Find and select App Manager

Click New Lightning App. Enter Event Management as the App Name, then click Next

- Under App Options, leave the default selections and click Next
- Under Utility Items, leave as is and click Next.

- From Available Items, select Events, Attendees, speakers, vendors, Reports and Dashboards and move them to Selected Items. Click Next.
- From Available Profiles, select System Administrator and move it to Selected Profiles.



- To verify your changes, click the App Launcher, type School Management and select the School Management app.

Note:

1. App Launcher-Displays available apps.
2. App Name-Displays the current selected app.
3. Navigation menu-Displays the tabs available inside the app.

MILESTONE 4 – FIELDS:

ACTIVITY 1:

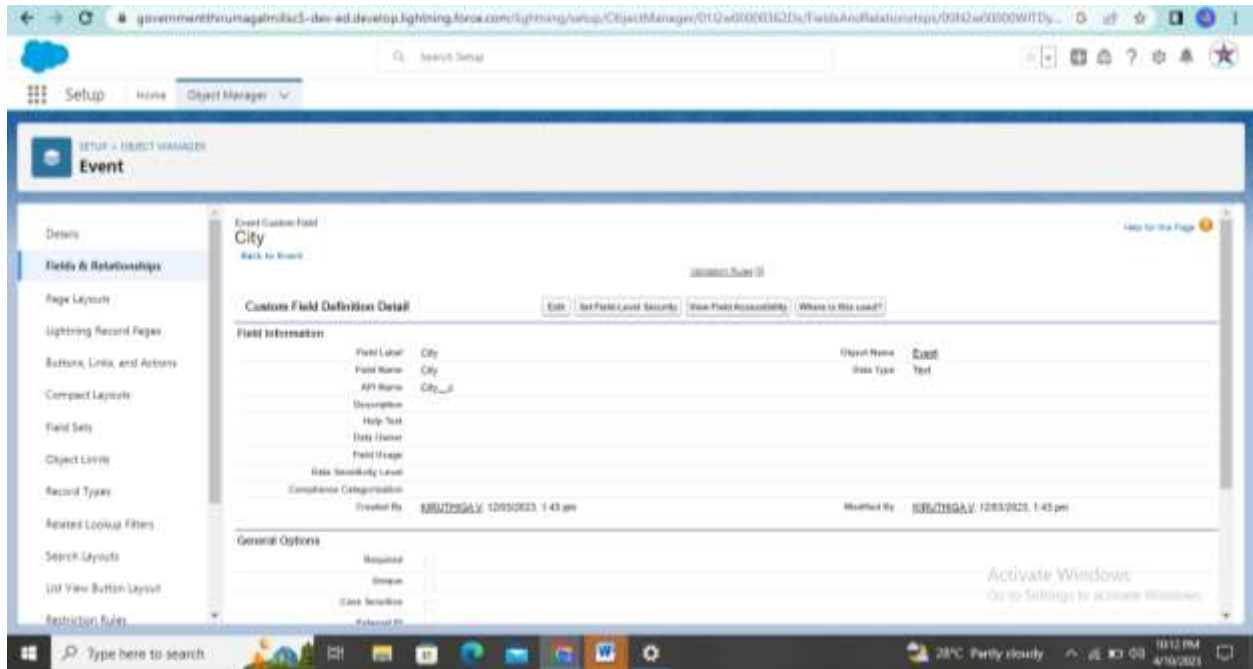
CREATION OF FIELDS FOR THE EVENT OBJECT:

1. click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Event.
4. Select Fields & Relationships from the left navigation, and click New.

Now we're ready to make a custom field. Let's do this!

5. Select the Text as the Data Type, then click Next.

6. For Field Label, enter City.

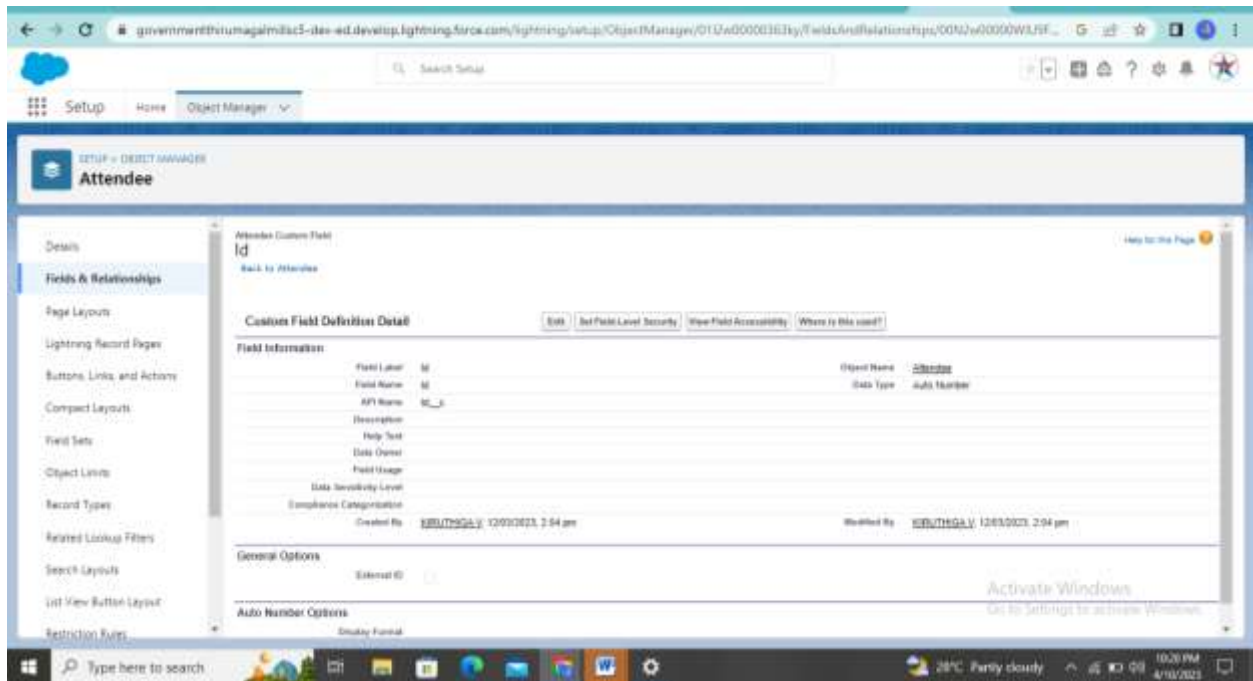


7. Click Next, Next, then Save & New

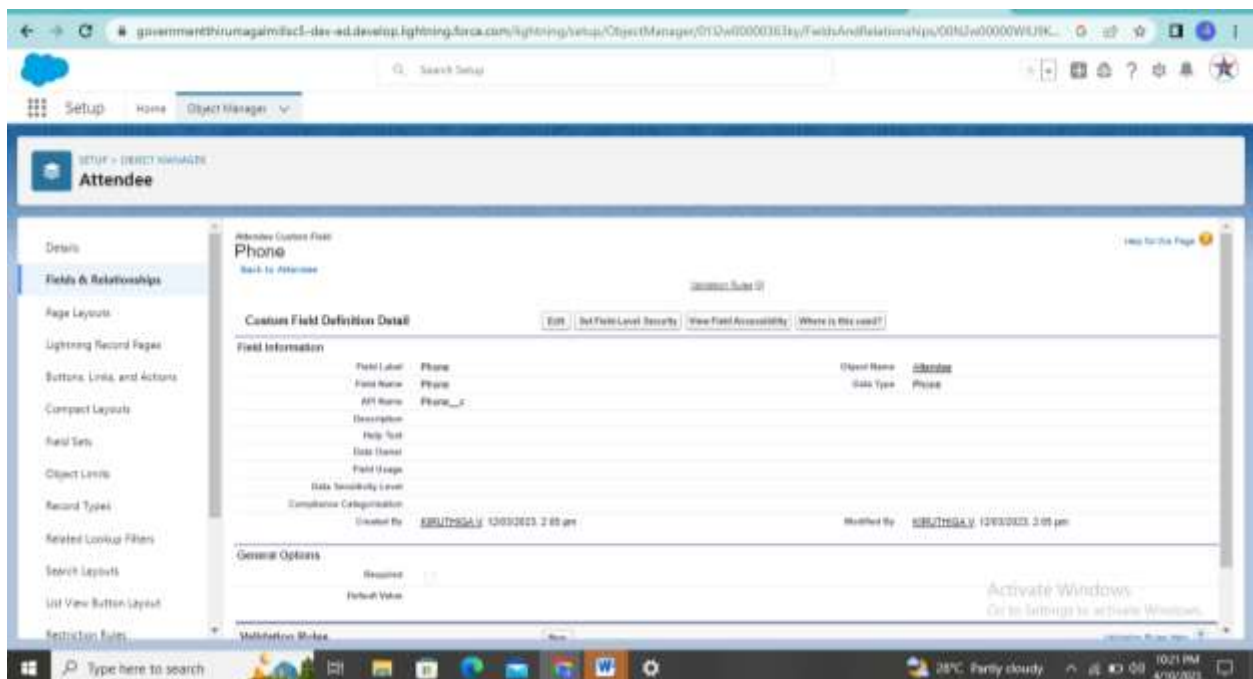
ACTIVITY 2:

CREATION OF FIELDS FOR THE ATTENDEES OBJECTS:

1. Select the Auto number as the Data Type, then click Next.
2. For Field Label, enter Id.
3. Click Next, Next, then Save & New

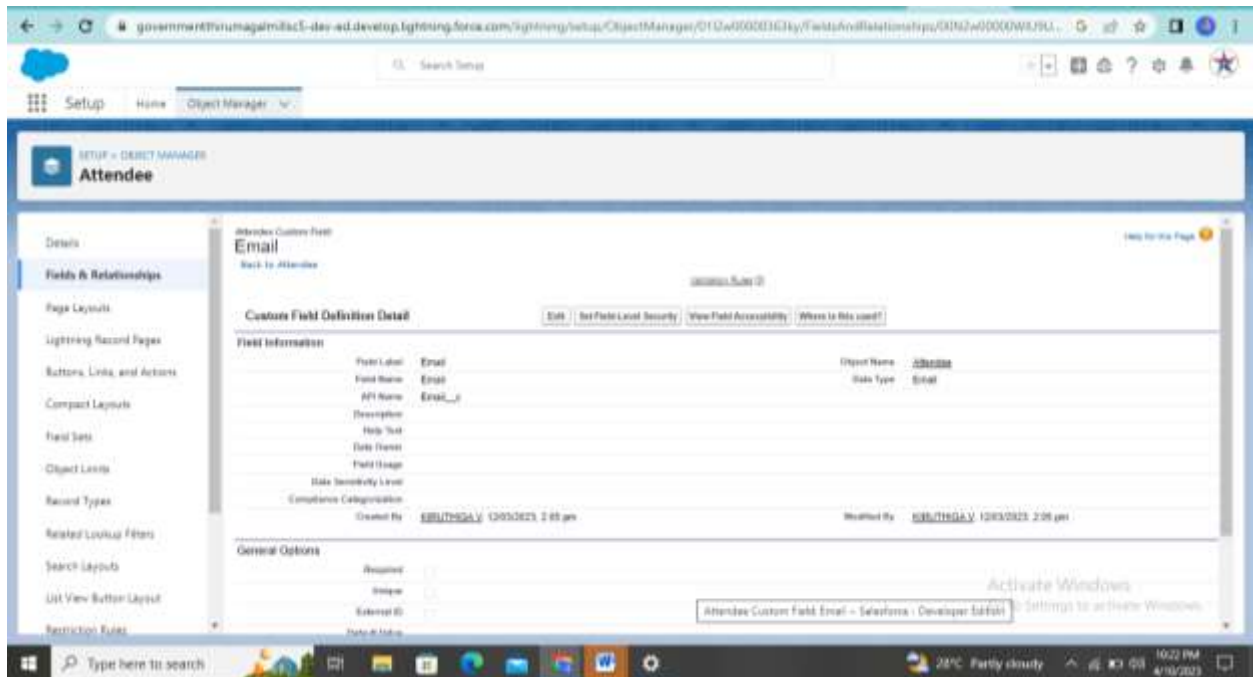


4. Select the phone as the Data Type, then click Next.
5. For Field Label, Phone.
6. Click Next, Next, then Save & Ne



7. Select the Email as the Data Type, then click Next.
8. For Field Label, enter Email.

9. Click Next, Next, then Save & New.



10. From Setup, click Object Manager and select Student.

11. Click Fields & Relationships, then New.

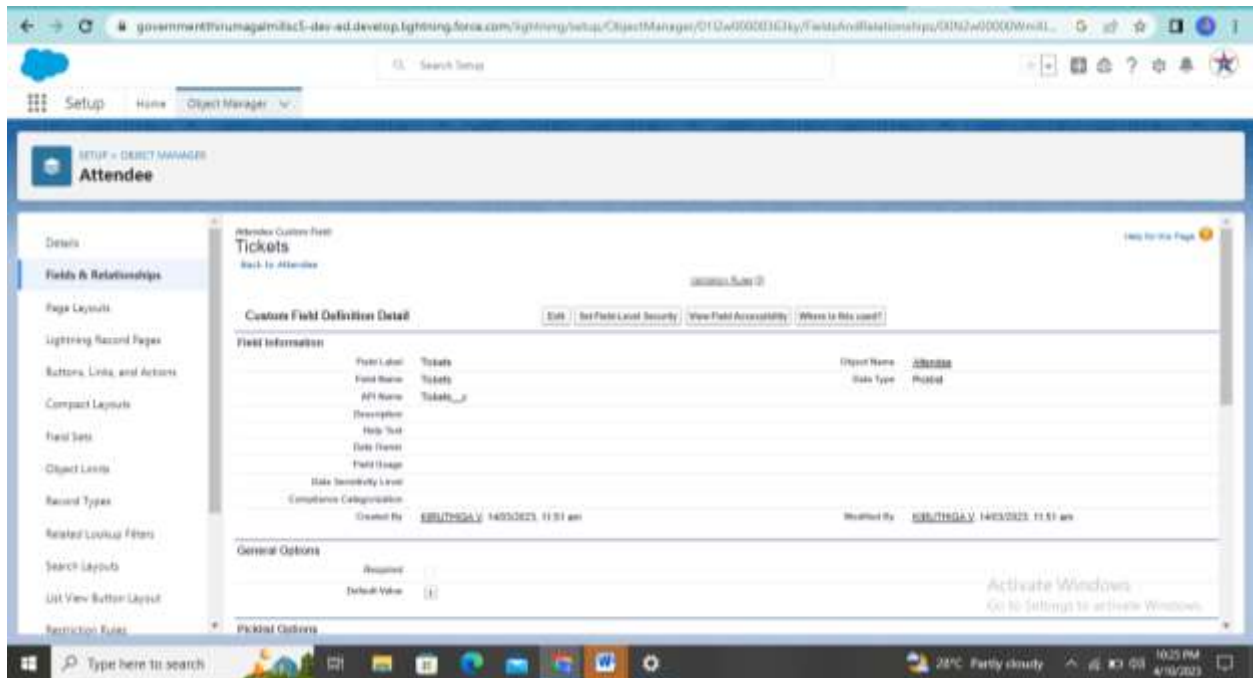
12. Select Picklist as the Data Type and click Next.

13. For Field Label enter Tickets.

14. Select Enter values, with each value separated by a new line and enter these values:

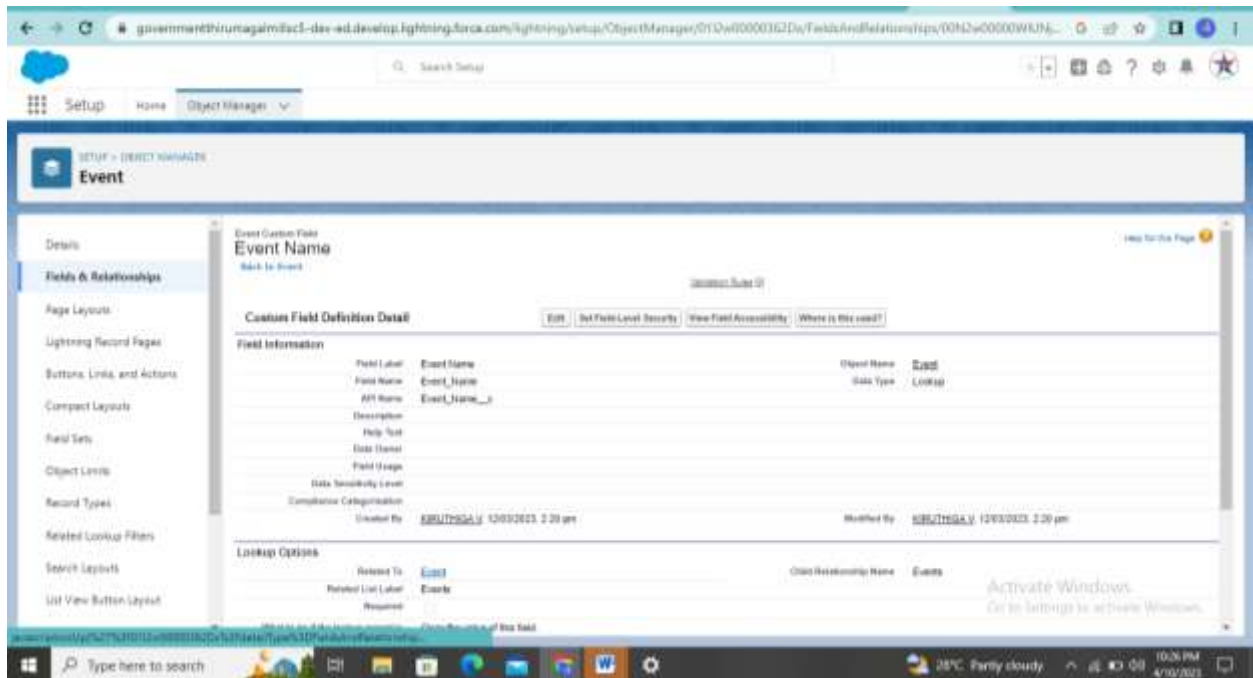
- Premium
- Gold
- Silver

15. Click Next, Next, then Save & New.



ACTIVITY 3:

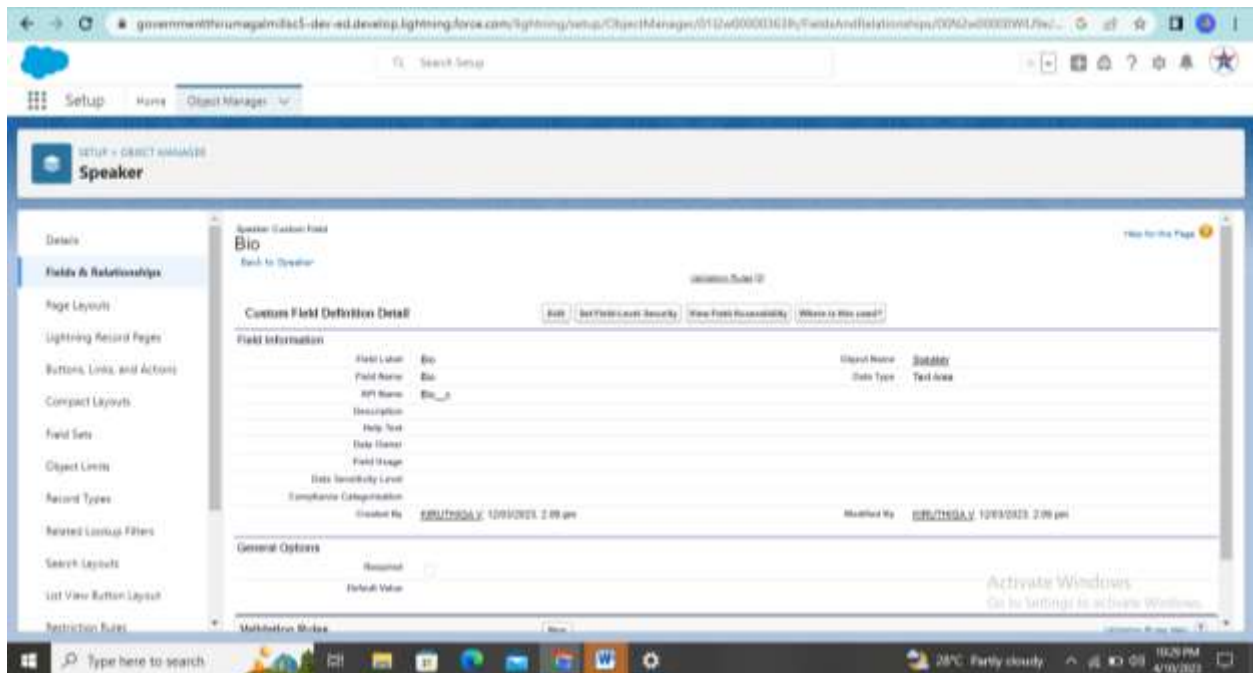
1. Select master-detail Relationship as the Data Type and click Next.
2. For Related to, enter Event.
3. Click Next.
4. For Field Label, Event Name.
5. Click Next, Next, Next and Save



ACTIVITY 4:

CREATION OF FIELDS FOR THE SPEAKERS OBJECTS:

1. Select the Text Area as the Data Type, then click Next.
2. For Field Label, enter Bio.

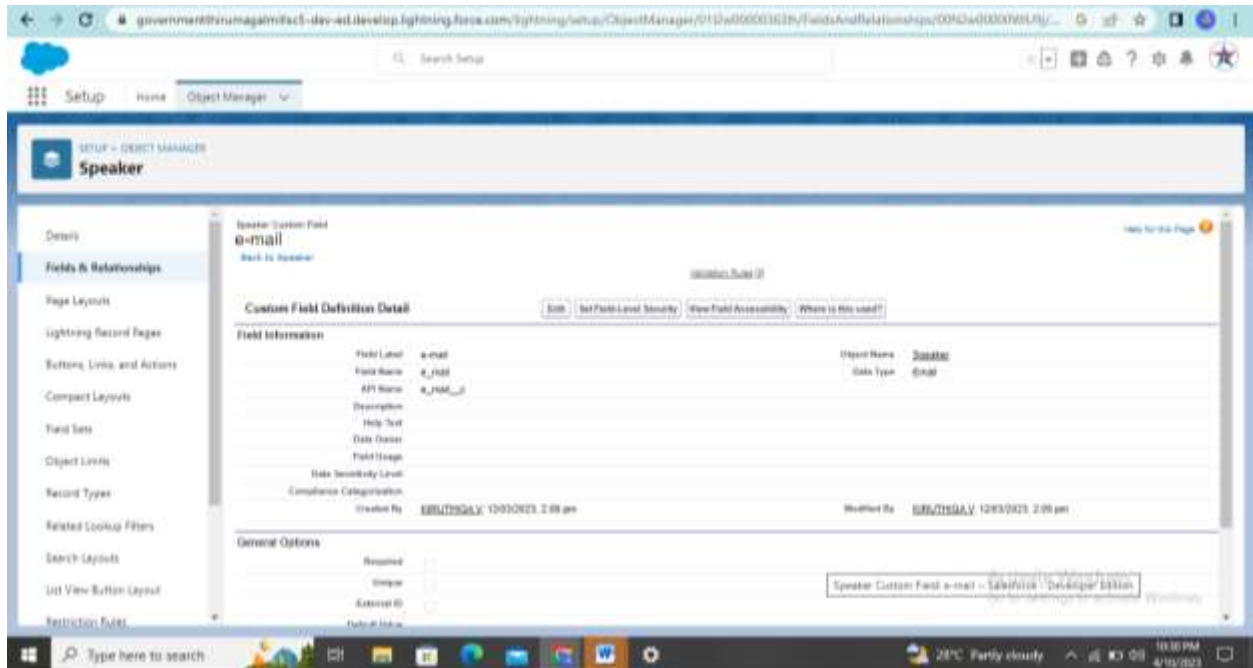


3. Click Next, Next, then Save & New.

4. Select the Email as the Data Type, then click Next.

5. For Field Label, e-mail.

6. Click Next, Next, then Save & New



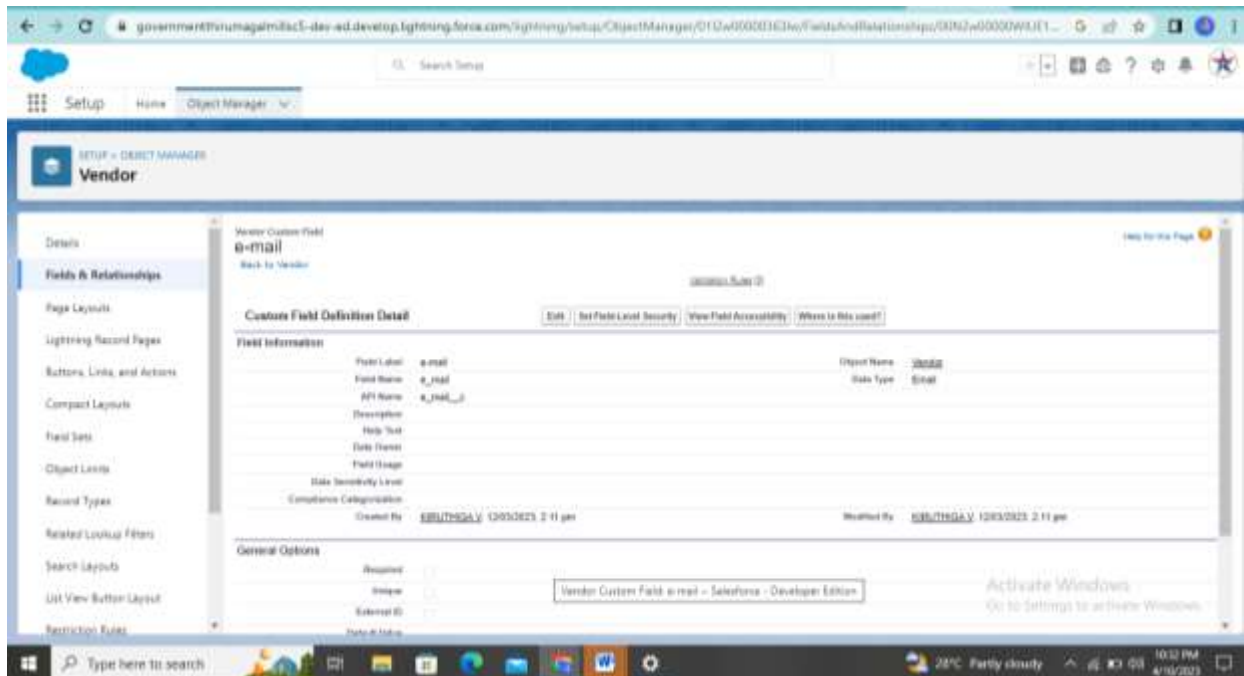
ACTIVITY 5:

CREATION OF FIELDS FOR THE VENDORS OBJECTS:

1. Select the Email as the Data Type, then click Next.

2. For Field Label, e-mail.

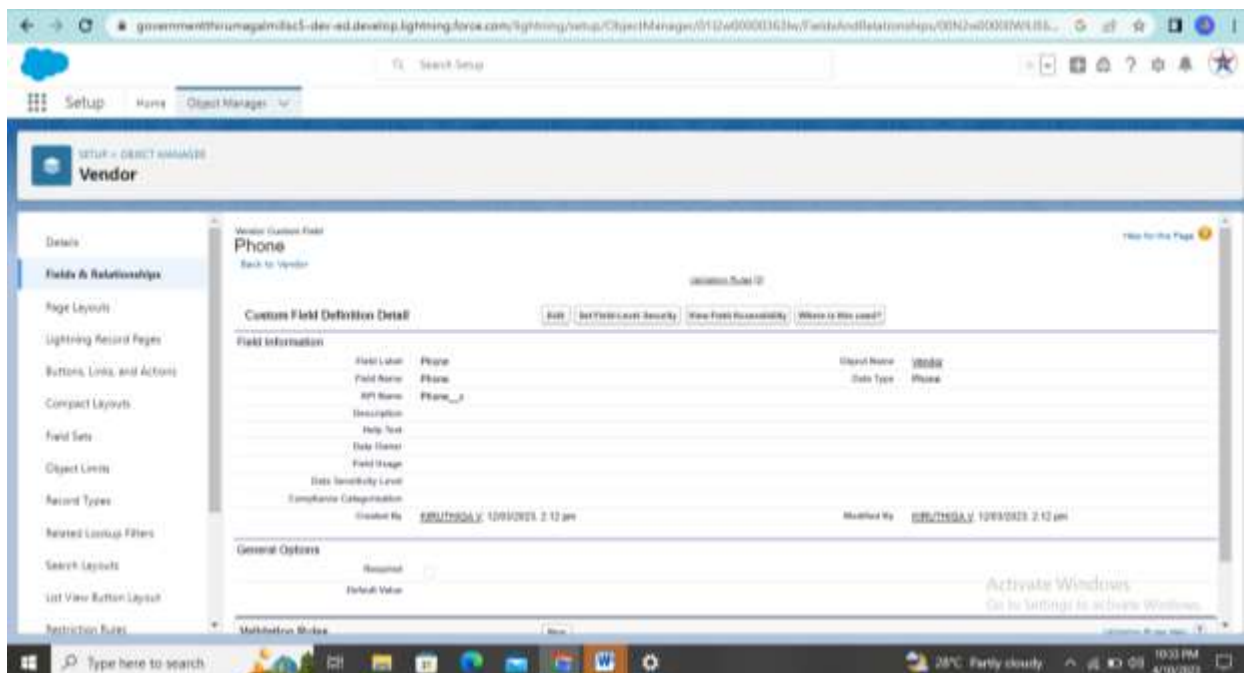
3. Click Next, Next, then Save & New.



4. Select the phone as the Data Type, then click Next.

5. For Field Label, Phone.

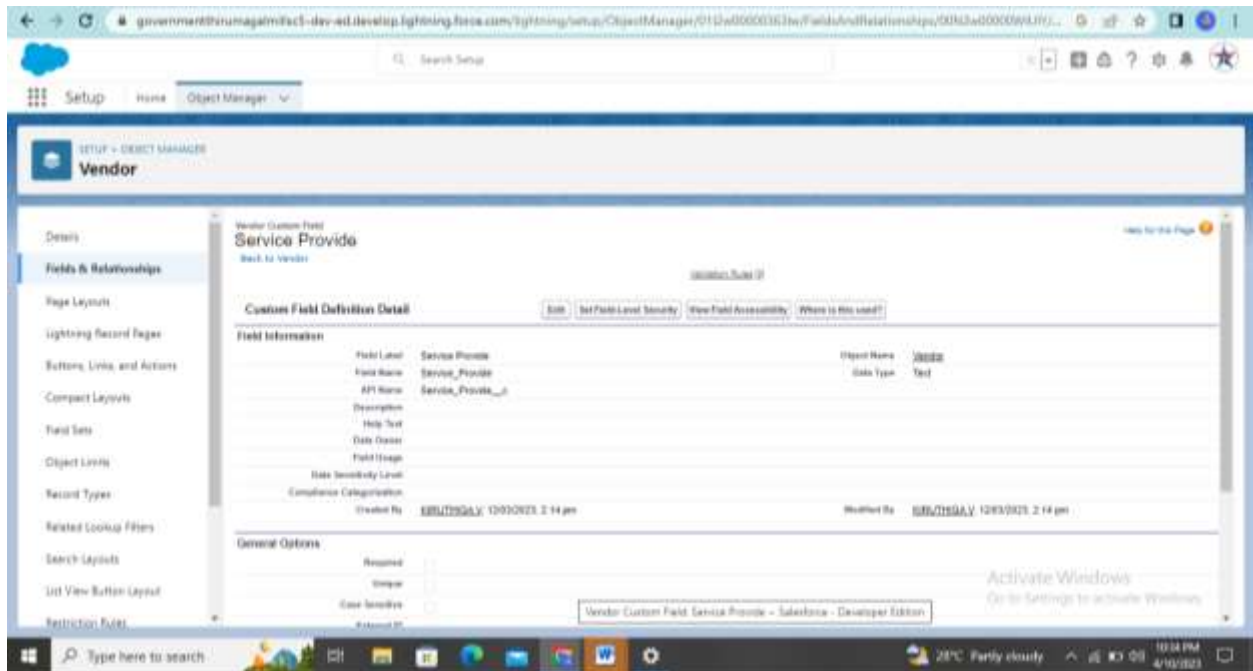
6. Click Next, Next, then Save & New.



10. Select the Text as the Data Type, then click Next.

11. For Field Label, enter Service Provider.

12. Click Next, Next, then Save & New.



13. Select Look-up Relationship as the Data Type and click Next.

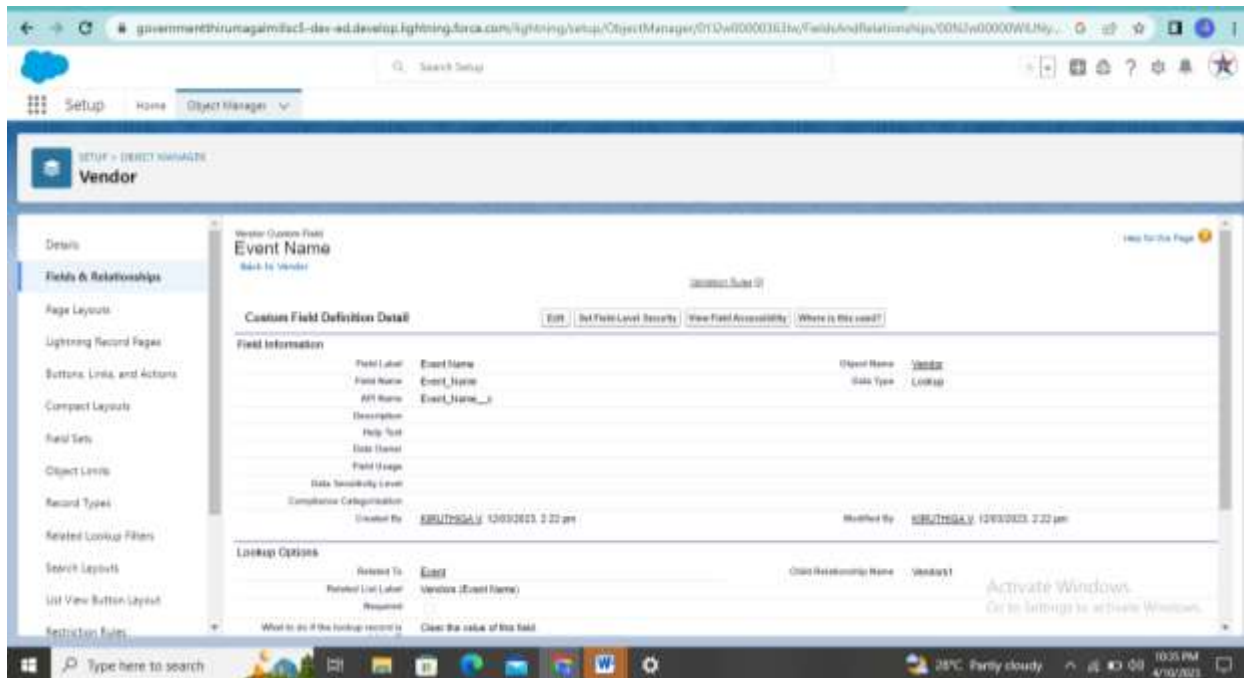
14. For Related to, enter Event.

15. Click Next.

16. For Field Label, Event Name.

17. Click Next, Next, Next and Save

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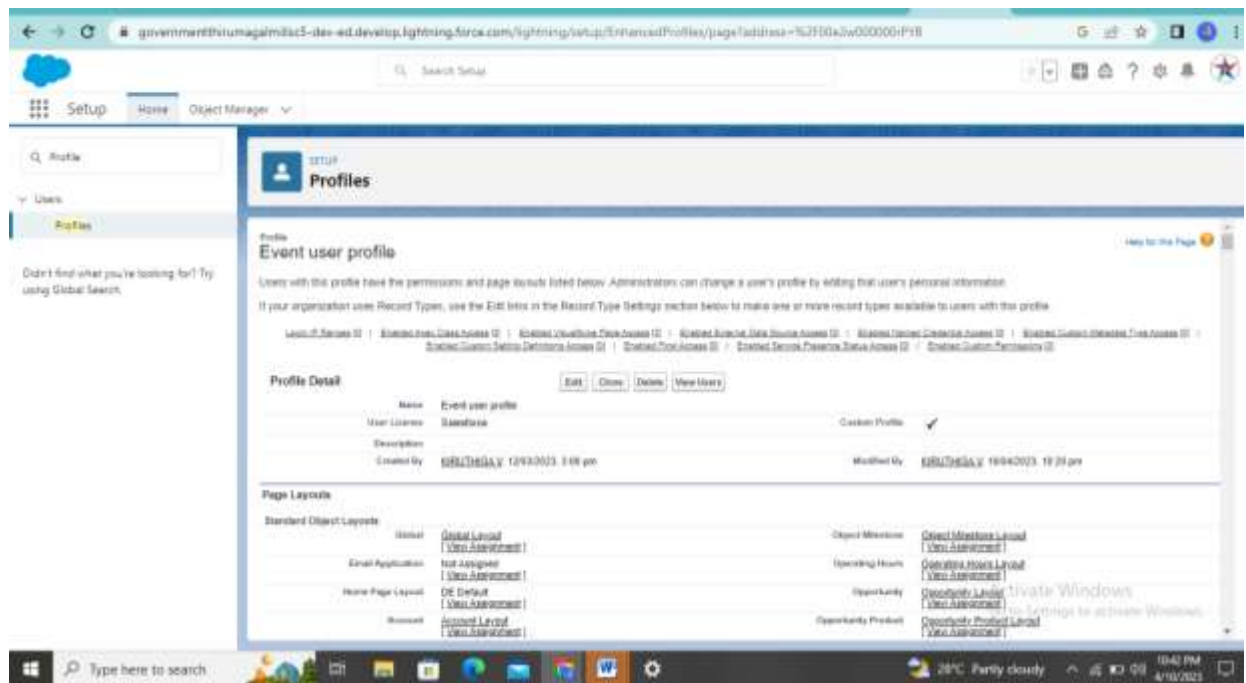


MILESTONE 5 – PROFILE:

ACTIVITY 1:

CREATION ON PROFILE:

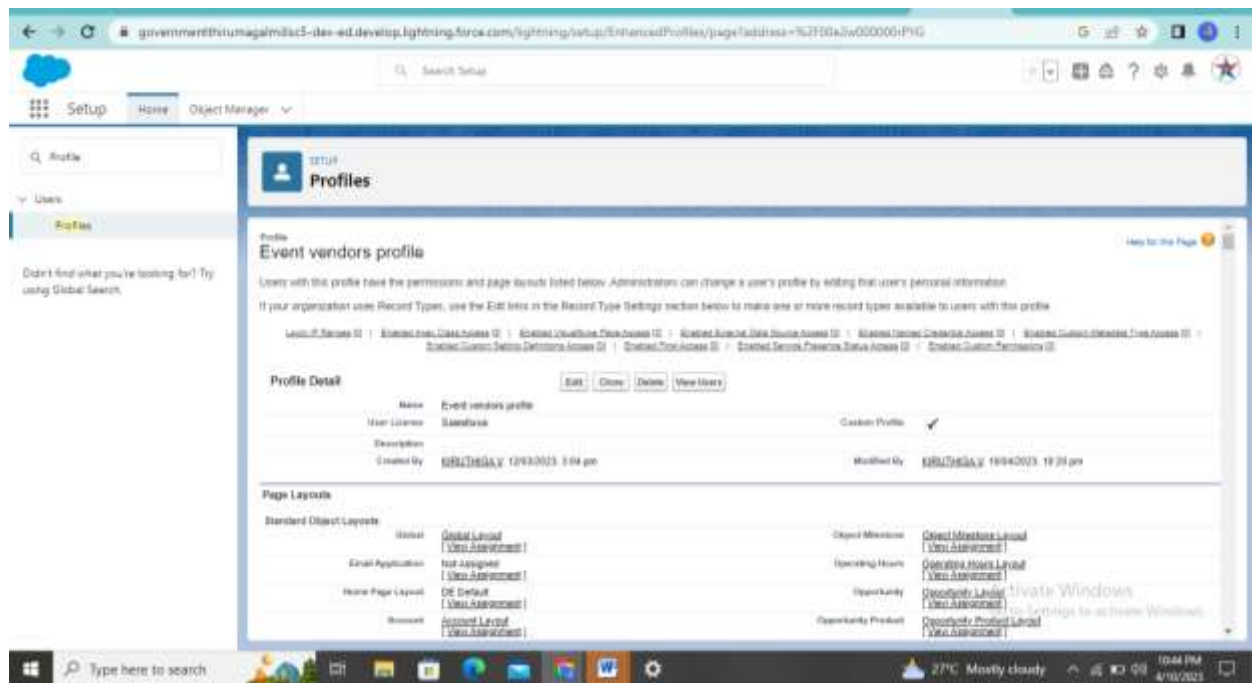
1. From Setup enter Profiles in the Quick Find box, and select Profiles.
2. From the list of profiles, find Standard User.
3. Click Clone
4. For Profile Name, enter Event user profile.
5. Click Save
6. While still on the Event profile page, then click Edit
7. Scroll down to Custom Object Permissions and Give view all access permissions to the Attendees, speakers and vendors.



ACTIVITY 2:

CREATE A PROFILE WITH THE PROFILE NAME AS “EVENT VENDORS PROFILE”

1. From Setup enter Profiles in the Quick Find box, and select Profiles.
2. From the list of profiles, find Standard User.
3. Click Clone
4. For Profile Name, enter Event vendors profile.
5. Click Save.
6. While still on the Event profile page, then click Edit.
7. Scroll down to Custom Object Permissions and Give view all access permissions to the Attendees, speakers and vendors

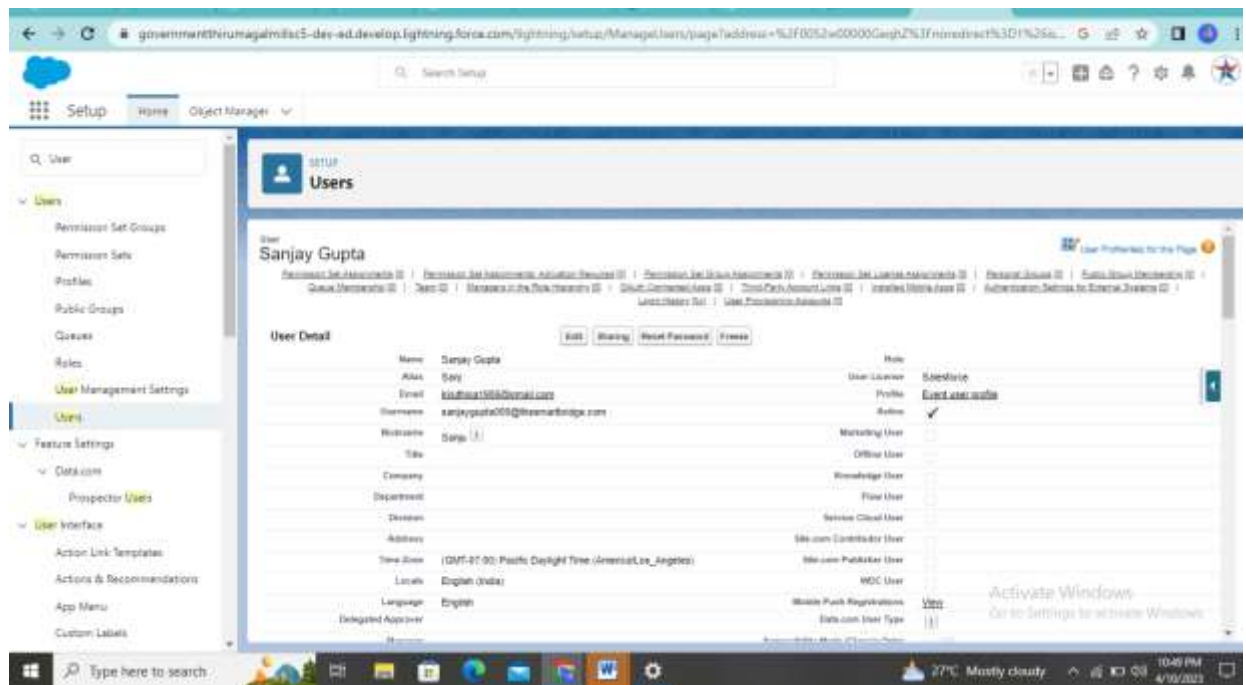


MILESTONE 6 – USER:

ACTIVITY 1:

CREATING A USER:

- First Name: Sanjay
- Last Name: Gupta
- Alias: Sanj
- Email: provide your personal email id for future reference
- Username: sanjaygupta@thesmartbridge.com
- Nickname: Sanju
- Role: leave it as default
- User License: Salesforce
- Profile: Event User Profile

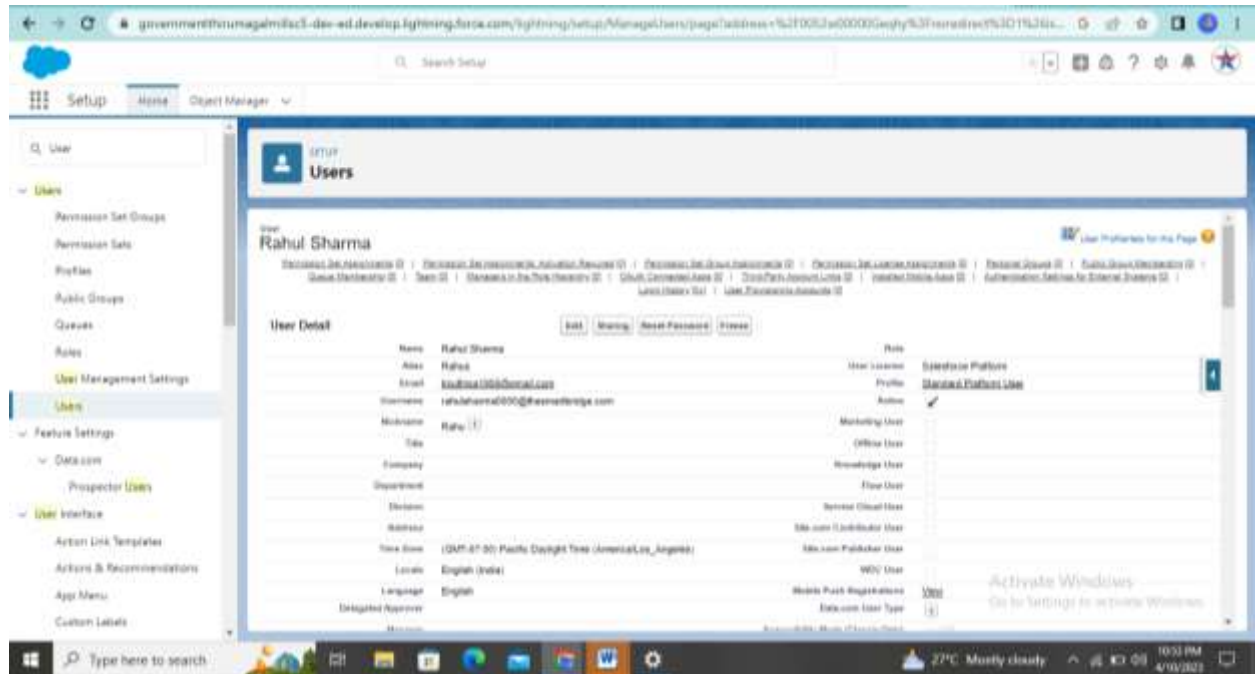


ACTIVITY 2:

CREATION ON PROFILE:

From setup type “users” in quick find and select users, then click New User

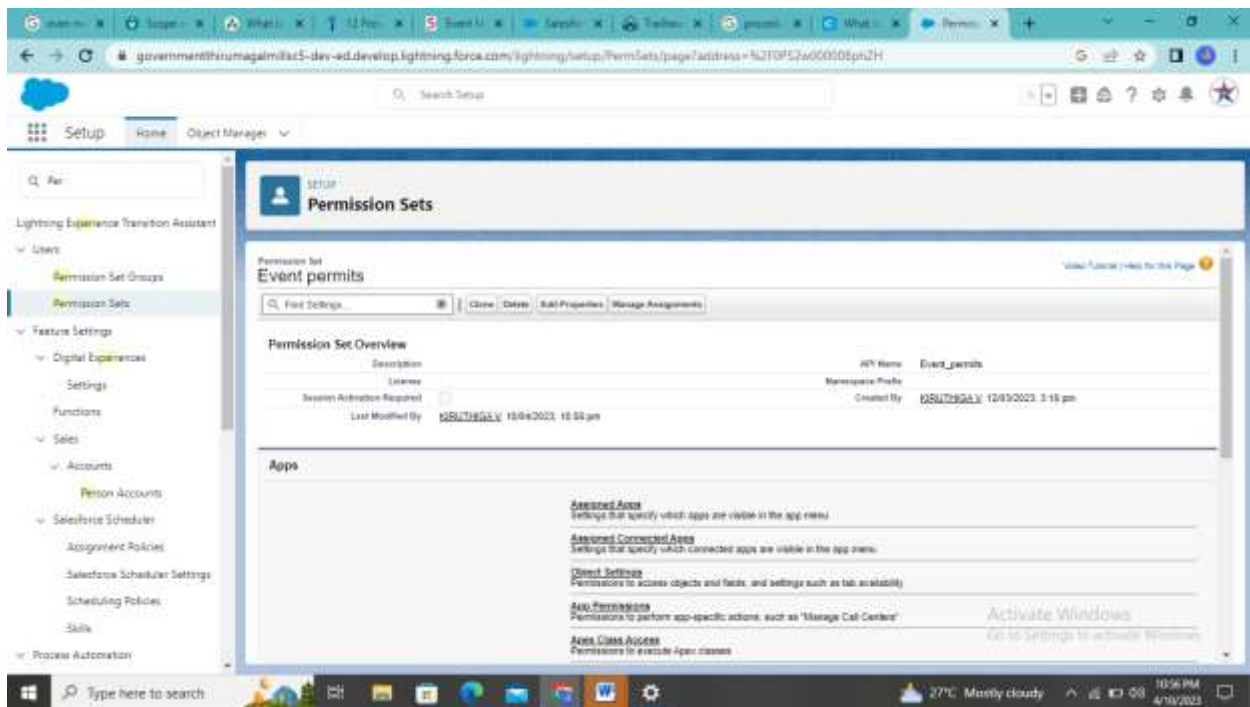
- First Name: Rahul
- Last Name: Sharma
- Alias: Rahu
- Email: provide your personal email id for future reference
- Username: rahulsharma@thesmartbridge.com
- Nickname: Rahu
- Role: leave it as default
- User License: Salesforce
- Profile: Event vendors profile.



MILESTONE 7 – PERMISSION SETS:

ACTIVITY 1:

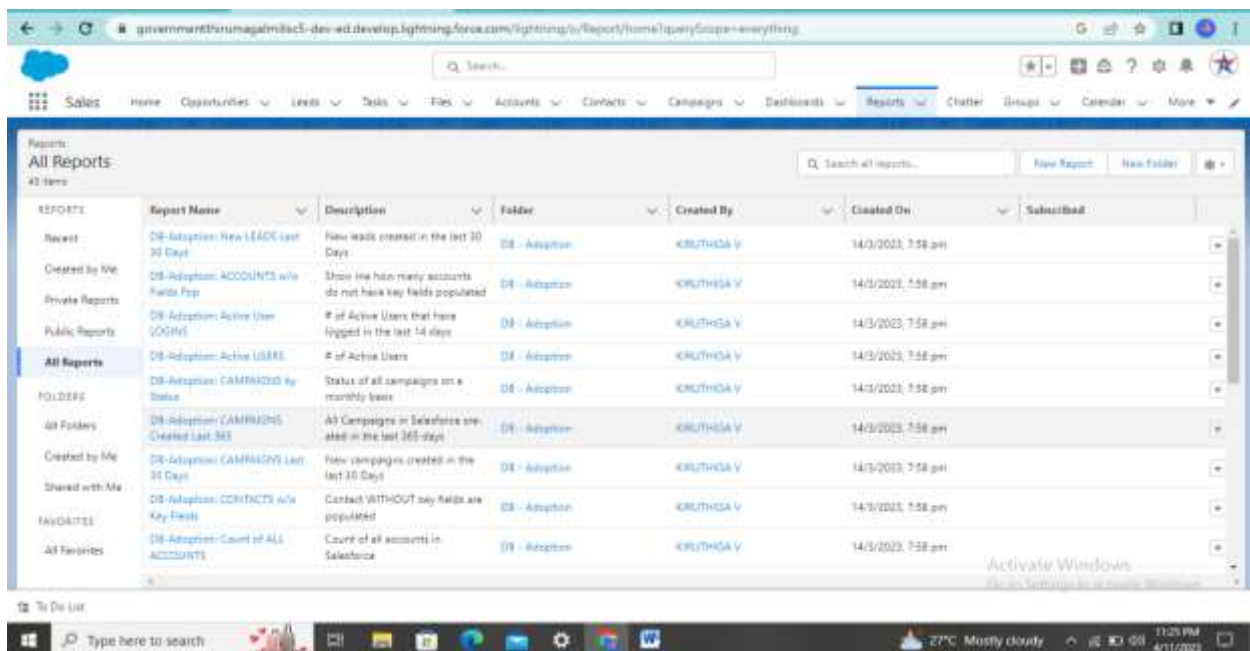
- CREATNG A PERMISSION SET:
- From setup search “permission sets” in quick find and select permission set then click on New.
- Enter label as: Event Permits and Save.
- After saving the permission click on the Manage assignment.
- Now click on the Add Assignment.
- Now select the users and click on save.



MILESTONE 8 – REPORTS

ACTIVITY :

CREATING A REPORT:



1. From the Reports tab, click New Report.

2. Select the report type Attendees with events for the report, and click Create.

3. Customize your report accordingly and include all fields, then save or run it

4. TRAILHEAD PROFILE PUBLIC URL

TEAM LEAD : <https://trailblazer.me/id/kiruv5>

TEAM MEMBER 1- <https://trailblazer.me/id/kiruv5>

TEAM MEMBER 2- <https://trailblazer.me/id/kiruv5>

TEAM MEMBER 3- <https://trailblazer.me/id/kiruv5>

5.ADVANTAGE AND DISADVANTAGE

ADVANTAGE:

- Opportunities for creativity. ...
- Ability to work on different events. ...
- Chance to work with diverse clients. ...
- Collaborative work environment. ...
- High projections for job growth.
- Few educational requirements. ...
- Best event planning
- End to end execution
- Improve customer services and satisfaction
- Smooth execution of planned ideas
- Saves time and money
- Maintain best account history
- Easy to manage
- The demand for professional event planners is growing rapidly in India.
- Event management provides multiple opportunities to meet and interact with celebrities like actors, actresses, sports personalities, politicians and similar high-profile people.
- This profession provides opportunities for free travel.
- Event management is a personally rewarding career as it provides job satisfaction.
- It is one of rare professions that requires minimum educational qualification to start a career.

DISADVANTAGE:

- Unconventional work hours. ...
- Time away from family and friends.

- Like many other creative fields, this profession demands long hours of hard works it is not a 9 to 5 job. Candidates should be able to work at odd hours and under pressure to meet the expectations of the clients.
- Many times, candidates are expected to work on weekends and even on some holidays.
- This profession requires extra amount of responsibility.
- There is a lack of stability in this profession.
- Sometimes meeting budgets can become a difficult task.

6. APPLICATION:

- Less effort required to add updates to existing events
- Deliver accurate services and resource order
- Eliminate missed communications
- Quick retrieval of invoices and payments
- Automated reminders and notifications
- Maintain event history and Attendance summary
- Save Time for planning future
- Create customized scheduling process

7. CONCLUSION:

- 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. Event Management always keep your objectives and goals on top priority while developing any plan of work.

8. FUTURE SCOPE

- Whether it's a big or small events, today people knows ***the benefit of hiring event management companies***. Looking forward to work for more 50 years into this industry sounds interesting. But yes this industry only accepts the hard workers and dedicated ones.
- If you have the capacity to work in flexible working hours, to compromise with food and sleep, having patience, communication skills then you can go much ahead into this industry. As talking about future is always just a prediction of things that may or may not happen.
- Analyzing today's demand and awareness, it can be said that with more technological world in future and more dynamics in services industries, scope of event management is pretty good.
- ***But*** what about the competition that is increasing massively day by day? We can find now event companies and managers every lane of cities or town.
- If there won't be any restriction or license game into establishing event companies, then it may happen that one day, event companies will be more than the total clients across nation. I know it sounds rubbish, but it's a bitter truth! Nothing bad than this can happen to this industry.